

Managing Patient/Caregiver Instruction Charting and Reports Overview

In order to provide patients and caregivers a more reader friendly view of the care they are receiving, NDoc has a specific Patient/Caregiver Instructions Report. This report only displays specific information with the content controlled by users and agency tables. The settings and associated logic are described below.

Administration

To ensure the Patient/Caregiver Report produces the desired results, the following options and associated table settings need to be considered.

Clinical Manager Designation (Administration>System>Tables>Company and/or Location Tables)

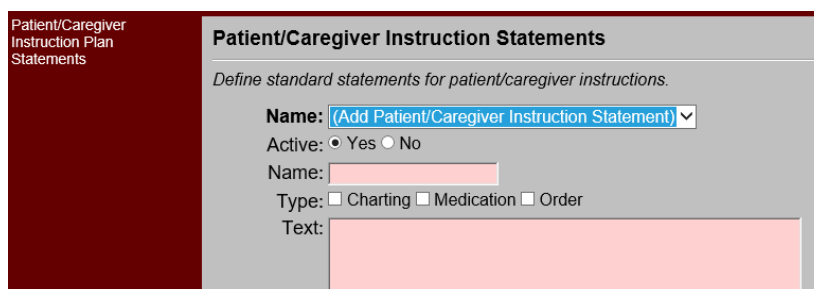
The name of a Clinical Manager is included in the Patient/Caregiver Instructions Report. This is separate from the patient's designated Case Manager. The display of Clinical Manager is controlled by the entry of a Clinical Manager within the Company and/or Location Tables (Administration>System>Tables). Each of these tables has a field to add a single Clinical Manager and a phone number to be determined by the agency. The field requires the entry of an employee as set up within the Employee Table. Upon searching and finding the user, the phone number field populates from the Employee Table entry. This number may be overwritten with a number determined by the agency. For the purposes of determining the designation of the Clinical Manager, the report query first looks to see if the patient's Location has a Clinical Manager designated and, if not, it will then look at the patient's Company to see if a Clinical Manager is charted. If neither table includes a designated user the field within the report will be empty. Currently, Clinical Manager is only mapped to the Patient/Caregiver Instructions Report.

Patient/Caregiver Instruction Table (Administration>System>Tables)

Users are able to chart specific Patient/Caregiver Instruction within a field found within each screen of the Visit Charting pages, as well as a field in both the Medication and Order entry screens. To assist in developing the content of these fields, agencies may build instruction statements that can be inserted within these fields. The table is pre-built with the three "starter" entries of:

- Services to be Provided
- Frequency of Services
- Treatments

These are options that are then displayed within the dropdown using the **Add Instructions** button within the charting screens, Medications, and Orders. The table provides the option to designate whether the statement will be available with Charting, Medications, and/or Orders.



Visit Charting Instruction Option

To provide users an area to chart patient instructions, a Patient/Caregiver Instruction field is positioned immediately above the Narrative Summary field found in nearly every charting screen (Visit Charting>Today's Care, OASIS, HIS, and Patient Profile). **NOTE:** This field mirrors the Patient Alert field in that the content carries forward from visit to visit. As with the Patient Alert field, the key is to add to the existing content of the field rather than to clear it and add charting. Additionally, to distinguish instructions between disciplines, users will need to label their entries for clarity (i.e., SN Instructions or PT Instructions). Finally, users should be reminded that the content of the field is based on what was last charted for that field. If the SN and PT are out in the field and both chart instructions, the content displayed within the field will be the charting entered last. Consequently, users may need to coordinate the charting of these instructions to ensure the complete instructions flow to the report.

As noted above within the settings info, this new field also provides a selection of customized agency statements that can be inserted within this charting field using the **Add Instructions** button and the content of the dropdown. These statements can serve as starters for patient specific text to be added by individual users.

Medication and Order Entry Instruction Charting Option

The medication and order entry screens include a Patient/Caregiver Instructions field and an **Add Instructions** button to insert statements set up within the table described previously. This field is designed to give users the ability to document patient/caregiver-friendly instructions that flow to the new Patient/Caregiver Instructions Report. **NOTE:** This text only goes to the Patient/Caregiver Instructions Report and not the Medication Profile. Additionally, the Medication Administration Instruction field does not go to the Patient/Caregiver Instructions Report, so those instructions may be included in this field as well as a guide. To add this information to an existing med/order, use the Edit button. These instructions do not flow to the POC or POF/PVC documents.

Patient/Caregiver Instructions Report

This report is located within the individual Patient Summary Report Manager or the Batch Reports option under the Reports>Patient section. This reporting tool is designed to provide agencies a patient/caregiver-friendly compilation of key details including times displayed in civilian times rather than military time. The report includes the following:

- **Patient Header** with patient's Permanent Address (formatted for window envelopes), physician info, Case Manager, and Clinical Manager if set as described above.
- **Patient/Caregiver Instructions** to include the most current value of the field as displayed within the visit charting screens.
- **Visit Schedule** to include the "future" scheduled visits based on the date range designated within the report options screen (info displayed includes dates, times, employee, discipline, and visit reason).
- **Medications List** to include general med info for Active meds and Patient/Caregiver Med Instructions if charted.
- **Orders List** to include general info for Active Orders and Patient/Caregiver Order Instructions if charted.

NOTE: The report options screen provides the option to have a copy of the report set up within Document Library under the category of Patient Documents with the ability to set tracking options.