Patient Instructions & Procedure Comments

The program allows you to create your own verbiage that can be easily used in the course of a visit. The two most common types of this are Patient Instructions and Procedure Comments.

Generally, there are two steps to implementing this feature:
1. Create the Instruction/Comment (that is, add an entry to the Instructions & Comments table, giving it a short description and entering the complete verbiage).
2. Adding a checkbox to the Instructions form so that it can be triggered easily in the course of a visit.

In the case of Procedure Comments, you may also find it helpful to link the verbiage to a procedure code. The effect of this is, when a provider selects that procedure from the CPT form in the visit, the associated comments automatically appear in the note – with the option to edit them on the fly.

Creating the table entry
The first step is to go to Tables, Clinical, Instructions & Comments. In the drop-down selection box at the top of the window you may either select an existing entry or scroll to the bottom and select **Create Instruction**.

In the above example, note that the verbiage makes use of variables dependent on the patient's gender. There are dozens of these variables available, the most common of which are listed below:

- [pat: first]
- [pat: last]
- [pat: sex]
- [pat: man/woman]
- [pat: age]
- [pat: he/she] *
- [pat: him/her] *

- `[pat: his/her] *`
- `[pat: dob]`
- `[other: date]`
- `[other: user]`

* Instead of using these gender-specific variables, we recommend using only male pronouns (i.e., he, him, his) in the text . The system will recognize and automatically convert the pronouns to their female counterparts when appropriate. Note that because of the vagueness of the female pronoun "her" (the same word is used as a possessive and objective pronoun) you cannot use female pronouns in the text as the system will be unable to properly convert female to male where appropriate.

If you are looking for some other data to automatically populate an instruction or comment, contact Customer Support for more direction.

Using dynamic variables in the verbiage

A dynamic variable is one that requires the user (provider) to enter at the time the verbiage is used. This is often helpful in Procedure Comments. For example, the verbiage:

> **An epidural steroid was injected between the 5th and 6th thoracic vertebrae using [get num:cc's used] cc's.**

> The variable **[get num:cc's used]** results in a window opening where the user is prompted to enter the numeric value of **cc's used**.

There are three types of "get" variables:
- **[get num:…]** This type is used to enter a numeric value.
- **[get text:…]** This type is used to enter a text value.
- **[get select:…]** This type is used to select from a drop-down box.

In each case, what you put in the brackets immediately following the colon is the label for the field you want the user to dynamically enter. The label simply provides context so the user knows what it is he or she is expected to enter.

Other usages for the "get" variable include:

> **This is a follow-up visit for [pat: first] after his discharge from [get text: Hospital name (large)]**

> The "get" variable used here results in a window appearing with a large text box where the user is prompted to enter the **Hospital name**.

> Notice the use of the indicator **(large)** contained in this "get" variable. It tells the system to provide you with a larger text box than normal for entering a long name. You may specify the size using one of the following, contained inside the get variable's brackets as illustrated above:

> - **(small)**
> - **(medium)**
> - **(large)**
> - **(extra large)**

Finally, when there are a few fixed options from which to choose and you want these options to appear in a drop-down box, use the following syntax:

> **The injection was given in the [get select: Location (medium){left;right}] forearm.**

> Upon use, the provider will be presented a drop-down box labeled "Location" that is of medium width with the two options, left or right, from which to choose.

> The number of options in a drop-down box is not limited to two. You may, for example, also have the variable **[get select: Location (medium){left;right;bilateral}]** in which case three options would be available in the drop-down box. No matter the number of options, just ensure that each is separated by a semi-colon.

You may, of course, use multiple "get" variables in the same verbiage – for example, for both, selecting the cc's used and gauge of the needle in a single comment.

Other options
In the case of Procedure Comments, it is helpful to link the comment, once created, to the procedure code. This is done in Tables, Procedures. Pull up the procedure code and select the comment in the Auto Comments drop-down box. The result will be, when a provider selects the procedure in the CPT form, the comment will automatically be selected.

You may want the comment to not only be automatically be selected, but to automatically open in an edit window upon selection. This is done in the Instructions/Comments table by checking the box **Edit text upon selection**.
If the instruction or comment is *not* something you want listed in the patient's clinical visit summary (which is typically provided to the patient at Close Visit and also is uploaded to the patient portal), check the box **Exclude from Visit Summary** in the Instructions/Comments table.

In the case of Procedure Comments, there is an option to have the procedure comments listed in their own area of the progress note instead of the Assessment and Plan. If you want to take advantage of this, you need to check the box **Exclude Procedure Comments in A&P** in Visit Configuration and you will need the Procedure Comments variable added to your visit note template in the Visit Type Set-Up. Contact Customer Support for assistance.

Adding a checkbox in the Instructions form
After creating the entry in the Instructions/Comments table, you will almost invariably want to create a checkbox for the instruction/comment so that it can be utilized in the course of a visit.

The best way to do this is, with a patient visit selected, click on the Instruction form to view the present layout. This is necessary because you will want to see what is already there to determine where you want the new checkbox to appear. It typically involves determining the column and row (and page if you have multiple pages) where you want the new checkbox. Once you've visually determined that, close the window.

Next right-click on the Instruction form to edit it. Click the Add Item button. This will open a window as follows:

Typically, you need only select the instruction/comment in the **Code** in the drop-down and specify its location (**Page #, Line #, Column #**). Once this is done, click **Save**. When you are ready to redraw the form, click the **Redraw** – but you do not want to do this with other users in the system. After redrawing it, you will need to exit out of the Clinical window and come back in for it to take effect.