VERSION 2.0 DECEMBER 17, 2018

HCHB: Guide to the IDG Console



Change Control

Version	Changed By	Approved By	Date	Change Comments
1.0	Shelly Blunk		01/01/2018	New
1.0	Tracy L. Constantine		05/01/2018	Review/Update for consistency, grammar, spelling, etc.
1.0	Shelly Blunk	Shelly Blunk	05/03/2018	Approved for publishing
2.0	Tracy L. Constantine		12/17/2018	Updated with DCOS Review notes, version #, flow, etc.
2.0	Shelly Blunk		02/10/2019	Approved for Publishing

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Intended Audience

This guide is intended for the following users or any colleague who may document on the *Plan of Care Update (POCU)* from the *R2/Office* application:

- S Clinical Director
- Solution Coordinator
- **O** Physician

The Basics

The HCHB IDG Console is used to record the team discussion that occurs at the Interdisciplinary Group (IDG) Meeting and generate a Plan of Care Update (POCU) for each patient. This document outlines the path to a successful IDG Process using HCHB, following the key principles in the diagram below:



Define the Details

When preparing to use HCHB for the IDG process, it's important to understand key details of how the system is designed. The section below defines the *IDG Roles* and describes the equipment needed to conduct the meeting.

IDG Roles

Core members of the *IDG Team* include the *Medical Director, Registered Nurse (RN), Social Worker (SW)* and *Chaplain/Spiritual Counselor*. These roles are necessary for a complete *Plan of Care Review*.

- Each core team member completes an *IDG Note* in the *Plan of Care Update (POCU)*, ideally from *PointCare*, and signs the note. This is reviewed in more detail later in this manual.
- The *Medical Director* is the last core team member to complete a note and unless the notes and signatures for the *RN, SW* and *Chaplain/Spiritual Counselor* are completed, the *Medical Director* can't complete and sign his/her note.

Non-core members of the *IDG Team* including the *Volunteer Coordinator*, *Hospice Aide*, and *Bereavement Coordinator* can be added to a patient's team assignment and are able to document on the *Plan of Care Update (POCU)*. Ensuring a connection between all of the disciplines involved in the patient's care plan and their notes regarding the patient's status creates a comprehensive and patient-centered plan.

Non-clinical roles in the system include the *Meeting Facilitator* and the *Scribe*. Both roles are integral to successfully managing an efficient and thorough *IDG Meeting*. Neither role is required by the system but consideration should be given to implementing these roles in the program.

- Meeting Facilitator
 - Their primary responsibility is to keep the flow of the meeting moving forward by displaying the information for the patient being discussed
 - Ideally, this should be performed by the *DCS* who is focused on the aspects of the clinical record to be reviewed by the *Medical Director* such as medications, recertification notes, and attachments, but could be any team member
- Scribe
 - Their primary responsibility is to capture the discussion of the *IDG* as the patient's *Plan of Care* is reviewed. While each *IDG Member* enters an individual note, the *Scribe's* role is to collect the essence of the discussion about the patient by the team.
 - This could be performed by any member of the team with consideration for ability to type, navigate the system, and familiarity with medical terminology.

Equipment

Ideally, three laptops and a projector or big screen monitor are needed to conduct the *IDG Meeting*. A laptop is provided for the *Medical Director*, the *Scribe* and a *Meeting Facilitator*. The *Facilitator* connects to the projector or screen. While each program may be set up differently, it's important to have the necessary equipment and arrangements to support an effective *IDG Meeting* to use the system as designed.

Fundamentals of the IDG Console

The IDG Console is located in the Clinical Manager of the HCHB application:



The filters on the left side of the screen, determine the content viewable in the grid to the right of it:

DG Console - SOLAMOR TRAI	NING 2							
Search		_						
Search By:			Drag a column header here to group by that column.					
Patient Name		<u> </u>	Patient Name	• ⊽ ₽ IDG Date	⊽ -¤ Reason	⊽ ⇔ Com		
Search For:			EXAMPLE, OPT	01/06/2018	RECERT ORD	ERDUE		
EXAM		×						
Common Filters		_						
Service Lines:								
HOSPICE		÷						
Branches:								
(ALL)	Q	-						
Teams:								
(ALL)	Q	•						
IDG Console Filters								
IDG Date From: ID	G Date To:							
11/11/2017 🗰 03	11/2018							
Meeting Reasons:		_						
(ALL)		-						
Meeting Statuses:		_						
IN PROGRESS OPEN		-						
Patients:		_						
(ALL)		Q						
Medical Director :		_						
		Q,						

Each line in the *IDG Console* represents a patient due for *IDG Discussion* and *Plan of Care Update (POCU)*. Specifics of the meeting are also included in the screen. The *Meeting Reasons* and *Meeting Statuses* fields are key drivers in the *IDG Process*. These items are defined in the section below.

Patient Name 🔺 🖓 🕂 IDG [Date 7 1 Reason	⊽ -⊐ Completed Date	⊽ +⊐ Voided	⊽ P Status	
EXAMPLE, OPT 01/06/	2018 RECERT O	RDER DUE	N	OPEN	
Meeting Reasons					
New Admission	Created by the adm This meeting shows	ission process. During <i>POC</i> on the date indicated at th	<i>Workflow Re</i> v at time.	view, the Clinic	cal D
Recurring	Created on a recurri available in the cons	ing cycle, based on the first sole 7 days before the due o	<i>IDG Meeting</i> date.	set. This meet	ting
Rescheduled Recurring	A recurring meeting moved from its original due date.				
Recert Order Due	Created 15 days before the patient is due for recertification.				
PRN	Created as needed.				
Death	Created when a dea	Created when a death is processed.			
Discharge	Created when a disc	charge is processed.			
Meeting Statuses					
Open	The meeting is avail	able in the console, but no	team membe	ers have signed	ł.
In-Progress	At least one team m	ember has signed.			
Completed	All required team m	embers (RN, SW, CH, MD) I	nave signed.		
Voided	The meeting is not r	needed.			

<< end of section >>

Preparation

Assigning IDG Members

IDG Members are initially assigned in the Review Hospice SOC Evaluation Documentation stage and can be updated in two ways:

- 1. From the *Clinical Input* screen (to update the members):
 - a. Right-click on the *Patient's name.*
 - b. Click on Patient Actions.
 - c. Click on Assign IDG Members to Patient.



d. *Move* members from left to right.

Available Workers:	Assigned Workers:
MEDICAL DIRECTOR - BROWER, KIM	BEREAVEMENT COORDINATOR - DICHIARA, RAL
MEDICAL DIRECTOR - COLEMAN, LABARON	PASTOR/COUNSELOR - FORMAN, ROBERT
MEDICAL DIRECTOR - CONSTANTINE, TRAC	PASTOR/COUNSELOR - TIRADO, LUZ CELENIAR
MEDICAL DIRECTOR - CUMMINGS, VIRGINIA	REGISTERED NURSE - BOKANOVICH, ROBERT
MEDICAL DIRECTOR - FONSECA, RAQUEL	SOCIAL WORKER - BOGIGIAN, KATHERINE
MEDICAL DIRECTOR - GRAHAM, SCOTT	SOCIAL WORKER - MCLAUGHLIN, SARAH
MEDICAL DIRECTOR - HCHB, EDWTEST	SOCIAL WORKER - MOWATT, SHANELL N
MEDICAL DIRECTOR - MEDICAL, DIRECTOR	VOLUNTEER COORDINATOR - THERRIEN, AMAN
MEDICAL DIRECTOR - PENA, KARI	
MEDICAL DIRECTOR - SOBTI, SANDEEP	
MEDICAL DIRECTOR - STONE, DAVID	
PASTOR/COUNSELOR - ARCHER, CAROLYN X	
DARTOD/COUNCELOD DUUNIZ OUCLUY	

- e. Click the *Save & Close* button.
- 2. From the *IDG Console* (Preferred):
 - a. *Highlight* the upcoming *IDG meeting* for the patient and click on the *Assign IDG Members* button at the bottom of the screen.

	08/25/2017	Ν	OPEN
4			
View Details	Add IDG Member Detail +	Add PRN IDG +	Add Recurr
F2F Console	Assign IDG Members to Patient	Review/Approve	Unsigned Orders

b. In this screen there are two tabs, *Current Meetings* and *Future Meetings*. If this is a permanent change update both tabs. If this is a modification to the current meeting only, update only the first tab. For example, if a colleague is on vacation and another colleague of the same discipline covers this week's meeting notes, the change is only made in the *This Meeting Only* tab.

Assign IDG Members to Patient for - SOLAMOR TRAINING 2	×
<u> </u>	<u>~</u>
This Meeting Only	<u>Euture Meetings</u>

c. Move members from left to right.



d. Click the *Save & Close* button.

Declined Services

In the event *Social Worker* or *Chaplain/Spiritual* services are declined, this can be indicated at the patient level from the *Team Assignment* screen referenced above. This action relieves the colleague from signing the *Plan of Care Update (POCU)* at each *IDG*.



When a discipline is marked as declined, this is indicated in the *Current Meeting Summary* section of the *Plan of Care Update*. A template will be inserted in the details section as shown below.

IDG Team Members	Team Member Name	Details
MEDICAL DIRECTOR		
PASTOR/COUNSELOR	SERVICES DECLINED	THIS DISCIPLINE'S SERVICES HAVE BEEN OFFERED BUT HAVE BEEN DECLINED AT THIS TIME BY THE PATIENT/CAREGIVER
REGISTERED NURSE		
SOCIAL WORKER		
mportant		

<u>F</u> uture Meetings	1		
e changes have been saved.			
emove check from box			
Declined Services:			
Pastor/Counselor			
Social Worker			
Assigned Workers:			
HOME HEALTH AIDE - DORRIS, KENNETH			
	e changes have been saved. emove check from box Declined Services: Pastor/Counselor Social Worker Assigned Workers: HOME HEALTH AIDE - DORRIS, KENNETH	e changes have been saved. emove check from box Declined Services: Pastor/Counselor Social Worker Assigned Workers: HOME HEALTH AIDE - DORRIS, KENNETH	e changes have been saved. emove check from box Declined Services: Social Worker Assigned Workers: HOME HEALTH ADE - DORRIS, KENNETH

The following validation messages are presented if the actions are not performed in the correct order. The intention of the validation is to prevent a discrepancy where the discipline is both assigned in the team and marked as declined.

Assign ID	G Member to Patient
	PASTOR/COUNSELOR roles are currently assigned. Please remove any assigned PASTOR/COUNSELOR roles in order to mark the service as Dedined.
Assign I	DG Member to Patient
	SOCIAL WORKER roles are currently assigned. Please remove any assigned Social Worker roles in order to mark the service as Declined.
	ок

Setting the Agenda

To prepare for the meeting, it's important to set the agenda and ensure all patients are available for documentation in the *IDG Console* on the correct date. Recurring meeting types show up in the console seven (7) days before *IDG*. This preparation should be completed as soon as possible after the meetings are available. Sometimes a change in date is needed due to a holiday, errors, etc. and the sections below outline the process of changing the *IDG Date* when necessary. Ultimately, the goal is to make sure all *IDGs* are set for the same date so you can run your agenda for a single date and have everything line up. It's imperative to validate the patient list in the *IDG Console* against the current census to ensure all patients are included in the *IDG Discussion*, as appropriate.

Edit the IDG Meeting Date

4.

To edit the meeting date from the *IDG Console*:

- 1. Right-click on the *Patient name*.
 - 2. Choose *Edit Date*.

Patient Name		₽₽	IDG Date	• ⊽ +¤ Co
right-click on	pati	ent	12/05/2017	
	Q	Vie	w Details	
	+	Add	IDG Memb	ər
	+	Add	PRN IDG	
	+	Add	Recuring IE)G
	/	Edit	Date	

3. Choose a new date using the *Calendar*.

Click the Save	& <i>Close</i> button.					
Edit IDG Me	Edit IDG Meeting Date					
Select the Date of the IDG Meeting Date: 12/04/2017	IDG Meeting					
	Save & Close 💾	Cancel Ø				

5. When a Recurring meeting type is rescheduled, the following message displays. If this is a change for only this meeting select this first option. If you need to reset the fourteen (14) day cycle, choose the second option.



Add Recurring

The option to add a *Recurring Meeting* is also available. Most commonly this function is only needed when a patient will be discussed at *IDG* on back to back weeks. At times, this is necessary to reset the cycle by using this option.

- 1. *Locate a past IDG* for the patient.
- 2. *Highlight* with single-click.
- 3. Then choose Add Recurring.

		5						
Patient Name	- ⊽₽	IDG Date	⊽⊀	- Co	mpleted Date	⊽₽∖	/oided	⊽ ⇔ Sta
EXAMPLE, OPT		01/06/2018			View Deteile	1	N	OPE
				Ğ,	View Details			
				1	Add IDG Wemb	er		
				±	Add PRN IDG			
				÷	Add Recuring ID)G		
	_			/	Edit Data			
Fill in the Da	te.							

4. Fill in the **Date**.



PRN Meetings

In the event a *PRN Meeting* is needed, this meeting type can also be added:

- 1. Right-click on the *Patient's name*.
- 2. Click on Add PRN IDG.



3. Choose a new date using the Calendar.

Add PRN Meeting Select the Date of the IDG Meeting IDG Meeting Date: 11/21/2017,	
Save & Close 🔛	Cancel Ø

- 4. Click the Save & Close button.
- 5. If a confirmation message appears, choose Yes. Create New IDG Meeting



Void Meeting

А ie i

As noted previously, meeting types are generated based on the event. If more than one event occurs in the IDG Period, it may be necessary to Void a Meeting. For example, if the patient is up for Recert, Recurring and Recert Order Due Meeting types will be present in the console. The Recurring Meeting can be voided. This ensures the patient is identified as a Recert at the upcoming meeting and that the correct template is available for the documentation.

-	Tip	for Quality				
	Voiding a	a meeting is only ger	nerally used	when the Re	cert and	Recurr
A meeti	ng is void	ed by Right-clicki	ng and sel	ecting Void	IDG M	eeting
ie ^ ⊽‡	IDG Date	⊽ -¤ Completed Date	⊽ +¤ Voided	⊽ I Status		tor?
i	02/28/2018	Right click for menu	Ν	OPEN	N	
	01/31/2018	Q	View Details			
N 	02/14/2018		Add IDG Memb	ber	-	
ч	02/25/2018	±	Add PRN IDG Add Recurina II	DG		
ч	01/10/2018		Edit Date		-	
	01/10/2018		Patient Progres	ss Summary Repo	ort	
	01/10/2010	@	POC Update			
, ROCKY	02/08/2018		Period Summa	ry		
, ROCKY	02/22/2018	Θ	Void IDG Meeti	ing 💥		
ROCKY	02/14/2018		Unvoid IDG Me	eting	-	

In the event a meeting is *Voided in Error*, the void can be reversed from the same menu by selecting the **Unvoid IDG Meeting** option.

Patient Name 🔹 🔍 4	IDG Date	V P Completed	Date		v + Status	
ABBZZZOTT. JOHNATHAN	01/03/2018	Right click for menu		Y	VOIDED	
ADZZZAMS, DEVIN R.	01/12/2018	Q	View	Details		
ADZZZAMS, LORETTA J.	01/17/2018	+	Add I	DG Member		
AGUZZZILAR, CASSIE S.	01/17/2018	±	Add F	Recuring IDG		
ALEXZZZANDER, ELAINE M.	01/09/2018		Edit D)ate		
ALEXZZZANDER, ELAINE M.	01/23/2018		Patie	nt Progress Sum Update	mary Report	
ARELZZZLANO, EDITH	01/11/2018		Recei	rt Summary		
ARMSZZZTRONG, CHARLES G.	01/09/2018	@	Perio Void I	d Summary DG Meeting		
ATKZZZINS, ALLAN I.	01/17/2018		Unvoi	id IDG Meeting	1	1
ATKZZZINS,	01/04/2018	D	Accia	n IDG Mombors	to Patient	

<< end of section >>

Documentation

A *Registered Nurse, Chaplain/Spiritual Counselor,* and a *Social Worker* are required to sign the *Plan of Care Update (POCU)* in advance of the *Hospice Physician*. Other disciplines including *Volunteer Coordinator, Bereavement Coordinator,* and *Aide,* can be included in the patient's team assignment, but are not required to complete the process.



It's critical that notes are completed and signed before the meeting starts. The physician is unable to sign the Plan of Care Update (POCU) without the required disciplines signatures.

Enter IDG Notes on the Plan of Care Update

Ideally, field colleagues will document *IDG Notes* on the *Plan of Care Updates (POCU)* via the *PointCare* application. Instructions for this process can be found in the *PointCare* manuals.



A colleague must be assigned as an IDG Member to be able to sign via the PointCare application.

Colleagues using the *R2/Office* application can use the *IDG Console*:

1. Begin by *Filtering* the console for the *Date, Team* (if applicable) and meeting statuses of In *Progress* and *Open*.

Branches:	
(ALL)	Q -
Teams: (ALL)	Q -
IDG Console Filter	•
IDG Date From: 01/01/2018	IDG Date To: 01/01/2018
Meeting Reasons:	:
(ALL)	•
Meeting Statuses: IN PROGRESS OF	: PEN v
Patients:	
(ALL)	Q,
Medical Director :	Q

- 2. Double-click the *Patient Meeting*, to open to *Team Assignment*.
- 3. Select your *Name* with a single click.
- 4. Edit/Sign Details.



5. Depending on your discipline and the meeting type, a template may populate the *Note Textbox*. The purpose of the template is to guide the content of the documentation.

Meeting Date:	IDG Member:
SATURDAY, 01/06/2018	BLUNK, SHELLY
Meeting Type:	IDG Role:
RECERT ORDER DUE	REGISTERED NURSE
Details: BRIEF SUMMARY OF CHANGES/DECLINE SIN	ICE LAST RECERTIFICATION PERIOD THAT SUPPORTS TERMINAL TRAJECTORY. TYPE YOUR NOTE
BRIEF SUMMARY OF PROGRESS TOWARD O	OALS OF CARE: TYPE YOUR NOTE HERE

6. If the note is complete, click Sign Details - OR -

Sian	Details

7. To save your progress and return to the note later, *Save & Close*.



IDG Meeting Details		
Are you certain you are	eady to sign the meeting details indicating completion?	
	Yes No	

Covering for an Assigned Team Member

If covering for an assigned team member, colleagues with the same discipline will find the option to Assign Details to Me when rightclicking on the original assigned name.

- 1. Right-click on the *Original Assigned Person's Name*.
- 2. Choose Assign Meeting Detail to Me.

IDG Role	♥ Worker	7	Status	7	Start Date	7	Signed Date	7	Voided Dat
BEREAVEMENT COORDINATOR	R Right-click on origin	al	OPEN		12/04/2017				
MEDICAL DIRECTOR	assigned person's na	me	OPEN						
PASTOR/COUNSELOR	FORMAN, ROBER	A	sign Dotoile to Mo		1				
REGISTERED NURSE		Ass	sign Details to Me						
SOCIAL WORKER	E	Edi	t Details						
VOLUNTEER COORDINATOR	<u>ග</u>	Rea	assign Details						

3. Proceed to *Document and Sign*, using the steps listed in the previous section.

Track Readiness

Considering all required disciplines must sign prior to the Hospice Physician, it's important to track readiness for the meeting. HCHB provides a couple of tools to help with this.

Details Ready for Medical Director Indicator

The IDG Console displays a column titled Details Ready for Medical Director. This indicates if the meeting has all required signatures.

Reason +					
Patient Name	▲ ⊽ ₽ IDG Date	⊽ +⊐ Completed Date	⊽ +¤ Voided	⊽ ⇔ Status ⊽	Details Ready for Medical Director?
Reason : DEATH A	AT HOME (1 item)				
	11/20/2017		Ν	5 OF 6 SIGNED	Y
Reason : NEW AD	MISSION (4 items)				
	21/2017		Ν	3 OF 6 SIGNED	Y
	20/2017		Ν	OPEN	Ν
	25/2017		N	OPEN	N
	15/2017		N	OPEN	N
Beason · RECERT	ORDER DUE (3393	itoms)			

RECERT ORDER DUE (3393 items

Hospice IDG Report

The Hospice IDG Report is available in Report Manager.

Re	Report Manager						
Reports	Batches State Reporting	l i i i i i i i i i i i i i i i i i i i					
Searc Repor	t Name	Search For: IDG					
Fol	ders ALL REPORTS						
.	Reports	K					

This report can be filtered for Meeting Date and Required, Unsigned Roles to obtain a list of missing signatures.

Hospice IDG Report - SOLAMOR T	_		×			
Apply Criteria Values: (DEFAU	LT) 🔻					
	Branch Groups:	(ALL)	•			
	Branches:	(ALL) C	<u> </u>			
	Teams:	(ALL)	•			
	Meeting Date From:*	01/01/2018 To : 01/01/2018 .	🎹			
	IDG Meeting Statuses:	(ALL)	•			
	IDG Meeting Reasons:	(ALL)	•			
	IDG Roles:	PASTOR/COUNSELOR REGISTERE	•			
	Worker Names:	_(ALL)	Q,			
	Client Names:	_(ALL)	0,			
	Exclude Medical Director.	NO	-			
	Exclude Signed Roles:	YES	-			
	Group By:	WORKER NAME	•			
	Sort By:	IDG DATE	-			
	Display Report Criteria:	FULL	•			
	View/Print Print C)nly Save As PDF Export +	Criteria	C C	ancel (ð

<< end of section >>

The Meeting

Compassus requires the *Medical Director, RN, SW, Chaplain/Spiritual Counselor, Bereavement Coordinator*, and *Volunteer Coordinator* to attend and participate in the *IDG Meeting*. The goal of the meeting is produce a *Plan of Care Update (POCU)* for each patient discussed. If the program uses a *Meeting Facilitator* and *Scribe*, then it's important for everyone to be working consistently when filtering the *IDG Console*.

Tip for Quality In addition to your system s Staples: Form# 24364792	steps, Compassus has a established IDG Agenda and Sign In available from
pplying the Date, Team, and Mee	ting Statuses.
Service Lines:	
HOSPICE	
Branches: (ALL) Q -	
Teams: (ALL) Q 🗸	 For the IDG Date, select the date from previous IDT to current IDT. This will ensure completion of any pending notes. Note completion is recommended during IDT unless a patient evaluation or family meeting is necessary prior to signing.
IDG Console Filters IDG Date From: IDG Date To: 01/01/2018 01/01/2018	2) "Meeting Status" should be "IN PROGRESSIOPEN" status. There is a "COMPLETED" option available if note needs to be edited.
Meeting Reasons:	allow selection of your name.
(ALL) -	4) The Load button will upload the current patients on your team that require discussion and documentation during IDT.
Meeting Statuses: IN PROGRESS OPEN	5) Clicking on the Reason tab at the top of the screen will arrange the patient is order of Deaths, Discharges, Admissions, Recert, Upcoming Recert and Recurring.
ALL)	This will allow dissurvises of estigate with a set accords
Medical Director :	
Load	

It's also recommended to group the screen by *Meeting Reason*. This is accomplished with drag and drop of the **Reason** column header into the gray area at the top of the grid.

Drag a column he	eader here	to group by tha	Drag Reason to the gray area t column.	Reason	⊽⇔
Patient Name	- ⊽₽	⊽ -⊳ <mark>Uns</mark> i Orde	igned Medical Director ers?	⊽ -¤ Reason	^{⊽ -⊳} Benefi Period
		N		RECUR	RING 1
		N		RECUR	RING 1
		K1		DECED	
Reason +					
Patient Name	• ⊽ ₽	IDG Date	⊽ -⊐ Completed Date	⊽ 中 Voided	⊽ ⇔ Status
Reason : DEAT		/IE (1 item)			
Reason : NEW	ADMISSI	ON (4 items)			
Reason : REC		ER DUE (3393	items)		
Reason : RECU	URRING (1	7466 items)			

Meeting Facilitator

The *Meeting Facilitator* uses a projector or big screen monitor to display patient information to aid in team discussion. The *POC Update* containing the team *IDG Notes* should be projected.

1. Choose **POC Update** which is the Hospice Comprehensive IDG Report and POC Update Report.



2. If additional documentation needs to be viewed by the team or physician, the *Medical Records Menu* is available by right clicking on the *Meeting*. This menu provides access to *Visit Notes, Face-to-Face Documentation*, etc.

Scribe

The responsibility of the *Scribe* is to record the discussion of the *IDG Team*. This is done using the process in the *Enter IDG Notes on the Plan of Care Update* section of this document starting on page 9.

Medical Director

The responsibility of the *Medical Director/Hospice Physician* is to record any additional updates to the patient's *Plan of Care (POC)*. This is done using the process in the *Enter IDG Notes on the Plan of Care Update* section of this document starting on page 9.

Additionally, medication review can be documented in HCHB and certifications and orders can be signed.

Medication Review

1. From the Note Signing screen, select *Medications* from the *Medical Record Info* menu.



2. Click Review Meds.

09/28/2017 8:07:07 AM	LEVSIN ORAL	GASTROINTES	TINAL THERAF	Y AGENTS
00/00/0017 9-01-01 AM				
09/26/2017 8.21.01 AM	LORAZEPAMORAL	CENTRALNER	V005 5151EW	IAGENIS
09/26/2017 8:21:01 AM	MORPHINE CONCENTR	RATE ANALGESIC. A	NTI-INFLAMMA	TORY OR
		Meds Meds	displayed wit displayed in	h a blue backg red text are D/(
Review Meds	View Allergies	View Med Understanding Char	iges	
F .45	Diat			
	Print •			

- 3. Identified Interactions will display.
- 4. *Review Interactions*, then *Close* the screen.

Drag a column header here to group by that column.	
Interacting Meds v Interaction	7
LORAZEPAM ORAL INTERACTS WITH MORPHINE CONCENTRATE ORAL OPIOIDS (IMMEDIATE RELEASE)/BENZODIAZEPINES	
MONOGRAPH TITLE:	^
Opioids (immediate Release)/Benzodiazepines SEVERITY EVEL ·	
3-Moderate Interaction: Assess the risk to the patient andtake action as needed.	
MECHANISM OF ACTION: Concurrent use of opioids and benzodiazepines mayresult in additive CNS depression.(1)	
CLINICAL EFFECTS:	
Concurrent use of opioids and other CNS depressants, suchas benzodiazepines, may result in profound sedation, respiratory depression, coma, and/or death.(1)	
PREDISPOSING FACTORS:	~
Print Close	1

5. Select *Yes* to complete the documentation review.

Review N	Vedications for
?	Click the Yes button to acknowledge that you have reviewed the medications for contraindications and possible synergistic and/or antagonistic reactions.
	Yes No

- 6. *Close* the *Medications* screen.
- 7. Notation of this medication review is automatically added to the patient's Plan of Care Update (POCU).

CTI and Order Signing

The *Medical Director* has the opportunity to electronically write the narrative and sign the certification documents during the *IDG Process*. There are two methods for reaching the orders screen:

1. The physician is prompted to review unsigned orders after clicking *Sign Details on the IDG Note*.

Warning: Unsigned Orders Exist
There are currently unsigned orders for this patient, would you like to review/approve the orders now?
Yes

2. Or in the right-click menu of the patient meeting select *Review/Approve Unsigned Orders*.

Drag a column header here to	group by that column.			
Patient Name ► 🕈 ዋ IDG	Date ⊽⇔Comp	eted Date	⊽ +¤ Voided	⊽ 1 Status
01/08	3/2018		N	OPEN
	View Details			
+	Add IDG Member			
+	Add PRN IDG			
+	Add Recuring IDG			
/	Edit Date			
	Patient Progress Sur	nmary Report		
	POC Update			
C.	Recert Summary			
Ca:	Period Summary			
Θ	Void IDG Meeting			
	Unvoid IDG Meeting			
Ì	Assign IDG Members	to Patient		
	Review/Approve Uns	igned Orders		
	F2F Console			
	Medical Records Info)	+	
Ć.	Reset Grid Lavout			

3. Either method will display any unsigned orders on the screen.

Status ⊙Unsigned	⊖Signed ⊖All		
Add Physi	cian Narrative	Edit Physician Narra	ative View Physician Narrative
Drag a column	n header here to group by that co	lumn.	
Order Date	♥ Order Type	⊽ Da	ite Sent to Physician ⊽ Date Sent t
01/08/2018	HOSPICE CTI		
01/07/2018	HOSPICE RECERTIFICAT	TON PLAN OF CARE UPDATE	

- 4. Make note of the *Order Type* and select an *Order* with a single-click.
- 5. A description of the selected order displays below.

Add Physici	ian Narrative	Edit Physician Narrative	View Physician Narrative
Drag a column h	header here to group by that col	umn.	
Order Date 01/08/2018 01/07/2018	Order Type HOSPICE CTI HOSPICE RECERTIFICATI	Date Sent ON PLAN OF CARE UPDATE	toPhysician ⊽ DateSentto
∢ Order Descripti	00		
✓ Order Descripti TERMINAL DIAG I CERTIFY THAT COURSE.	ion: SNOSIS: CANCER I THE PATIENT'S PROGNOSIS	S IS SIX MONTHS OR LESS IF THE DISEASE	E RUNS ITS NORMAL

6. Review and Sign the Order.

TERMINAL DIAGNO I CERTIFY THAT TH COURSE.	DSIS: CANCER HE PATIENT'S PRO	OGNOSIS IS SIX MONTI	HS OR LESS IF THE	DISEASE RUNS ITS NO	DRMAL
View Order	Sign Order	Dicline Order	F2F Encounter		Close

7. A *CTI Order Type* requires the *Physician's Narrative* before the order can be signed.

Add Physic	cian Narrative +	Edit Physician Narrative	View Phys
Drag a column	header here to group by that co	olumn.	
Order Date	♥ Order Type	♥ Date Sent	to Physician
01/08/2018	HOSPICE CTI		
01/07/2018	HOSPICE RECERTIFICAT	TION PLAN OF CARE UPDATE	
∢ Order Descrip	Error The order cannot	be signed as it is missing a Physician Narrative.	
CERTIFICATIO I CERTIFY THA COURSE. VERBAL CERT TERMINAL DIA	IN OF TERMINAL ILLNESS AT THE PATIENT'S PROGNOS TIFICATION WAS RECEIVED FI AGNOSIS: CANCER	SIS IS SIX MONTHS OR LESS IF THE DISEASI	E RUNS ITS NO

8. Click Add Physician Narrative.

•			
	Add Physician Narrative +	Edit Physician Narrative	View Phys
	Drag a column header here to group by that column.		
	Order Date Ø Order Type 01/08/2018 HOSPICE CTI	⊽ Date Sent	to Physician
9. 10.	Enter the <i>Narrative</i> . <i>Save and Close</i> . Add Physician Narrative for - SOLAMOR TRAINING 2		×
	ZIMMZZZERMAN, PAMELA		
	BRIEF NARRATIVE STATEMENT (REVIEW THE INDIVID	DUAL'S CLINICAL CIRCUMSTANC IUSTIFICATION FOR HOSPICE SE	ES AND SYNTHESIZE RVICES)
	ENTER NARKATIVE INFORMATION HERE		
	ATTESTATION: I CONFIRM THAT I COMPOSED THE NA REVIEW OF THE PATIENTS MEDICAL RECORD AND/O	ARRATIVE ABOVE AND THAT IT IS REXAMINATION OF THE PATIEN	BASED ON MY f.
		Save & Close	Cancel Ø
	Tip for Quality		
	The Narrative Statement must be patient sp	ecific and must be at least ten	characters in length
11.	Sign the Order.		
	I CERTIFY THAT THE PATIENT'S PROGNOSIS IS SIX M COURSE.	IONTHS OR LESS IF THE DISEAS	E RUNS ITS NORMAL
			~
	View Order Sign Order Cline Ord	F2F Encounter	Close

Send Plan of Care Update to Primary Physician

At the completion of the meeting, workflow is generated for the *Medical Records Specialist (Team Coordinator)* to send a copy of the *Plan of Care Update (POCU)* to the *Primary Physician*.

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