

# Documentation: Making an EMR Work for PACE

Regional PACE Conference  
November 16-17, 2010

Presenters:

Kristi Martin, RN, MSN, Center  
Manager

Kimberly Woodley, CQE, Quality  
Coordinator



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# Background

- Centra PACE, located in Lynchburg, Virginia, opened February 2009
- Current Enrollment- 65 Participants
- Centra Health is the sole hospital system
- Centra has Electronic Medical Record (EMR)

# Our Challenge

- To create a seamless process using our hospital system's established EMR while ensuring that we met CMS regulations.
  - Section 460.210 Medical Records
    - » A PACE organization must maintain a single, comprehensive medical record for each participant, in accordance with accepted professional standards.

# First Steps

- Our hospital uses the McKesson system for their EMR.
  - Our first step was to meet with the IT department to discuss creation and implementation of our “PACE” charting fields.
  - Staff worked very closely in creating assessment pages that were tailored to the PACE participant and assessment for each discipline.

# Example of IDT Plan of Care Page:

**Logged in User: KRISTI G MARTIN CLINICAL O |true|PACEIDT |**

File Patient Flowsheets Reviews Prints Profile Utilities Help

Patient:  NKA Refresh

Age: 74 yr Gender: M Attending: SELLERS, VERNIA R. Fac - Dept: CENTRA - PACE DOB:  Acct: 1015201808  
 Diagnosis: (W) DM, hx prostate ca, COPD, failure Service: DPE Rm-Bed:  Admit Dt: 06/01/2010 MRN:

Chart Allergy Flowsheet Admin Rx IV Manage I/O ALERTS Acute Care Restraint General Education Lab Results ECG Pathology Report Radiology Results Cardiology Report  
 PACE Psychosocial Assess PACE Pharmacy PACE Labs PACE CNA PACE Rehab Aide  
 PACE Therapeutic Recreation PACE Nursing Assessment PACE Home Care Assess PACE Physical Therapy PACE Occupational Therapy PACE IDT Meeting PACE Speech PACE Transport PACE Nutrition Assessment


Show All + Expand All - Collapse All Add Selection 10/29/2010

IDT Meeting	07/02/2010 14:30	07/28/2010 09:55	08/03/2010 15:47	08/10/2010 16:32	08/12/2010 09:29	10/29/2010 11:11
IDT Meeting			Progrnt	Progrnt		
Diagnosis						
PreviousTeamGoal						
POA/spokesperson						
GDS						
MMSE						
PharmCompliance						
Braden Scale						
Rehab						
Transportation						
Code Status						
Days Attended						
Home Care						
Home Assistance						
Wanderguard						
Restraints						
Fall Risk						
Safety Concerns						
SafetyIntervtn						
Recommendations						
ParticipantGoals						
PlanToAddresGoal						
ReassessmentFreq						
PlanToReviewPOC						
Goals set						
Problem 1						
Team Goal 1						
Target Date 1						
Intervtn/Freq 1						

Save Cancel

start Kristi Martin - ... Presentation1 PACE Logged Off - ... McKesson PC... Care Organiz... Logged in Us... 11:20 AM

# Example cont.

 **Logged in User: KRISTI G MARTIN CLINICAL O |true|PACEIDT |**

File

Patient

Flowsheets

Reviews

Prints

Profile

Utilities

Help

Patient:

NKA

Refresh

Age: 74yr

Gender: M

Attending: SELLERS, VERNAR.

Fac-Dept: CENTRA - PACE

DOB:

Acct: 1015201808

Diagnosis: (W) DM, hx prostate ca, COPD, failure

Service: DPE

Rm-Bed:

Admit Dt: 06/01/2010

MRN:

Chart Allergy

Flowsheet

Admin Rx

IV Manage

I&O

ALERTS

Acute Care Restraint

General Education

Lab Results

ECG

Pathology Report

Radiology Results

Cardiology Report

PACE Psychosocial Assess

PACE Pharmacy

PACE Labs

PACE CNA

PACE Rehab Aide

PACE Therapeutic Recreation

PACE Nursing Assessment

PACE Home Care Assess

PACE Physical Therapy

PACE Occupational Therapy

PACE IDT Meeting

PACE Speech

PACE Transport

PACE Nutrition Assessment

Show All

+ Expand All

- Collapse All

★ Add Selection

10/29/2010

IDT Meeting

☐ More Results

07/02/2010

14:30

07/28/2010

09:55

08/03/2010

15:47

08/10/2010

16:32

08/12/2010

09:29

11:11

IDT Meeting

Add

Show All

Goals set

Problem 1

Team Goal 1

Target Date 1

Intervntn/Freq 1

RespnsDiscipln 1

Team Goal 1 Met

Problem 2

Team Goal 2

Target Date 2

Intervntn/Freq 2

RespnsDiscipln 2

Team Goal 2 Met

Problem 3

Team Goal 3

Target Date 3

Intervntn/Freq 3

RespnsDiscipln 3

Team Goal 3 Met

Problem 4

Team Goal 4

Target Date 4

Intervntn/Freq 4

RespnsDiscipln 4

Team Goal 4 Met

Problem 5

Team Goal 5

Target Date 5

Intervntn/Freq 5

mm/dd/yyyy

mm/dd/yyyy

mm/dd/yyyy

mm/dd/yyyy

mm/dd/yyyy

mm/dd/yyyy

Save

Cancel

start

Kristi Martin - Inb...

Presentation1

Logged Off - Wind...

Citrix ICA Clie...

Untitled - Notepad

11:30 AM

# Discipline Specific Assessment Pages

- Each discipline worked with IT department in creating their assessment pages.
- Each discipline has a section for:
  - Problems
  - Goals
  - Target Date
  - Interventions
  - Responsible Discipline
  - Goal was met or unmet

ParticipantGoal

Focus 1

Problem

Goal

Target Date

Intervention

Goal Met

This ensured that each discipline was charting the needed information in the desired format

# Nursing Assessment Page:

**Logged in User: KRISTI G MARTIN CLINICAL O | true | PACEFLOW |**

File Patient Flowsheets Reviews Prints Profile Utilities Help

Patient:  **NKA**

Age: 74 yr Gender: M Attending: SELLERS, VERN A. Fac - Dept: CENTRA - PACE DOB:  Acct: 1015201808  
Diagnosis: (W) DM, hx prostate ca, COPD, failure Service: DPE Rm-Bed:  Admit Dt: 06/01/2010 MRN:

Chart Allergy Flowsheet Admin Rx IV Manage I&O ALERTS Acute Care Restraint General Education Lab Results ECG Pathology Report Radiology Results Cardiology Report  
PACE Psychosocial Assess PACE Pharmacy PACE Labs PACE CNA PACE Rehab Aide  
PACE Therapeutic Recreation PACE Nursing Assessment PACE Home Care Assess PACE Physical Therapy PACE Occupational Therapy PACE IDT Meeting PACE Speech PACE Transport PACE Nutrition Assessment

Patient Info	10/14/2010 12:30	10/14/2010 15:20	10/15/2010 12:30	10/19/2010 12:30	10/19/2010 15:21	10/22/2010 12:30	10/26/2010 12:30	10/28/2010 12:30
Neurological	<input type="button" value="More Results"/>							
Respiratory	<input type="button" value="Patient Info"/> <input type="button" value="Chart"/>							
Cardiovascular	Assessment Semian Chief Complaint Med Compliance  Good Sleep pattern Noproblem Assistive Device Glasses Speech Screen No							
NeuroVascular	<input type="button" value="Neurological"/> <input type="button" value="Chart"/>							
GastroIntestinal	LOC AgeapAlertAwak * Oriented to Orntx4 Affect/Mood AgeapCalmCoop * Pupils Equal Speech Clear Facial Symmetry Symtrl Motor Strength Strong ALL EXTREMITIES Abwoas Ambulation							
GenitoUrinary	<input type="button" value="Respiratory"/> <input type="button" value="Chart"/>							
Nutrition	Resp Pattern Nnlabr  BREATH SOUNDS All Lobes Clear Bilateral Clear ShortnesOfBreath Nonnot Cough Absent							
Integumentary	<input type="button" value="Cardiovascular"/> <input type="button" value="Chart"/>							
Pressr/UlcerRisk	Heart Sounds S1s2 Heart Rhythm Reglr							
Pain Assessment								
Fall Risk Assess								
Plan of Care								

start
Kristi Martin - In... Presentation1 Logged Off - Win... Logged in User: ... Care Organizer - ... McKesson PC Vie... 11:47 AM

# Nursing Assessment Page cont.

**Logged in User: KRISTI G MARTIN CLINICAL O | true | PACEFLOW |**

File Patient Flowsheets Reviews Prints Profile Utilities Help

Patient:  **NKA** Refresh

Age: 74 yr Gender: M Attending: SELLERS, VERNAR. Fac-Dept: CENTRA - PACE DOB:  Acct: 1015201808  
 Diagnosis: (W) DM, hx prostate ca, COPD, failure Service: DPE Rm-Bed:  Admit Dt: 06/01/2010 MRN:

Chart Allergy Flowsheet Admin Rx IV Manage I&O ALERTS Acute Care Restraint General Education Lab Results ECG Pathology Report Radiology Results Cardiology Report  
 PACE Psychosocial Assess PACE Pharmacy PACE Labs PACE CNA PACE Rehab Aide  
 PACE Therapeutic Recreation PACE Nursing Assessment PACE Home Care Assess PACE Physical Therapy PACE Occupational Therapy PACE IDT Meeting PACE Speech PACE Transport PACE Nutrition Assessment

Show All + Expand All - Collapse All Add Selection 10/29/2010

Patient Info ☐ More Results 10/19/2010 12:30 10/19/2010 15:21 10/22/2010 12:30 10/26/2010 12:30 10/28/2010 12:30 10/29/2010 11:50

Neurological  
 Respiratory  
 Cardiovascular  
 NeuroVascular  
 GastroIntestinal  
 GenitoUrinary  
 Nutrition  
 Integumentary  
 Pressr/UlcerRisk  
 Pain Assessment  
 Fall Risk Assess  
**Plan of Care**

Plan of Care Add Show All

ParticipantGoal	10/19/2010 12:30	10/19/2010 15:21	10/22/2010 12:30	10/26/2010 12:30	10/28/2010 12:30	10/29/2010 11:50
Focus 1						
Problem						
Goal						
Target Date						mm/dd/yyyy
Intervention						
Goal Met						
Focus 3						
Problem						
Goal						
Target Date						mm/dd/yyyy
Intervention						
Goal Met						
Focus 4						
Problem						
Goal						
Target Date						mm/dd/yyyy
Intervention						
Goal Met						




Save Cancel

start Kristi Martin - In... Presentation1 Logged Off - Win... Logged in User: ... Care Organizer - ... McKesson PCVie... 11:50 AM

Logged in User: KRISTI G MARTIN CLINICAL O | true | PACETX |

Patient:  ▼ NKA Refresh

PACE Psychosocial Assess		PACE Pharmacy	PACE Labs	PACE CNA	PACE Rehab Aide													
Chart Allergy	Flowsheet	Admin Rx	IV Manage	I&O	ALERTS	Acute Care Restraint		General Education		Lab Results	ECG	Pathology Report		Radiology Results		Cardiology Report		
PACE Therapeutic Recreation		PACE Nursing Assessment		PACE Home Care Assess		PACE Physical Therapy		PACE Occupational Therapy		PACE IDT Meeting		PACE Speech		PACE Transport		PACE Nutrition Assessment		

Pace Transport	 More Results	06/18/2010	07/20/2010	08/05/2010	09/13/2010	10/25/2010
		07:13	13:37	10:15	07:47	07:57  12:44 

# Transport Assessment Page cont...

Logged in User: KRISTI G MARTIN CLINICAL O | true | PACETX |

FilePatientFlowsheetsReviewsPrintsProfileUtilitiesHelp

Patient:  NKA Refresh

Age: 74 yrGender: MAttending: SELLERS, VERNA R.Fac-Dept: CENTRA - PACEDOB: Acct: 1015201808

Diagnosis: (W) DM, hx prostate ca, COPD, failureService: DPERm-Bed: Admit Dt: 06/01/2010MRN:

Chart AllergyFlowsheetAdmin RxIV ManageI&OALERTSAcute Care RestraintGeneral EducationLab ResultsECGPathology ReportRadiology ResultsCardiology Report

PACE Psychosocial AssessPACE PharmacyPACE LabsPACE CNAPACE Rehab Aide

PACE Therapeutic RecreationPACE Nursing AssessmentPACE Home Care AssessPACE Physical TherapyPACE Occupational TherapyPACE IDT MeetingPACE SpeechPACE TransportPACE Nutrition Assessment

Show All+ Expand All- Collapse AllAdd Selection

10/29/2010

Pace Transport	06/18/2010	07/20/2010	08/05/2010	09/13/2010	10/25/2010
<div><div>More Results</div><div><div>Pace Transport</div><div>Directions</div><div>Assistive Device</div><div>Medical Device</div><div>Other Info</div><div>Transport Notes</div><div>Note 1</div><div>Note 2</div><div>Note 3</div><div>Note 4</div><div>Note 5</div><div>Goal 1</div><div>Problems</div><div>Goals</div><div>Target Date</div><div>Intervention</div><div>Goals Met</div><div>Goal 2</div><div>Problems</div><div>Goals</div><div>Target Date</div><div>Intervention</div><div>Goals Met</div><div>Goal 3</div><div>Problems</div><div>Goals</div><div>Target Date</div><div>Intervention</div><div>Goals Met</div></div></div>	07:13	13:37	10:15	07:47	07:57 12:44

SaveCancel

start

Kristi Martin - In...Logged Off - Win...Care Organizer - ...Logged in User: ...McKesson PCVie...Microsoft Power...12:47 PM

# Advantages to Using Same EMR as Hospital System:

- Allows for one (1) comprehensive medical record that houses all documentation from hospital admissions to PACE charting.
- Allows for gathering documentation quickly and efficiently- able to print chronological, comprehensive records
- Allows all clinical personnel to view medical records from entire hospital system
- Covered under hospital's HIPPA policy- records are protected on a need to know basis

# Challenges:

- Development of a process to ensure that all paper records were scanned into EMR.
  - Enrollment Agreements, Consents, MAR's
- Development of system to retain records per CMS guidelines
  - Section 460.200 Maintenance of Records  
PACE organizations to retain records for the longest of following periods: six years from the date of the last entry made in the record; or six years after date of disenrollment.

# Internal Auditing:

- Admin team performs consistent chart audits to ensure completeness and accuracy of charting.
- Internal audits are performed monthly by center manager when completing Team Plan of Care.

# CMS Audits

- EHR allows for chronological, comprehensive printing of specific sections for audits.
- Notebook with 18 specific tabs (CMS mandated) for each participant medical record.
- EHR was printed and placed under appropriate tabs.

# Example:

HorizonWP Physician Portal - Windows Internet Explorer provided by Centra

File Edit View Favorites Tools Help

Back Forward Stop Reload Home Search Favorites RSS Print Mail

Address <http://chipper.centrahealth.com/portal/site/hpp/menuitem.3d308ac16bd7f42bcd0e1b40be031bb8/#StationCensusRow0> Go Links Convert Select

Kristi Martin :: November 3, 2010 **my portal** **suspend** **help** **logout** Site Controls: <Select>

Patient Locator Patient Summary **Results** Pyramis ECG Ancillary Charting I&O Vital Signs Meds Orders Medical Records Home Meds NSG Admission HX Facesheets Links

**edit Patient Demographics** last refresh: 14:39

Pat. Name	Location	Admission Date	MRN	Sex	Age	Allergies	Admitting Diagnosis	Attending
+	PACE	06/01/2010 15:50		M	74 Y	NKA	DM, HX PROSTATE CA, COPD, FAILUR	SELLERS, VERA R MD

**edit Results Viewer** last refresh: 14:39

No patient selected. Please select a patient.

powered by **McKESSON** **HORIZON** WP

Trusted sites

start Kristi Martin - Inb... Microsoft PowerP... HorizonWP Physi...

2:39 PM

# Example con' t...

**Medical Record Viewer - Windows Internet Explorer provided by Centra**

MRN: [REDACTED] Encounter: 1015201808 Admitted: 06/01/2010 03:50 PM  
DOB: [REDACTED] Facility: C Discharged:

File Pages Document Edit View Assignments Deficiencies Help

Content

Documents Bookmarks Patient Encounter

Expand Collapse

My View ANCILLARY CARD-VASC  
NSG PATH RAD Results  
Dictated Reports ENDO LAB VIEW LABS MAMMO  
Centra-Medical Record CRR-Medical Record

ALLEN, RONALD LEE

- ADVANCE DIRECTIVE
  - Page 1
  - Page 2
  - Page 3
  - Page 4
  - Page 5
- POWER OF ATTORNEY
  - Page 1
  - Page 2
  - Page 3
  - Page 4
  - Page 5

# 1018202417 CLB 07/01/2010

# 1015201808 DPA 06/01/2010

- AUTH. FOR RELEASE OF INFO
  - Page 1
- CONSENT FOR PATIENT PHOTOGRAPH
  - Page 1
- CONSULTATION REPORT
- DOCTORS ORDERS
- HISTORY & PHYSICAL
- IMMUNIZATION CONSENTS
- MEDICATION ADMIN. RECORD
- PACE SERVICES
- PAST DIAGNOSIS AND PROCEDURES
- PT. IMMUNIZATION ADMIN ASSESS.
- TUBERCULIN SKIN TEST

# 1014600001 DPA 05/26/2010

- NURSING
  - Nurse Documentation(N 06/02/10)

Group By: Encounter Document

Centra  
Lynchburg, Virginia

**Centra PACE  
Consent For Photograph**

I, \_\_\_\_\_, give my permission to Centra PACE  
for my photograph to be taken for identification and center activities.

[Signature] Participant / Responsible Party Date 5/27/10

Ashley Coleman Witness Date 5/27/10

50% Page 1 of 1

start Kristi Martin - Inb... Microsoft PowerP... HorizonWP Physi... Medical Record VI...

2:47 PM

# QAPI: Prospective

- Functional Status: Tinetti Score at PT Discharge and three months restorative
- Cognitive Ability: Semi Annual MMSE
- Social/Behavioral Functions: Recreation Therapy Goals
- Physiological & Clinical Well Being: Vaccination Rates – PN, Flu, & Tetanus
- Emotional/ Mental Health Status: GDS Assessment and Address if score >5

# QAPI: Prospective



- End of Life Planning: DNR, POA, Five Wishes, etc.
- Nutrition: Weight Loss/Gain

# QAPI: Retrospective

- Death Review
- Level II Events



# QAPI: Retrospective

HorizonWP Physician Portal - Windows Internet Explorer provided by Centra

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Print Mail Print Mail

Address <http://chippor.centrahealth.com/portal/site/hpp/menuitem.e7c71ed892f75b21cbe61894de031bb8/index.jsp#cmdocview1> Go Links

Kimberly Woodley :: November 4, 2010 my portal suspend help logout Site Controls: <Select>

Patient Locator Patient Summary Results Pyramis ECG Ancillary Charting I&O Vital Signs Meds Orders Medical Records Home Meds NSG Admission HX Facesheets Links

Pace CNA HomeCareAssess [Back to Top](#)

11/01/10 14:15	Home Care Note 1	<u>Son called back re: no heat in home this am when driver picked prt up. He states there is heat available but _____ turns knobs and cuts heat off. Prts granddaughter is to check on prt every am to fix oatmeal, change pull ups if needed and check heat</u>
	Home Care Note 2	<u>Prts son states granddaughter sometimes sleeps late and doesnt check on _____ He was instructed to encourage her to get up and check on prt every am. He will notify her of this. Son leaves for work between 3-4am every day.</u>
11/01/10 09:40	Home Care Note 1	<u>Received call from bus driver that there was no heat in prts home this am. Left message for son _____ to _____</u>

Trusted sites

start Kimberly Woodley... Microsoft PowerP... PACE Monthly Rep... HorizonWP Physi...

9:35 AM



# QAPI: Retrospective

- Hospitalizations
- ED Visits – Avoidable???
  - Day of week
  - Time
  - Transport
  - Admitting Diagnosis
  - Hospitalized

# QAPI: Retrospective

Medical Record Viewer - Windows Internet Explorer provided by Centra

MRN: \_\_\_\_\_ Encounter: \_\_\_\_\_ Admitted: 09/10/2010 07:21 AM  
 DOB: \_\_\_\_\_ Facility: C Discharged: 09/10/2010 07:39 AM

File Pages Document Edit View Assignments Deficiencies Help

Content

Documents Bookmarks Patient Encounter

Expand Collapse

My View ANCILLARY CARD-VASC  
 PATH RAD Results  
 ENDO LAB VIEW LABS MAMMO NSG  
 CRR-Medical Record Dictated Reports  
 ✓ Centra-Medical Record

ADVANCE DIRECTIVE  
 DURABLE DO NOT RESUSCITATE OR  
 POWER OF ATTORNEY

# 1025300078 EMR 09/10/2010  
 ABSTRACT SUMMARY REPORT  
 Page 1  
 AMBULANCE RUN SHEET  
 ED EMR  
 PAST DIAGNOSIS AND PROC  
 PATIENT INFORMATION  
 REGISTRATION RECORD  
 Page 1

# 1023500899 TRL 08/20/2010  
 # 1023200883 OPL 08/20/2010  
 # 1022201626 CLB 08/10/2010  
 # 1020900325 TRL 07/21/2010  
 # 1020200052 EMR 07/21/2010  
 # CV10660187382816 OPL 06/08/2010  
 # 1008401403 CLB 03/24/2010  
 # 1007100416 TRL 03/11/2010  
 # 1007000433 EMR 03/11/2010

Group By: Encounter Document

25%

Centra

ACCOUNT NUMBER PATIENT TYPE REGISTRATION RECORD PREVIOUS ADMT DATE MEDICAL RECORD #  
 1025300078 09/10/10 0721 1 09/20/10  
 PATIENT NAME 12/03/25 AGE 84 SEX F RACE W ETHNICITY OTH PATIENT SEC REC #

PATIENT ADDRESS  
 CITY LYNCHBURG STATE VA PATIENT PHONE  
 PATIENT EMPLOYER PATIENT OCCUPATION EMPLOYER PHONE  
 EMPLOYER ADDRESS CITY STATE ZIP

GUARANTOR INFORMATION  
 GUARANTOR NAME L RELATIONSHIP TO PATIENT SELF GUARANTOR PHONE  
 GUARANTOR ADDRESS (HOME) CITY STATE ZIP  
 GUARANTOR EMPLOYER EMPLOYER PHONE  
 EMPLOYER ADDRESS CITY STATE ZIP

INSURANCE INFORMATION  
 RELIANCE COMPANY / GROUP NUMBER 100078685 LEFFEL, LOLA L 12/03/1925  
 TRISTATE BENEFIT PAGE CE 9999

RELATIVE ONE RELATIVE TWO  
 NAME RELATION NAME RELATION  
 ADDRESS (HOME) ADDRESS (WORK)  
 CITY STATE ZIP CITY STATE ZIP  
 WORK PHONE WORK PHONE

Medical Record Copy

1025300078

Page 1 of 1