

#### 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 'Phone Notes' form for a patient named Mickey Mouse, aged 10 years, 4 months, on 4/24/03. The form is divided into several sections:

- Recent and Upcoming Appointments:** Last Visit: none, Last Physical: none, Next Physical Due: none, Scheduled Appointments: none.
- Contact:** Call Taken By: Tim Proctor (dropdown), Call Taken At: 09/19/13 10:25am (text), Caller's Name: unknown (dropdown), Relationship: select relationship to ... (dropdown), Return Phone: (empty dropdown), Needs To Be Signed By: select a provider (dropdown).
- Subject:** (empty text field)
- Phone Note:** (empty text area)

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!

**Tasks**

TASK: enter task name TO: enter user name

NOTE: [text area]

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

**Buttons:** 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**  
[Search Box] **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

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

#### 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?

### 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

Logged In: pcc