

By: Lana Fox, President
lanea@clinicnote.com

Introduction:

Lana Fox



Dreams



Reality

Learning Objectives:

60 min session

1. Define & discuss documentation systems
2. Understand regulations & guidelines for compliance
3. Learn best practices for teaching with an EMR

Goals:

To have two takeaways



Action Item



Helpful Information

Let's GO!

Picture current process:

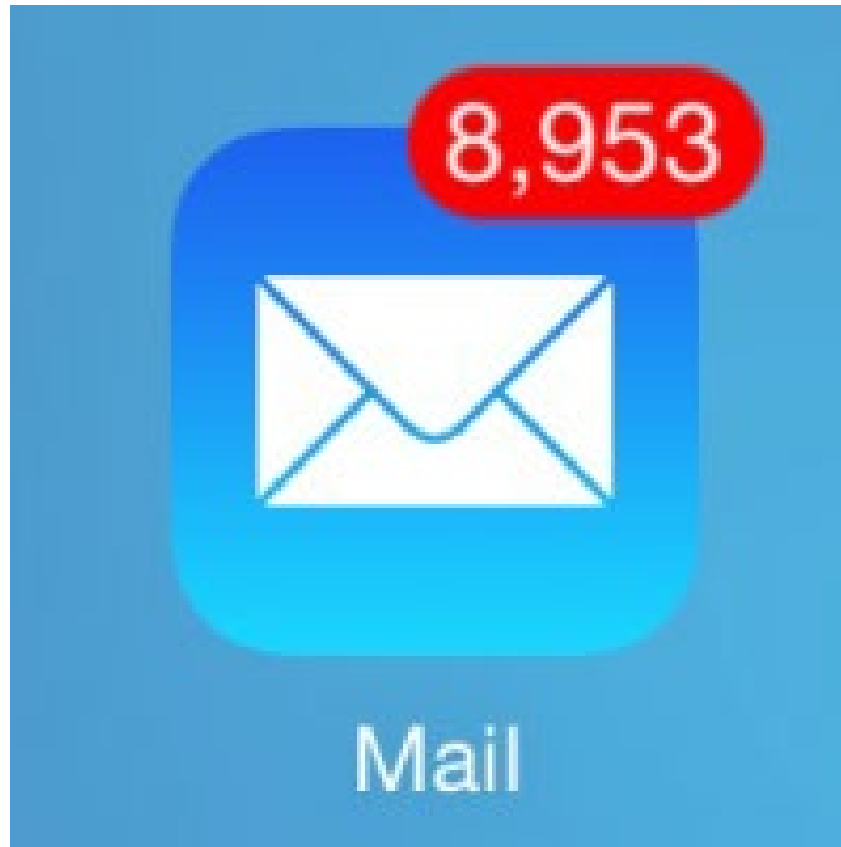
Documentation & communication



Where do you store client information?



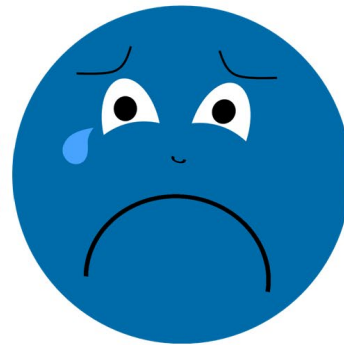
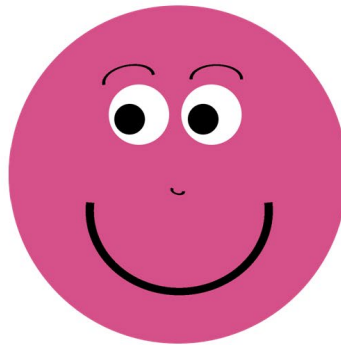
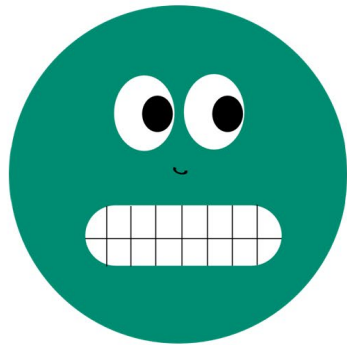
How do students communicate with you?



How do you edit student work?



**What feeling do you get
when you think about your
documentation system?**



Objective #1:

Define and discuss documentation
systems being used

Use pen & paper for documentation



Edit student de-identified notes/reports on Word documents

The screenshot shows the Microsoft Word interface with the document titled "Appetite - Surfeit for the Senses EDIT 4-18-13 - Microsoft Word". The ribbon is set to the "Review" tab, which includes options for "File", "Home", "Insert", "Page Layout", "References", "Mailings", "Review", and "View". The "Review" tab is further divided into "Proofing" (Spelling & Grammar, Translate Language), "Comments" (New Comment), "Tracking" (Track Changes, Show Markup, Reviewing Pane), "Changes" (Accept, Reject, Previous, Next), "Compare" (Compare), and "Protect" (Block Authors, Restrict Editing). The "Next" button in the "Changes" group is circled in red. The document text is shown with various tracked changes, including deletions (marked with red lines) and insertions (marked with blue lines). A red circle highlights the phrase "Alex's head lift" in the first paragraph. On the right side, there are two comments: "Comment [MAD2]: Marked b/c I if/how you changed the money matter might need to tweak here..3" and "Comment [MAD3]: No new knife clothes?".

Appetite - Surfeit for the Senses EDIT 4-18-13 - Microsoft Word

File Home Insert Page Layout References Mailings Review View

Spelling & Grammar Proofing Translate Language Language New Comment Comments Track Changes Tracking Show Markup Reviewing Pane Accept Reject Previous Next Changes Compare Block Authors Restrict Editing Protect

A chirp from his pocket made Alex's head lift. He pulled his phone out, grinning down at the message that his new smartphone display brought to him displayed on his new smart phone.

Wish I could be there too, see you tonight?

Alex tapped a quick *definitely* as his response, pocketed his phone and keys, and grabbed his knife kit on the way out.

Despite his attempts at convincing himself, ~~compared to how his life had been before, that not much had changed, the truth was that~~ everything had changed. Dieter had ended the moratorium on Alex's access to Koch family money, even going so far as to apologize for the oversight, clapping Alex on the back and laughing that he hadn't realized how ~~low-poorly~~ line chefs, even sous chefs, were paid. Alex and Nik were officially dating, and Alex had a place of his own. He hadn't splurged on many extra frills, knowing most of his time would still be sunk into the restaurant, but he'd made sure to get a top of the line television ... and the best bed on the market, long enough for Alex's lanky height, and more than large enough for two).

The empty spaces cried out for Nik's presence, and Alex was looking forward to bringing Nik him over. Nik had seen the place before, of course, but that had been prior to escrow, ~~when the walls were bare and the rooms devoid of anything resembling a home. That morning, the last piece of furniture had been delivered. The last of the furniture had been delivered that morning, and Alex couldn't wait for that night. He'd slept on the couch the night before, waiting for his brand new bed, the bed for which Alex had been eagerly waiting, and he could not wait for Nik to finally see it and banish the last of the emptiness.~~

The past few weeks had been far too busy for the both of them, and Alex begrudged the lack of Nik kisses in his life. He was looking forward to claiming his full share that evening.

they went home, etc, cause right now it's only been 2-3 and I know it takes 1 b/t recording and airing.

Comment [MAD2]: Marked b/c I if/how you changed the money matter might need to tweak here..3

Comment [MAD3]: No new knife clothes?

Upload documents to university
approved file storage



Use an EMR



Electronic Medical Records (EMRs)
were first introduced in 1972

By the 2000's laptops became more common and the need for EMRs became more evident



In 2010 the Patient Protection & Affordable Care Act was signed



In 2019 why doesn't
everyone have an EMR?

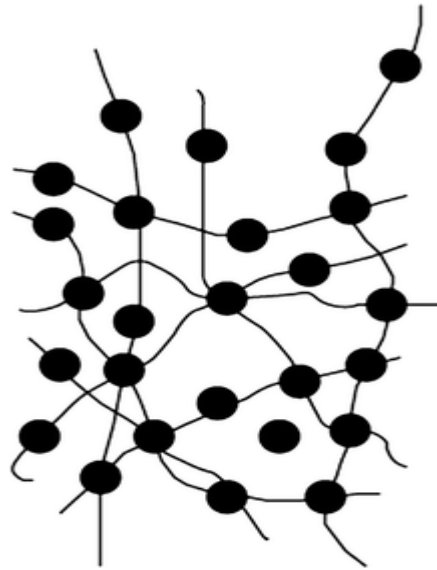


Problem:

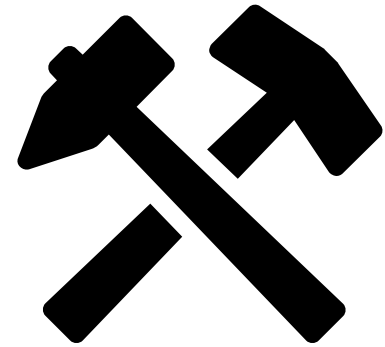
Not specialized enough



Expensive



Complex

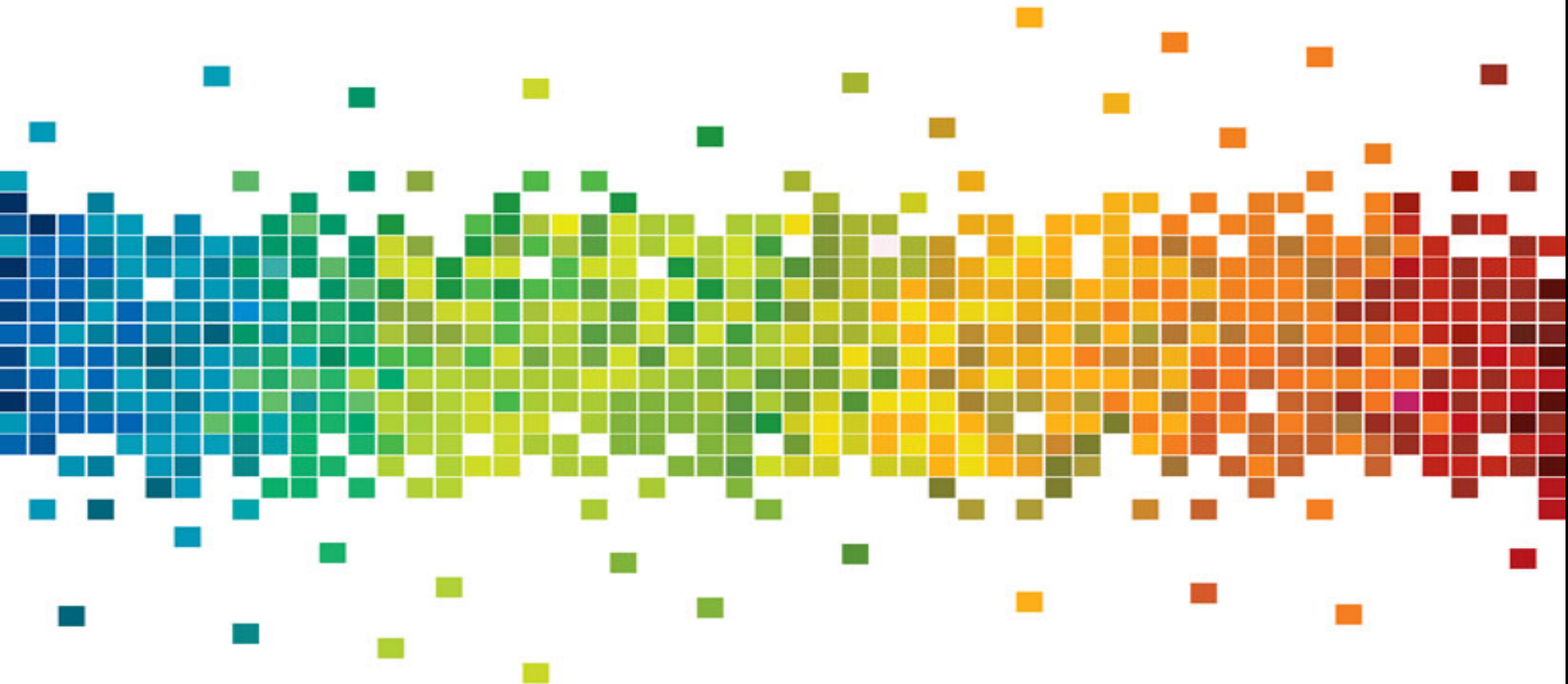


Wrong Tools

Dream: Imagine your EMR



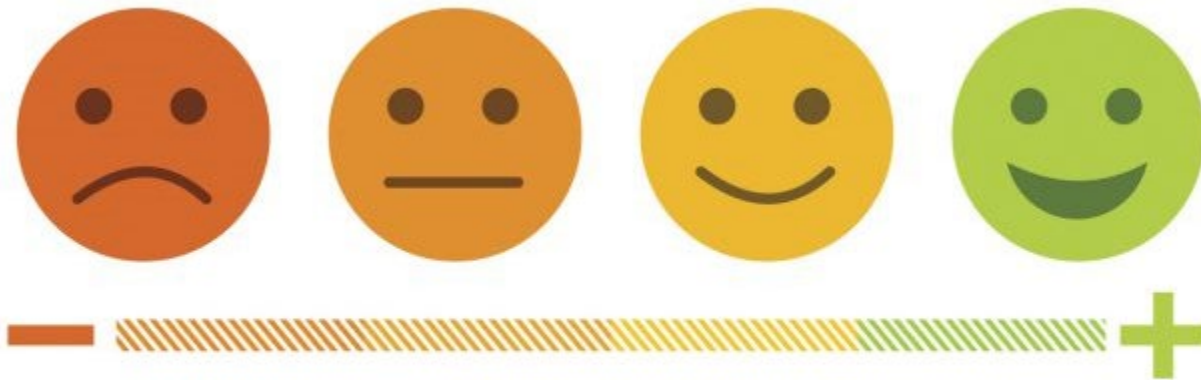
What would it look like?



How would you improve collaboration?



How would it make you feel?



What features would you include?



What would make your
EMR amazing?



My first CAPCSD:

Figure out if there was a need



10-15 people at breakout session

Our first customers:

Helped us to design our current platform



ROCKY MOUNTAIN
UNIVERSITY *of*
HEALTH PROFESSIONS

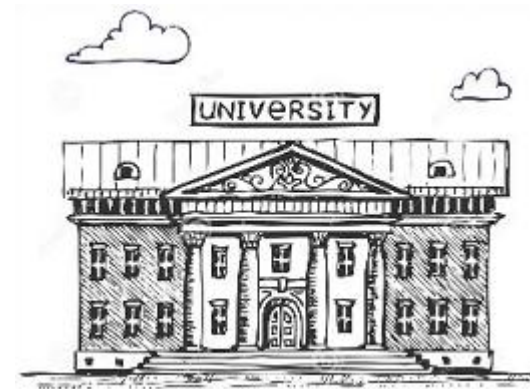
Product:

Transitioned our tool

Private Practice



University



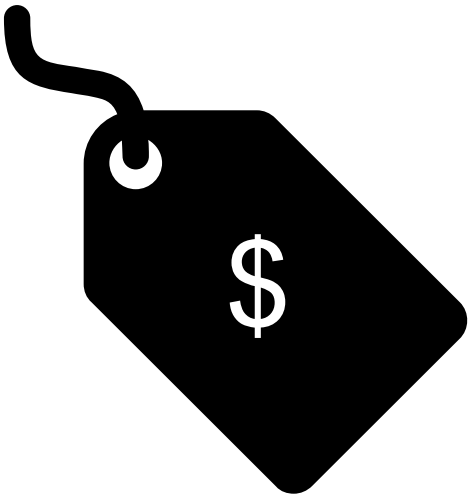
2017-2019:

Demos with 86 universities

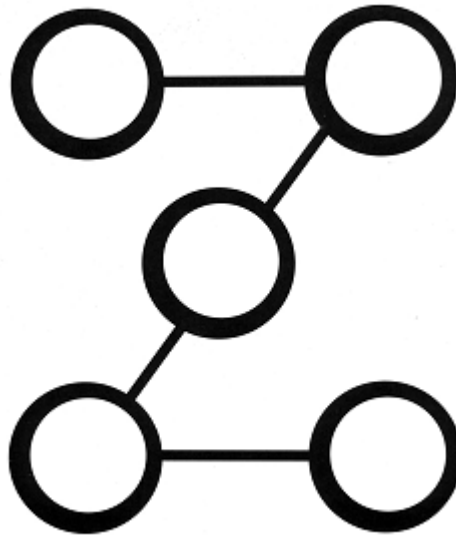


Solution:

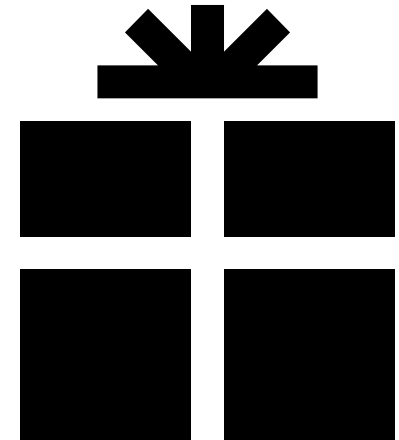
Web platform for clinics



Affordable



Clear Process



Right Tools

Objective #2:

Understand regulations and
guidelines for compliance

Choose an EMR

Make sure to compare apples to apples



\neq



Implementing an EMR:

Define an timeline



1. Faculty on board
2. IT/Security
3. Legal
4. Training

EMRs should be HIPAA
compliant but you still have to
train students & faculty



Four main categories:

Protect protected health information (PHI)



**HIPAA
Security Rule**



**HIPAA
Privacy Rule**



**HIPAA
Enforcement Rule**



**HIPAA Breach
Notification Rule**

Objective #3:

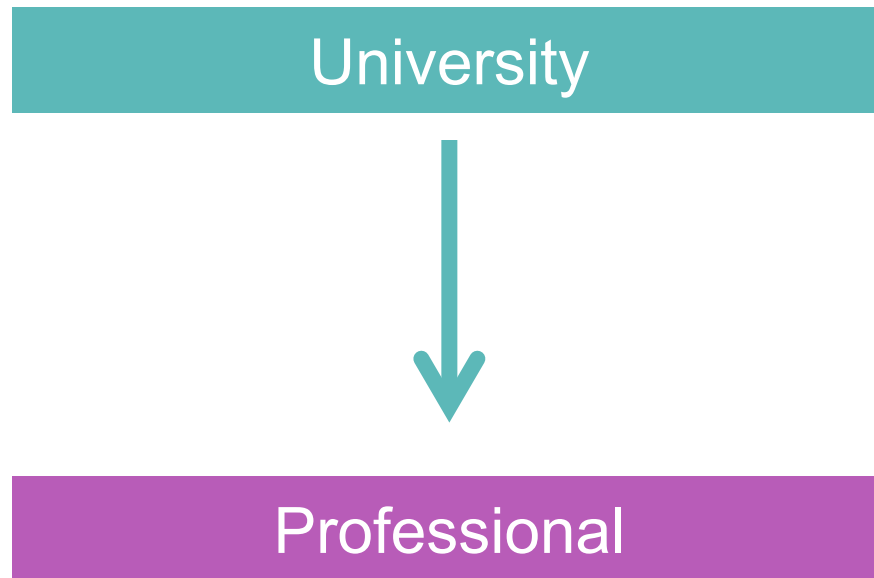
Learn best practices for teaching
with an EMR

Preparing students:
4/5 therapists use EMRs



Preparing students:

Confidence for workplace transition









Preparing students:

Real-world learning



ClinicNote

Simple. Secure. Dependable.

-  SOAP Notes
-  Reports/Evals
-  Scheduling
-  Billing
-  Storage
-  Teaching Tools

Electronic Medical Record for
Speech Pathologists &
Audiologists in
private practice &
university clinics.

www.clinicnote.com

Tools for Teaching:

Think back



Tools for Teaching:

User Restrictions

Edit User

Allowed IPs

Permissions

Select All / Select None

| Permission | Enabled |
|---------------|-------------------------------------|
| Billing | <input type="checkbox"/> |
| Schedule | <input checked="" type="checkbox"/> |
| Notes | <input checked="" type="checkbox"/> |
| Delete | <input type="checkbox"/> |
| Upload Files | <input checked="" type="checkbox"/> |
| Folders | <input checked="" type="checkbox"/> |
| Contact Notes | <input checked="" type="checkbox"/> |

Restrict to Specific Patients

☒

Permitted Patients

Filter Patients

Select All / Select None

| Name | Therapist | Last Seen | Select |
|------------------|------------------|-----------|-------------------------------------|
| Andrews, Amelia | Jon Gilbert | | <input checked="" type="checkbox"/> |
| Baboian, Tristan | Calvin Greenfeld | | <input type="checkbox"/> |
| Green, Maxwell | Isabelle Lehman | | <input checked="" type="checkbox"/> |
| Laino, Lauren | Jon Gilbert | | <input type="checkbox"/> |

Cancel

Update User

Tools for Teaching:

Client Storage

Client List

Add New Client

Search

Date Range

First Name

Last Name

Therapist

Active Only

Inactive Only

Search

Clear

Sort

Name Alphabetical

Last Session

Amelia Andrews

Therapists

Fagen, Mae; Gilbert, Jon; Greenfeld, Calvin; Lehman, Isabelle; Notman, Rachel; Sutton, Natalie; White, Gabrielle

Primary

Jon Gilbert

Address

Street

213 Franklyn Ave

City

Straight City

State

VA

Zip

45392

Phone

343-456-0983

E-mail

amelia@gmail.com

Last Session

03/25/2019

DOB

03/31/2011

Gender

Female

Family Contact Info

Father

Steve Andrews

Phone

324-529-0987

Email

steve.andrews@gmail.com

Notes

Reports

Forms

Files

Contact Notes

Edit Info

Move to Inactive

Tristan Baboian

Evaluation

Allergies: NA

Phone


34534234

Notes


Close


Tools for Teaching:


To-do List

7
Todos


Enter a new Todo...



 3/29/2019, SOAP Note, Amelia Andrews




☐




3/26/2019, Base template, Amelia Andrews

☐




3/25/2019, SOAP Note, Ben Ruskin

☐




3/25/2019, SOAP Note, Amelia Andrews

☐




2/5/2019, Adult Intake Form, Amelia Andrews

☐




1/18/2019, Speech and Language Initial Evaluation, Amelia Andrews

☐




1/18/2019, Base template, Amelia Andrews

☐

Complete All Todos 

Save & Create/Update Claim

 View PDF

✓ Save Note

↻ Submit

 E-Sign Your Note ×

Draw your signature using your mouse or touch screen.



Name of Signer

Title

Use Saved Signature

Reset Signature

Cancel

✓ Accept Signature

Tools for Teaching:

Add real Dx & CPT codes

Diagnosis and CPT [⌵ Collapse All](#)

| | Code | Description | | |
|-----------|------------------------------------|--|----------------------|--------------------------------|
| Diagnosis | F48.2 | Pseudobulbar affect | | |
| CPT Code | 92626 | Evaluation of auditory rehabilitation status, first hour | MOD | Units |
| | | Draft - Work in Progress | <input type="text"/> | <input type="text" value="1"/> |
| | + Add New CPT Code | | | |

| | | | | |
|-----------|------------------------------------|--------------------------------|----------------------|--------------------------------|
| Diagnosis | F70 | Mild intellectual disabilities | | |
| CPT Code | G8983 | Body pos D/C status | MOD | Units |
| | | Draft - Work in Progress | <input type="text"/> | <input type="text" value="1"/> |
| | + Add New CPT Code | | | |

[+ Add New Diagnosis](#)

Tools for Teaching:

Track changes & edits

Edit Note

Show Past Notes

Hide History/Comments

Show Snippets

Track Changes

History

Comments

+ Add Comment

Subjective

L.F 03/30/19 12:53am

Highlighted "today. ": Write in a piece of information related to why the patient was late.

+ More

L.F 03/30/19 12:54am

Made Changes: Added "She seemed distracted during her session and very tired."

- Less

Reject Show Accept

☐ Completed by Student

☐ Completed by Supervisor

Reply

Combined Objective Comment

L.F 03/30/19 12:55am

+ Add New Long Term Goal

Previous Plan

Subjective

Amelia was late today. She seemed distracted during her session and very tired.

1

Objective

+ Add New Quantitative Data Field

☒ Combine Objective Comments

1) **Data Field #1:**Will sequence a story or activity that includes 3 parts

New Value

Previous Value 0.19

On 03/27/2019

Enter formulas in New Value by preceding with =

Chart

2) **Data Field #2:**The student will retell a story with visual cues (e.g. sequence cards) including problem and solution.

New Value

Previous Value 0.82

On 01/31/2019

Enter formulas in New Value by preceding with =

Chart

3) **Data Field #3:**Will state a sequence of event/procedure.

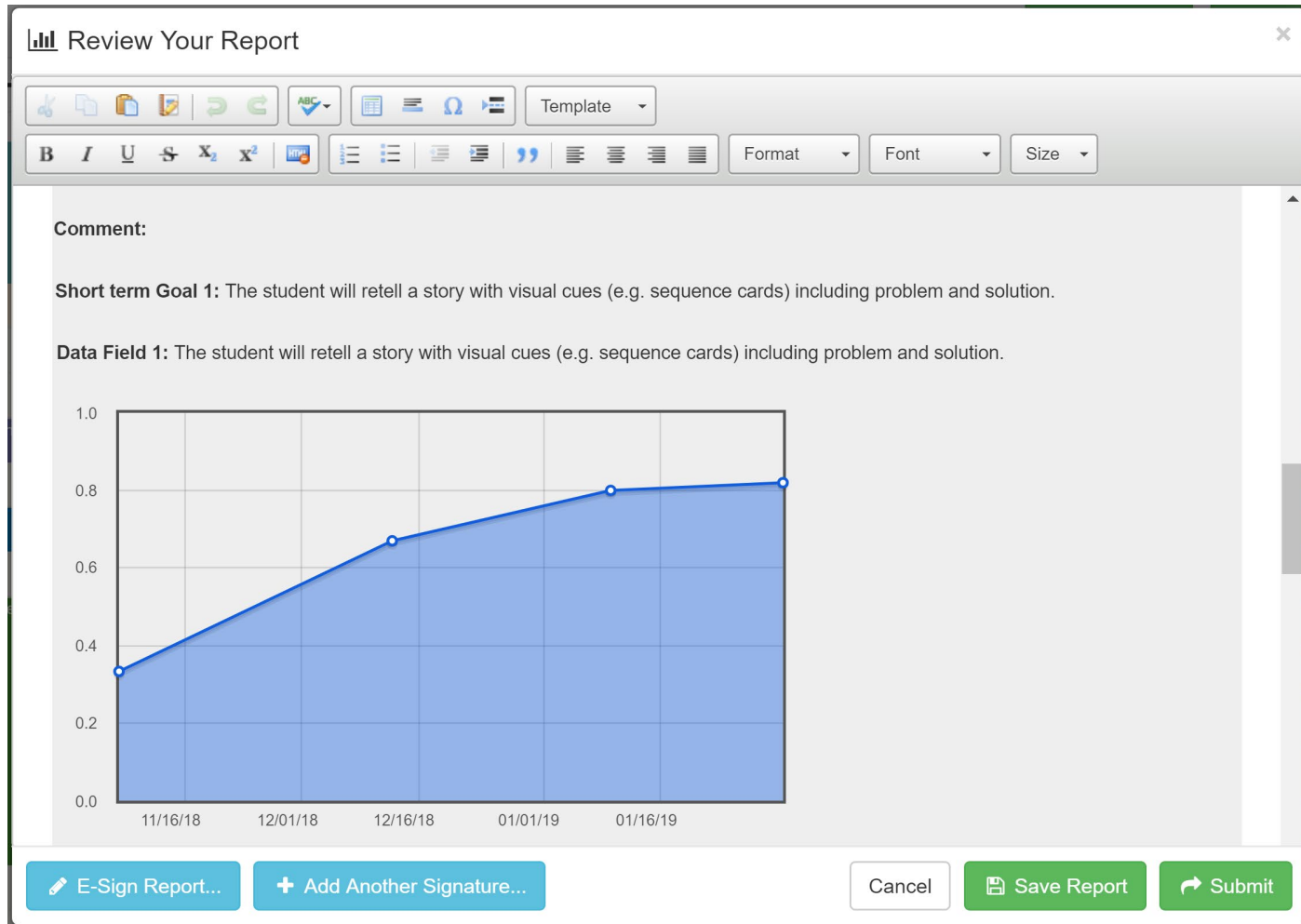
Save & Create/Update Claim

View PDF

Save Note

Submit

Tools for Teaching: Customized Reports



Tools for Teaching:

Platform for all clinical documentation

The screenshot displays the staging.clinicnote.com/Clinician# interface. The top navigation bar includes a browser address bar, navigation icons, and user links for 'Apps', 'Sign In', and 'Sign In - Gust'. The main header shows the user 'Lana Fox' and three primary action buttons: 'New Client', 'New Note', and 'Contact Notes'. The interface is divided into several functional areas:

- Calendar (Left):** A teal header indicates '5 Appointments Today' for 'Fri 3/29'. The calendar grid shows appointments for 8:00 AM, 9:00 AM, 10:00 AM, 11:00 AM, 12:00 PM, 1:00 PM, 2:00 PM, 3:00 PM, 4:00 PM, 5:00 PM, and 6:00 PM. Appointments are color-coded and include names like Maxwell G., Ben R., Kathleen F., Jon G., Caroline S., Tristan B., Natalie S., and Mae F., Lana F., Kathleen F., Isabelle L., Rachel N., Natalie S.
- Todos (Top Middle):** A teal header shows '2 Todos'. It includes a text input for 'Enter a new Todo...', a list of tasks with checkboxes (e.g., '3/29/2019, SOAP Note, Amelia Andrews'), and a 'Complete All Todos' button.
- Clients (Top Right):** A blue header shows a group icon and 'Clients'. It includes a 'View Client List' button.
- Reporting (Middle Right):** An orange header shows a bar chart icon and 'Reporting'. It includes a 'Generate a Report' button.
- Goals (Bottom Middle):** An orange header shows a target icon and 'Goals'. It includes a 'Manage Client Goals' button.
- File Vault (Bottom Right):** A purple header shows a document icon and 'File Vault'. It includes a 'View Facility Files' button.
- Forms (Bottom Middle):** A purple header shows a list icon and '3 Forms'. It includes a 'Start a Form' button.
- Billing (Bottom Right):** A green header shows a dollar sign icon and 'Billing'. It includes an 'Open Billing Module' button.
- Snippet Editor (Bottom Middle):** A green header shows a scissors icon and 'Snippet Editor'. It includes a 'View Snippets' button.
- Admin (Bottom Right):** A teal header shows a shield icon and 'Admin'. It includes a 'View Admin Panel' button.



Who has the first question?

Lana Fox, President
lane@clinicnote.com
319-430-2656

Goals:

What were your two takeaways?



Action Item



Helpful Information

Visit us in booth 34!



Lana Fox, President

lane@clinicnote.com

319-430-2656

Works Cited

<https://dashboard.healthit.gov/quickstats/quickstats.php>

<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5171496/>

<https://www.healthcarelaw-blog.com/the-electronic-medical-records-emr-mandate/>

<https://www.truevault.com/blog/how-do-i-become-hipaa-compliant.html>



EMR Implementation Timeline

Blue = EMR's responsibility Purple = University responsibility

10-30 Days

- Verbal “Yes, we would like to use EMR.”
 - Ideal semester start date: Summer, Fall or Spring
 - Split by semester and cohort
 - # of Students
 - # of Supervisors/Instructors
 - # of Office Personnel
 - Name & Address to use on contract
- IT Introduction: EMR sends packet of security documentation.
- Legal Introduction: EMR sends a preliminary contract for review.

30-60 Days

- Send completed security document back to university.
- Legal department: Send edits/changes to the contract.
- Send edited contract to Lawyer for review. (typically this is exchanged 1-2 times)
- University starts compiling evaluations, progress reports, lesson plans, etc. in Word document format or PDF.

2-5 Days

- Final Legal document is signed by EMR and sent to University.
- University signs contract & sends EMR a copy.
- EMR creates university dashboard & starts making templates for evals, reports, lesson plans, etc.

Schedule Training

- Attend a 1 hour faculty training online & start using dashboard.
- Schedule online student training for the next semester.