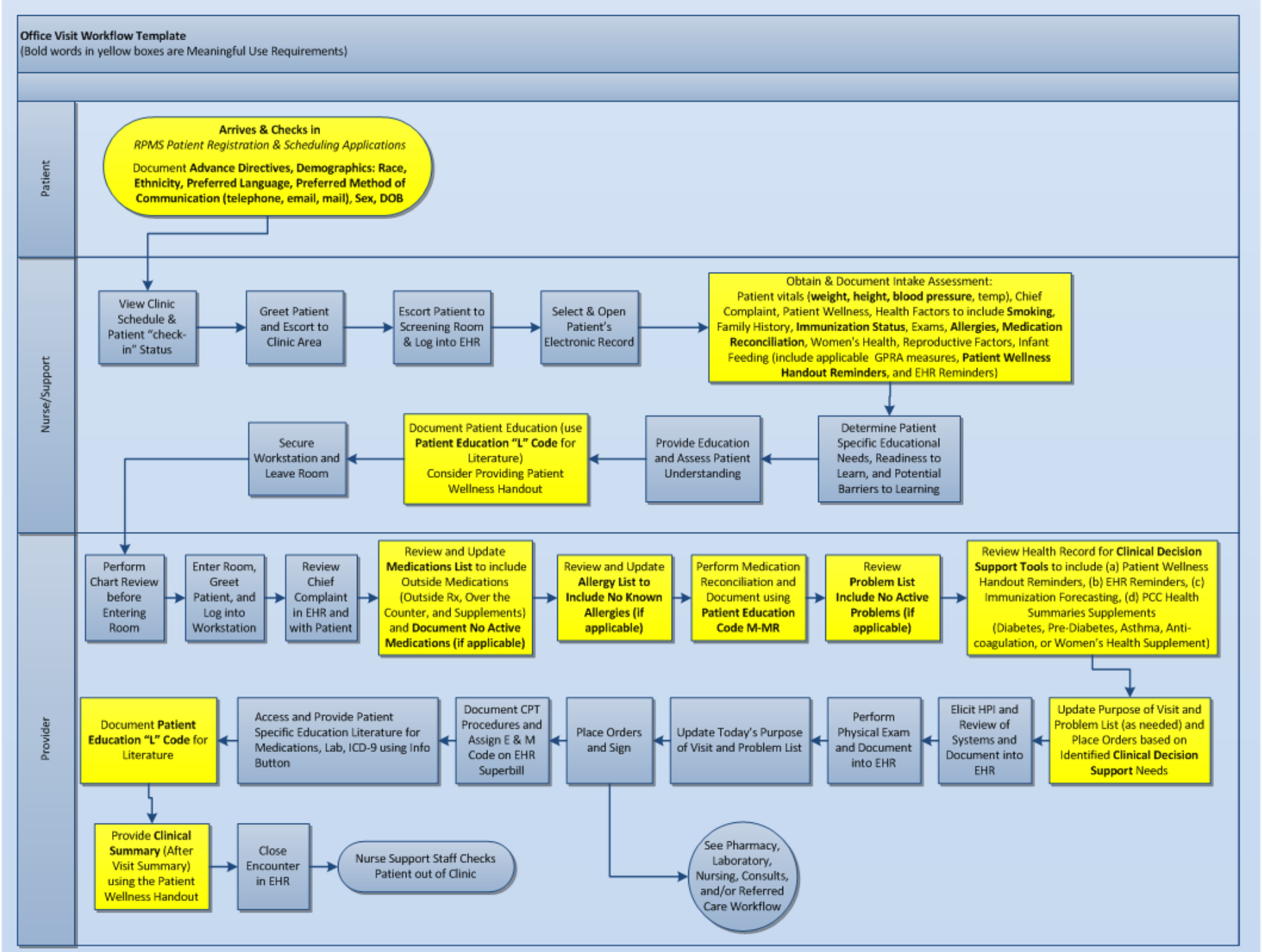
Office Visit Workflow Template
(Bold words in yellow boxes are Meaningful Use Requirements)
Patient
Nurse/Support
Provider
Arrives & Checks in
RPMS Patient Registration & Scheduling Applications
Document Advance Directives, Demographics: Race, Ethnicity, Preferred Language, Preferred Method of Communication (telephone, email, mail), Sex, DOB
View Clinic Schedule & Patient "check-in" Status
Greet Patient and Escort to Clinic Area
Escort Patient to Screening Room & Log into EHR
Select & Open Patient's Electronic Record
Obtain & Document Intake Assessment: Patient vitals (weight, height, blood pressure, temp), Chief Complaint, Patient Wellness, Health Factors to include Smoking, Family History, Immunization Status, Exams, Allergies, Medication Reconciliation, Women's Health, Reproductive Factors, Infant Feeding (include applicable GPRA measures, Patient Wellness Handout Reminders, and EHR Reminders)
Determine Patient Specific Educational Needs, Readiness to Learn, and Potential Barriers to Learning
Provide Education and Assess Patient Understanding
Document Patient Education (use Patient Education "L" Code for Literature) Consider Providing Patient Wellness Handout
Secure Workstation and Leave Room
Perform Chart Review before Entering Room
Enter Room, Greet Patient, and Log into Workstation
Review Chief Complaint in EHR and with Patient
Review and Update Medications List to include Outside Medications (Outside Rx, Over the Counter, and Supplements) and Document No Active Medications (if applicable)
Review and Update Allergy List to Include No Known Allergies (if applicable)
Perform Medication Reconciliation and Document using Patient Education Code M-MR
Review Problem List Include No Active Problems (if applicable)
Review Health Record for Clinical Decision Support Tools to include (a) Patient Wellness Handout Reminders, (b) EHR Reminders, (c) Immunization Forecasting, (d) PCC Health Summaries Supplements (Diabetes, Pre-Diabetes, Asthma, Anti-coagulation, or Women's Health Supplement)
Update Purpose of Visit and Problem List (as needed) and Place Orders based on Identified Clinical Decision Support Needs
Elicit HPI and Review of Systems and Document into EHR
Perform Physical Exam and Document into EHR
Update Today's Purpose of Visit and Problem List
Place Orders and Sign
Document CPT Procedures and Assign E & M Code on EHR Superbill
Access and Provide Patient Specific Education Literature for Medications, Lab, ICD-9 using Info Button
Document Patient Education "L" Code for Literature
Provide Clinical Summary (After Visit Summary) using the Patient Wellness Handout
Close Encounter in EHR
Nurse Support Staff Checks Patient out of Clinic
See Pharmacy, Laboratory, Nursing, Consults, and/or Referred Care Workflow