

Treatment Plans



TREATMENT PLAN - HOW TO CREATE

A Treatment Plan that gives you a list of educational handouts to give to patients and that will automatically log this action into the Meaningful Use data table and be counted in the Meaningful Use percentage count.

This type of treatment plan requires that you create documents that need to be attached.

You should start by reviewing the Treatment Plan training videos that are available on the Client Website under **PCM Documentation and Videos.**

FIRST: Before you begin to create the treatment plan, you need to create the documents that you plan to attach.

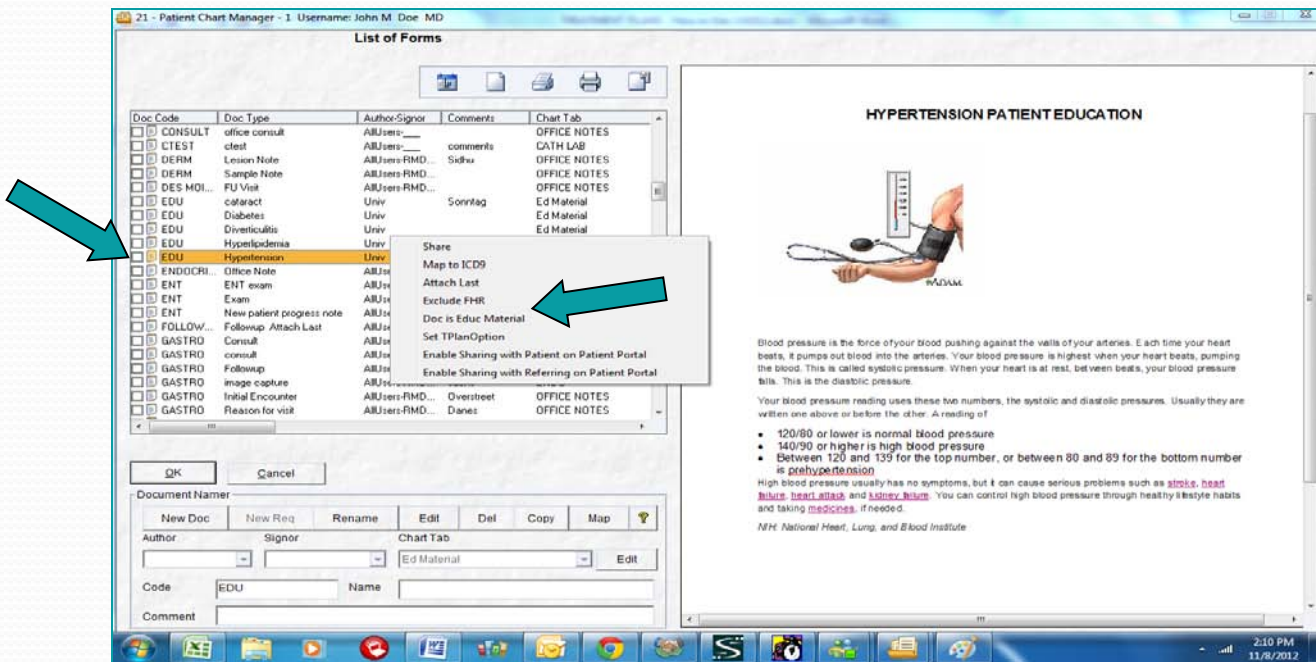
➤ A patient education handout

- This can be either a PEN or TXT document, but making it a TXT document gives you more flexibility to change it at a later time. You can simply cut and paste information you may have from existing documents or other sources into a new TXT document. I would suggest you set the document code for this handout to EDU so that it will be easy to locate all your educational material handouts in one group.

When you create the educational document, make note of the Doc Code (first column) for your document.

You will need this later.

ALSO –If the document is educational material, be sure to tag the document as educational material by right clicking on the highlighted document and selecting “Doc is Educ Material”



➤ For this example, I have created an education handout on hypertension.

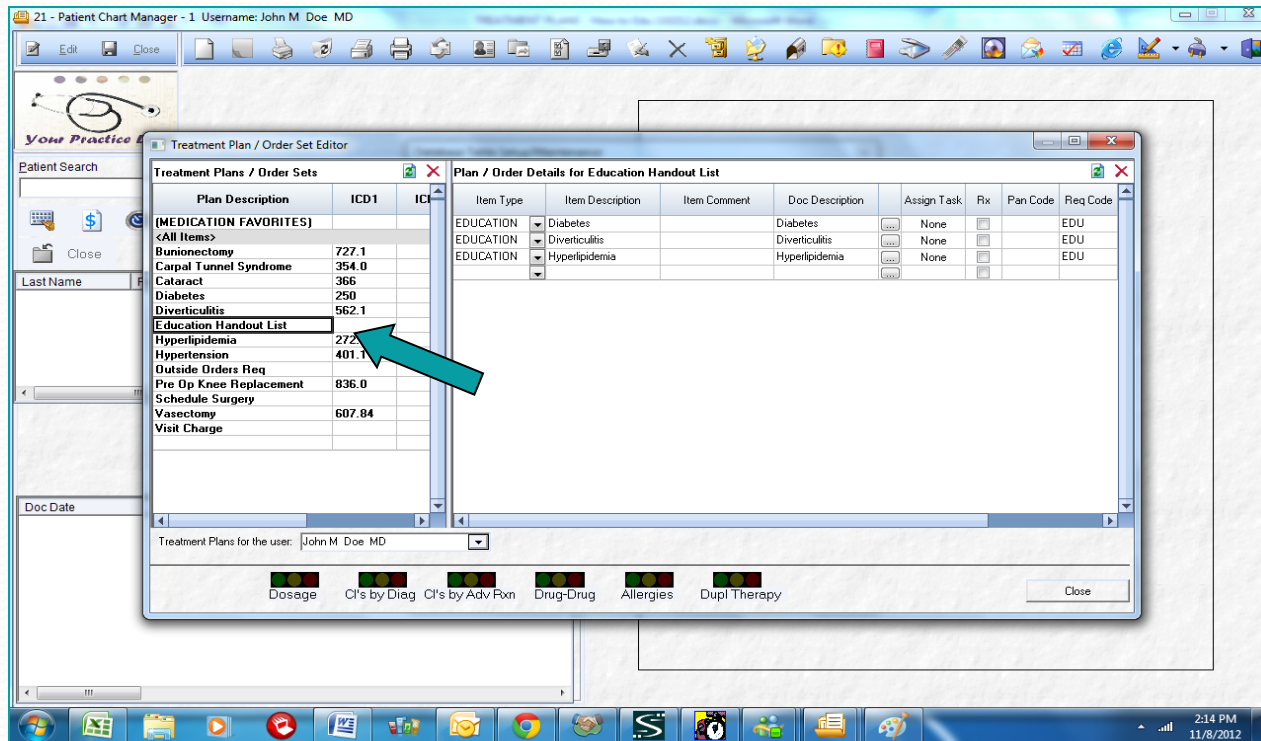
The screenshot displays a software window titled "21 - Patient Chart Manager - 1 Username: John M. Doe MD". The main window is titled "List of Forms" and contains a table with the following columns: Doc Code, Doc Type, Author/Signor, Comments, and Chart Tab. The "Hypertension" document is highlighted in the list.

Doc Code	Doc Type	Author/Signor	Comments	Chart Tab
CONSULT	office consult	AllUsers		OFFICE NOTES
CTEST	chest	AllUsers	comments	CATH LAB
DERM	Lesion Note	AllUsers-RMD...	Sidhu	OFFICE NOTES
DERM	Sample Note	AllUsers-RMD...		OFFICE NOTES
DES MQL...	FU Visit	AllUsers-RMD...		OFFICE NOTES
EDU	cataract	Univ	Sonntag	Ed Material
EDU	Diabetes	Univ		Ed Material
EDU	Diverticulitis	Univ		Ed Material
EDU	Hyperlipidemia	Univ		Ed Material
EDU	Hypertension	Univ		Ed Material
ENDOCRI...	Office Note	AllUsers-RMD...	Castro	OFFICE NOTES
ENT	ENT exam	AllUsers-RMD...	library	OFFICE NOTES
ENT	Exam	AllUsers-RMD...	Wade	PROGRESS NOTES
ENT	New patient progress note	AllUsers-RMD...	Sample ENT	Progress Notes
FOLLOWW...	Followup Attach Last	AllUsers-RMD...	Sample	OFFICE NOTES
GASTRO	Consult	AllUsers-RMD...	Matossian	OFFICE NOTES
GASTRO	consult	AllUsers-RMD...	GENERIC	OFFICE NOTES
GASTRO	Followup	AllUsers-RMD...	Matossian	OFFICE NOTES
GASTRO	image capture	AllUsers-RMD...	sachs	ENDO
GASTRO	Initial Encounter	AllUsers-RMD...	Overstreet	OFFICE NOTES

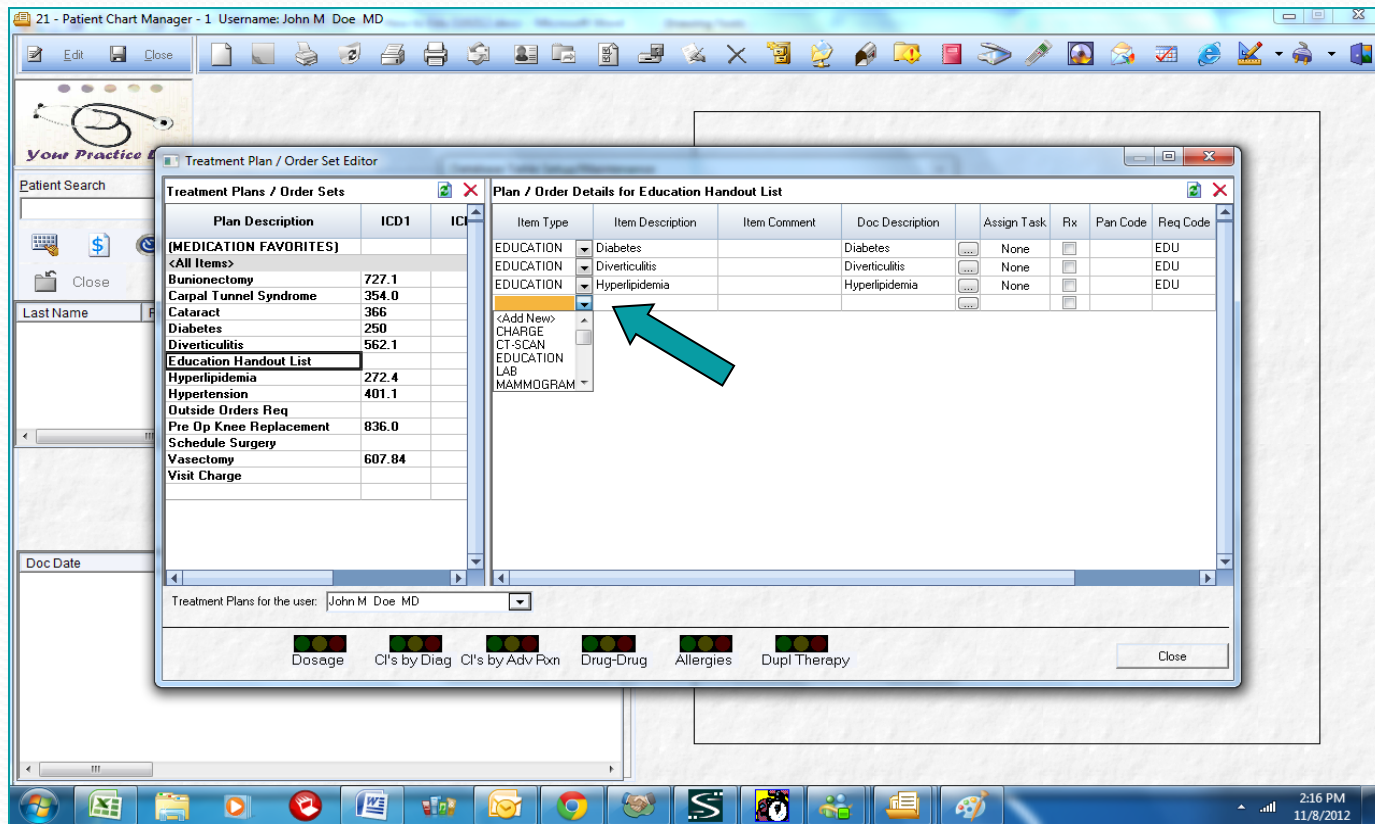
The "HYPERTENSION PATIENT EDUCATION" document preview includes an illustration of a person's arm with a blood pressure cuff and a stethoscope. The text explains that blood pressure is the force of blood pushing against the walls of arteries and provides a list of normal and high blood pressure ranges. It also mentions that high blood pressure usually has no symptoms but can cause serious problems like stroke, heart failure, and kidney failure. The source is cited as NIH: National Heart, Lung, and Blood Institute.

➤ Once you have your set of documents prepared, you can set up the treatment plan.

- Go to the Treatment Plan Editor and create a new treatment plan by typing in the new name, in this case “Education Handout List”.



- Add a new “Item Type” of “Education” by clicking on the “Add new” option from the drop down.



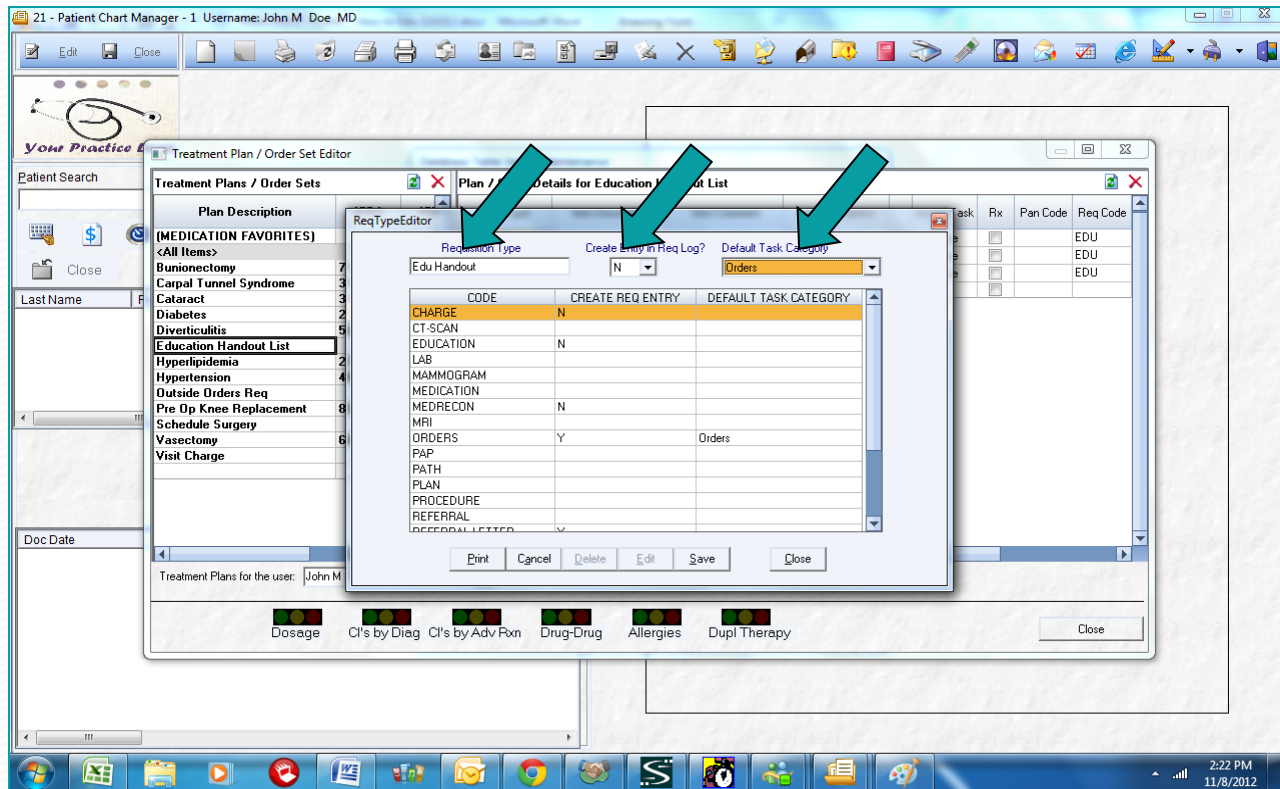
➤ Click the “Add “ button.

The screenshot displays a medical software interface with a 'ReqTypeEditor' dialog box open. The dialog box contains a table with the following data:

CODE	CREATE REQ ENTRY	DEFAULT TASK CATEGORY
CHARGE	N	
CT-SCAN		
EDUCATION	N	
LAB		
MAMMOGRAM		
MEDICATION		
MEDRECON	N	
MRI		
PAP		
PATH		
PLAN		
PROCEDURE		
REFERRAL		
REFERRAL LETTER		
REMINDER		

A teal arrow points to the 'Add' button at the bottom of the dialog box. The background shows a 'Treatment Plans / Order Sets' window with a list of medical conditions, including 'Outside Orders Req' which is selected. The system tray at the bottom right shows the date and time as 9:04 AM on 11/2/2012.

- Enter a Requisition Type name (Edu Handout in this example), Select N to track in Req Log, and from the Default Task Category, select Orders in this case.



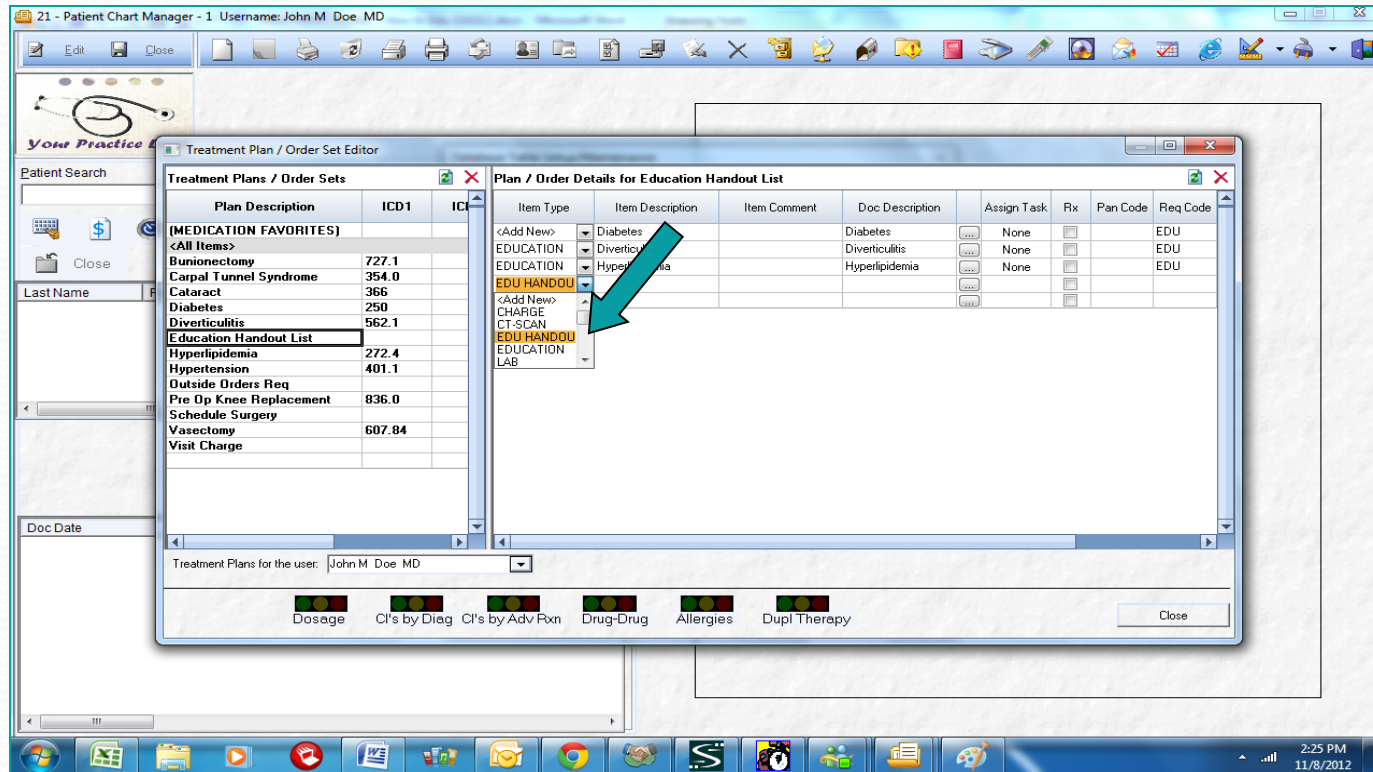
➤ Click “Save”. You will then see your new entry on the list.

The screenshot displays a medical software interface. In the foreground, a 'ReqTypeEditor' dialog box is open, showing a table of requisition types. A red arrow points to the 'DEFAULT TASK CATEGORY' column for the 'EDU HANDOUT' entry. The background window, 'Treatment Plan / Order Set Editor', shows a list of medical conditions under 'MEDICATION FAVORITES', with 'Education Handout List' selected. The system tray at the bottom indicates the time is 2:23 PM on 11/8/2012.

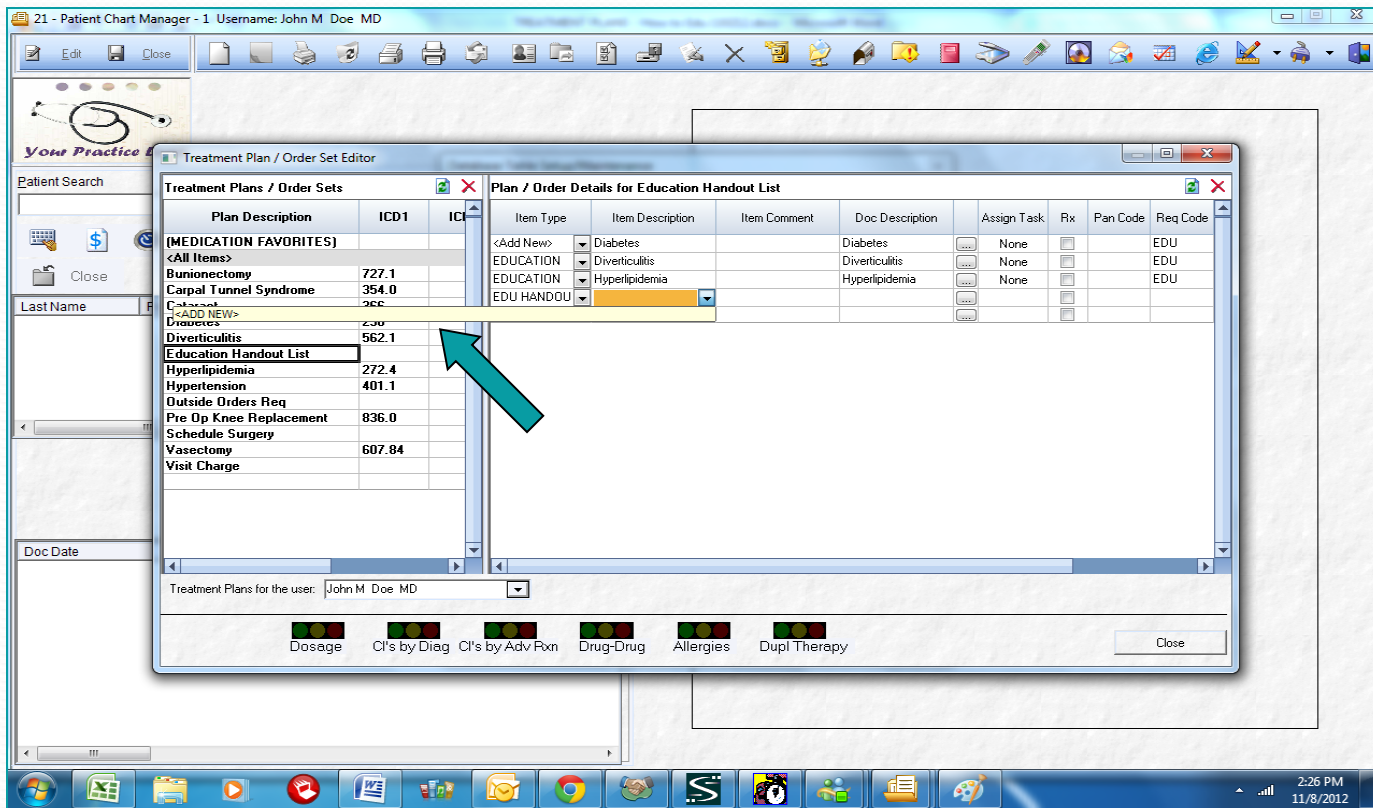
CODE	CREATE REQ ENTRY	DEFAULT TASK CATEGORY
CHARGE	N	
CT-SCAN		
EDU HANDOUT	N	Orders
EDUCATION	N	
LAB		
MAMMOGRAM		
MEDICATION		
MEDRECON	N	
MRI		
ORDERS	Y	Orders
PAP		
PATH		
PLAN		
PROCEDURE		
RECEPTION		

- Close and return to the Treatment Plan Editor. Select your new Item type from the Item Type drop down list.

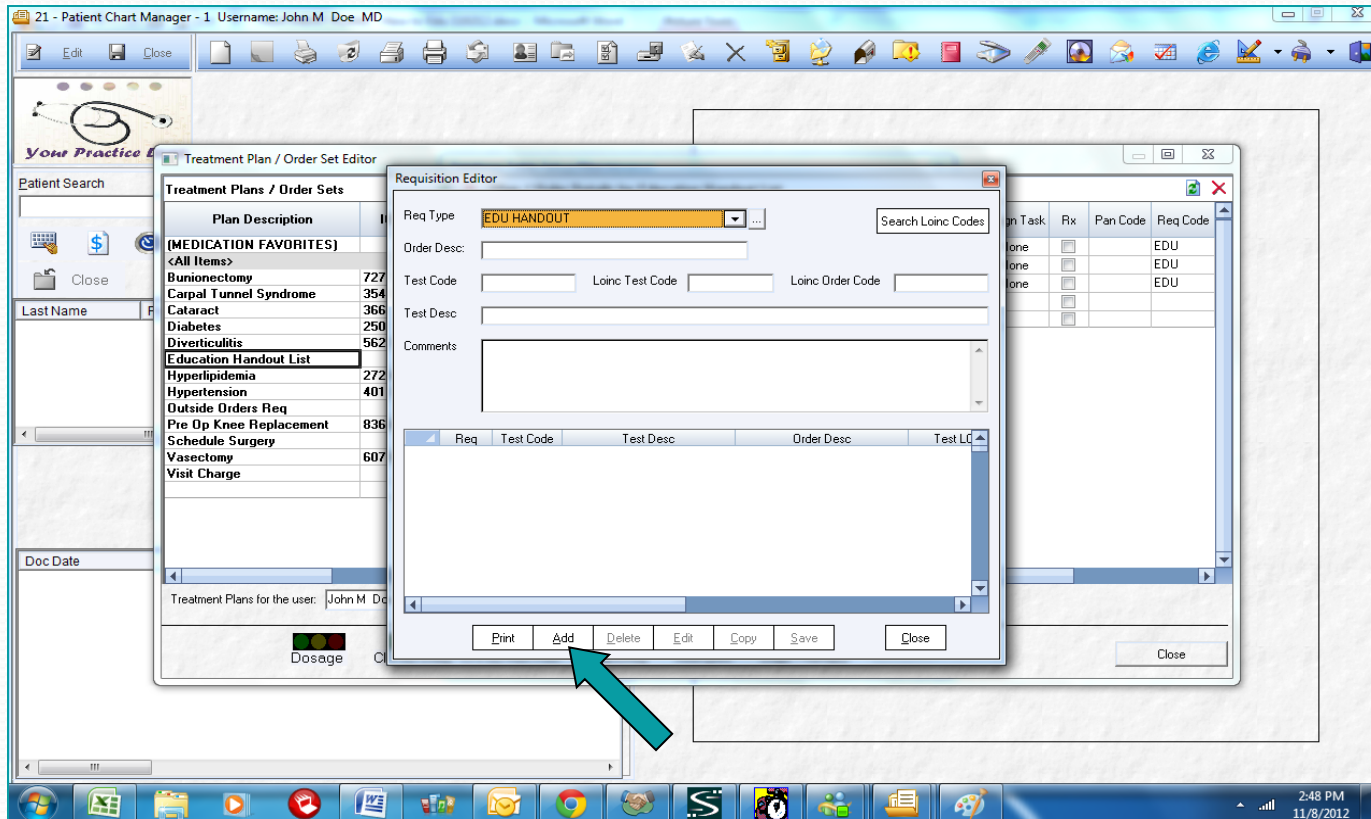
In this example, Edu Handout.



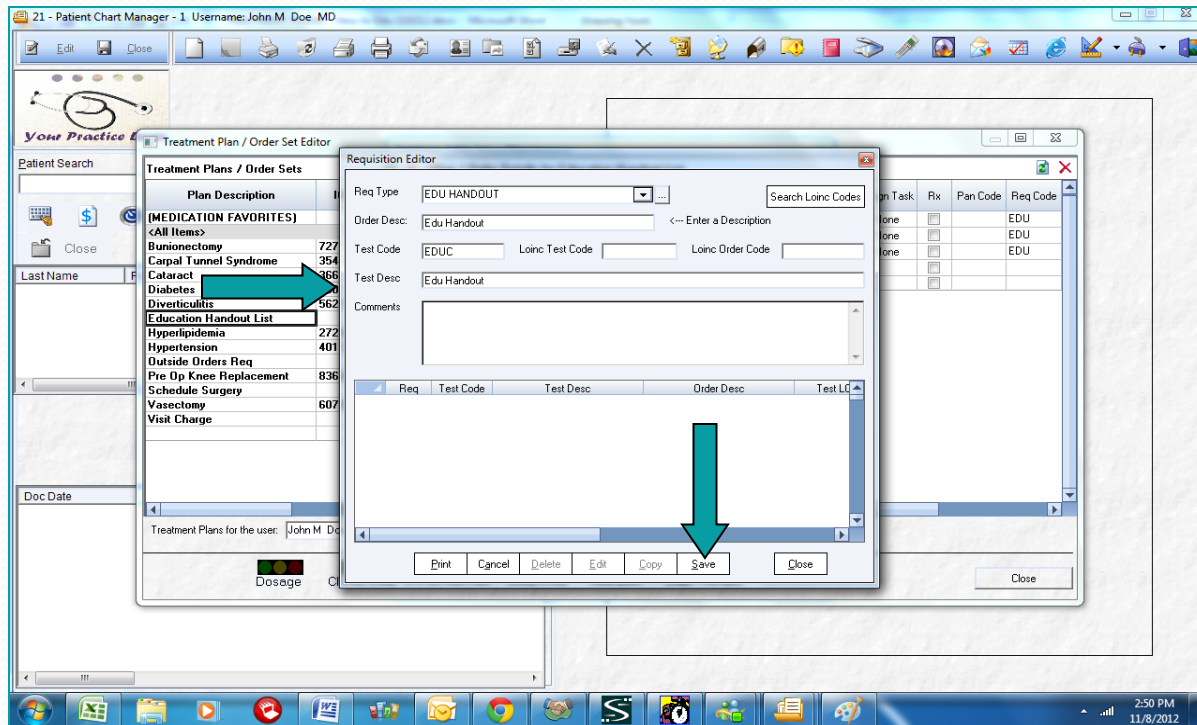
- Create an Item Description by selecting “Add New” from the drop down.



➤ Then Click the Add button.



➤ Then enter an Order Description, Test Code and Test Description. Note: What you put in the Test Desc field will print on your chart note, so it should reflect the topic of the handout. In this example, Hypertension would be appropriate. Then click “Save”.



➤ The new item description will show up in the bottom screen.

The screenshot shows a medical software interface with a 'Requisition Editor' dialog box open over a 'Treatment Plan / Order Set Editor' window. The Requisition Editor contains the following fields:

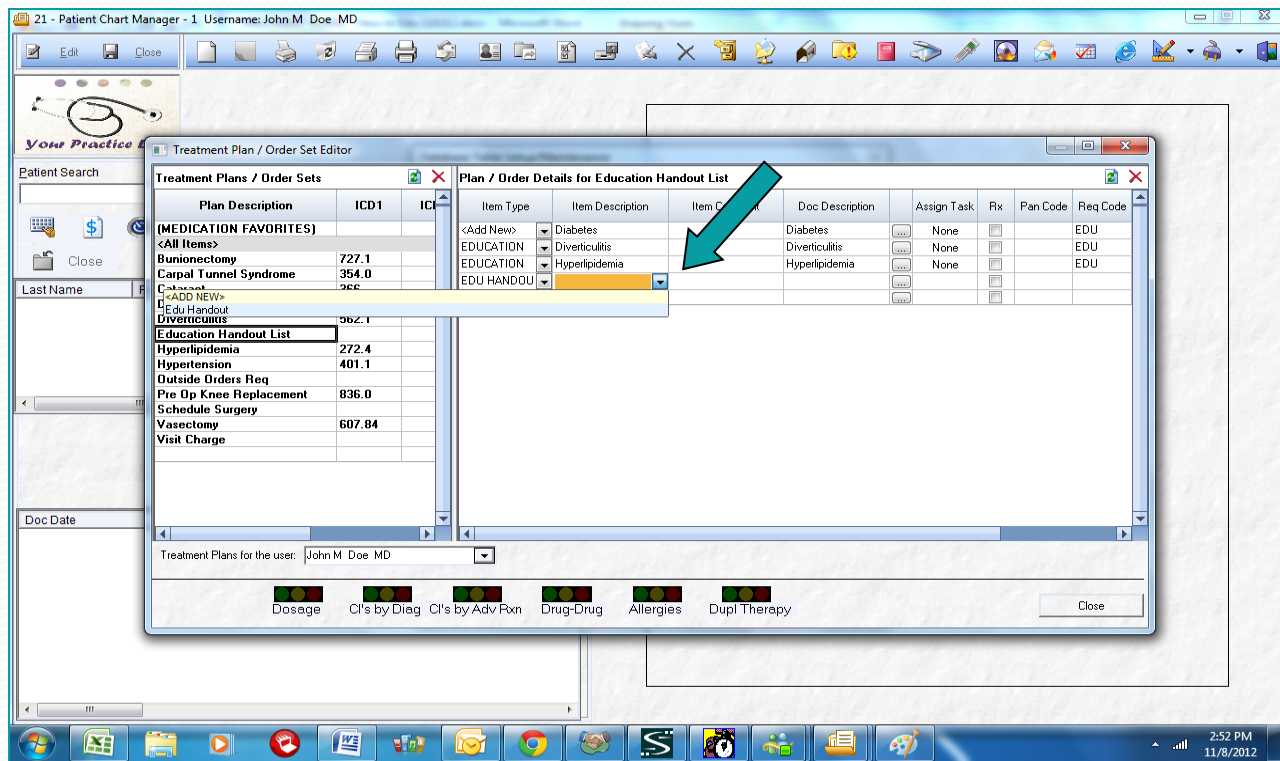
- Req Type: EDU HANDOUT
- Order Desc: Edu Handout
- Test Code: EDUC
- Test Desc: Edu Handout
- Comments: (empty)

At the bottom of the Requisition Editor is a table with the following data:

Req	Test Code	Test Desc	Order Desc	Test LC
1	U HANDO EDUC	Edu Handout	Edu Handout	

A teal arrow points to the 'Test LC' column of the table. The background window shows a list of treatment plans for 'John M. Doe' with categories like 'Medication Favorites', 'Education Handout List', and 'Visit Charge'. The Windows taskbar at the bottom shows the date and time as 2:51 PM on 11/8/2012.

- Click “Close”, then select your item from the Item Description Drop Down. The Item Comment field is just an optional comment field.



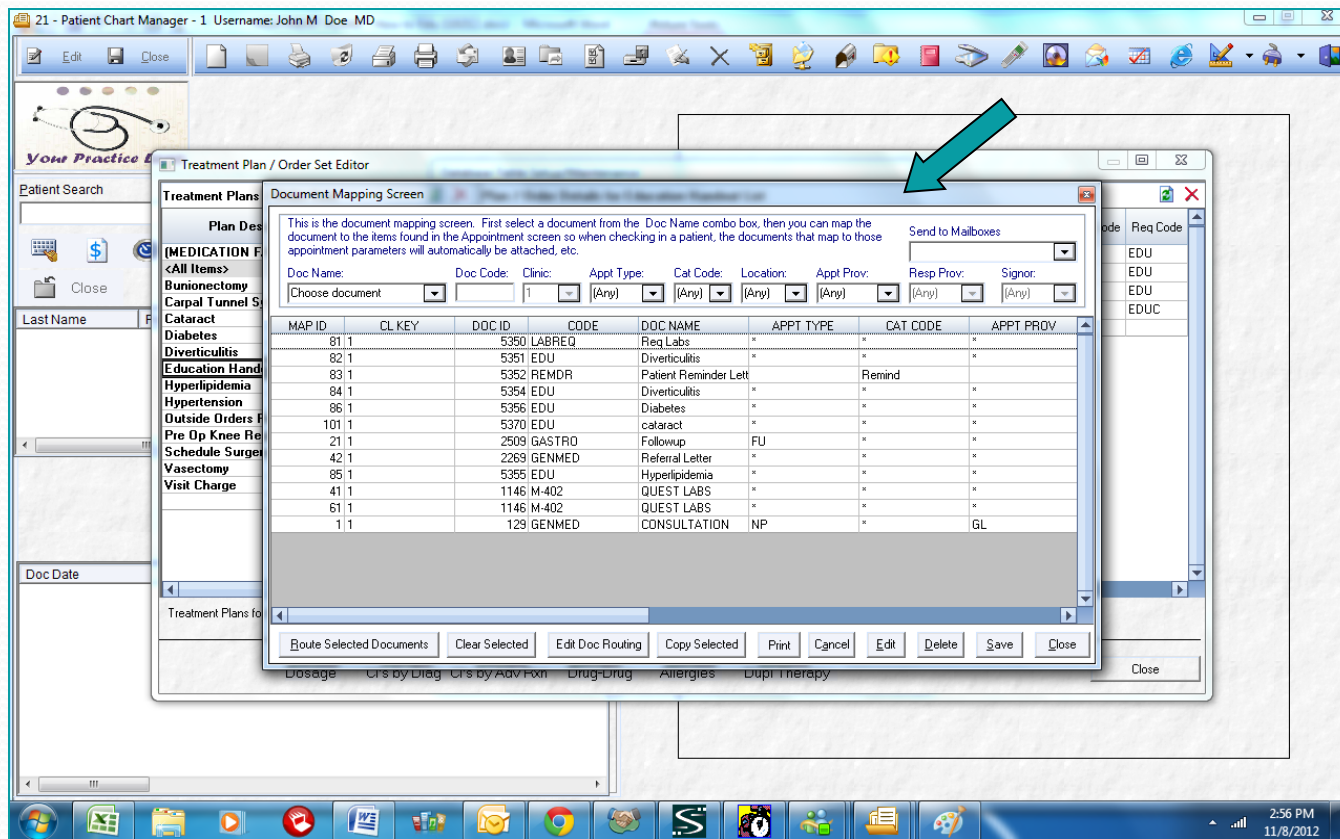
- Now you are ready to attach the document you created to the treatment plan so it will automatically pull it and attach it to the chart.
- You should have made note of the Doc Code, but if you didn't, you can find it by finding the document in the list from Document Setup. The Doc Code is the first column.

The screenshot shows a software window titled "14 - Patient Chart Manager - 1 Username: John M. Doe MD; Pt. Name: D.O.B. Chart Desc:". Inside, a "List of Forms" dialog box is open, displaying a table of document codes and types. A teal arrow points to the row with Doc Code "EDU" and Doc Type "Hypertension".

Doc Code	Doc Type	Author/Signor	Comments	Chart Tab
<input type="checkbox"/> CA-168	MA Hx	AM/Jeers-RMD...	HPC	OFFICE NOTES
<input type="checkbox"/> CA-458	Office Visit Note	AM/Jeers-RMD...	HPC	OFFICE NOTES
<input type="checkbox"/> CA-458	Office Note	AM/Jeers-RMD...		OFFICE NOTES
<input type="checkbox"/> CARD	office consult	AM/Jeers...		OFFICE NOTES
<input type="checkbox"/> CONSULT	consult	AM/Jeers...	comments	CATH LAB
<input type="checkbox"/> CTEST	Lesion Note	AM/Jeers-RMD...	Sidhu	OFFICE NOTES
<input type="checkbox"/> DERM	Sample Note	AM/Jeers-RMD...		OFFICE NOTES
<input type="checkbox"/> DES MOL...	FU Visit	AM/Jeers-RMD...		OFFICE NOTES
<input type="checkbox"/> EDU	cataract	Univ	Sorentag	Ed Material
<input type="checkbox"/> EDU	Diabetes	Univ		Ed Material
<input type="checkbox"/> EDU	Dyslipidemia	Univ		Ed Material
<input type="checkbox"/> EDU	Hypertension	Univ		Ed Material
<input type="checkbox"/> ENDOCRIL...	Office Note	AM/Jeers-RMD...	Castro	OFFICE NOTES
<input type="checkbox"/> ENT	ENT exam	AM/Jeers-RMD...	Mxay	OFFICE NOTES
<input type="checkbox"/> ENT	Exam	AM/Jeers-RMD...	Wade	PROGRESS NOTES
<input type="checkbox"/> ENT	New patient progress note	AM/Jeers-RMD...	Sample ENT	Progress Notes
<input type="checkbox"/> FOLLOWUP	Followup Attach Last	AM/Jeers-RMD...	Sample	OFFICE NOTES
<input type="checkbox"/> GASTRO	Consult	AM/Jeers-RMD...	Malotian	OFFICE NOTES
<input type="checkbox"/> GASTRO	consult	AM/Jeers-RMD...	GENERIC	OFFICE NOTES
<input type="checkbox"/> GASTRO	Followup	AM/Jeers-RMD...	Malotian	OFFICE NOTES

The right side of the dialog shows a preview of the "HYPERTENSION PATIENT EDUCATION" document, which includes an illustration of a person's arm with a blood pressure cuff and text explaining blood pressure and hypertension.

- Click on the box to the right of the Doc Description field and the Document Mapping Screen will open.

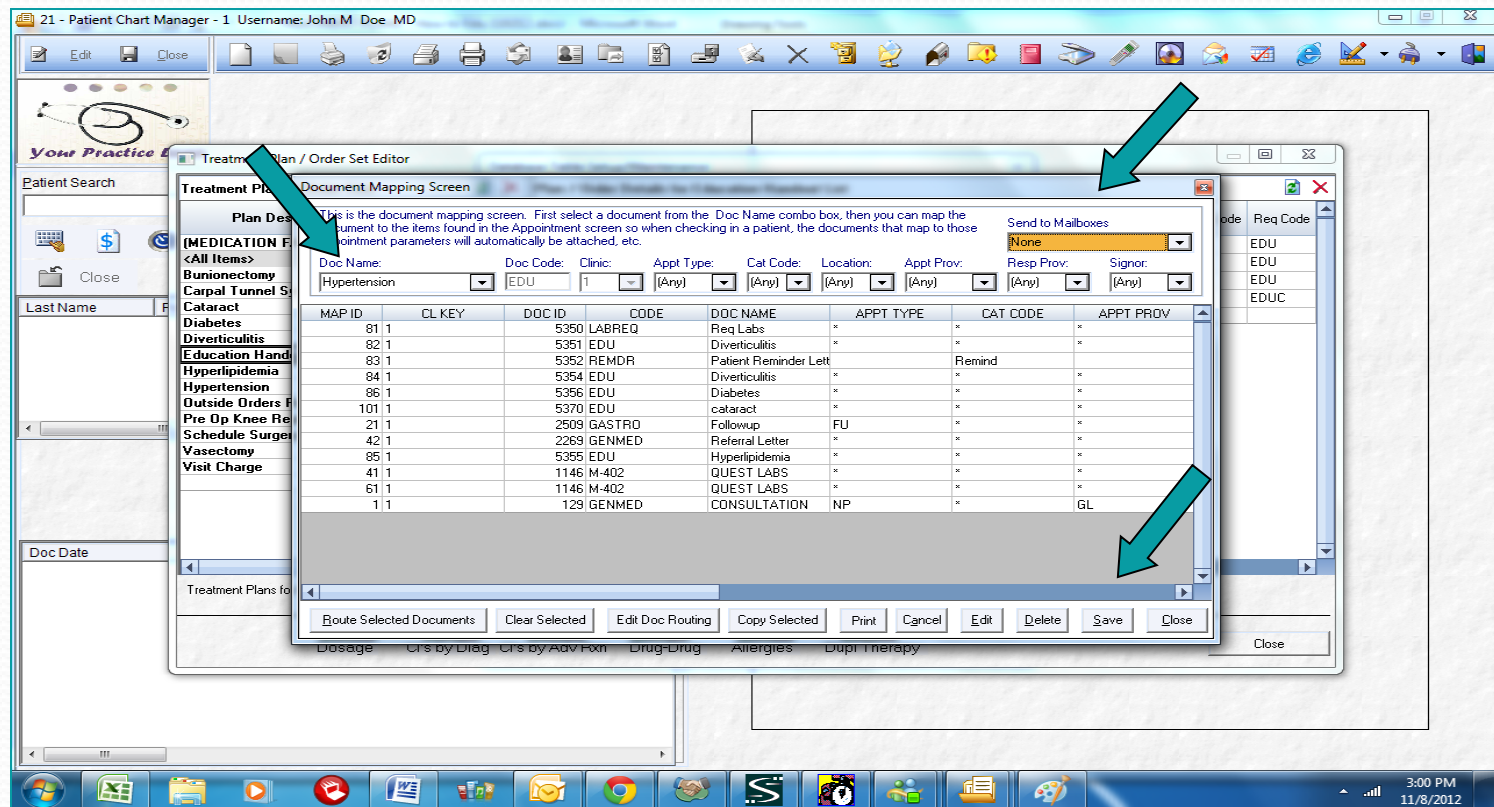


- Click on the drop down in the Doc Name Field. Then in the CODE column, scroll to find the Doc Code for the document you want to attach. These are listed alphabetically.

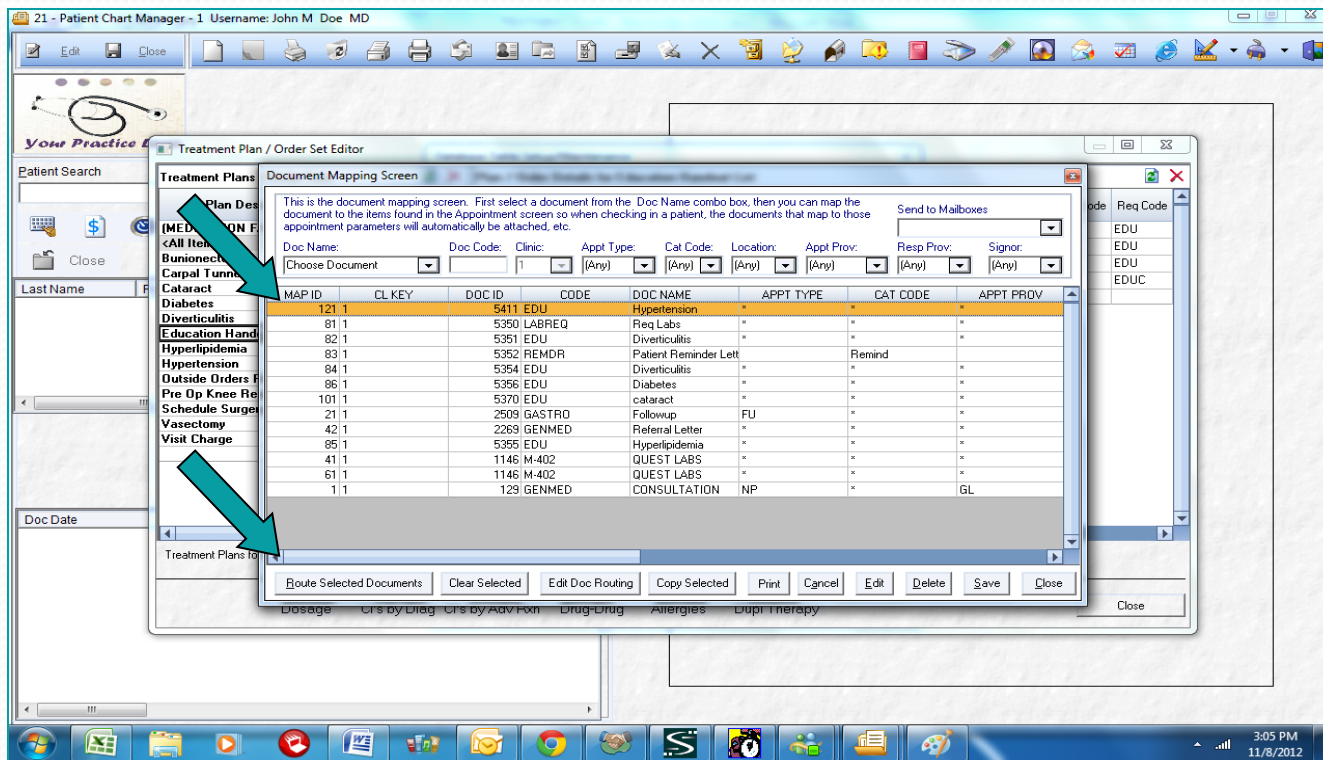
The screenshot shows a 'Document Mapping Screen' dialog box within a medical software application. The dialog box has a title bar that reads 'Treatment Plan / Order Set Editor' and 'Document Mapping Screen'. Below the title bar is a descriptive text: 'This is the document mapping screen. First select a document from the Doc Name combo box, then you can map the document to items found in the Appointment screen so when checking in a patient, the documents that map to those appointment categories will automatically be attached, etc.' Below this text are several dropdown menus for 'Doc Name', 'Doc Code', 'Clinic', 'Appt Type', 'Cat Code', 'Location', 'Appt Prov', 'Resp Prov', and 'Signor'. The 'Doc Name' dropdown is currently set to 'Hypertension'. Below these dropdowns is a table with columns: Name, Code, Id, Author, Signor, C.NAME, APPT TYPE, CAT CODE, and APPT PROV. The 'Hypertension' document is highlighted in the list. At the bottom of the dialog box are several buttons: 'Route Selected Documents', 'Clear Selected', 'Edit Doc Routing', 'Copy Selected', 'Print', 'Cancel', 'Edit', 'Delete', 'Save', and 'Close'.

Name	Code	Id	Author	Signor	C.NAME	APPT TYPE	CAT CODE	APPT PROV
Hypertension	EDU	5411	Univ					
Diverticulitis	EDU	5354	Univ					
Diverticulitis	EDU	5351	Univ					
Hyperlipidemia	EDU	5355	Univ					
Chart front	ENDO_SIER	1930	AllUsers	RMD10	ient Reminder Lett		Remind	
Diabetic Flow Sheet	ENDOC	35	AllUsers	RMD10	erticulitis	*	*	*
Office Note	ENDOCRINE	3749	AllUsers	RMD10	betes	*	*	*
ENT exam	ENT	2789	AllUsers	RMD10	aract	*	*	*
					owup		FU	
42 1		2269	GENMED		Referral Letter	*	*	*
85 1		5355	EDU		Hyperlipidemia	*	*	*
41 1		1146	M-402		QUEST LABS	*	*	*
61 1		1146	M-402		QUEST LABS	*	*	*
1 1		129	GENMED		CONSULTATION	NP	*	GL

- Select and the document name will appear in the Doc Name box. In the Send to Mailboxes field in the upper right, select NONE. Then click the Save button.



- Your document will then appear on the list. Highlight your document on the list. Then click on Route Selected Documents in the lower left.



- The following screen will display – Document Routing Setup.
- Highlight the document you want to attach

Document Routing Setup - Clinic 1

Select a document routing action first, then select desired document destination, and if routing 'ToUser', a Routing Condition as well.

Select Rows for Save/Delete: With each Save Click, the selected items in the list will update with the displayed document destination.

Routing Action: [Dropdown] Document Destination: [Dropdown] Routing Condition: [Dropdown]

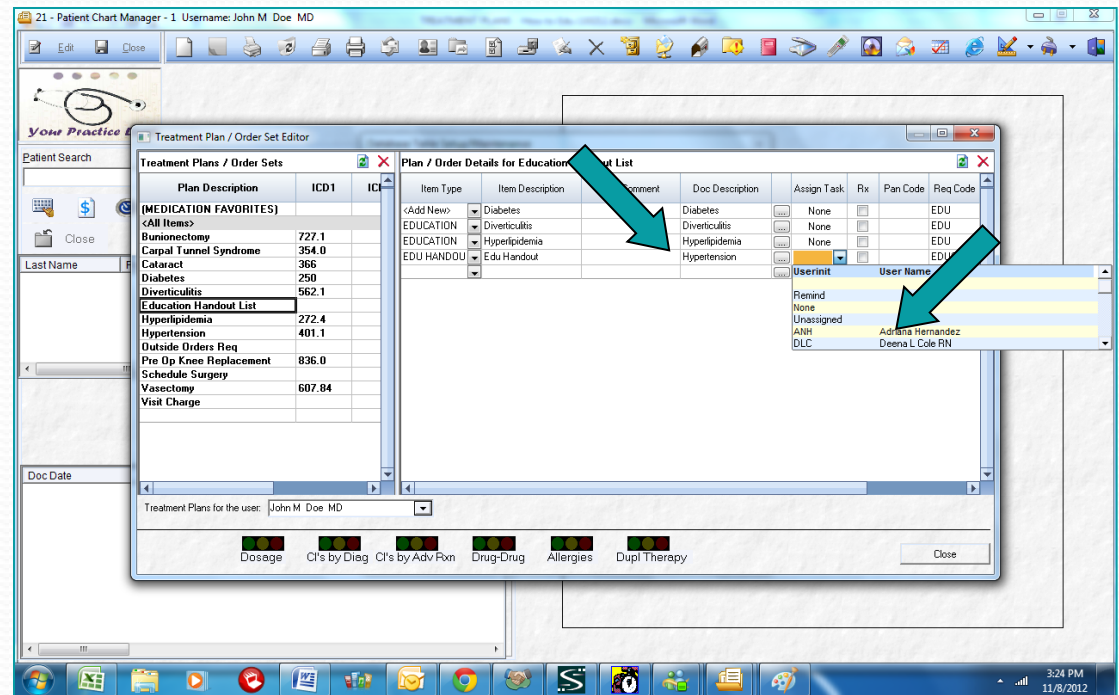
Del Selected Save Selected Copy Selected Close Print

DOC_ID	MAP_ID	DOC CODE	DOC NAME	ROUTE ACTION	DESTINATION	CONDITION	LOGON	DATE CREATED	CREATED BY
2509	21	GASTRO	Followup	ToUser	(Appt Prov)	On Check-In	1	3/31/2010 1:42:16	IRMD
1146	41	M-402	QUEST LABS	Print	\\Warrainepc\HP LaseJet Professi	On Check-Out	1	11/7/2012 3:37:28	IRMD102
1146	41	M-402	QUEST LABS	ToUser	(None)	On Treatment Plt	1	4/18/2011 1:42:33	IRMD102
1146	41	M-402	QUEST LABS	ToUser	(None)	On Treatment Plt	1	4/14/2011 11:20:04	IRMD102
2269	42	GENMED	Referral Letter	ToUser	(None)	On Treatment Plt	1	4/14/2011 12:03:11	IRMD102
1146	61	M-402	QUEST LABS	ToUser	(None)	On Treatment Plt	1	4/18/2011 1:49:21	IRMD102
5350	81	LABREQ	Req Labs	Print	\\Warrainepc\HP LaseJet Professi	On Check-Out	1	11/7/2012 3:34:14	IRMD102
5350	81	LABREQ	Req Labs	Print	\\Warrainepc\HP LaseJet Professi	On Check-Out	1	10/22/2012 12:06:1	IRMD102
5351	82	EDU	Diverticulitis	Print	\\Warrainepc\HP LaseJet Professi	On Treatment Plt	1	10/22/2012 12:12:4	IRMD102
5354	84	EDU	Diverticulitis	Print	\\Warrainepc\HP LaseJet Professi	On Treatment Plt	1	10/22/2012 1:55:56	IRMD102
5355	85	EDU	Hyperlipidemia	Print	\\Warrainepc\HP LaseJet Professi	On Treatment Plt	1	10/22/2012 2:19:34	IRMD102
5356	86	EDU	Diabetes	Print	\\Warrainepc\HP LaseJet Professi	On Treatment Plt	1	10/22/2012 3:57:20	IRMD102
5370	101	EDU	cataract	Print	\\Warrainepc\HP LaseJet Professi	On Treatment Plt	1	10/23/2012 10:56:4	IRMD102
5411	121	EDU	Hypertension				1	11/8/2012 3:08:07	IRMD102

➤ At the top of that screen, select the following:

- For Routing Action, make your choice ; in this example Print
- For Document Destination, make your choice, in this example select the printer
- For Routing Condition, make your choice, in this example “on treatment plan”.

➤ Then click Save Selected.



CONGRATULATIONS!

- You have created a treatment plan with an educational handout.
- Repeat the steps for as many handouts as you have.
- **To Test what you have done** - In Patient Chart Manager, do the following:
 - Pick a test patient.
 - Open a text template.
 - Insert the treatment plan for Educational Handouts.
 - Verify that your handout is selected and click Close.

- Now go to the patient data table “Meaningful Use” in that patient’s chart. You will see that an entry has automatically been made with the event code “6” for Educational Materials.

The screenshot displays a medical software interface titled "14 - Patient Chart Manager - 1 Username: John M. Doe MD; Pt. Name: TEST, TEST (HMO) D.O.B. 1985-01-01 Chart Desc: Main Chart". The interface includes a "Patient Search" section with a search bar containing "TEST, TEST" and a "Patient Data Tables" window. The "Patient Data Tables" window has a search bar with "PT Name", "PT ID:", "MR #:", "Prov Init:", "From:" (11/08/2012), and "To:" (11/08/2012). Below the search bar is a table with columns: DATE, PROVINIT, EVENT CODE, EVENT DESC, and DATE COMPLETE. A red arrow points to the row with DATE 11/08/2012, PROVINIT RMD102, EVENT CODE 6, and EVENT DESC Educational Materials Provided. The table also shows a "DATE COMPLETE" of 11/08/2012. The interface includes various navigation buttons like "Add New", "Delete", "View Deleted", "View Normal", "Print", "Plot Graph", "Exp. to Excel", "Mgmt. Report", "Cancel", and "Close".

DATE	PROVINIT	EVENT CODE	EVENT DESC	DATE COMPLETE
11/08/2012	RMD102	6	Educational Materials Provided	11/08/2012

- You can also check your Meaningful Use Report card to verify that it has been counted.

14 - Patient Chart Manager - 1 Username: John M. Doe MD; Pt. Name: D.O.B. Chart Desc:

Meaningful Use Measures

Date Range: 11/ 8 /2012 To: 11/ 8 /2012 Res Prov: RMD102 Source: ALL

Run Report Export Exc/Html Print

Test	Denominator Cnt	Numerator Cnt	Percentage	Eligible Rate
Record demographics	1	0	0	50 Not Eligible
Record and chart changes in vital signs: Height, Weight, Blood Pressure, BMI, Growth chart for children 2-20 year including BMI	1	0	0	50 Not Eligible
Record smoking status for patients 13 years old Or older	1	0	0	50 Not Eligible
Provide patients with an electronic copy of their health information (including diagnostic test results, problem list, medication lists, medication allergies), upon request	0	N/A	N/A	50 Excluded. No Record was found detail on the exclusion.
Provide clinical summaries for patients for each office visit	1	0	0	50 Not Eligible
Incorporate clinical lab-test results into certified EHR technology as structured Data	0	N/A	N/A	40 Excluded. No Record was found detail on the exclusion.
Send reminders to patients per patient preference for preventive/follow up care	0	N/A	N/A	20 Excluded. No Record was found detail on the exclusion.
Provide patients with timely electronic access to their health information (including lab results, problem list, medication lists, medication allergies) within four business days of the information being available to the EP	0	N/A	N/A	10 Excluded. No Record was found detail on the exclusion.
Use certified EHR technology to identify patient-specific education resources and provide those resources to the patient if appropriate	1	1	100	10 Passed (Eligible).
The EP who receives a patient from another setting of care or provider of care or believes an encounter is relevant should perform medication reconciliation	0	N/A	N/A	50 Excluded. No Record was found detail on the exclusion.

Selected Measure Details: View Measure Details

Menu set measures, Measure 6: More than 10% of all unique patients seen by the EP during the EHR reporting period are provided patient-specific education resources.

Denominator: Number of all unique patients seen by the EP during the reporting period.

Numerator: Number of patients in the denominator who receive patient education specific resources.

Exclusion: No exclusion.