Provider Workflow Guidelines for MV

PRIOR TO THE VISIT – prepare for the visit by reviewing relevant information in the chart. Work in the "Provider View".
   a. **Review the most recent primary care note by clicking "Documents". Add relevant portions of this note to your HPI**
      i. Update and insert in your HPI your one-liner summary: age, gender, relevant PMH and reason for visit
         - Ex: 48F with HTN, DM here for routine 3-month F/u of DM
      ii. Summarize last PC visit note
         - Ex: Last seen 5/2021, started on Metformin 500mg BID and ordered A1c
   b. **Review other relevant notes and summarize this in your HPI**
      i. Ex: Followed by Cardiology, last seen 4/2021, started on Aspirin 81mg qday and referred for exercise stress test, which was normal 5/2021
      ii. Ex: Seen in ED 6/2021 for leg redness, diagnosed with cellulitis, started on Bactrim DS BID x 7 days
   c. **Update Diagnosis and Problem List**
      i. In the "Provider View", click on "Consolidated Problems"
      ii. Update the Problem list by removing duplicate problems and resolving acute problems
      iii. Add chronic medical conditions as needed by typing in the problem in the "Add Problem" section
         - When adding a problem, decide whether to select "This Visit" vs "Chronic" vs both
      iv. To adjust the problem on the problem list, click on the problem name, then click "Modify" and make changes in the "Display As" field. This will show up in your note
         - Ex: Can change "Diabetes" to "Diabetes Type II with Retinopathy"
      v. Click "This Visit" for problems you anticipate you will address at this upcoming visit
   d. **Review all labs and imaging**
      i. Tag labs and imaging results (will pull into your note) or can use // to pull in specific labs of interest
   e. **Review Healthcare Maintenance and make note of what is due via the "Recommendations" tab**
   f. **Review and update immunizations**
      i. Note what immunizations are needed so you can let your CMA know during your Huddle
      ii. Your CMA can update immunizations done at outside facilities by importing data from CAIR

DURING THE VISIT
   a. **Huddle with your assigned Certified Medical Assistant (CMA)**
      i. Meet with your CMA for 2-3 min at the beginning of the session to:
         - Discuss healthcare maintenance requirements/immunizations and discuss patient prep needed/anticipated procedures
            a. Ex: For patient one, can you please give Pneumovax, patient two needs foot exam so please have patient take socks/shoes off, patient three speaks Korean so please call interpreter, etc.
         - Review your future clinic availability so that you have a sense of how soon you can book F/U appointments
   b. **Review your schedule on the Ambulatory Organizer to see your patient list, appointment times and dispo:**
      i. Blue=checked in; Green= vitals completed, patient ready to be called; Orange=MD working; Dark Gray = D/C; Light Gray = No show
   c. **Review yellow sticky note from CMA (on Ambulatory Organizer)**
   d. **To open a patient chart, click on the patient's name; choose a relationship when prompted**
   e. **Review nursing intake (Click Documentation, Display: All). Review**
   f. **Take history from patient and take notes in the HPI, ROS, PE sections of the "Provider view"**
   g. **Update medication list by clicking "Home Medications" then "Document Medication by Hx"**
      i. Ensure a preferred pharmacy is selected
   h. **Update Social/Family Histories as needed by clicking on the "Histories" tab**
   i. **As patient brings up new concerns, update the problems list by clicking "Consolidated Problems" and typing new concern/diagnosis into the "Add problem" section**
   j. **Present to your assigned attending**
   j. **Review with your attending and update Healthcare Maintenance by clicking the "Recommendations" tab**
   k. **Review Staying Healthy Assessment (SHA) forms (includes alcohol screening, Tobacco use, Depression screen, TB screen)**
   l. **Medication Refills**
      i. Attending or licensed resident completes medication reconciliation and refills/orders new prescriptions.
         - Unlicensed residents should review meds with patient, remind their assigned attending to refill medications, do not propose meds
         - When appropriate, order meds for 3-month supply with 1-3 refills
         - Delete/discontinue duplicates and old meds
         - Ask patient to call pharmacy (818-904-5000) to activate meds, for refills and new prescriptions

m. Place Orders

    i. Click on the "General Medicine" tab to order:

- Visit Charge
    - i. F/U FTF visits: Established Return 99213, Established SHA 99395, 99396, 99397 based on age
    - ii. New FTF visits: New visits 99202, New IHA 99385, 99386, 99387 based on age
    - iii. Phone visits: Telephone/Electronic visit charge based on time spent on phone with patient.
- Clinic Follow up (located under "Specialty Request" tab)
    - i. If appointment request is for < 5 weeks, CMA or PAC will schedule appt
    - ii. If appointment request is for > 5 weeks, CMA/resident can instruct patient to call 818-627-3000 to schedule appt
    - iii. Be specific about who they are to f/u with and when (ie. Dr. Cheng in 5 weeks)
- Labs/Imaging
    - i. Associate with a problem on the problem list
    - ii. Click "Modify Details"
    - iii. Click calendar icon and select time window for labs/studies to be done (give appropriate range)
        - o For labs to be drawn **in lab**, select: Nurse collect **NO**, Future order **YES** (even for same day lab draws)
        - o For labs drawn **in clinic** (e.g. Pap Smear, UTox), select: Nurse Collect **YES**, Future Order **NO**
        - o All labs Future order **Yes**, **On Exactly** for now or **In Approximately** for planned future lab (no need to adjust grace times)
        - o Do not need to reorder labs if order already present from prior
        - o All labs can be done at all facilities, patient just needs to notify lab (ie. can get OV ordered labs done at MV)
- Ambulatory Communication (Amb Comm) orders
    - i. CMA orders (EKG, hemacue, visual acuity, PHQ9, bladder scan, patient information)—please also verbally communicate time sensitive orders that affect disposition
    - ii. Tell CMA patient is ready for dispo either with amb com or verbally
- Specialty Requests only valid for Behavior Health at MV

AFTER THE VISIT

a. Sign Note

    i. From "Admit/clinic" tab, click "Select Other Note"

- Note Template:
    - i. "Ambulatory Office Visit Note" (for FTF visits) or "Phone Visit Note" (for phone visits)
- Note Type:
    - i. "Adult Primary Care Outpt Provider Note" for follow up visits
    - ii. "Ambulatory IHA Provider Note" for IHA patients who have never before been seen in clinic

    ii. Select Sign/Submit and forward note to your assigned attending to sign

- Can create a favorites tab with a list of primary care attendings

b. Refer to Sub-specialists as needed by placing an e-Consult – click "e-Consult" from Menu tab

c. No Shows

    i. Review patient chart with your attending at the end of the visit to decide next appropriate course of action

    ii. Send ORCHID message with subject line "No Show/Broken Appointment" (from drop down menu) to *your CMA for the session* with rescheduling instructions. CC your attending

    iii. Reorder labs/imaging as needed

BETWEEN VISITS

- Residents are responsible for patient care in between clinic visits. Refer to "Resident Responsibilities" document for details
    - o Residents are expected to check their inbox on a daily basis and address:
        - Labs/Imaging
        - Messages
    - o Residents are expected to address e-Consult responses from specialists within 72 hours of email notification