

## Accuro EMR Guide Supplement – PaCT Test Box 3 Content for Innovation Hub Feedback

### Advance Care Planning

There are 3 advanced care planning documents that Alberta primary care clinics will commonly discuss with and/or complete with their patients. These are:

1. Personal Care Directive
2. Goals of Care Designation
3. Enduring Power of Attorney

The first 2 documents may be completed at the clinic with the provider or a team member. A copy is always provided to the patient with a copy also kept by the clinic. One or both of these documents may also be completed by another provider in another part of the health system. Enduring Power of Attorney documents are not created/completed at the clinic.

If the documents are in existence, it is best practice that a copy is on file in the patient's medical record in the medical home.

Clinics will want to create *standardized* processes for filing these documents so they can search for them, create rules for them, and/or be able to map them to other documents. In the event that the clinic does not have a copy but the patient lets them know they exist, there are also some suggestions provided on how this may be captured in a standard way.

For more information on advanced directives in Alberta please visit the website:  
<http://goals.conversationsmatter.ca.s3-website-us-east-1.amazonaws.com/make-the-decision/>

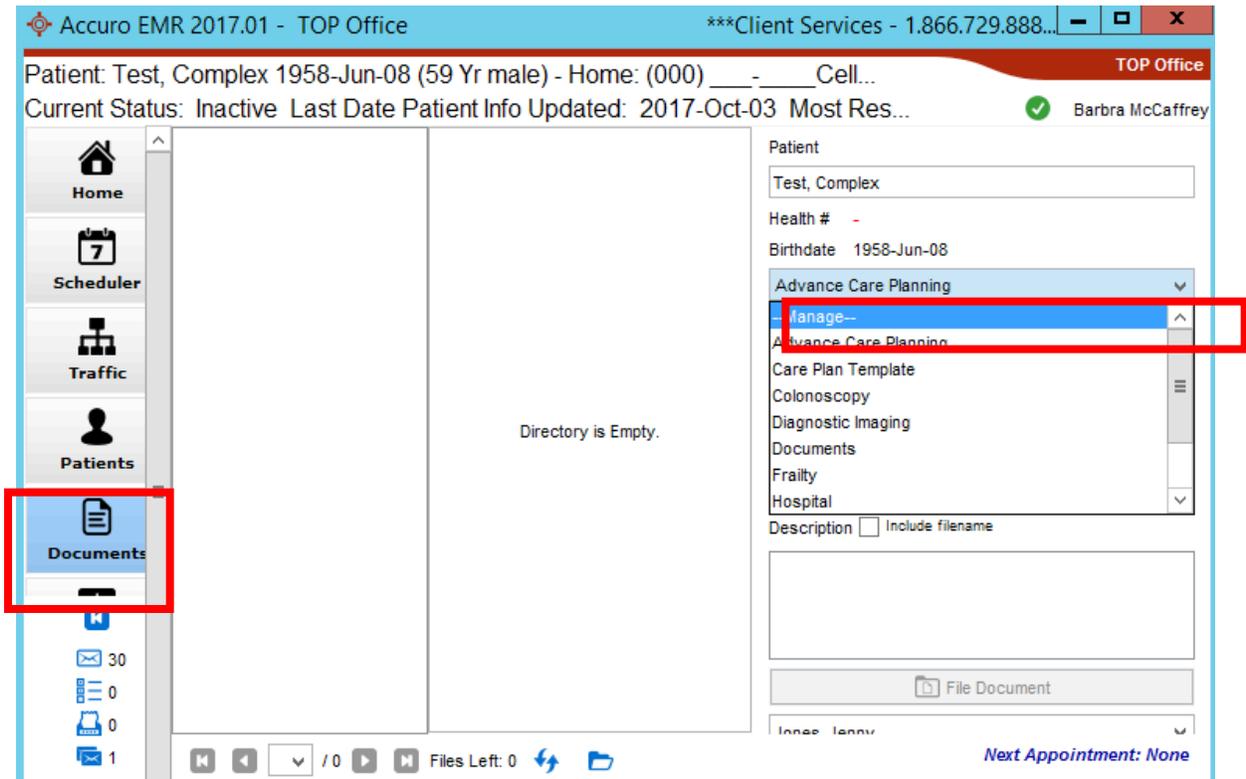
You may also reference some content on advance directives in TOP Cognitive Impairment Clinical Practice Guideline (2017):  
[http://www.topalbertadoctors.org/download/2113/Cogn%20Imp-Resources%20&%20Future%20Planning.pdf?\\_20180430204754](http://www.topalbertadoctors.org/download/2113/Cogn%20Imp-Resources%20&%20Future%20Planning.pdf?_20180430204754)

### Filing Advance Care Planning Documents

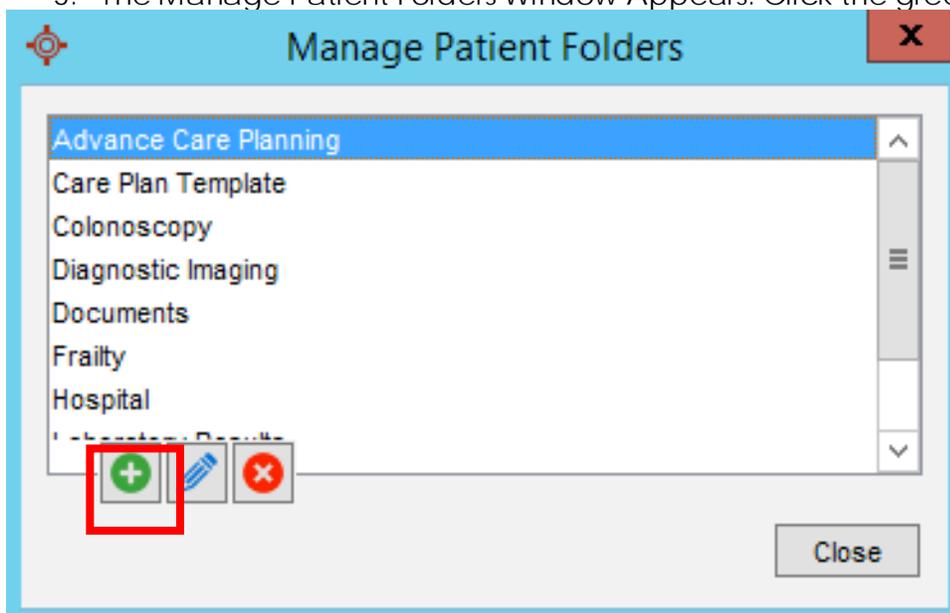
For Advance Care Planning documents brought to the clinic, or created at the clinic with the patient, you will want to scan and save them into the EMR. It is important that they are saved in a consistent manner so that they are easy to find. If you do not already have a workflow for this, the "Documents" tab in Accuro EMR can be easily

modified to create a document type "Advance Care Planning" with three sub-types: "Personal Care Directive", "Goals of Care Designation", and "Enduring Power of Attorney" ideal for storing these types of documents.

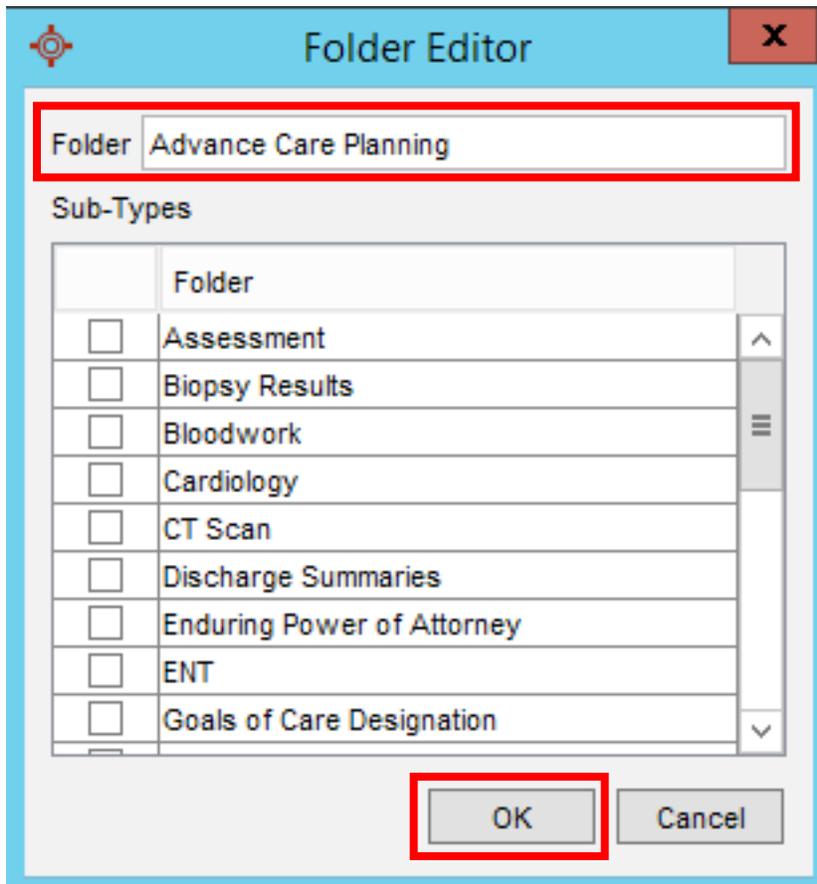
1. Navigate to the "Documents" area of the EMR.
2. Click the "Document Type" dropdown and choose "Manage"



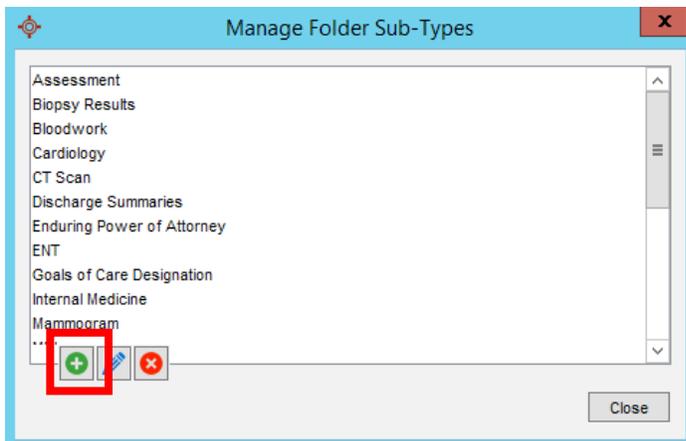
3. The Manage Patient Folders Window Appears. Click the green plus sign.



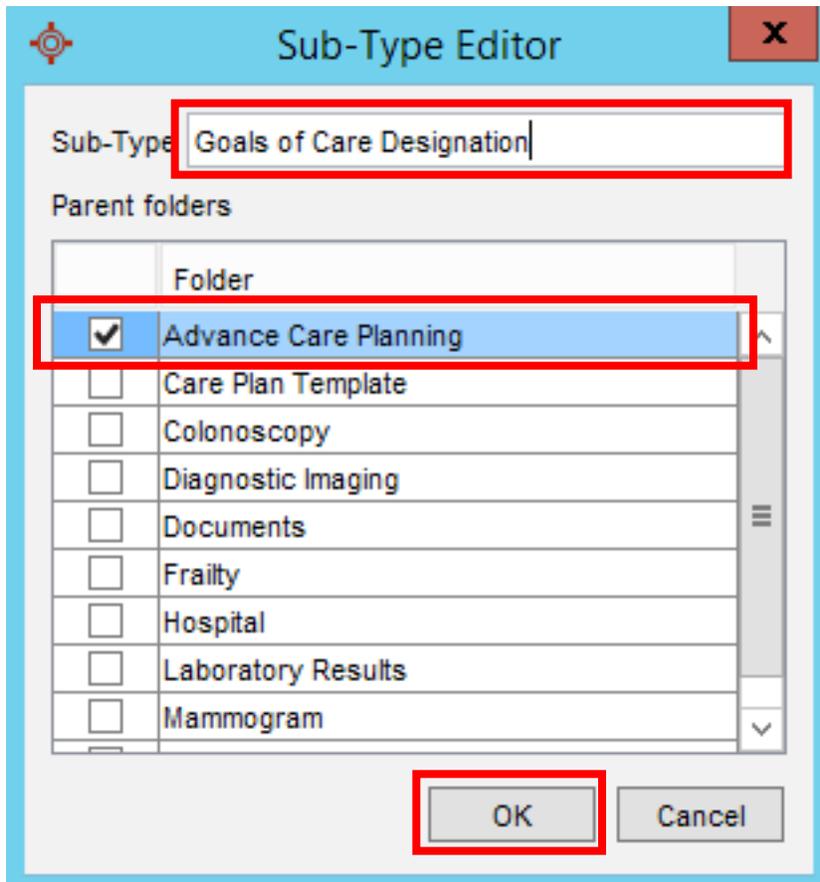
4. The Folder Editor appears. Type "Advance Care Planning" in the "Folder" field and click "OK"



5. You will now see "Advance Care Planning" as one of your options in the "Document Type" dropdown. Make sure it is selected and then click the "Document Sub-Type" drop down and choose "Manage"
6. The "Manage Folder Sub Types" window appears. Click the green plus sign.



7. Select "Advance Care Planning" as the parent folder and type "Goals of Care Designation" in the "Sub-Type" field. Click OK.



8. Repeat this process for the other document sub-types: "Personal Directive" and "Enduring Power of Attorney"

Now your EMR is set up to easily and correctly classify Advance Care Planning documents as they are imported.

## Searching for Advance Directive Documents

Documents that are consistently classified in this fashion will be easy to search in the query builder using the "Documents" rule category and selecting a "Type contains Advanced Care Planning" rule. For more information about using the query builder see the Accuro Help files or the "TOP Accuro EMR Guide for Patient's Medical Home".