

Med-Access EMR Guide Supplement – PaCT Test Box 3 Content for Innovation Hub Feedback

Advance Directives

There are 3 advanced directive 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/>

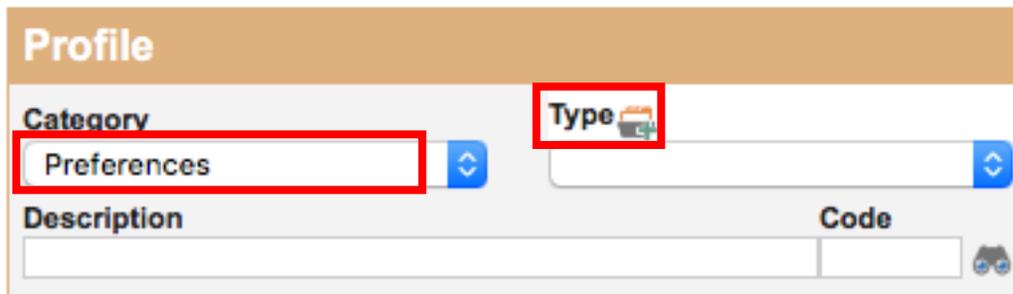
You may also reference some content on advance directives in TOP Cognitive Impairment Clinical Practice Guideline (2017): http://www.topalbertadoctors.org/download/2113/Cogn%20Imp-Resources%20&%20Future%20Planning.pdf?_20180430204754

Filing Advance Directive Documents

For advance directive documents brought to the clinic, or created at the clinic with the patient, you will want to scan and save them into the EMR in a way that they are easily found. In Med-Access EMR an appropriate place is in the "Profile" tab under category "Preferences".

Creating Profile Category Types

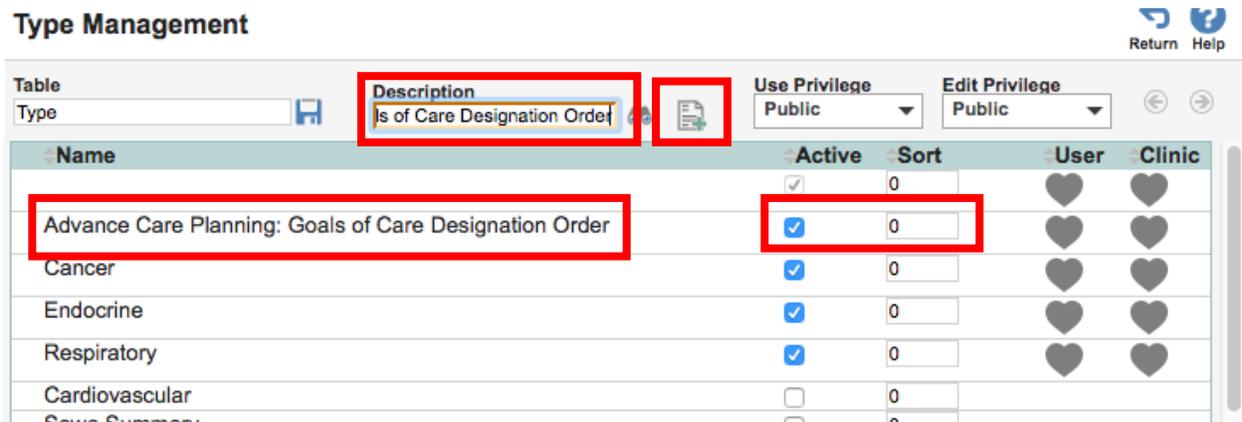
The first step to setting up your EMR for saving this way will be to create Profile Category Types for each of the advanced directive documents. To do this, open up a new "Preferences" Profile item and hover your cursor next to the title of the "Type" field. You'll see the icon for the managed list. Click on it.



The screenshot shows a form titled "Profile". It has two dropdown menus: "Category" and "Type". The "Category" dropdown is set to "Preferences". The "Type" dropdown is empty and has a document icon next to it. Below these are fields for "Description" and "Code".

This will open the "Type Management" window. You can create a new list entry by

typing the name in the "Description" field and clicking add . In the example below we've added "Advance Care Planning: Goals of Care Designation Order" to our list. Check to make sure your new entry is active and set the sort order if you want it to appear in a certain spot on your list.



The screenshot shows the "Type Management" window. It has a search bar for "Table" with "Type" entered. There are "Use Privilege" and "Edit Privilege" dropdowns, both set to "Public". A table lists profile types with columns for Name, Active, Sort, User, and Clinic. The "Description" field is highlighted with a red box, containing "Goals of Care Designation Order". The "Add" icon is also highlighted with a red box. The table has a red box around the "Advance Care Planning: Goals of Care Designation Order" row, which has its "Active" checkbox checked and "Sort" set to 0.

Name	Active	Sort	User	Clinic
Advance Care Planning: Goals of Care Designation Order	<input checked="" type="checkbox"/>	0	♥	♥
Cancer	<input checked="" type="checkbox"/>	0	♥	♥
Endocrine	<input checked="" type="checkbox"/>	0	♥	♥
Respiratory	<input checked="" type="checkbox"/>	0	♥	♥
Cardiovascular	<input type="checkbox"/>	0	♥	♥
Some Summary	<input type="checkbox"/>	0	♥	♥

Repeat these steps for the other document types:

- Advance Care Planning: Personal Directive
- Advance Care Planning: Enduring Power of Attorney

Advanced users may want to create templates with mapped versions of these forms in the EMR. For instructions on how to create mapped forms please see the Med-Access help files “Mapped Form Basics”, “Mapped Form Style Guide”, and “Form Builder Templates Tool”.

Creating Profile Entries

Profile entries are most easily created either through a Visit or directly in the Profile tab.

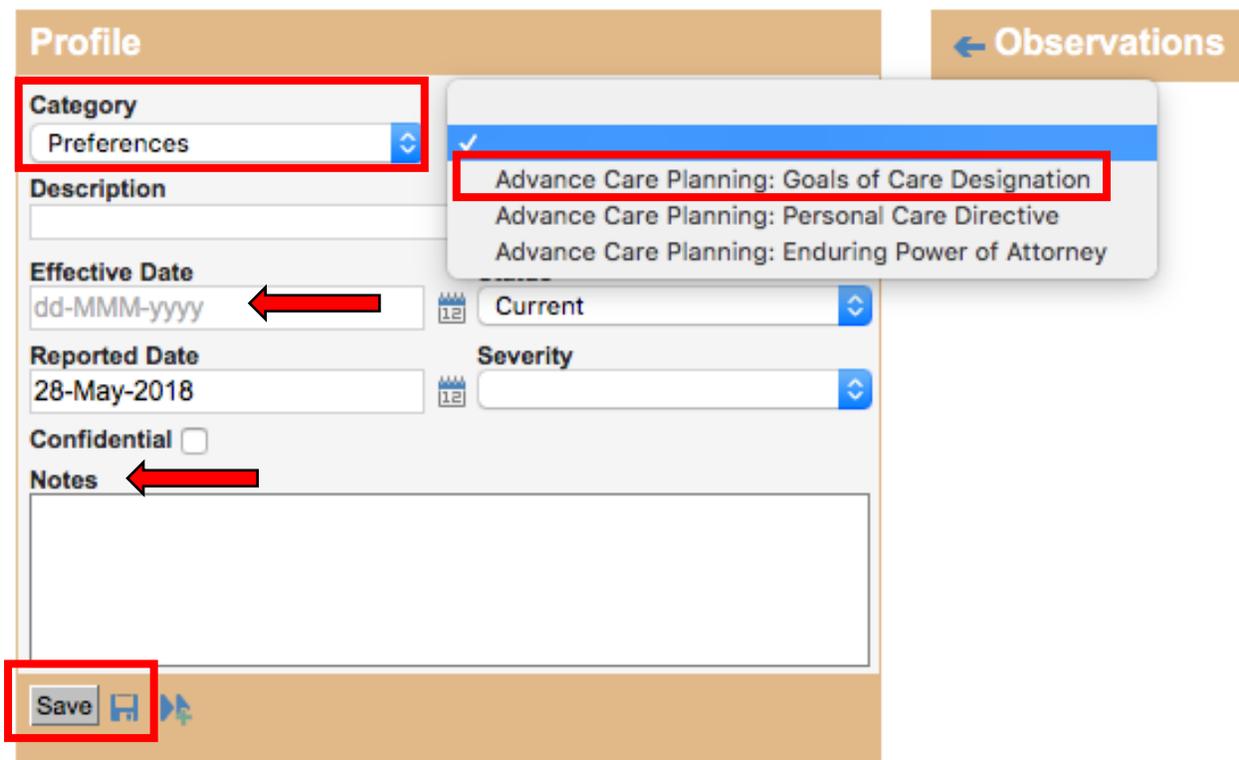
Creating a Profile Entry from Visit:

- 1) On the Assessment bar, click  (Add to Profile). A Profile item opens in a new window.
- 2) Change the Category to “Preferences”.
- 3) Choose the document Type from your newly created list.

- 4) Fill-in the “Effective Date” field to match the date that the document was signed.
- 5) (Optional) In “Notes” enter information to display in summary view (e.g. M1)
- 6) Attach the scanned Advance Care Planning document to the profile entry.
- 7) Click “Save”.

Creating a Profile Entry from the Profile Tab:

- 1) In the Profile tab, click  (Create New Problem). A Profile item opens in a new window.
- 2) Change the Category to "Preferences".
- 3) Choose the document Type from your newly created list.



The screenshot shows a 'Profile' form with the following fields and actions:

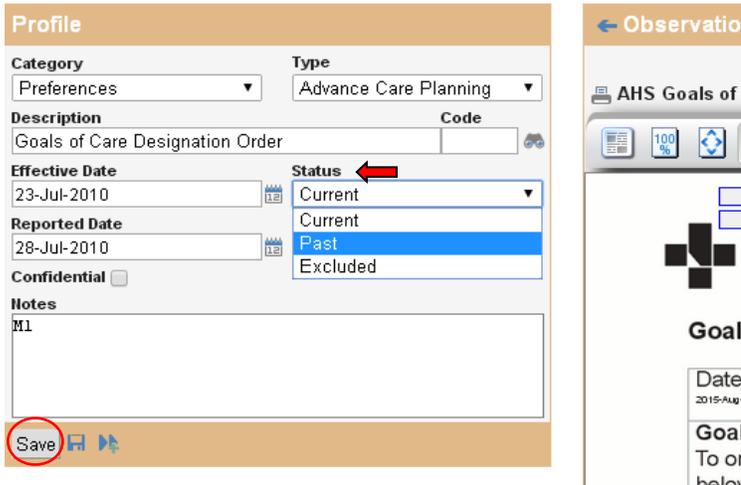
- Category:** A dropdown menu set to 'Preferences'.
- Description:** A text input field.
- Effective Date:** A date input field with a calendar icon and a red arrow pointing to it.
- Reported Date:** A date input field set to '28-May-2018'.
- Confidential:** A checkbox that is currently unchecked.
- Notes:** A large text area with a red arrow pointing to it.
- Save:** A button at the bottom left, highlighted with a red box.
- Dropdown Menu:** A menu is open showing three options: 'Advance Care Planning: Goals of Care Designation' (highlighted with a red box), 'Advance Care Planning: Personal Care Directive', and 'Advance Care Planning: Enduring Power of Attorney'.

- 4) Fill-in the "Effective Date" field to match the date that the document was signed.
- 5) (Optional) In "Notes" enter information to display in summary view (e.g. M1)
- 6) Attach the scanned Advance Care Planning document to the profile entry.
- 7) Click "Save".

Expiry of a Profile Item:

When a newer version of an Advance Care Planning document is to be entered, any previous entry should first be expired.

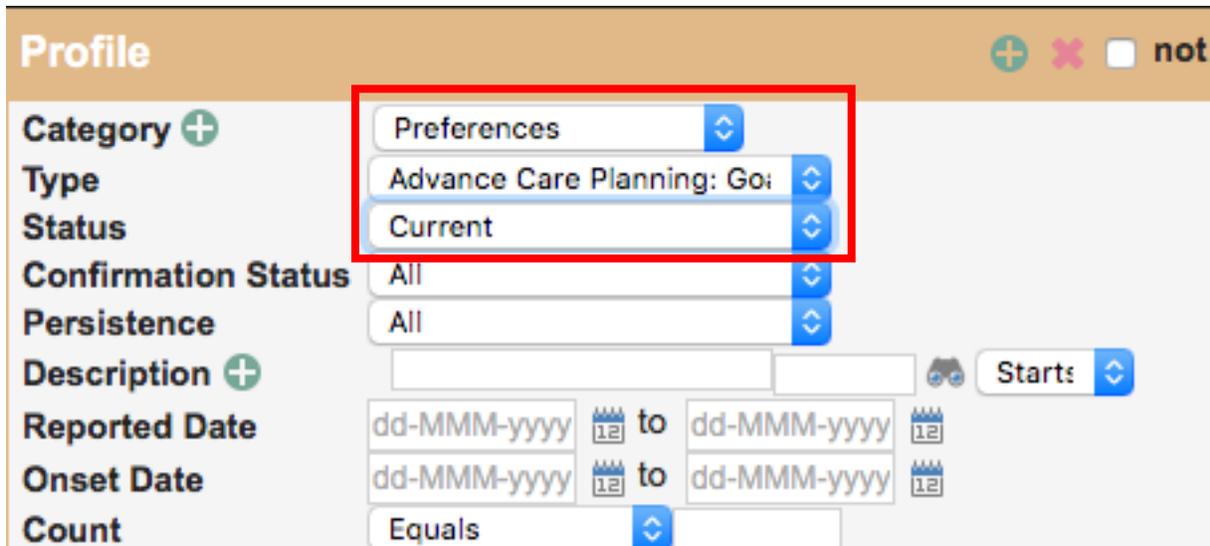
- 1) In the Profile tab, click  (Edit) on the line which corresponds with the item that is to be expired.
- 2) In the Status field, select "Past" from the dropdown.
- 3) Click "Save".



4) Proceed to create a new Profile entry for the new document.

Searching for Advance Directive Documents

If you consistently record your Advance Care Planning documents using this workflow, then finding these patients in your EMR should be easy. Using Practice management reporting set your demographic search for the appropriate population and then set your profile criteria as shown:



These criteria could also be used to create Clinical Decision Support triggers to alert you that the patient has Advance Care Planning documents on file.

Logging Existence of Advance Directive Documents

There may be instances where the patient informs the clinic that the documents are in existence but there is not yet a copy at the clinic. You may wish to record that the document(s) exist using the same workflows as above.