Using Encounter Forms and Centricity EMR to Document and Facilitate Office Visits from Registration to Surgery, an Orthopaedic Practice’s Perspective
Objectives

1. Acquire key strategies to setting up your custom forms project for success
2. Learn how to use forms to gain efficiency, help the user do the right thing at the right time, and provide the patient with educational materials, while keeping the forms easy to use.
3. Discover the savings and rewards of using custom forms.
Let’s begin by discussing the importance of acquiring key strategies to successfully set up your custom forms project.
Key Strategies

Understanding Our History

Frustrated users

Forms take too long to use

Can't find what I am looking for
EMR was being used as a document management service
Key Strategies

Each physician had their own encounter

New Patient visit for Dr. XXX
Recheck visit for Dr. XXX

Difficult to manage!
Key Strategies

Disappointing office notes

Visually unappealing

Translation was too generic

Too many pages
Key Strategies

Staff were entering data, but physicians were not.

We ran into problems with the physician’s dictations contradicting the EMR translations.
Limited form options

- Basic forms from our VAR/GE
- Non-specialty forms
- CCC forms and other companies
Limited form options

“All good options, not great for us”
Surgical Services using a separate documentation software tool not connected to EMR
Key Strategies

Key Players and Concepts

Understanding the workflow

- Look at what types of papers are being filled out, and how you can make them electronic.
Key Strategies

Key Players and Concepts

Understanding the workflow

- Understand what other duties staff have besides documentation
Key Strategies

Key Players and Concepts

Understanding the workflow

-Make sure you consider what educational materials are being given to the patient
Key Strategies

Key Players and Concepts

Understanding the workflow

Consider how information is shared throughout the office
Key Strategies

Develop a strong team that is willing and able to link the EMR system to the clinic.
Key Strategies

Strong Team

Liaison position

Programmer

End Users
Key Strategies

**Liaison Position**

Clinical and Tech background or strong desire to learn about technology

Help to prioritize needs and changes

Help to bridge the gap between IT and the user
Key Strategies

**Programmer**

- General programming knowledge
- MEL knowledge

Using a programmer allowed us to ramp up faster. The programmer was able to have a vision that allowed us to have greater functionality behind our forms.
Key Strategies

End Users

Physician Champions/Team Leaders

Help to standardize workflows and form components

Test and give feedback
Key Strategies

Concepts used to guide projects

Brain Storming

Understand Functionality and Limitations of EMR, but do not limit ideas

Creative Philosophies
Key Strategies

Concepts used to guide projects

Brain Storming

- Interview staff
- Evaluate what outcomes are desired
- Keep in mind the patient population you are serving
- Begin with the current workflow
- Don’t be afraid to change the workflow
- Ask yourself if you are adding value to the visit
Key Strategies

Understand Functionality and Limitations of EMR, but not limit ideas

GE/VAR: Can’t have concurrent users in same encounter at the same time.

Forms cannot create referral orders.
Key Strategies

Creative Philosophies

- Do not accept “no”
- Think Outside the Box
- “Magic Wand”
- “Put it in the parking lot”
- Make it easy to do the right thing
Use forms in order to gain efficiencies, help the user to do the right thing at the right time, provide the patient with educational materials and at the same time keep the forms easy to use.
Efficiencies/Easy to Use

Find areas where technology can save the staff and patient’s time

- **STOP** Handwriting information
- Share information from one encounter to another
Efficiencies/Easy to Use

**STOP** Handwriting information

Requisitions: cultures, labs
ABN, narcotics contract, consents, educational materials, by using handouts
Pre-Op orders, by using letters

Physical therapy, work note, by using orders
Efficiencies/Easy to Use

Eliminate duplication of work

Clinical

Avoid handwriting prescriptions and also entering them into EMR by using ERx
Efficiencies/Easy to Use

Eliminate duplication of work

Clinical

Eliminate having the patient fill out the H&P, enter into EMR and then scan handwritten form by using a chart summary and updating in real time.
Efficiencies/Easy to Use

Eliminate duplication of work

Clinical

Prevent re-entering information gathered in phone notes, other encounters, or patient portal, by using OBS terms.
Efficiencies/Easy to Use

Eliminate duplication of work

Surgical Services

Eliminated printed materials being faxed to outside facilities

Using PDF creator

Saved 25 minutes per day per person

<table>
<thead>
<tr>
<th>Time Saved Per Person</th>
<th>Money Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per Day</td>
<td>Per Employee Per Year</td>
</tr>
<tr>
<td>25 Minutes</td>
<td>$2,160</td>
</tr>
<tr>
<td>125 Minutes</td>
<td>$15,180</td>
</tr>
<tr>
<td>Per Year</td>
<td>By ONE Per Year</td>
</tr>
<tr>
<td>6,500 minutes (108 hours)</td>
<td>$15,180</td>
</tr>
</tbody>
</table>
Efficiencies/Easy to Use

Eliminate duplication of work

Surgical Services

Eliminate separate documentation software tool

reviewed and entered patient history 3 times
Efficiencies/Easy to Use

Eliminate duplication of work

Surgical Services

Link EMR order to PM schedule

Provide EMR information to the physicians during surgery
Efficiencies/Easy to Use

Eliminate duplication of work

Business Office

Automate PQRI codes and Modifiers generation

Code Assists do not have to search for answers in office visits
Help the users do the right thing

Can’t create order without a diagnosis

Made required fields in red

Stop user from continuing unless certain actions are complete

Disable parts or sections (i.e. History Screening)

- Provide the user with tips
Help the users do the right thing

Pop-ups generated by banner and forms

Allow the software to know the rules
Efficiencies/Easy to Use

Help the users do the right thing

Grey help buttons for reference

ABN or DME waiver automatically picked based on insurance
Efficiencies/Easy to Use

Help the users do the right thing

Help staff ask the right questions by adding the “scripted” question to the form

Diabetic diagnosis and allergy information automatically added to orders/schedule
Efficiencies/Easy to Use

Make the EMR easy for the staff (user friendly)

Easy buttons
One click answers multiple questions

Multi-Function buttons
One click can create an order, add translation, and print a handout
Efficiencies/Easy to Use

User Specific Customization

Injection Protocols

Interventional Operative Reports
Use Dynamic content

Dynamic choices

- Injection dosages
- Diagnosis, status post, medications
Use Dynamic content

Questions change based on body part in HPI
Triage encounter form
EMPI form
Display visit and patient information

- Display orders within Superbill form
- Display orders and problems on Fracture Care form
- Display insurance
- Display pharmacy
Efficiencies/Easy to Use

Use only one encounter type for every office visit

Auto flag to precert for DME’s and prior authorizations
Efficiencies/Easy to Use

Patient Education

Program educational materials to auto print

Smoking Cessation
Vitamin D
Visit Summary
Surgical Education Checklist
Discover the savings and rewards gained by using customized forms.
Discover the Savings

Stop ordering pre printed materials

Keep an electronic file for emergency

Keep a disaster preparedness tote with paper forms
Discover the Savings

Eliminate or reduce costs

Reduced our Transcription cost by over 61% in 18 months

“It affected the Transcription department in a big way. We went from 17 transcriptionists down to 7 in about a year and a half, and reduced the cost by 61%.”
Discover the Savings

Eliminate or reduce costs

Save cost of labor to scan documents (3 FTE’s)

“It also helped in Medical Records to reduce the amount of scanning we have to do. Our reduction of 3 staff from Medical Records came from the combined use of the forms.”
Discover the Savings

Collected incentive dollars for ERX & PQRI in 2008-2010

We feel 2011 will be even better for us; we left some money on the table in previous years.
Discover the Savings

Saving time in other areas of your organization

Surgical Services

Precert

Coding

Medical Records

Front desk/

Customer Services
Discover the Savings

Coding

Entering billing codes

“We key less than we use to, and are also able to look at documents right away to ensure correct changes.” -code assist
Discover the Savings

Coding

Help support audit process

“The more standardized the data, the easier it is for the workflows.”
Discover the Savings

Coding

Un-coded diagnosis is not allowed
Discover the Savings

**Coding**

Adding modifiers automatically

- E&M (24,25,57)
- X-ray (no charge, study patients)
- DME (GY, right, left, & bilateral)
Discover the Savings

Coding

PQRI codes are automated

System automatically adds codes based on questions in the H&P

“I know it has made the PQRI bonus a reality with the linking of PQRI codes to certain activities in the EMR. Especially for the non surgeons.”
Discover the Savings

**Precert**
Auto flagging for DME’s and injections

Prior authorization/medical necessity

Necessary documentation is already in the record
Medical Records

“Our Transcription Support Specialists spent almost all of her time dealing with transcription issues (filling in blanks, look for no dictates, etc) prior to the forms. Now she only spends an hour her day on transcription related issues, and her job has changed so now she spends most of her day helping our Compliance Officer.”
Discover the Savings

Front Desk/ Customer Services

- disability
- letter of medical necessity
- FMLA
- excuse notes for school & work
- general notes
Discover the Savings

Surgical Services

Bill of Rights

Discharge instructions

Consent forms
Discover the Savings

Surgical Services

Pre-op orders

Vender letters

Create change/cancellation form
Discover the Savings

Surgical Services

Patient education tools

Medical clearance letters

Using the letters options to directly fax from the EMR
On going issues that present themselves along with the strides we are taking toward excellence.
The Circle of Life

Office Visit

Completion Form

Surgical Services

Surgical Discharge Instructions

Surgery Report
Questions?