

Factor 4: Documenting clinical advice in the medical record

The practice would document their process for documenting clinical advice in the medical record.

Here is an example of where phone advice would be documented in PCC EHR:

The screenshot shows a web-based form titled "Phone Notes" for a patient named Mickey Mouse, aged 10 years, 4 months, with a date of 4/24/03 and a gender of M. The form is divided into several sections: "Recent and Upcoming Appointments" with fields for Last Visit, Last Physical, Next Physical Due, and Scheduled Appointments, all currently set to "none"; a "Contact" section with fields for Call Taken By (Tim Proctor), Call Taken At (09/19/13 10:25am), Caller's Name (unknown), Relationship (select relationship to ...), Return Phone, and Needs To Be Signed By (select a provider); a "Subject" section with a text input field; and a "Phone Note" section with a large text area for documentation. The form has a light beige background and a vertical scrollbar on the right side.

Phone Notes Mickey Mouse 10 yrs, 4 mos 4/24/03 M

Recent and Upcoming Appointments
Last Visit: none
Last Physical: none
Next Physical Due: none
Scheduled Appointments: none

Contact
Call Taken By: Tim Proctor
Call Taken At: 09/19/13 10:25am
Caller's Name: unknown
Relationship: select relationship to ...
Return Phone:
Needs To Be Signed By: select a provider

Subject

Phone Note

The detailed advice would be documented in the “Phone Note” text field and a summary or subject of the note would go in the “Subject” field.

Here is an screenshot showing how clinical advice by secure electronic message would be documented in PCC EHR:

PCC EHR

Portal Message **Dino Flintstone** **4 yrs, 3 mos** **6/29/09** **M**

Portal Messages

Subject: Acetaminophen or Tylenol? TO: enter user name

Date: 09/30/13 2:33pm
From: Wilma Flintstone
Phone: 8024974671

Fred gave Dino children's acetaminophen instead of children's tylenol. Is that okay?

Reply

Hi Wilma,
Tylenol's active ingredient is acetaminophen, so you should be all set. Please call the office if you'd like to ask about dosage or the doctor's instructions. Have a great week!

No Reply **Send**

Tasks

TASK: enter task name TO: enter user name

NOTE:

☐ Task Completed AT: mm/dd/yy 12:00am BY: enter user name

Previous **Next** **Close** **Save** **Save + Exit**

Read and reply, or click "No Reply"

Optionally, create tasks for other users

The date and time of the response would be documented once the reply was sent or saved.

A history of phone encounters, messages, and visits are stored in a "Visit history index" within the patient chart. The screenshot below shows this visit history index filtered to show only phone encounters and electronic messages. Once the user selects an entry in the index, the detail for the entry is displayed above including the documented advice given for the phone encounter and/or messages.

PCC EHR

FIND

Pebbles Flintst... PCC# 3336

Medical Summary

Demographics

History

Visit History

Immunization History

Flowsheets

Growth Charts

Documents

History index of documented visits, phone calls, and messages.

Create Visit

Visit History

Pebbles Flintstone 10 yrs, 1 mo 9/24/03 F

11/12/13 - Portal Message

Portal Message

Portal Messages

Subject: Acetaminophen or tylenol? TO: James Davidson, M.D.

Date: 11/12/13 02:57 PM

From: Chris Forleo

Fred gave Pebbles Acetaminophen instead of Tylenol? Is that OK?

Scrollable section showing details documented for visit, phone call, or message selected below.

Visit History Index

Display: Phone Notes, Portal Messages

Date	Age	Protocols	Details	Provider	Docs
11/12/13	10y 1m	Portal Message	Subject: Acetaminophen or tylenol?	n/a	
11/12/13	10y 1m	Phone Notes	Subject: none	n/a	

Filtering to show only phone notes and electronic messages

Print

Edit

View Documents

Add Phone Note

Close

Save

Save + Exit

start

PCC EHR

Logged In: pcc

04:22PM

Left