

**ADPH NP Fall Program  
All Things EHR  
Referral and Follow-up  
Documentation**

**Satellite Conference and Live Webcast  
Thursday, November 15, 2018  
9:00 – 11:00 a.m. Central Time**

Produced by the Alabama Department of Public Health  
Video Communications and Distance Learning Division

**Faculty**

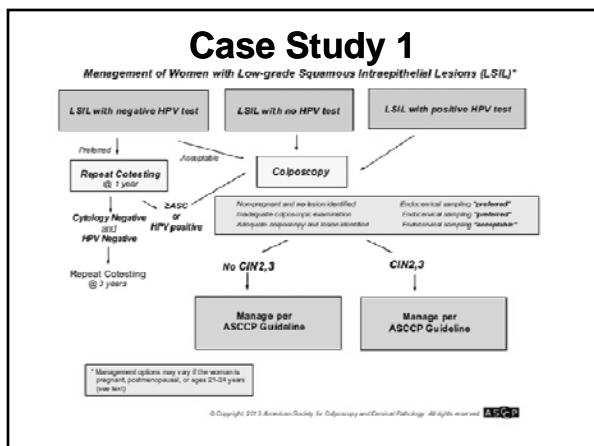
Krysta Hood, DNP, RN, CRNP  
Nurse Practitioner Senior  
Alabama Department of Public Health

**Objectives**

- Discuss documentation of abnormal findings, including breast and pap follow-up, in CureMD
- Review the use of the Referrals, Tasks, and Notes functionality
- Utilize the CureMD Referral system for follow-up with case study integration

**Case Study 1**

- 34 yo, G2P2, presents for FP Initial, no abnormal pap history or abnormality upon exam
- Pap Smear Results: LSIL, HPV Positive



**Case Study 1**

- Where do you document the recommendations for follow-up in the Lab result section?
  - a. In the Lab Log Comments
  - b. Review the Lab with No Comments
  - c. Initiate a Referral
  - d. Both B & C

## Lab Documentation

- Review the Lab
  - Name, Date, Time
- Do **NOT** document remarks
  - Examples: Refer for Colposcopy

**Cotest 1 year**

**Repeat cytology in 3 years**

**Any History or F/U**

Lab Results

Date	Laboratory	Order No.	Status	Ordering Provider	Print
11/16/2018 8:30 AM	Internal Lab	509	Final	Kristina Cramarossa	
11/16/2018 8:05 AM	Internal Lab	508	Final	Kristina Cramarossa	

Test	Result	Flag	Normal Range
WBC's	3 HPF	Normal	0-3
RBC's	1 HPF	NO	0
YEAST	NP HPF	NO	0
Trichomonas	Absent HPF	NO	0
Clue Cells	NA HPF	NO	0
Bacteria	Present HPF	NO	0
Amitic	NP N/A	NO	NEG

test comments

Reviewed: Cramarossa, Kristina 11/6/2018 8:05 AM  
 Acknowledged: Cramarossa, Kristina 11/6/2018 8:05 AM  
 Lab Assigned for HD for further review and plan of care  
 Reviewed: Cramarossa, Kristina 11/6/2018 8:05 AM  
 Modified: Cramarossa, Kristina 11/6/2018 8:04 AM

Review Comments

Reviewed: Cramarossa, Kristina 11/6/2018 8:04 AM  
 Added: Cramarossa, Kristina 11/6/2018 8:03 AM

Date	Laboratory	Order No.	Status	Ordering Provider	Print
8/10/2017 4:46 PM	Internal Lab	238	Final	Fred Goode	
8/10/2017 1:38 PM	Internal Lab	361	Final	Kristina Cramarossa	
8/9/2017 6:16 PM	Internal Lab	230	Final	Kristina Cramarossa	
8/9/2017 6:14 PM	Internal Lab	290	Final	Kristina Cramarossa	
8/7/2016 12:04 PM	Internal Lab	241	Final	Kristina Cramarossa	

## Lab Reviewed

Review History

REVIEW  Save Acknowledge

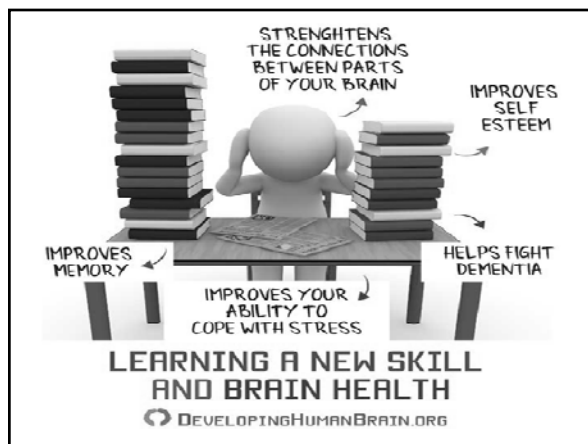
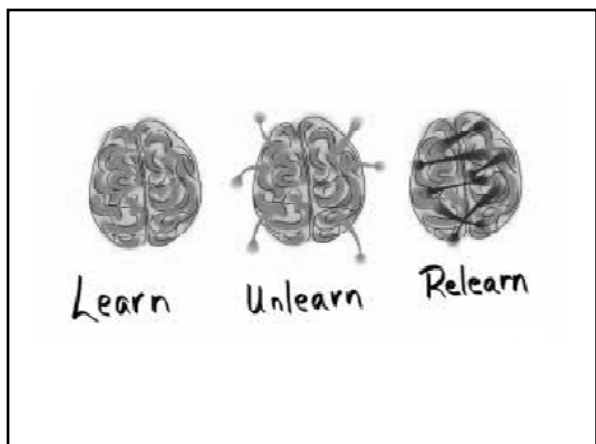
Characters left: 2000 Assign

Log

Reviewed	Hood, Krysta 11/06/2018 10:35 AM
Added	Stout, Laura 10/24/2018 11:45 AM

## Lab Documentation

- Why should there be no remarks made on any Lab result?
  - a. Medico legal Document
  - b. Patient Portal
  - c. Standardized Documentation
  - d. All of the Above



### Case Study 1: Continued

- After reviewing the Lab, where do you document the follow-up steps?
  - a. Lab
  - b. Referral
  - c. Notes
  - d. Tasks

### Referrals

- A Referral should be generated for any abnormal finding, diagnostic mammogram, or abnormal pap smear requiring follow-up
- The Referral and Comments Section currently serves as our Progress Note. This Progress Note will track our entries for follow-up and escalating attempts (i.e. phone call, 1st class letter, certified letter)

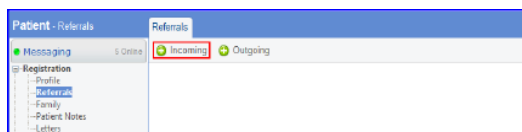
### Referrals

- To start a Referral
  - Registration in Tree Menu
- Tip - Go to Dashboard - My Preferences - Patient - Expand Registration Tree Menu
- Allows Referrals to be visible from Note

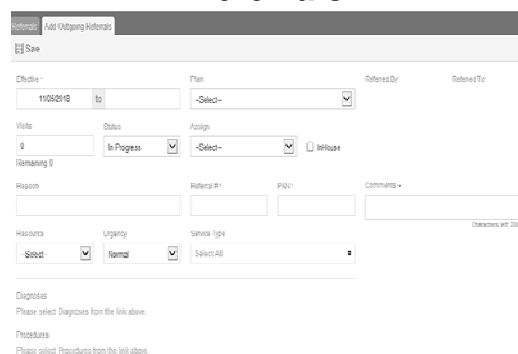
### Referrals

- Incoming Referral - Created after being Referred By a provider or specialist
  - Ex: Implant Insertion
- Outgoing Referral- Created when the patient is Referred To another provider or specialist
  - Ex: Abnormal Findings, Pap, or Breast Follow-Up

### Referrals



### Referrals



### Referrals

- **Referral Effective Dates: Same Date 11/01/2018 to 11/01/2018**
- **Plan: Insurance, Type of Coverage**
- **Referred By: NP Name**
- **Referred To: MD/Facility/Health Department**
  - Can be changed
  - New providers can be added without an NPI

### Referrals

- **Visits**
- **Status: In Progress, Complete**
- **Assign: F/U Nurse or NP**
- **In House: Referral inside the department**

### Referrals

- **Reason**
- **Referral #**
- **PAN**
- **Comments**
  - Follow-up Steps Documentation
  - Save

### Referrals

- **Resource**
- **Urgency**
- **Service Type**

### Referrals

Effective: 11/01/2018 to 11/01/2018 Plan: MEDICAD PAYING Referred By: CRNP, Hood, Koyata Referred To: Dr. Clinic (UAB) Coloproctology

Notes: 0 Status: In Progress Assign: Hood, Koyata In House:  201 Monroe St Suite 250 36101 205/942/0000 UAB Coloproctology Clinic 33254/0001 2020/10/17/18

Reason: Abnormal Pap/FU Needs Colps Referral #: 11/02/18 ICD9: Comments: Save

Resource: .Select- Urgency: Low Service Type: Select All History: 11/05/2018 08:03:10P Comments by HOOD, Koyata: **Note for Coloproctology: Printing for this example.** 11/05/2018 08:03:10P Comments by HOOD, Koyata: **Text Referral**

Diagnosis: Please select Diagnosis from the list above.

Procedures: Please select Procedures from the list above.

• Appointments 0

No Record Found

### Referrals

- **Referral Details Report**
- **Patient Referral and Data Exchange**
  - Registration-Letters-ADPH
  - Patient Referral
  - Patient Signature

### Referral Details

**State of Alabama Department of Public Health**  
 333 West Tower Drive  
 Montgomery, AL 36104  
 www.al.gov/dph

**Theresa Test**  
 Patient ID: 03001971  
 Referral # 1182008

**Urgency**  
 Standard

**Referred to**  
 Dr. KYCIA HOOD, OB/GYN  
 1182008 (1182008)  
 1182008 (1182008)

**Referred by**  
 Dr. KYCIA HOOD, OB/GYN  
 1182008 (1182008)  
 1182008 (1182008)

**APPOINTMENT**

Effective	11/05/2018	11/05/2018
Number of Visits	0	0
Visits Made	0	0
Remaining Visits	0	0

**NOTES**  
 Refer for Colposcopy. Pending for Pap Smear.

**APPOINTMENTS**

Time	Provider/Resource	Location	Primary	Secondary	Status

Signed By: Kykia Hood, CRNP on Tuesday, November 6, 2018 at 9:58 am

Print Letter

Print Letter

"ADPH Patient Referral"

### PATIENT REFERRAL AND DATA EXCHANGE

Name: Theresa Test  
 Date of Service: November 05, 2018  
 Account: SST

Date of Screening: [Redacted]  
 Date of Referral: [Redacted]

**SECTION 1 (To be complete by Health Department):**

Patient Referred to:  
 Name: [Redacted]  
 Address: [Redacted]  
 Phone Number: [Redacted]

Health Department:  
 Name: Wilcox Co Health Department  
 Address: 707 Union Street Camden, AL 36726  
 Phone Number: (334) 882-4545  
 Health Department Screening Provider #: [Redacted]

Appointment Date: [Redacted]  
 Day of the Week: [Redacted]  
 Time of Day: [Redacted]

Primary Physician  
 Name: [Redacted]  
 Phone Number: [Redacted]

"ADPH Patient Referral"

Name of Client/Patient: Theresa Test  
 Account Number: SST  
 Birthdate: 03/00/1971  
 Phone: (212) 735-1234  
 Address: 101 Main St.

Primary Plan: MEDICAID PLAN FIRST  
 Primary Plan Policy Number: 33000089700  
 Secondary Plan:  
 Secondary Plan Policy Number:

Caring Person:  
 Name:  
 Phone Number: (H), (C)

Reason For Referral: Abnormal Pap Smear Follow UP, Need for Colposcopy

Additional Health Problems and Referrals: [Redacted]

Assistance is  or  needed with transportation (For Medicaid Patients Only)

**SECTION 2 (To be completed by patient or legal representative)**

I authorize the release of medical information on the named client/patient to the provider specified above and findings/results returned to the above named health department.

Signature of Patient or Legal Representative  
 eSignature

Date of Signature: November 05, 2018

"ADPH Patient Referral"

**DECLARATION (To be completed by patient or legal representative)**

I authorize the release of medical information on the named client/patient to the provider specified above and findings/results returned to the above named health department.

Signature of Patient or Legal Representative:  
 eSignature

Date of Signature: November 05, 2018

**SECTION 3 (To be completed by Consulting Provider)**

Date of Examination or Service: November 05, 2018  
 Diagnosis: eDiagnosis

Follow-Up Details  
 Appointment Kept  
 Patient Treated  
 Appointment Not Kept

Refer for Additional Follow-up/Treatment to  
 Further Follow-up (Specify)  
 County Health Department  
 Other (Specify)

**SUMMARY:**

Electronically signed by Kykia Hood CRNP on Monday, November 5, 2018 at 9:28 AM

## Referrals

- Diagnoses/Procedures
- Documents

## Document Manager

SEARCH | ALL DOCUMENTS | EXTERNAL LINKS

File | Folder | Log

Assign | eMessage | Print

DATE | DOCUMENT | FOLDER

01/18/2018	PLANS FIRST APP.pdf	CUMMER / MISCELLANEOUS
01/18/2018	PLANS FIRST APP.pdf	CUMMER / MISCELLANEOUS
01/18/2018	PLANS FIRST APP.pdf	CUMMER / MISCELLANEOUS

Complaint Form CHR FC (0)  
 Comments (0)  
 Consultation Results (0)  
 CURRENT OPICRESULTS CHAU/CLAU (0)  
 Current (0)  
 Breast and Cervical (0)  
 EHR Consults (0)  
 E-HITAA (0)  
 Immunizations (0)  
 Miscellaneous (0)  
 NED (0)  
 TO (0)  
 Diagnosis (0)  
 Discharge (0)  
 ECT (0)  
 ICD-9 Revised (0)  
 InsuranceCards (0)  
 LRD Results (0)  
 MEDICAL MISCELLANEOUS (0)  
 Other Results (0)  
 P/AP history (0)  
 Photos (0)  
 Print Chart Log (0)  
 Procedure Results (0)  
 Possible Issues (0)  
 Radiology Results (0)  
 Referrals (0)  
 Test Folder (0)

### Breast Follow-Up

- Continue to send Breast F/U to Central Office through the Abnormal Breast Consult Template
- Upload EHR Note into Consult Template
- Upload Consult Template once recommendations are received from MD

### Tasks

- Generated with a Referral
- Title Changes
- Status

### Tasks

- Assign multiple providers
- Do NOT document in the Note or Remarks section
- Documentation from Referral will display in the Note section

### No Additional Follow-Up

- Examples:
  - Urine C&S
  - Screening Mammograms
- Append the Note with Results

### Appended Note

### Phone Encounter

Phone Encounters | Phone Encounter | Clinical Overview | Document Manager

Save | Sign | Print | Assign | File | Review | Letters | Create eSuperbill | Change Case

Print | Black | [Rich Text Editor Icons]

47Y old patient called for the consultation of the followings.

<< Complaints >>

<< ROS >>

<< Prescription >>

### Banner Notes

Theresa Test #	Home (202) 265-1284	1.77	30.54	Always	Insurance \$ 1114.77	Notes
47Y 7M Female	Mobile (202) 999-5555	85A	80C	Pending	Primary NICKOLAS P.	Specialty/Referral
DOB 8/28/2012				SUBA		Account/Referral/Co-Occur
Account 987		167 lbs	5' 2.0"			
theresa.test@gmail.com		Weight	Height			

### Tips

VIEW | Reason | Type | Note Template | Status | eSuperbill | Provider | Assigned To | Actions

11/16/2018 | PP Initial | Progress Note | PP Initial/Annual Visit | Draft | Not Coded | Hood, Krista | CRP

Provider Notes | Progress Note | Clinical Overview | Document Manager

Save | Sign | Print | Assign | File | Review | Letters | Create eSuperbill | Change Case

Date*	11/6/2018 09:13 AM	Dictation Date	Non-MU
Provider	Hood, Krista	Note Type	Progress Note
Note Template*	PP Initial/Annual Visit	Referring Provider	
Visit Reason*	PP Initial	Ref. Prov. Specialty	None
Location*	Tuscaloosa Co Health Dept		
User Role	Nurse / Provider		
Linked Appointment	Not Linked		
Transferred to MP#1-83			
MS-DRG Service Type*	GENMED		

Print | Black | [Rich Text Editor Icons]

Alabama Department of Public Health Family Planning Assessment Record  
Initial/Annual Visit

### Reference

- **American Society for Colposcopy and Cervical Pathology (ASCCP); 2012 Updated Consensus Guidelines for Managing Abnormal Cervical Cancer Screening Tests and Cancer Precursors; Algorithms, reprinted April 2013.**  
<http://www.asccp.org/consensus.shtml>