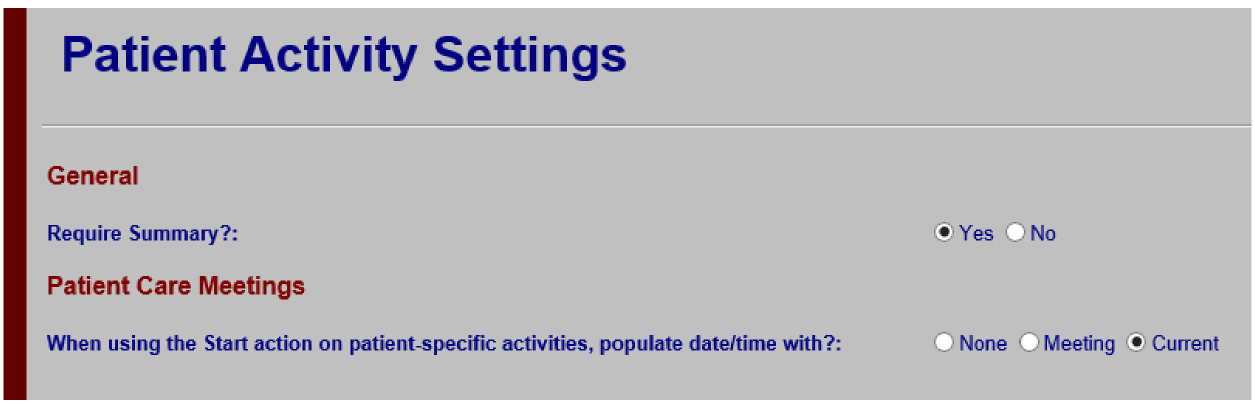
Managing Patient Activity and Patient Care Meeting Settings

Patient Activity and Patient Care Meeting Overview

The Patient Activity function provides users the venue to chart non-visit charting activities, on-call activities, and care coordination meetings (i.e., interdisciplinary meetings and care coordination efforts). Agencies have significant latitude to customize how these activities are handled. Settings are available to customize the results to be displayed in many of the drop downs and can be configured to show certain fields based on the type of activity selected. The tables that control the drop-down options within the Patient Activity screens are found under the Administration module. Each of these have a specific function and can be customized. Note that options within these tables cannot be deleted, but they can be inactivated. For entries where multiple selections can be made, use the CTRL button to select more than one entry. These relevant tables are explained in the sections below.

Patient Activity Settings

The settings for Patient Activity are as follows:



- **General - Require Summary? Y/N:** If Yes, then the Summary field is required for all activities. Note that regardless of this setting, the summary is always required once a patient specific meeting in a patient care meeting is started.
- **Patient Care Meetings - When using the Start Action on patient specific activities, populate date/time with? - None, Meeting, or Current:** This option gives users the ability to determine if the date/time related to the patient specific meetings within a Patient Care Meeting should not be defaulted, defaulted to the patient care meeting's start time, or defaulted to the system's current date and time for each individual meeting.

Patient Activity Tables

The tables to be configured for the Patient Activity function are explained in the sections below:

On-Call Priority Table

Found under Administration>System>Tables>On-Call Priority, this table controls the field labeled Priority when the On-Call Activity option is selected (e.g., *Urgent, Follow-up by 10am,* etc.). It is only visible within the On-Call screens. These table entries allow users to apply an agency determined priority level to the patient's care based on the need for the on-call activity.

Patient Activity Action Table

Found under Administration>System>Tables>Patient Activity Action, this table determines what options are present as checkboxes in all of the Patient Activity entries (e.g., *MD Notified, Disc Notified, Pt/CG/Family Notified*, etc.). The table allows agencies to determine which action is relevant to each activity.

Patient Activity Location Table

Found under Administration>System>Tables>Patient Activity Location, this table controls the location fields found only within the Meeting and Other activities (e.g., *Patient Home, Agency*, etc.). The entries of Patient Home and Agency are set up as defaults for Meeting and Other activities.

Patient Activity Reason Table

Found under Administration>System>Tables>Patient Activity Reason, this table controls what options are present within the dropdown list of Reasons (e.g., *Change in Condition, Cancelled Visit, IDT*, etc.) found in all of the Patient Activity entries. The table includes pre-built entries that cannot be edited. Additions to the table can be customized to display within selected activity screens.

Patient Activity To/From Table

Found under Administration>System>Tables>Patient Activity To/From, this this table controls what options are present within the To or From dropdown lists (e.g., *Patient, Caregiver, Physician, Lawyer*, etc.) found in all of the Patient Activity entries. The table features customization by allowing users to choose which options are available in each activity type.

Patient Care Meeting Settings

The settings to be configured for the Patient Care Meetings function are explained in the sections below. Note the following provides an explanation of the terms being used in this case:

- **Patient Care Meeting (PCM) -** this represents a single sit-down meeting during which one or more patients may be discussed
- **Individual Patient Meeting (IPM) -** when a patient is added to a PCM, an IPM is created for that patient. This meeting also appears in Patient Activity. The attendees may be customized for each IPM. This is similar to what appears as far as the meeting in Patient Activity.
- **Scribe -** the "owner" of the meeting, by default the user who created it. This user has ultimate control over the patient care meeting

Calendar Settings

To ensure Patient Meetings appear on the Employee Calendar, the setting "Patient Activity: Display Meeting entries on Employee Calendars?" must be set to YES within Administration>System>Settings>Employee Activity.

Patient Care Meeting Type Table

The table, under Administration>System>Tables, sets up the Patient Care Meeting Types that are available within the Patient Care Meeting function. The table then sets up a link with the Patient Activity Reason; creates a Due Date for tracking between meetings; the option of to apply the type to homecare, hospice, or both; and allows for configuration for tracking for a meeting on or after discharge dates.

Patient Activity and Patient Care Meeting - User Access/Permission Settings

Patient Activity Permissions

The editing permissions for Patient Activity are designed to maintain the integrity of the records. The following rules apply:

Non-Meeting Patient Activity
- If the user created the activity, then the user may edit and delete the activity
- If the user has clinical oversight, then the user may edit and delete the activity

Meeting Patient Activity (not from Patient Care Meetings)
- If the user created the activity, then the user may edit and delete the activity
- If the user has clinical oversight, then the user may edit and delete the activity
- If the user is an attendee, then the user may use the Prepare action to enter prep notes

Meeting Patient Activity (from Patient Care Meetings)
- If the user is the scribe, then the user may edit and delete the activity
- If the user is an attendee, then the user may use the Prepare action to enter prep notes

Patient Care Meeting Permissions:

There are two main permissions that can be assigned to user types in Administration>System>Settings>User Access to provide Patient Care Meetings access and edit capability.

- **Patient Care Meetings** - allows view access to the page. Users with this access level only are only allowed to view patient care meetings for which they are listed as attendees. They may also edit their prep notes.
- **Patient Care Meetings Supervisory Access** - gives users the ability to create and view all PCMs and change the scribe for any PCM.

Having supervisory access and being the scribe for a PCM gives several additional capabilities for that PCM (i.e., rights to delete PCM, add/remove patients, edit/start/complete PCMs and IPMs. By default, the scribe for a PCM is the user who created it, although the scribe may be changed later to give a different user expanded access.

Resources

For further details related to Patient Activity and Patient Care Meetings, please refer to the following resources:

- NDoc FASTForm for Charting Patient Activity
- NDoc Reference for the Patient Care Meeting Functionality