

Group Notes/ Encounter Collection User Manual



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Table of Contents

Introduction.....	2
Purpose of Group Notes	2
Scope of the Manual	2
Audience	2
User Section	3
Group Notes Operation.....	3
Visit Information	4
Patient Selection	5
Common Encounter Data Entry.....	6
Common Note Title	7
Common Encounter Entry	9
Common Encounter Entry	9
Individual Note Text Entry	11
Individual Encounter Entry.....	12
Group Signing.....	13
Repeat	15
Glossary	16
Index	18

Introduction

Purpose of Group Notes

This program was designed to assist providers in documenting group therapy sessions and events such as immunization clinics. It allows the easy assembly of patient groups based on Clinics, Specialties, Wards, Teams, or Provider lists. It then allows the note author to specify parts of a note that apply to the entire group and parts that apply to individuals. It does the same with encounter data. After the note and encounter information is complete, it provides for a single signature for the entire group.

Scope of the Manual

Tasks associated with Group Notes are: System setup, workstation setup, creation of notes for a group, and collection of encounter data. This manual provides information deemed necessary to carry out these functions.

From time to time improvements are made to the TIU package, including improvements to Group Notes. The latest information about TIU, as well as the latest version of this manual, is posted on the Text Integration Utilities (TIU) Web Page at:

`vista.med.va.gov/tiu/html/Enhance.htm`
or
`vaww.vista.med.va.gov/tiu/html/Enhance.htm`

This document is intended for use during development and testing of the Group Notes executable. When Group Notes is released this document will cease to exist as a living document and the information in it will be inserted into the appropriate VistA manuals. (However, the document will continue to be available on the above page—it will not be updated with post-release changes.)

Also on release, information about Group Notes will be available on the TIU page of the VDL (VistA Document Library) at www.va.gov/vdl/Clinical.asp?appID=65.

Audience

Information in this manual is intended for end users. This usually means providers conducting group sessions and limited scope clinics such as for training or vaccination.

User Section

Group Notes Operation

Group Notes is a companion to the CPRS (Computerized Patient Record System) Notes tab. If you are familiar with creating clinical notes in CPRS you will have little trouble with Group Notes.

Creating notes for a group of patients who have just participated in a group therapy session, education, or an immunization clinic follows these steps:

1. Set the visit location and the date/time for the encounter.
2. Select the patients involved, compiling them into a list.
3. Select a note title common for the group.
4. Enter note information common for the group.
5. Enter encounter data that is common for the group.
6. Select individual patients and enter encounter and note information unique to each individual.
7. Sign the notes.
8. Go back to the patient selection screen and repeat for additional groups.

If you are interrupted and exit the session before signing the notes, Group Notes will file notes individually unsigned and generate notifications that there are notes awaiting signature. Any work subsequent to exiting Group Notes must be accomplished in CPRS.

Visit Information

Information filled in or provided in the Group fields (upper right corner) is carried forward by the program into the encounter fields.

1. Check that the provider is correct.

2. Set location here.

3. Check that the visit time is correct.

Group Notes in use by: Snow, Charles R. (10.5.21.65)

File Help

Patient List

- ☐ Providers
- ☐ Clinics
- ☐ Team/Personal
- ☐ Wards
- ☐ Specialties
- ☒ All

Patients (all)

Oak, Giant

Jones, Jackie

Jordan, Air

Jordan, Michael

Kent, Clark

Kilman, Buzz

Kirk, James T

Kpugley, Lil

Kreuz, Keith

Kreuz, Kevin

Lando, Joseph

Lina, Patient - ALIAS

Lobel, Anna Marie

Loe, Loey Jr

Lu, Lulu

New Outpatient

No Visits

Not Inpatient

Novak, Thomas J

Oak, Giant

Ohara, Scarlet

Outpatient, Mike

Overworked, Staff

Patch, Ct

Patient, Lina's

Group Encounter Provider:

Snow Charles R - Staff Physician

Group Visit Location:

BARB'S CLINIC

Group Visit Time:

Jul 11, 2004@15:30

Oak, Giant

SSN: 333-44-1256

DOB: Sep 05, 1960

Female

Veteran

Location: 7AS

Room-Bed: 200-1

Inquiry

Patient list for group notes/encounters

Remove Remove All

Name	SSN	Age	Sex	Location	Admission	Primary Team	Primary Provider
AUSTIN, STEVE	777-22-9999	50	M	3AS	8/11/1999		
EICHELBERGER, ORED	201-00-0000	34	F				
OAK, GIANT	333-44-1256	43	F	7AS	8/3/1998		

Group Notes

Patient Selection

As with CPRS, Group Notes opens with the patient selection screen. This screen is very similar to the CPRS patient selection screen with a number of fields and buttons added to facilitate group notes.

1. Select a patient list.

2. Select patients by clicking on their names.

3. This button supplies additional demographic information.

4. Patients are listed here.

The screenshot shows a software window titled "Group Notes in use by: Snow, Charles R. (10.5.21.65)". It features a menu bar with "File" and "Help". On the left, there are radio buttons for "Patient List", "Providers", "Team/Personal", "Specialties", "Clinics", "Wards", and "All". The "Patient List" radio button is selected. In the center, a list of patient names is displayed, with "Oak, Giant" highlighted. On the right, there are several input fields: "Group Encounter Provider" (set to "Snow Charles R - Staff Physician"), "Group Visit Location" (set to "BARB'S CLINIC"), and "Group Visit Time" (set to "Jul 11, 2004@15:30"). Below these fields, demographic information for "Oak, Giant" is shown, including SSN, DOB, gender, and veteran status. At the bottom, there is a table titled "Patient list for group notes/encounters" with columns for Name, SSN, Age, Sex, Location, Admission, Primary Team, and Primary Provider. The table contains three entries: AUSTIN, STEVE; EICHELBERGER, DREO; and OAK, GIANT. At the bottom right, there are buttons for "Remove", "Remove All", and "Group Notes".

Name	SSN	Age	Sex	Location	Admission	Primary Team	Primary Provider
AUSTIN, STEVE	777-22-9999	50	M	3AS	8/11/1999		
EICHELBERGER, DREO	201-00-0000	34	F	7AS	8/3/1998		
OAK, GIANT	333-44-1256	43	F	7AS			



Note:

If the patients are being selected from a clinic appointment list, the date and time of the visit **MUST** match exactly the date and time of the appointment. If there is a mismatch, you will create a duplicate encounter.

An extra button is added below patient demographics that, when pressed, displays detailed patient demographic information. Finally there is a list box provided showing the patient list as you build it.

With the patient list there are two additional buttons: Remove and Remove All. These have the obvious function allowing you full edit control over the list. Once you are satisfied press the Group Notes button.

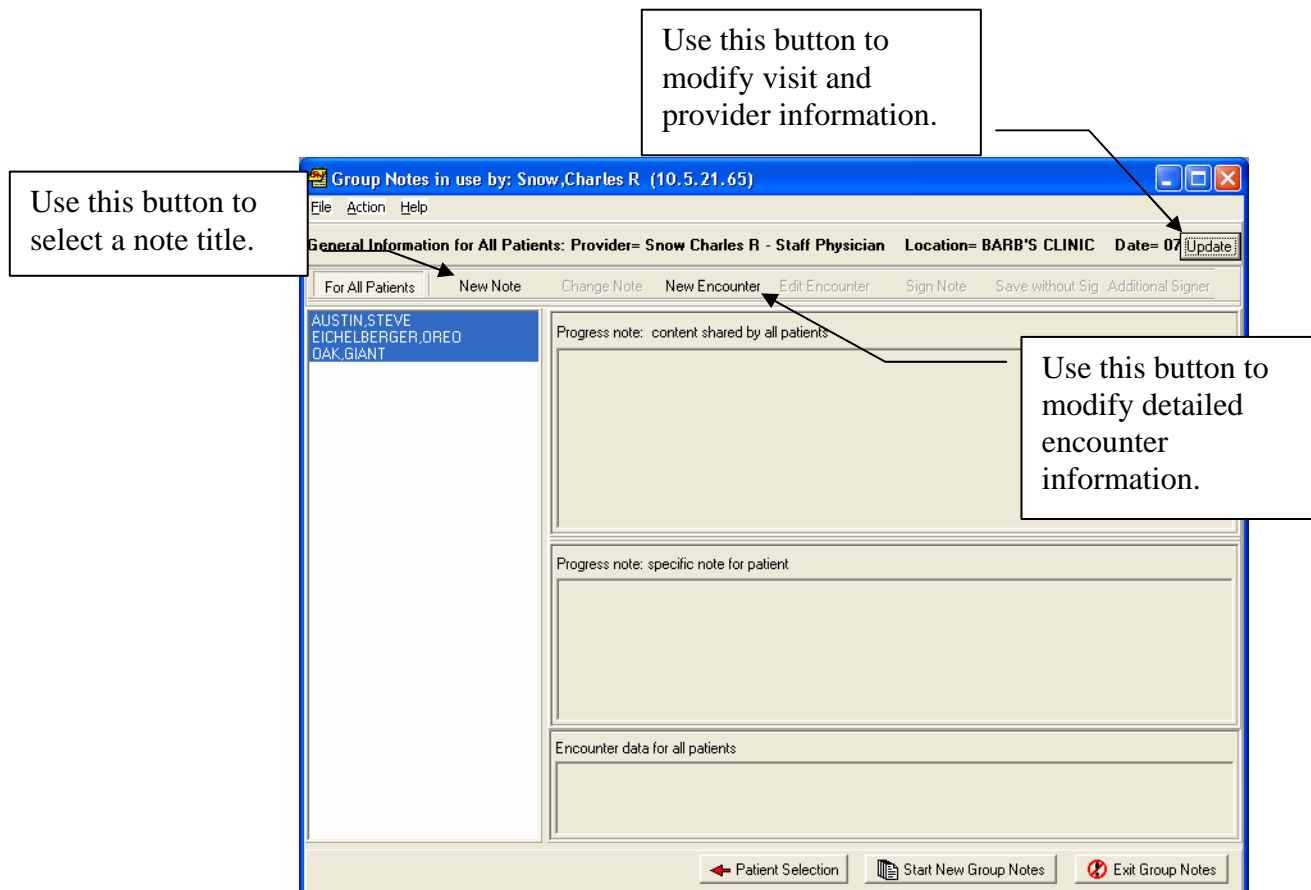
Common Encounter Data Entry



Note: Information common to the entire group must be entered before data for an individual patient.

Pressing the Group Notes button moves to the note-building dialog screen. To return to patient selection (to add or subtract patients) use the Patient Selection button.

Until you change it by selecting an individual patient, all actions will apply to the entire group.



Common Note Title

Pressing the New Note button will allow you to select a note title. This will be the note title used for each member of the group:

Progress Note Properties

Progress Note Title: PTSD

PTSD
REACTION <ADVERSE REACTION/ALLERGY>
REACTION\ALLERGY <ADVERSE REACTION\ALLERGY>
REHAB <CHAPLAIN - DRUG REHAB>
REHAB <TOM'S BLIND REHAB NOTE>
RENAL <NUTRITION - RENAL>
REPORT <ADVANCED DIRECTIVE CONSULT REPORT>

Date/Time of Note: Jul 12, 2004@11:11 ...

Author: Snow Charles R - Staff Physician

Expected Cosigner:

OK Cancel



Note: If the provider requires a co-signer, the co-signer must be designated at the time of note title selection. The field for designating a cosigner appears only if the author of the note requires a cosigner. The requirement for cosigner is a product of the author's User Class and the set up of the document in TIU.

This is the “point of no return.” Once you select a title, a note will be created for each member of the group. If you exit the program without signing, unsigned notes are created for each member of the group and notifications will appear in CPRS that a note awaiting signature is available for each of these patients.



Warning: Objects in boilerplate are problematic for group notes. The first patient on the list gets filled in and then the note text is given to each patient. So, do not use objects in the boilerplate of these notes titles that would be different for each patient.

Common Note Text Entry

If the note title selected contains boilerplate text, it will appear in the Common note content pane. You may edit the contents of this boilerplate and/or add additional text.

The screenshot shows the 'Group Notes' application window. The title bar reads 'Group Notes in use by: Snow, Charles R. (10.5.21.65)'. The menu bar includes 'File', 'Action', and 'Help'. The main area is divided into several sections. At the top, a status bar displays 'General Information for All Patients: Provider= Snow Charles R - Staff Physician Location= BARB'S CLINIC Date= 07 Update'. Below this is a toolbar with buttons: 'For All Patients', 'New Note', 'Change Note', 'New Encounter', 'Edit Encounter', 'Sign Note', 'Save without Sig', and 'Additional Sign'. The left pane lists patient names: 'AUSTIN, STEVE', 'EICHELBERGER, ORED', and 'OAK, GIANT'. The right pane contains three text entry areas: 'Common note content for group patients. Title: PTSD' (with a callout 'Add or modify common note text.'), 'Additional note text for selected patient. Title: PTSD' (with a callout 'When ready, press this button to continue on to common encounter data.'), and 'Encounter data for all patients'. At the bottom are three buttons: '<=> Patient Selection', 'Start New Group Notes', and 'Exit Group Notes'.



Note: For CACs and ADPACs: When setting up boiler plate that will be used in Group Notes be aware that inserted objects that import specific patient data will not work properly. Generally speaking, *do not put TIU objects in this boiler plate*. Exceptions to this rule are objects that are general in nature such as the current date.

Common Encounter Entry

The Group Notes encounter form is customized for group entry. At this point in the program only tabs that would be common to all patients are displayed:

Group Notes In use by: Snow, Charles R. (10.5.21.65)

File Action Help

General

Encounter Form for BARB'S CLINIC (Jul 12, 2004 @ 08:16)

For All Visit Type Diagnoses Procedures Patient Ed Immunizations Health Factors

AUSTIN EICHELE OAK BLF

Type of Visit

NEW PATIENT

ESTABLISHED PATIENT

CONSULTATIONS

NEW PATIENT

ESTABLISHED PATIENT

CONSULTATIONS

NEW PATIENT

Section Name

Brief Exam 1-15 Min 99201

Limited Exam 16-25 Min 99202

Intermediate Exam 26-35 Min 99203

Extended Exam 36-50 Min 99204

Comprehensive Exam 51+ Min 99205

Modifiers

Service Connection & Rated Disabilities

Service Connected: 75%

Rated Disabilities: NONE STATED

Available providers

Snow Charles R - Staff Physician

Tab Meds - Brain Surgeon

Test Dayon

Test Delisa - Field Support

Thecat Felix

User Jerry - Physician

Vertigan Richard E

Add

Remove

Primary

Current providers for this encounter

Snow Charles R - Staff Physician

Yes No Visit Related To

Service Connected Condition

Combat Vet (Combat Related)

Agent Orange Exposure

Ionizing Radiation Exposure

Environmental Contaminants

MST

Head and/or Neck Cancer

OK Cancel

< Patient Selection Start New Group Notes Exit Group Notes

When finished
press the OK
button.

Fill out the encounter form the way you would normally perform this operation, then press the OK button.

Select an individual patient by clicking on the patient's name:

Group Notes in use by: Snow, Charles R. (10.5.21.65)

File Action Help

General Information for All Patients: Provider= Snow Charles R - Staff Physician Location= BARB'S CLINIC Date= 07 Update

For All Patients New Note Change Note New Encounter Edit Encounter Sign Note Save without Sig Additional Signer

AUSTIN, STEVE
EICHELBERGER, OREO
OAK, GIANT

Common note content for group patients. Title: PTSD

Pt shows symptoms of acute PTSD due to war related experiences. A group discussion was held . . .

Additional note text for selected patient. Title: PTSD

Encounter Data for all patients

NEW PATIENT Comprehensive Exam: 51+ Min
Diagnoses: PTSD * (ICD-9-CM 309.81) (Primary)
Patient Educations: DEPRESSION SCREENING

<- Patient Selection Start New Group Notes Exit Group Notes

When finished with common data, select a single patient that you need to enter individual data for.

Group encounter data appears in this pane.

Individual Note Text Entry

When an individual patient is selected, the Additional note text pane becomes active.

The screenshot displays the 'Group Notes' application window. The title bar reads 'Group Notes in use by: Snow, Charles R. (10.5.21.65)'. The menu bar includes 'File', 'Action', and 'Help'. Below the menu bar, a status bar shows 'General Information for All Patients: Provider= Snow Charles R - Staff Physician Location= BARB'S CLINIC Date= 07 Update'. A toolbar contains buttons: 'For All Patients', 'New Note', 'Change Note', 'New Encounter', 'Edit Encounter', 'Sign Note', 'Save without Sig', and 'Additional Signer'. On the left, a patient list shows 'AUSTIN, STEVE', 'EICHELBERGER, OREO' (highlighted), and 'OAK, GIANT'. The main area is divided into three panes: 'Common note content for EICHELBERGER, OREO Title: PTSD' (containing text about PTSD symptoms), 'Additional note text for EICHELBERGER, OREO Title: PTSD' (containing text about increased hostility), and 'Encounter data for EICHELBERGER, OREO' (containing patient exam, diagnosis, and education information). At the bottom, there is a 'Patient Selection' button and a 'Start New Group Notes' button.

Repeat for each patient that needs specific note text.

Type information specific to the selected patient here.

When finished customizing individual notes, press this button to customize individual encounter data.

Individual Encounter Entry

When an individual patient is selected the encounter form now shows all tabs.

Encounter data that applies only to this single patient may now be entered.

If the patient is in any of these categories, you must indicate if the group session was related.

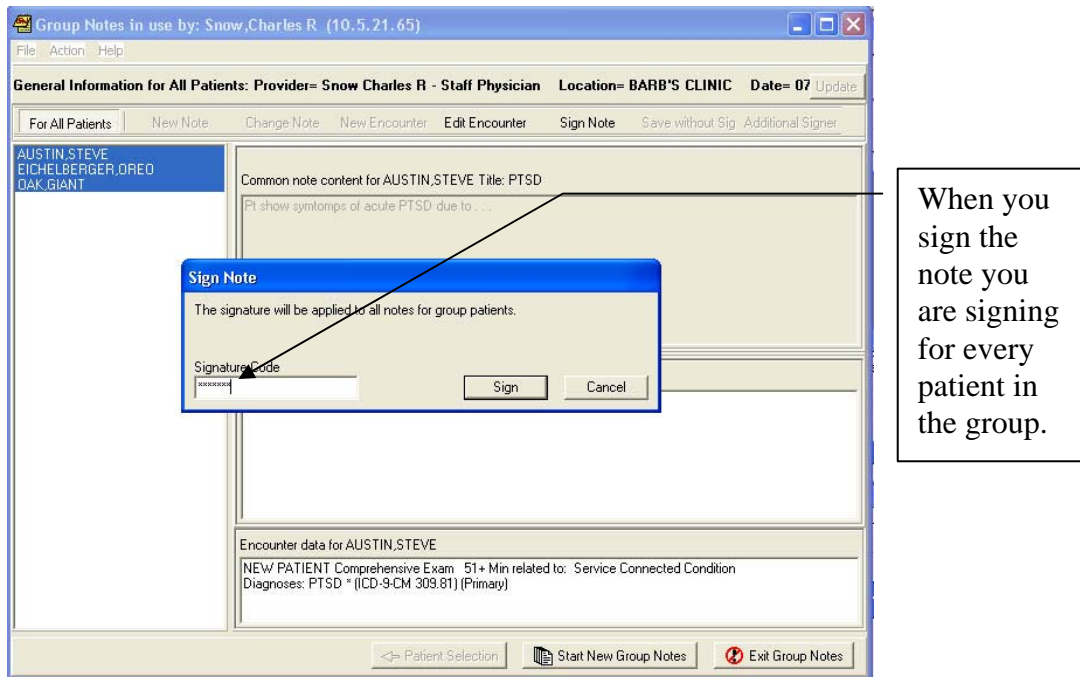
The individual encounter data only appears when that patient is selected.

When all data has been entered press the sign note button.

Group Signing

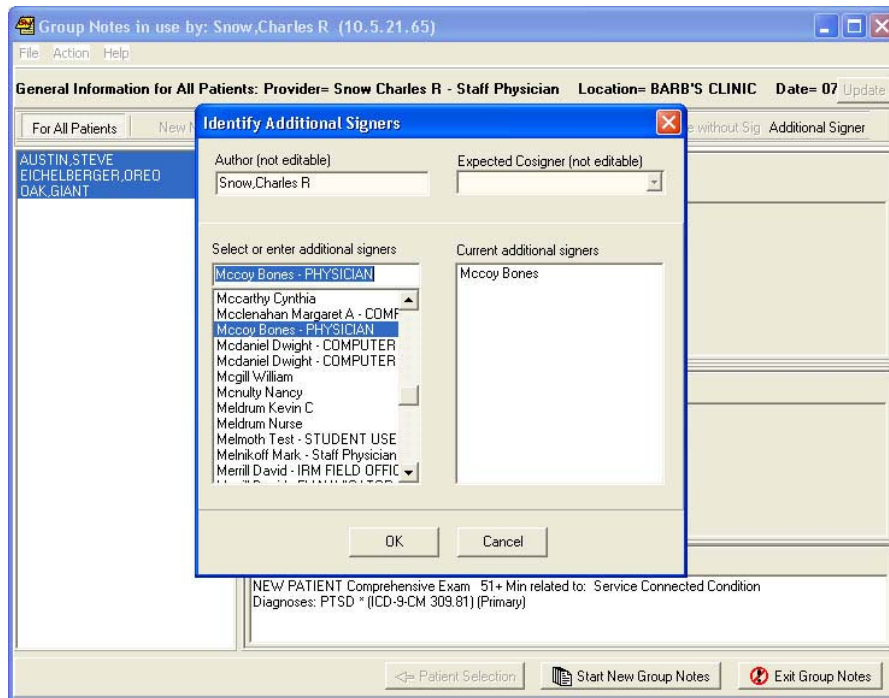
When the sign note button is pressed the program automatically selects For All Patients. If any encounter data is missing such as service connected status, the program will prompt you for it at this time.

When you sign the note, you are signing for every patient in the group:



If business rules specify that you need a cosigner, then notifications will appear in CPRS to the effect that the expected cosigner has notes ready to sign.

After the signature has been accepted, the Additional Signer button becomes active. If this button is pressed the following dialog appears:



Repeat

To return to the patient selection dialog with a clean slate to enter another group, press the Start New Group Notes button. Otherwise press the Exit Group Notes button

The screenshot shows a software window titled "Group Notes in use by: Snow, Charles R. (10.5.21.65)". The window has a menu bar with "File", "Action", and "Help". Below the menu bar is a status bar with "General Information for All Patients: Provider= Snow Charles R - Staff Physician Location= BARB'S CLINIC Date= 07 Update". A toolbar contains buttons: "For All Patients", "New Note", "Change Note", "New Encounter", "Edit Encounter", "Sign Note", "Save without Sig", and "Additional Signer". The main area is divided into three sections. The top section, "Signed by: SNOW, CHARLES R at 7/12/2004 9:40:16 AM", contains the text "Common note content for EICHELBERGER, DREO Title: PTSD--- Signed" and "Pt shows symptoms of acute PTSD due to war related experiences. A group discussion was held...". The middle section, "Additional note text for EICHELBERGER, DREO Title: PTSD--- Signed", contains "Pt showed increased hostility...". The bottom section, "Encounter data for EICHELBERGER, DREO", contains "NEW PATIENT Comprehensive Exam 51+ Min", "Diagnoses: PTSD * (ICD-9-CM 309.81) (Primary)", "Patient Educations: DEPRESSION SCREENING", and "Health Factors: SMOKELESS TOBACCO USER". At the bottom of the window are three buttons: "<=> Patient Selection", "Start New Group Notes", and "Exit Group Notes".

When signed, this notice appears and you may not make any further changes.

Press this button to start over on a new group.

Glossary

ADPAC	Automated Data Processing Application Coordinator. A VistA software expert who usually works for IRMS.
Boilerplate	<p>A pre-defined TIU template that can be filled in for Titles, speeding up the text entry process. TIU exports several Titles with boilerplate text which can be modified to meet specific needs; sites can also create their own.</p> <p>For Group Notes a title with information that would be common for each member of the group works well. Any TIU objects used in boilerplate are filled in as if for the first patient, so avoid objects in Group Notes boilerplate.</p>
CAC	Clinical Application Coordinator. A software specialist who usually works for one of the medical center services.
CPRS	Computerized Patient Record System. A front-end program that attempts to provide all VistA functionality in a Windows interface. Currently CPRS is being re-written to work in any windowing system that supports a web browser. This will allow users to access VistA from UNIX and Macintosh based systems. The target date for release of this advanced system is third quarter 2005.
IRMS	Information Resource Management Service.
TIU	Text Integration Utilities. An umbrella package with the purpose of combining all clinical note processing into a single entity. In CPRS, TIU is represented by the Notes tab.
VDL	VistA Document Library. A service of the Department of Veterans Affairs to provide documentation to all users. Anyone can access the VDL at web address: www.va.gov/vdl/

Index

A

Additional Signer, 14
ADPAC, 8, 16
Audience, 2

B

boilerplate, 8
Boilerplate, 7, 16

C

CAC, 8, 16
Common Encounter Data, 6
Common Encounter Entry, 9
Common Note Text Entry, 8
Common Note Title, 7
co-signer, 7
CPRS, 16

E

encounter data, 2, 3, 6
Encounter Entry, 9, 12
encounter fields, 4
encounter form, 9
Exit Group Notes, 15

G

Group Signing, 13

I

Individual Encounter Entry, 12
Individual Note Text, 11
Individual Note Text Entry, 11
Introduction, 2
IRMS, 16

N

New Note, 7
Note Text, 8, 11
Note Title, 7

O

objects, 8, 16
Operation, 3

P

patient list, 3
Patient Selection, 5
Purpose, 2

R

Repeat, 15
Revision History, ii

S

Scope of the Manual, 2
sign note, 13
Start New Group Notes, 15

T

Text Entry, 8
Title, 7
TIU, 2, 16

V

VDL, 2, 16
Visit, 4

W

Web Page, 2