DYNAMIC DOCUMENTATION

DYN DOC BASIC ANATOMY REVIEW

- Dynamic Documentation

- Note Type vs Note Template

- Workflow mPages

- EMR Content

- Autotext and Smart Templates

TERMINOLOGY: DYNAMIC DOCUMENTATION

- A type of clinical documentation, which is created through the Documentation Tab or MPages portion of the patient's chart

- Two column view:
  - Left Column: Descriptive Narrative
  - Right Column: EMR Content

TERMINOLOGY: NOTE TYPE VS NOTE TEMPLATE

- Note Type =
  - Used with both PowerNotes and Dynamic Documentation
  - Selected by the provider to identify the type of information contained within his/her note
  - Used to organize and filter notes both in the back end and by the end user
  - Ex: OP Primary Care Sick Visit Note, NW Admission H&P, LTC Progress Note, ED Procedure Notes, etc

NOTE TYPES	NOTE TEMPLATE
OP Primary Care Sick Visit OP Primary Care Well Visit OP OB/GYN Note	Office Note
Alert Note ANMC Note Pain Contracts	Free Text Note
NW Admission H&P OB Maternal Admission H&P LTC Admission H&P	Admission H&P

- Note Template =
  - New with Dynamic Documentation
  - The blueprint of the note
  - Constructed in the background
  - Composed of sections and subsections
  - Dictates which EMR Content or Smart Templates are pulled into the note and where they go
  - Each Note Type is mapped to a Note Template
  - Ex: Office Note, Admission H&P, Progress Note, Procedure Note, etc

TERMINOLOGY: WORKFLOW MPAGES

- MPages provide a single consolidated view of information that is contained throughout the medical record

- MPages have existed at YKHC since Cerner was originally launched

- Types of MPages –
  - Summary MPages
  - Workflow Mpages

- Mpages are made up of Components, such as Allergies, MultiMedia Manager, Patient Education, etc

- While the use of Workflow Mpages is new with Dynamic Documentation, Workflow Mpages and Dyn Doc are distinct
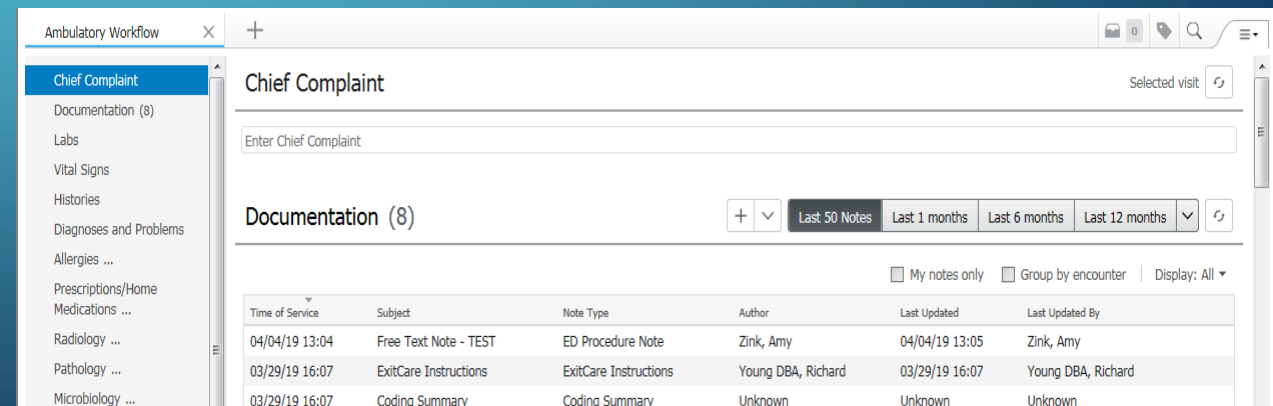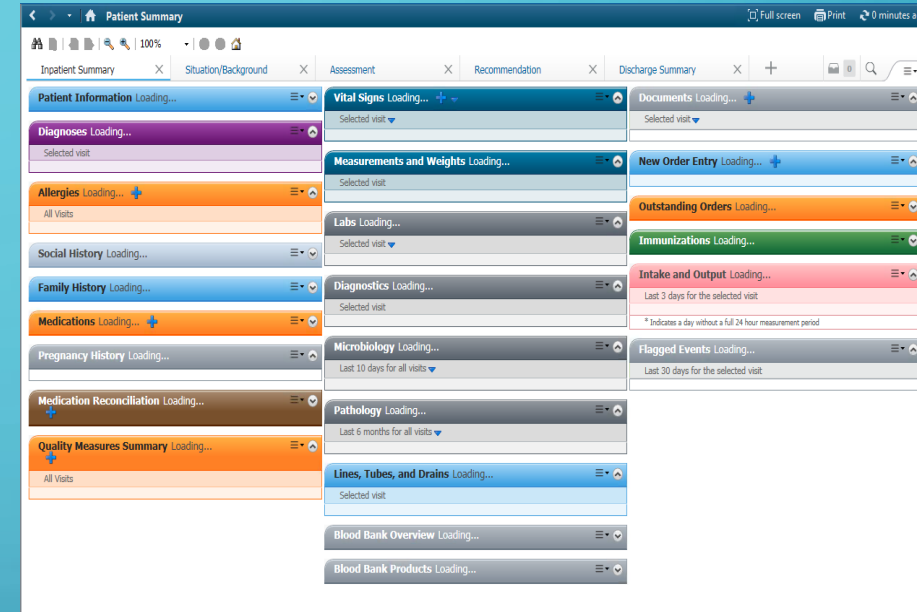
TERMINOLOGY: DYN DOC EMR CONTENT

- Any content from the chart and within the Workflow Mpages is considered EMR Content, including the freetext that you type into the HPI, Review of Systems, Review of Systems Components

- Most sections of the Note Templates use EMR Content Filters to pull specific content into the note in a specific format/layout

- Some sections of the note have multiple filter options to choose from

TERMINOLOGY: AUTOTEXT

- Autotext
  - Personal or global phrases, which can be stored and reused by typing in an abbreviation.
  - All YKHC global abbreviations begin with .. (two periods) such as '..rosbasic' (Basic Review of Systems), but your personal autotext may begin with any combination of letters that you would not accidentally type on a normal basis
  - These are case sensitive, and 99.9% of global autotext are currently all lowercase
  - Autotext is not new with Dyn Doc, but increased use of autotexts is recommended due to the loss of PowerNote's Macros
  - Features of Autotext:
    - Insertion of _ (underscore) to tab quickly from one place in a text to another using the F3 key
    - Dropdown fields can now be built into autotexts when a choosing from a list of items would be convenient

TERMINOLOGY: SMART TEMPLATES

- Smart Templates
  - They are build with very specific parameters
    - Specific types of clinical information (Allergies, Problems, Labs, Vitals, etc)
    - Specific time frame and/or number of occurrences
    - Variety of formats (Tables, Lists, etc)
  - Can be added to Autotext or embedded directly into the note template
  - YK Smart Phrases (..YK) that you are familiar with using are still available for use

CREATING A DYN DOC NOTE: DOCUMENTATION TAB VS. WORKFLOW

Using Documentation Tab:

- Quick access to note creation

- A la Carte Note Type – Note Template matching

CREATING A DYN DOC NOTE: DOCUMENTATION TAB VS. WORKFLOW

Using the Workflow:

- Accessed through Viewpoints
  - PowerChart: Ambulatory View & Inpatient View
  - FirstNet: ED View

- User designed workflow
  - Begin creating the note while interacting with elements of the chart review
  - Order the flow of the chart review and note creation in a manner that is intuitive for the individual user
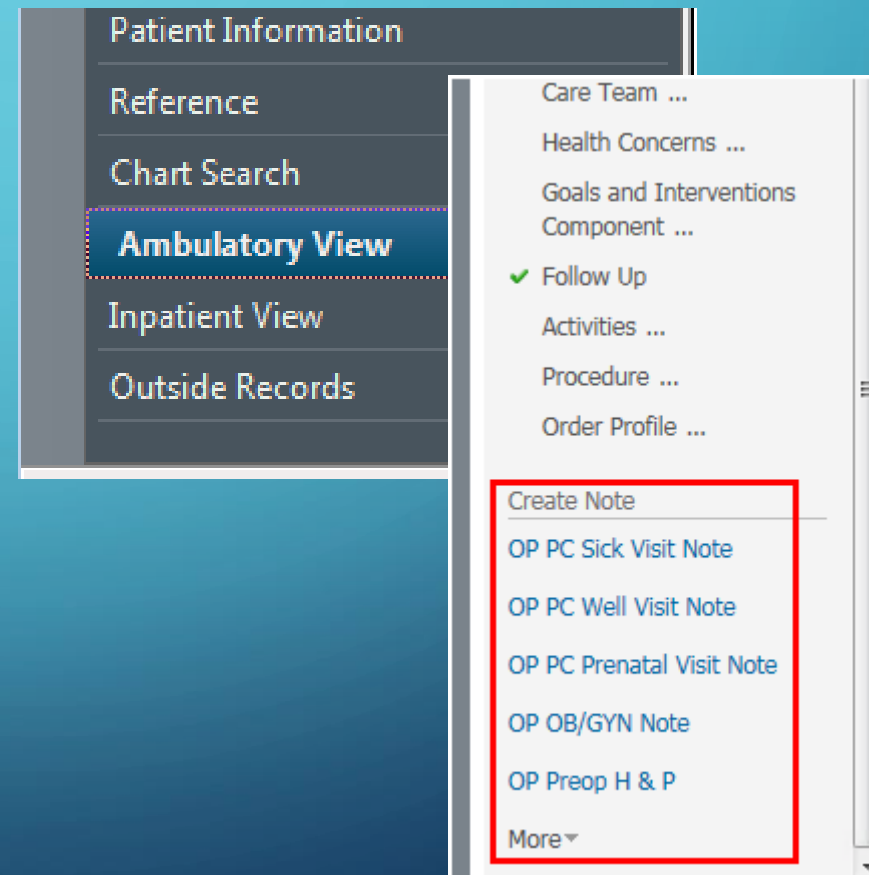
MPAGES AND PROMOTING INTEROPERABILITY

While the creation of the clinical note may be more direct, the use of the workflow mPage ensures that the provider is documenting elements of patient care required for reimbursement in a way that is reportable…

- **Completion of specific components:** Patient Education

- **New components created for Promoting Interoperability:** Health Concerns; Goals and Interventions

- **Actions required within existing components:** Reconciliation of Allergies and Medications

- **Reconciliation now required for Unverified Data from Outside Sources:** Problems, Allergies, Medications, Immunizations *(Look for the purple diamonds)*
  - Commonwell
  - Clipboard
  - FHIR API

COMMONWELL UPDATE

- Information sharing with other healthcare facilities

- Not yet live – training info/ job aids are in progress

CLIPBOARD AND FHIR/API UPDATE

- Patient Provided Information

- Promoting Interoperability requirements are fulfilled as part of the registration process – Access Offered (Go-Live for Registration changes is scheduled for 4/15)

- Clipboard: Data collected from the patient related to Problems, Allergies, Medications and Immunizations, Custom Forms

- FHIR/API: Data collected by the patient using apps such as fitness trackers and dietary trackers

- Not yet live – will initially go live with a patient subset (Women's Health)

MOVING FORWARD: DYN DOC WORKGROUPS

- We have created small focus groups that can represent each department and their needs.

- Within the workgroups we are reviewing the items within the workflows and note templates that can be altered to create a better charting experience.
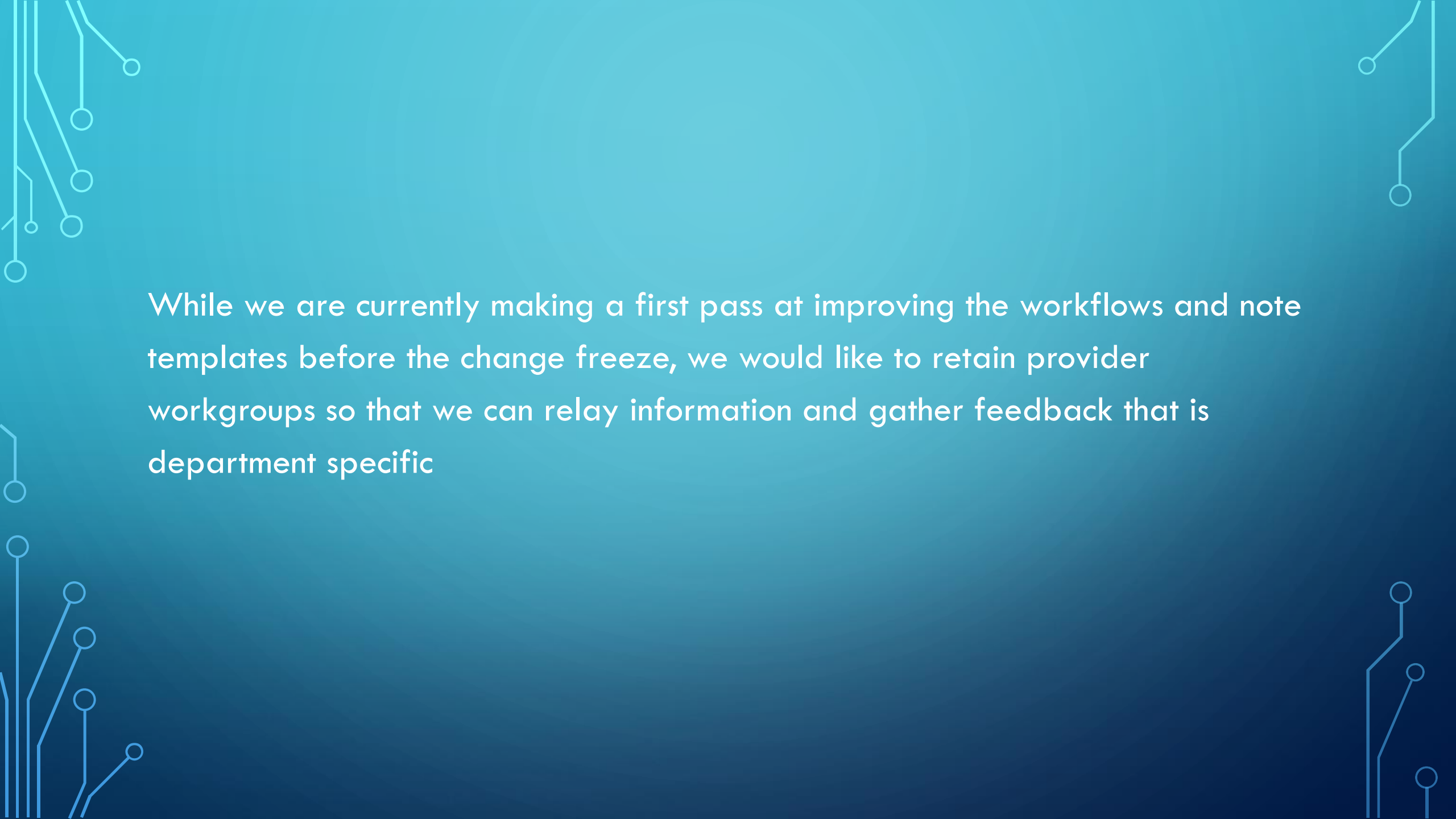
DYN DOC WORKGROUP RECOMMENDATIONS

Workflow Mpages:

- Recommendations to change lookback options for Documentation, Labs and Vitals

- Group Radiology results by subsections: XR, CT, US, Mammo

- Defining Primary Labs section

DYN DOC WORKGROUP RECOMMENDATIONS

Note Templates:

- Refine the Demographics section by removing the often inaccurate PCP field

- Reorganizing template layout – move Labs and Radiology to the top of the right column

- Changing filters for Vitals and Labs to improve the quality of information pulling into the note

- Creation of smart templates to easily pull additional information

While we are currently making a first pass at improving the workflows and note templates before the change freeze, we would like to retain provider workgroups so that we can relay information and gather feedback that is department specific

COMMENTS OR QUESTIONS?