

Progress Note Organization: Action Plans & Planned Visits

Abby Wilson, MD

1/29/15



Action Plan

- ◆ What is an action plan?
- ◆ Why should we use them?
- ◆ What are the obstacles to using action plans?
- ◆ How can the obstacles be overcome?

What Is An Action Plan?

- ◆ A detailed method, **worked out in advance** for the attainment of a goal.
- ◆ This can be a blueprint for change where **both the patient and the provider** have input.

Already In Use?

- ◆ Providers **already develop an assessment and treatment plan** for patients at each office visit.
- ◆ A **visit summary is already printed** for each patient at check out.
- ◆ An action plan is **an organized combination** of the two.



PLAN
PLAN
PLAN
PLAN
ACTION

Imagine...

- ◆ You've **successfully** transitioned from paper charting to EMR!
- ◆ Now, there is a drive to **pick up the visit pace** – do more with less.
- ◆ **More** patient education, **more** detail in the visit summary
- ◆ Be available for your patients: **in person, by phone and via email.**
- ◆ *It's enough to raise your blood pressure – unless **your own action plan** calls for daily, stress-reducing cardiovascular exercise

In The Beginning...

- ◆ In medical school, you begin with **anatomy and physiology**, using basics to **creating a medical foundation** which you can build upon.
- ◆ It takes **years of hard work**, studying and training, to become a licensed physician.
- ◆ You **develop practice goals** and you **amend those goals** as medicine changes.

Medical Evolution

- ◆ **New preventative health guidelines** will come out
- ◆ **New medications** will be unveiled
- ◆ **New technologies** will be developed to streamline processes
- ◆ All in an attempt **to improve patient care** and **promote healthy longevity.**

New Job Title



Set Priorities

- ◆ As with anything else in life, to keep up with the change, you need to **set priorities** with your EMR tasks.
- ◆ You can **organize your office visits** so your progress note is finished when the patient checks out!
- ◆ You can **save hours of work** each week by:
 - ◆ Creating templates
 - ◆ Using macros & dictation to ease your work load

Why Should We Use Action Plans?

- ◆ Picture a grocery store....
- ◆ Two different scenarios:
 - ◆ You need groceries and **have not made a list**
 - ◆ You need groceries **and have prepared a list in advance**

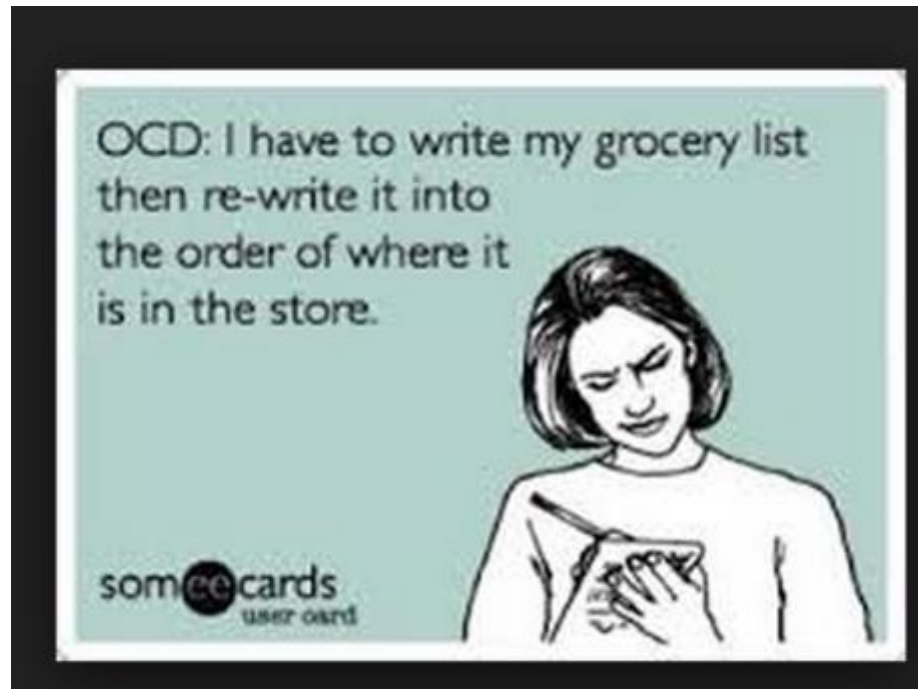
The Grocery Store: No List

- ◆ **Life is hectic.** Finding time to get groceries is challenging.
- ◆ Without a list, you can still get your groceries
- ◆ When you get home, you find **you've forgotten items.** ☹️
- ◆ Back to the store you go – maybe today or maybe tomorrow...
- ◆ You ask yourself → am I **maximizing my time?** **Am I saving money?**

The Grocery Store: Yes List

- ◆ It took a little planning, but you've **organized a list by store section** → dairy, produce, bakery, etc.
- ◆ You've also perused through coupons & found **this week's deals**
- ◆ You can use this list again for items you buy repeatedly – adding new items prn
 - ◆ You have effectively created a **grocery template**.
- ◆ With a little pre-shopping prep, you've improved your shopping experience → **moving quickly, efficiently and saving money.**

Organize, Organize, Organize



Organization Is Important!

- ◆ Use it or lose it!
- ◆ If your EMR is not organized, you can get lost in detail and lose valuable visit time.
- ◆ Action plans can help streamline treatment goals - providing a consistent thread of communication between patient and provider.
- ◆ Other providers can clearly track patient progress using action plans.

First Progress Then Success!

- ◆ The first action plan may be difficult, but once you have formed an action plan with your patient – you've made progress!
- ◆ And...
- ◆ Success comes when **you both see tangible results**
- ◆ Then...
- ◆ You can continue to develop more action plans together and **move in a positive patient-centered direction.**

Overcoming Resistance

- ◆ Make your own plan of action for the office (PAO)
 - ◆ What would you like to accomplish?
 - ◆ What are the obstacles to achieving goals?
 - ◆ What can be done to overcome those obstacles?

PAO: Goals

- ◆ Goals:
 - ◆ Every patient with a chronic condition has an action plan
 - ◆ Action plans **will not increase** office visit length
 - ◆ **Progress notes will be completed** by the time patient checks out
 - ◆ EMR organization will **minimize after hours charting**

Office Action Plan: Obstacles

◆ Obstacles:

- ◆ Task overload – there's already **so much to be done** not enough time to do it
- ◆ Time consuming - navigating through an action plan in an EMR could be **confusing and time consuming**
- ◆ Lack of patient participation - some patients are **not willing to get involved** in developing an action plan

PAO: Overcoming Obstacles

- ◆ Let the EMR work **for** you!
- ◆ **Use templates, macros and dictation** to minimize the amount of free typing you need to do during your visit.
- ◆ This will allow you to quickly and easily finish an action plan (and often the progress note) before the patient leaves the office.

EMR

EVERYONE IS HERE TO SAVE YOU,
BUT UNFORTUNATELY, YOU'RE NOT IN THE COMPUTER.



Planned Visits

- ◆ What are planned visits?
- ◆ What types of things can be done before the visit and when?
- ◆ How do you utilize your team members?
- ◆ What to do before the visit?
- ◆ What to do during the visit?

What Are Planned Visits?

- ◆ **Regularly scheduled** visits where **chronic condition** follow up will be discussed.
- ◆ Examples:
 - ◆ Diabetes follow up – 3-6 months
 - ◆ Hypertension follow up – 1-6 months
 - ◆ Chronic pain follow up – 1-3 month
 - ◆ Obesity follow up – 1-3 month
 - ◆ Depression/anxiety follow up – 1-3 month
 - ◆ Asthma – 3 months

Utilize Your Team

- ◆ **Determine your goals** for office visit flow
- ◆ Designate an **eCW (EMR) champion** – someone who will help develop templates, macros and shortcuts for all to use.
- ◆ **Think BIG and start small.**
- ◆ Each member of the care team plays an important role
- ◆ **Delegate tasks** appropriately amongst your team members

Before The Visit

- ◆ Ensure the patient has the appropriate **lab work or imaging requests completed**
- ◆ Input updated:
 - ◆ Lab results
 - ◆ Imaging reports
 - ◆ Consultant notes

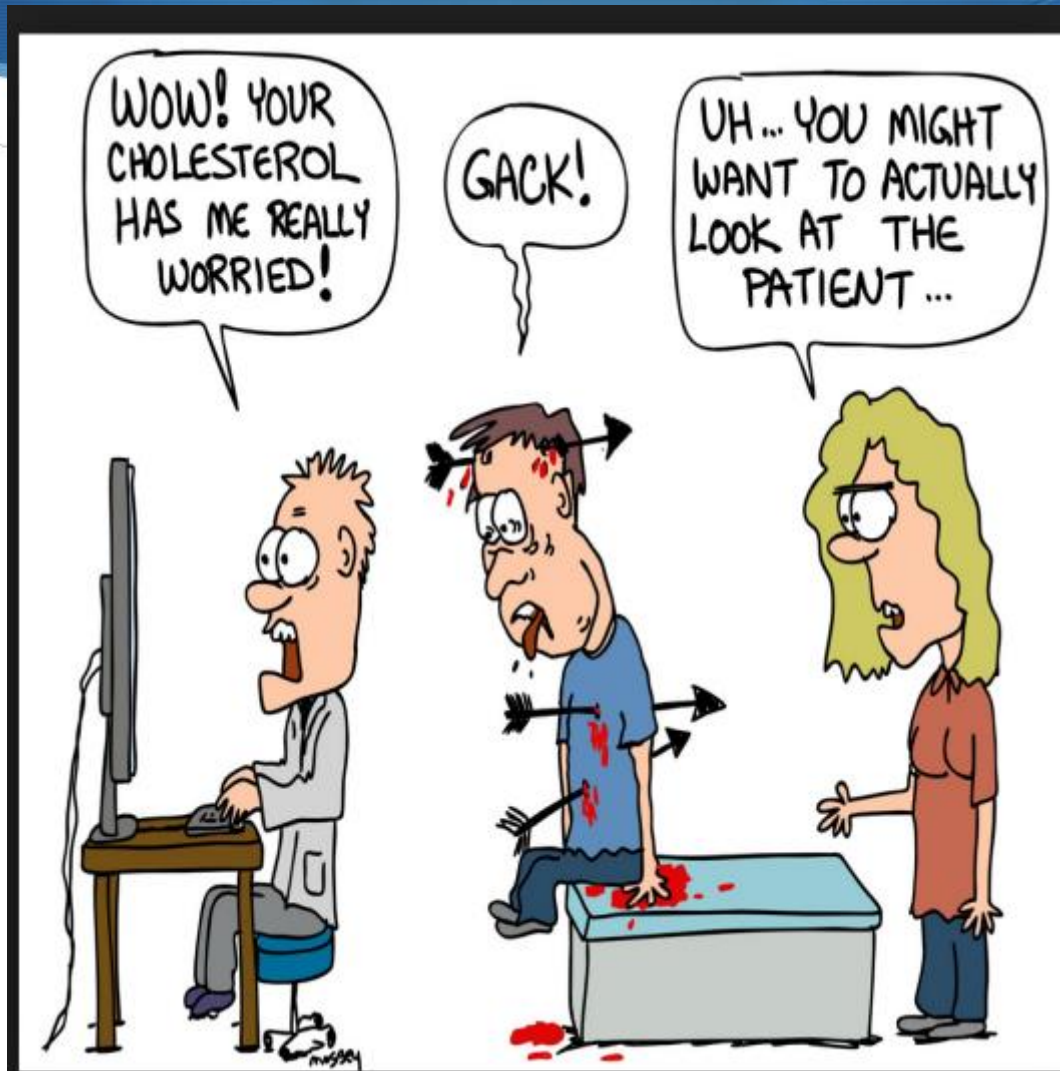
During The Visit

- ◆ Refills needed
- ◆ Vaccines due
- ◆ Update/import logs– glucose log, blood pressure log
- ◆ Make an action plan and discuss follow up

Use Your EMR

- ◆ Create HPI templates that will:
 - ◆ Allow your MA to plug in **information needed** for your visit
 - ◆ Allow you to **review all the information on one page** during your visit

Maintaining Eye Contact



Maintaining Eye Contact

- ◆ One of the most challenging aspects of EMR office visits is maintaining eye contact while documenting.
- ◆ **Revisit the lay-out** of your exam room and try to minimize screen distraction:
 - ◆ Have your patient face you
 - ◆ Shift your computer set up toward the patient – allowing you to see your patient over the screen
 - ◆ Use templates, macros and/or dictation to help minimize the amount of free typing

Test Patient

- ◆ Meet Nester Tester on 1/25/15 and again on 1/31/15 ☺
- ◆ Go to eCW test patient

Action Plan Screenshots

⊕ **Patient:** ZzTester, Nester **DOB:** 01/01/2001 **Age:** 14 Y **Sex:** Female

Subjective:

Chief Complaint(s):

- 3 mo DM f/u

HPI: ▼

Action Plan

Diagnosis ____.

Goals ____.

Obstacles ____.

Overcoming Obstacles ____.

Timeline ____.

Assessment: ▼

- DM (diabetes mellitus) - 250.00 (Primary), poorly controlled - Hba1C at 8.2%

Plan:

Treatment:

DM (diabetes mellitus)

Continue Lantus Solution, 100 UNIT/ML, Subcutaneous, Notes: 20 units at night

Continue MetFORMIN HCl ER Tablet Extended Release 24 Hour, 500 MG, 1 tablet with evening meal, Orally, Once a day

Notes: _

Action Plan

Goals:

1. No fasting glucose readings over 150
2. No more late night cookies

Obstacles:

1. I get really hungry at night
2. I love cookies

Overcoming obstacles:

1. I will eat more regular meals throughout the day so I am not so hungry at night
2. I will try a healthier snack option in the evening - like apples and cheese or celery and peanut butter
3. I will not bring cookies in the house

Timeline: I want to accomplish my goals in the next 3 months!.

Procedures:

Immunizations:

Therapeutic Injections:

Diagnostic Imaging:

Lab Reports:

Preventive Medicine: ▼

Next Appointment:

3 Months

Planned Visit Screenshot

Subjective:

Chief Complaint(s):

- planned visit

HPI: ▼

DM

14 year old female presents with c/o Diabetes since _age 10.

c/o Date of diabetic education

Date of education 07/28/2011

c/o Date of last eye exam

Eye exam 01/28/2015

c/o Date of last foot exam

Foot Exam 01/28/2015

Average Fasting Glucose _125.

Testing glucose once daily.

Requires insulin _yes.

Hba1C _7.0 on 1/24/15.

LDL _98 .

HDL _65 .

Triglycerides _70 .

Microalbumin/creatinine ratio _normal on 9/2014.

CBC _normal .

TSH _normal.

Refills needed _yes, all medications to Walgreens on S. Airport.

Hypoglycemic episodes _none.

Vaccines needed Pneumovax.

Planned Visit Screenshot

Assessment:

Assessment: ▼

- DM (diabetes mellitus) - 250.00 (Primary)
- Need for pneumococcal vaccine - V03.82
- Diabetic nephropathy - 250.40
- HTN (hypertension) - 401.9
- Hyperlipidemia - 272.4
- Severe obesity (BMI \geq 40) - 278.01
- Tobacco abuse - 305.1

Plan:

Treatment:

DM (diabetes mellitus)

Refill Lantus Solution, 100 UNIT/ML, Subcutaneous, Notes: 20 units at night

Refill MetFORMIN HCl ER Tablet Extended Release 24 Hour, 500 MG, 1 tablet with evening meal, Orally, Once a day

Need for pneumococcal vaccine

Notes: Patient Educated with: pneumovax23.2013.pdf (pneumovax23.2013.pdf).

Diabetic nephropathy

Refill Lisinopril Tablet, 10 MG, 1 tablet, Orally, Once a day

HTN (hypertension)

Refill Aspirin-81 Tablet Delayed Release, 81 MG, 1 tablet, Orally, Once a day

Hyperlipidemia

Refill Atorvastatin Calcium Tablet, 40 MG, 1 tablet, Orally, Once a day

Picture In Exam

Examination: ▼

General Examination

Records reviewed



Physical Examination: ▼

Bornd Silent Mouse Links

◆ Amazon \$17.99

◆ http://www.amazon.com/Bornd-M120-Reduction-Batteries-Included/dp/B00CG5L8Y4/ref=sr_1_1?s=electronics&ie=UTF8&qid=1422583667&sr=1-1&keywords=bornd+silent+mouse&pebp=1422583669511&peasin=B00CG5L8Y4

◆ eBay - \$7.99

◆ <http://www.ebay.com/itm/like/271236899960?lpid=82&chn=ps>

Questions?

