



Documenting Group Care Using Electronic Health Record

Presented by:

Ryan Hensler

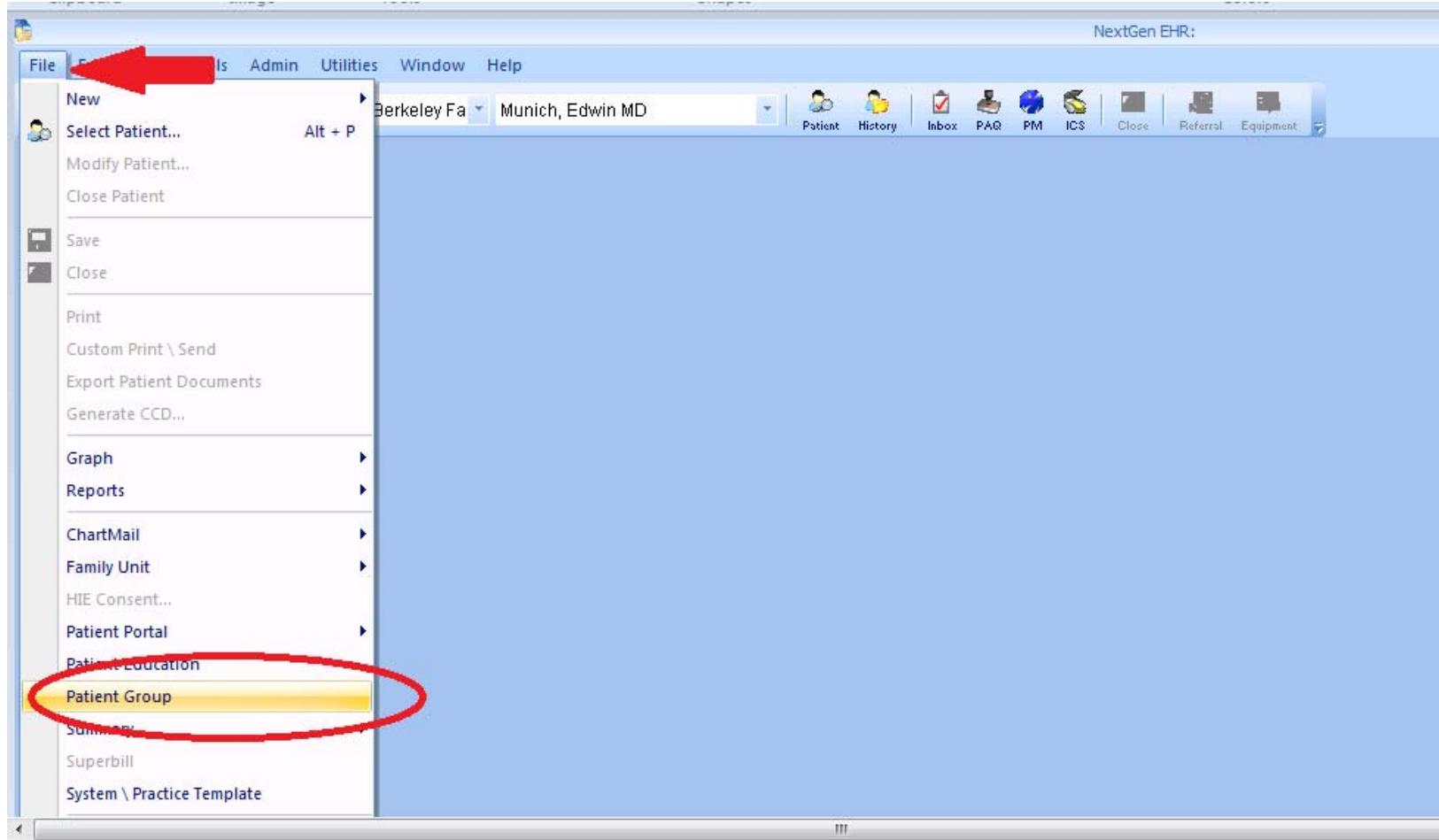
EHR Project Manager Lifelong Medical Care

rhensler@lifelongmedical.org

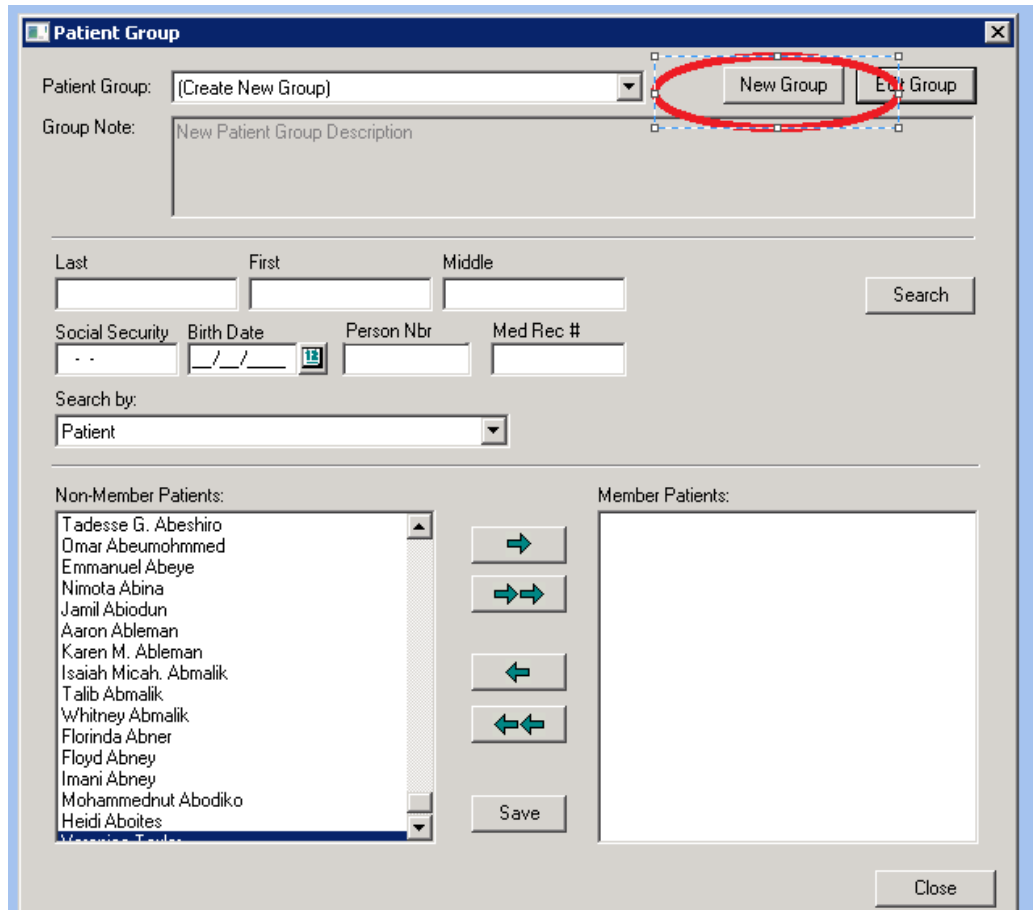
How am I ever going to get all of these charts in to one computer?



Getting Started (creating your group)



Creating your group (cont'd)



Patient Group

Patient Group: (Create New Group) **New Group** **Edit Group**

Group Note: New Patient Group Description

Last First Middle Search

Social Security Birth Date Person Nbr Med Rec #

Search by: Patient

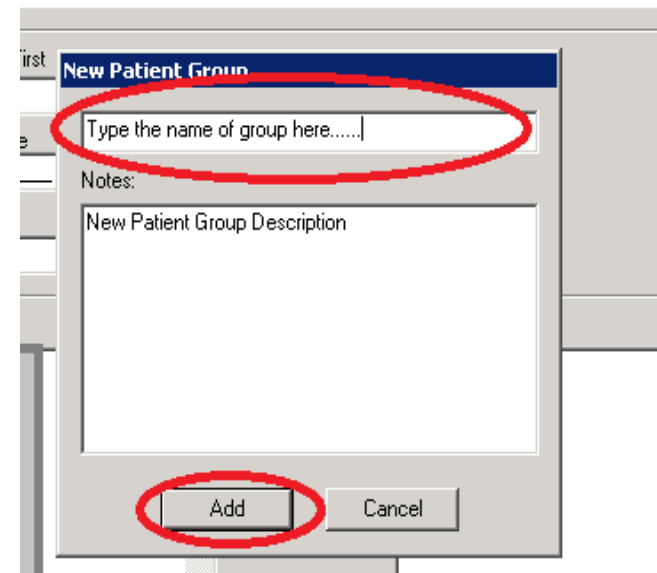
Non-Member Patients:

- Tadesse G. Abeshiro
- Omar Abeumohammed
- Emmanuel Abeye
- Nimota Abina
- Jamil Abiodun
- Aaron Ableman
- Karen M. Ableman
- Isaiah Micah. Abmalik
- Talib Abmalik
- Whitney Abmalik
- Florinda Abner
- Floyd Abney
- Imani Abney
- Mohammednut Abodiko
- Heidi Aboites

Member Patients:

Save

Close



New Patient Group

Type the name of group here.....

Notes: New Patient Group Description

Add Cancel

Creating your group (cont'd)

The screenshot shows the 'Patient Group' window. At the top, the 'Patient Group' dropdown is set to 'QIND Group Demo', with 'New Group' and 'Edit Group' buttons to its right. Below this is a 'Group Note' text area containing 'New Patient Group Description'. The search section includes fields for 'Last' (containing 'test'), 'First', and 'Middle', with a 'Search' button to the right. Below these are fields for 'Social Security', 'Birth Date', 'Person Nbr', and 'Med Rec #'. A 'Search by:' dropdown is set to 'Patient'. The bottom section features two lists: 'Non-Member Patients' and 'Member Patients'. The 'Non-Member Patients' list contains names like 'Alantine Test', 'Angie A. Test', etc. The 'Member Patients' list contains 'Chris Test', 'Beyonce K. Test', and 'Cindy Test'. Between the lists are buttons for adding and removing patients. A 'Save' button is located at the bottom center, and a 'Close' button is at the bottom right. Red annotations include a box around the 'Last' field, a box around the 'Med Rec #' field, a box around the 'Non-Member Patients' list, a box around the 'Add' button, a red arrow pointing to the 'Search' button, and a red arrow pointing to the 'Save' button. A red text label 'Don't forget to Save!' is positioned next to the 'Save' button.

Patient Group: QIND Group Demo [New Group] [Edit Group]

Group Note: New Patient Group Description

Last: test First: Middle: [Search]

Social Security: Birth Date: Person Nbr: Med Rec #: [Search]

Search by: Patient

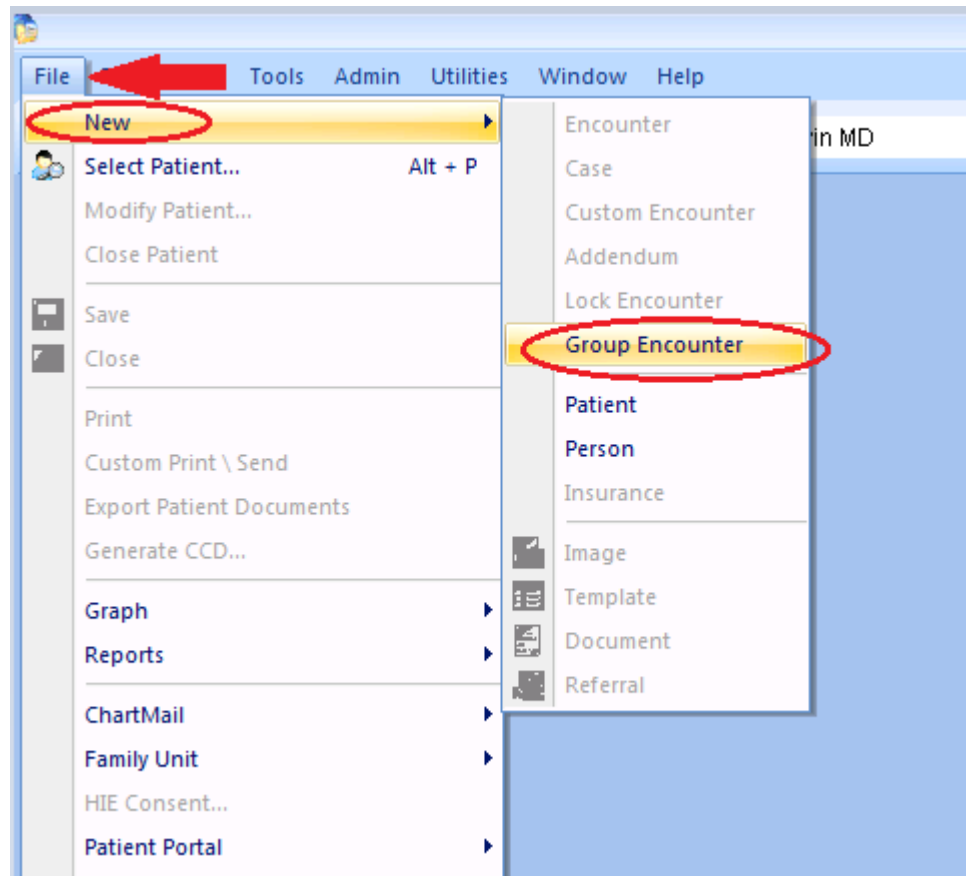
Non-Member Patients: Alantine Test, Angie A. Test, Billyjean Test, Catbird Test, Chris Test, Cynthia Test, Doe Test, Ed M. Test, Garry Test, George I. Test, Gilly Test, Helen Test, Helen Test, Imran Test, Income Test

Member Patients: Chris Test, Beyonce K. Test, Cindy Test

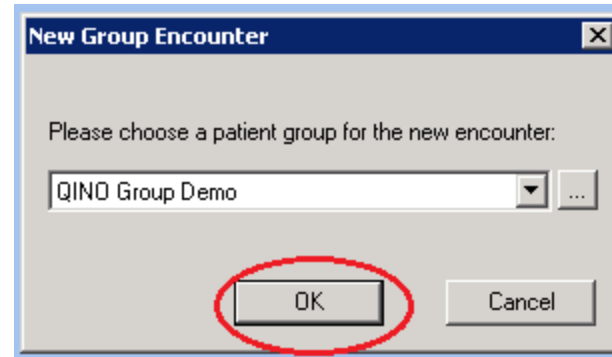
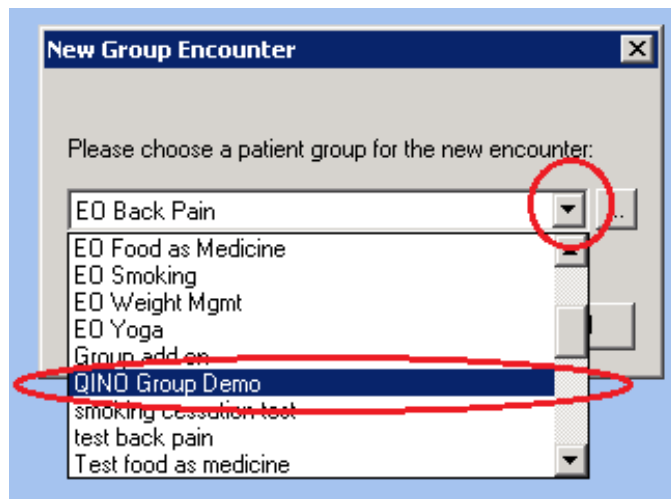
[Add] [Remove] [Save] [Close]

Don't forget to Save!

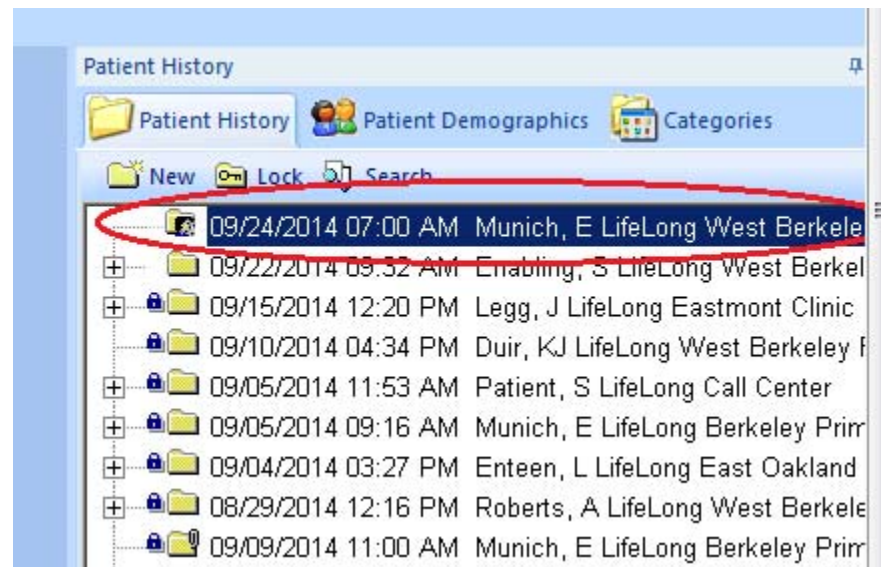
Starting the Group Encounter



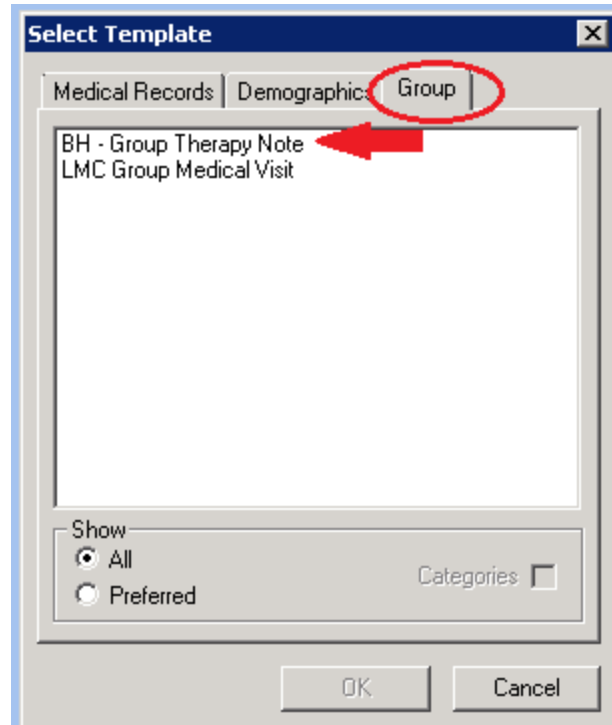
Starting the Group Encounter (cont'd)




Starting the Group Encounter (cont'd)



Selecting the Group Template



Original Group Template

Alert 

Group Information:

Name of group: Date of group: Duration of group:

Co-facilitators:

Name: Name:

Teaching Methods:

Audiovisual Demonstration Group discussion Handout material
 Homework assignment Role play Other:

Individual's General Group Participation:
(Choose appropriate level of overall progress in each blank below.)

Patient absent

Individual's participation in group discussions in an active and meaningful way.

Showed willingness to learn, and help others learn, new ways of thinking, behaving, and managing feelings.

Provided honest, appropriate feedback.

Displayed empathy for other group members.

Openly disclosed relevant personal information, feelings, and thoughts.

Actively solicited feedback from other group members.

Completed assignments in a timely and satisfactory manner.

Client's mood:

Evidence of Learning: (1 = Poor, 5 = Excellent)

Skill building/understanding:

Attentiveness/participation:

Name of Problem/Need Addressed in Group:

Treatment is Necessary to:

Reduce risk of client needing a more intensive level of care (e.g. hospitalization, relapse.)

Reduce risk of harm to self or others

Maintain or improve current level of functioning

Observations/Progress Toward Identified Goal: [Mental Status Exam](#)

Plan:

Group Members **Chart Note**

LifeLong Medical Modified Template

Group Medical Visit Alert

Group Information:
Name of group: Date of group: Duration of group:

Co-Facilitators:
Name 1: Name 2:

Teaching Methods:
 Audiovisual Demonstration Group discussion Handout material
 Homework assignment Role play Other:

Individual:
 Patient absent Patient's Mood:

HPI: 1. 2. 3.

(subjective comments)

Today's Assessment:
1. 2. 3.

Plan Comments: (Individual) (assessment comments)

Evidence of Learning: (1 = Poor, 5 = Excellent)
Skill building/understanding: Attentiveness/participation:

Group Topic(s):

Group Assessment: [Screening Tools](#) [Mental Status Exam](#)

Group Plan: copy to plan comments

Navigation: [Intake](#) [Meds](#) [Labs](#) [SOAP](#) [Fee-Ticket](#) [Checkout](#) [Non-Billable Services](#) [Group Members](#) [Chart Note](#)

Right Panel: [HPI](#) [My Phrases](#) [Manage My Phrases](#) [Plan](#) [My Phrases](#) [Advice](#) [My Phrases](#)

LMC Template Features

09/24/2014 07:00 AM : "LMC Group Medical Visit" x

Group Medical Visit Alert

Group Information:
Name of group: Date of group: Duration of group:

Co-Facilitators:
Name 1: Name 2:

Teaching Methods:
 Audiovisual Demonstration Group discussion Handout material
 Homework assignment Role play Other:

Individual:
 Patient absent Patient's Mood:

HPI: 1. 2. 3.

(subjective comments)

Today's Assessment:
1. 2. 3.

Plan Comments: (Individual) (assessment comments)

Group Documentation

Evidence of Learning: (1 = Poor, 5 = Excellent)
Skill building/understanding: Attentiveness/participation:

Group Topics(s):
This section is specific to the topics of discussion at todays group visit.....
.....
.....

My Phrases
HPI
My Phrases
Manage My Phrases

Group Assessment: [Screening Tools](#) [Mental Status Exam](#)

.....
.....

Group Plan: copy to plan comments

.....
.....

Plan
My Phrases

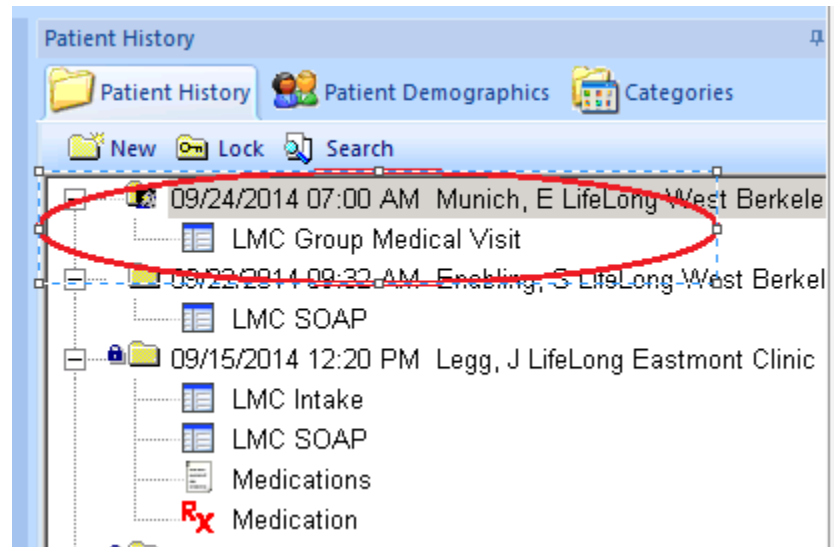
Advice
My Phrases

Links to other templates.
[Intake](#) [Meds](#) [Labs](#) [SOAP](#) [Fee-Ticket](#) [Checkout](#)
[Non-Billable Services](#)

Group Members Chart Note

Group Documentation

(populates on all group members encounter)



Group Documentation (cont'd)

(populates on all group members encounter)

Group Medical Visit

Alert
Group Information:
Name of group: Date of group: Duration of group:
Co-Facilitators:
Name 1: Name 2:
Teaching Methods:
 Audiovisual Demonstration Group discussion Handout material
 Homework assignment Role play Other:
Individual:
 Patient history Patient's voice
HPI: 1. 2. 3.

(subjective comments)
Today's Assessment:
1. 2. 3.


(assessment comments)
Plan Comments: (Individual)

Evidence of Learning: (1 = Poor, 5 = Excellent)
Skill building/understanding: Attentiveness/participation:
Group Topic(s):
This section is specific to the topics of discussion at today's group visit.....
.....
.....
Group Assessment: [Screening Tools](#) [Mental Status Exam](#)
Group Assessment is the subjective component of the visit for the group.....
.....
Group Plan: copy to plan comments
This is the group plan that is used to describe the plan and goals for the group.....
.....
.....
Group Members Chart Note
[Intake](#) [Meds](#) [Labs](#) [SOAP](#) [Fee-Ticket](#) [Checkout](#)
[Non-Billable Services](#)

Information is carried over to each patient in the group!

Generated Document

(Captures both the individual and group documentation)



PATIENT: Beyonce K. Test
DATE OF BIRTH: 08/20/1962
MRN: 000000157055
ENCOUNTER DATE: 9/24/2014
VISIT TYPE: Group Medical Visit

Name of group: Diabetes
Co-facilitator: Ryan Hensler Dr. Know it all
Duration of group: 90 minutes
Methods Used: Handout material
Group discussion

Today's Topic:
This section is specific to the topics of discussion at todays group visit.....
.....

Group Assessment:
Group Assessment is the subjective component of the visit for the group.....
.....

Plan:
This is the group plan that is used to describe the plan and goals for the group.....
.....
.....

Participants Mood: **Individual component**

Individual SOAP:
Chronic Problems Addressed Today:
Hypertension, benign.
Substance abuse/dependence.

Assessment/Plan:
Diabetes Mellitus Type 2, Uncomplicated (250.00)
Hypertension, benign (401.1)

Generated Document (cont'd)

Substance abuse/dependence (304.90)

DM: continue exercise regimen

HTN: Continue to take medication

Plan Comments:

Plan for the patient that is printed on the patient
plan.....

Provider: Edwin Munich MD 09/24/2014

A handwritten signature in black ink, appearing to read 'Edwin Munich MD', is written over a light gray rectangular background.

Document generated by: Ryan Hensler 09/24/2014 8:09 AM

LifeLong West Berkeley Family Practice
2031 6th St
Berkeley, CA 94710-2006
Phone: (510)981-4200 Fax: (510)981-4292

Benefits to Using the Group Template

- Ability to document on multiple patients at one time.
- Chart both individual and group information on a single template.
- Provides charting efficiency in a large group setting.
- Built to cater to the group care we provide not restricted to using medical record (SOAP) to try and document a group visit.
- Setup to accommodate the billing and documentation component for both a individual and group visit encounter.

Things to keep in mind

- There is currently no group visit scheduling component in Nextgen.
- Group encounters create a new encounter for each patient. You do not want front desk to also check in the patient and create an encounter (duplicate encounters).
 - Use “Appointment Kept” in appt book and marry the encounter back to the appt after charges have been submitted.

Questions?

