

Chapter 6

The Office Visit

Chapter 6 Content:



- Building an Office Visit Note
 - Activating a New Dx Code or Drug
 - Discontinuing Medication
 - Editing OV Popup Text
 - Office Visit Reports
 - Office Visit Menus
 - Routing Slip
 - Addendums
-

1. Overview



1. Overview

➤ The Office Visit note:

- ❖ The most common form of encounter with the patient
- ❖ Laid out in the **SOAP** format displaying the subjective (**S**), objectives (**O**), assessment (**A**), and plan (**P**) areas
- ❖ Displays Face Sheet information

OV 07/22/2009

Edit Actions Database Tools

Pt: Adams, Patti G 06/29/42

Patient
Adams, Patti G 06/29/42
Age: 67 yrs 0 mns 24 days.
198 Elm St
Sherman, TX 77521
Home #: (214) 766-7676
Mobile #: (214) 777-7987
EMail: mom5645566@aol.com
SS#: 876-45-6676
Marital Status: Married
Sex: F
Employer: Home Engineer

Allergies
Demerol, Codeine
Other Sensitivities:
Causes Low BP
Causes Nausea

PMHX
DM, Adult Onset,NID, Controlled 250.00
HTN 401.9
Depression - Recurrent 296.32
Hyperglycemia 790.6
Pneumonia, Bacterial 482.89
Type 2 diabetes for 10 years
Hospitalized March 2006 Hyperglycemia
Hospitalized once for Pneumonia
Last Tetanus 2004
Influenza Vaccine 10/05

FMHX
Lung CA 162.9
Father CA of the Lung (contributing factor)

Social History
Alcohol: Occasionally
Nonsmoker
Wears seat belt 100%

Chief Complaint
07/22/2009 Office Visit
Subjective:
Objective:
Assessment:
Plan:
Date of Service: 07/22/2009
Patient Number: 31 Chart ID: not Charted
Last Modified: 07/22/2009

Date: 07/22/2009 last mod: 07/22/2009

S Panel

Follow-Up.
Pt reports symptoms began suddenly
Pt reports symptoms began gradually
1
2
3
4
5
6
1/2
day(s) ago
month(s) ago
year(s) ago
hour(s) ago
minute(s) ago
and has been constant since onset.
and has been episodic since onset.
and has waxed and waned since onset.
Fever. Onset day(s) ago. Associated symptoms i
Cough. Onset day(s) ago. No fever. Nature of co
Pain is

Copy 05/11/2009 HYPERTHYROID LEG PAIN
Prev 05/11/2009 LOSS OF CONSCIOUSNESS
Note 05/11/2009 ALLERGIES, CONGESTION,
07/31/2007 ITCHY EYES, RUNNY NOSE
01/16/2005 constant pain
01/16/2005 Physical Exam/Prevention
Check-up

init

Done Edit Print Report Delete ePrescribe Export Spell Template Sign

SPRINGCHARTS
Electronic Health Records

2. Building an Office Visit



2. Building an Office Visit

➤ Features

- ❖ Navigation Panel for each segment of the OV note
- ❖ PopUp Text for rapid selection in each segment
- ❖ Previous Encounter Notes for each segment available to copy
- ❖ Time & Initial stamp available to document activities
- ❖ FS Tab allows for any item from Face Sheet into the OV note

The screenshot displays the SpringCharts Electronic Health Records interface for an Office Visit (OV) note. The window title is "OV 07/22/2009". The patient information panel on the left shows details for Patti G Adams, including age (67 yrs 0 mns 24 days), address (198 Elm St, Sherman, TX 77521), and contact information. The chief complaint section in the center shows the date of service (07/22/2009) and the last modified date (07/22/2009). The right panel displays a list of previous encounter notes, with a red arrow pointing to the "FS" tab, indicating that items from the Face Sheet can be copied into the note. The interface also includes a navigation panel on the left, a pop-up text box for rapid selection, and a toolbar at the bottom with options like Done, Edit, Print, Report, Delete, eRx, ePrescribe, Export, Spell, Template, and Sign.

2. Building an Office Visit

➤ Features

- ❖ Additional three Vitals can be added to server
- ❖ Growth Charts are available Hgt, Wgt, BP & BMI
- ❖ Search database for Dx, Rx, Tests and Procedures

OV 07/31/2007
Edit Actions Database Tools
Pt: Adams, Patti G 06/29/42 Date: 07/31/2007 last mod: 08/03/2007

Patient
Adams, Patti G 06/29/42
Age: 67 yrs 5 mins 8 days.
198 Elm St
Sherman, TX 77521
Home #: (214) 766-7676
Mobile #: (214) 777-7987
Email: mom5645566@aol.com
SS#: 876-45-8676
Marital Status: Married
Sex: F
Employer: Home Engineer

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Influenza Vaccine 10/05

FMHX
Lung CA 162.9
Father CA of the Lung (contributing factor)

Social History
Alcohol: Occasionally
Nonsmoker
Wears seat belt 100%

07/31/2007 Office Visit
Subjective:
Chief Complaint: constant pain
Present Illness: How long? All day
Where? Lower abdomen
Fever. Onset days ago. Associated symptoms include Cough. Onset days ago. No fever. Nature of cough is . Has tried to treat with . Seems worse at during the day. Associat symptoms include. Overall is getting .
How long? All day
Review of Systems: weight change, chills, night sweats, generalized weakness.
01/16/2005
GENERAL:
- No weight change, fever, chills, night sweats, generalized weakness.
Update
Objective:
Vitals: Temp: 98.6F HR: 70 Resp: 17 BP: 135/80
Wt: 170.0lbs Ht: 64.0in BMI: 29.18

CHEST: Symmetrical appearance and movement with normal A/P diameter. Respirations are regular with no intercostal retractions or use of accessory muscles apparent. Normal diaphragmatic excursion. Normal fremitus, no thrills. Normal t

Temp: 98.6 F Resp: 17 Pulse: 70
BP: 135 / 80 Ht: 64.00 in Wt: 170.00 lb
HC: in BMI: 29.18 Body Fat: %

Graphs:

Previous Vitals

Date	Temp	HR	Resp	BP	Wt	Ht	BMI
07/31/2007	98.6		17	135/80	170.0	64.0	29.18
01/16/2005	98.6		17		160.0	64.0	
01/09/2005	100		17		165.0	64.0	20.32
12/27/2004	99.0F	HR: 65	Resp: 17	BP: 168/80	Wt: 168.0	Ht: 64.0	BMI: 28.83
12/21/2004	Temp: 98.5F	HR: 80	BP: 130/74		Ht: 64.0	BMI: 29.18	
04/26/2003	Temp: 97.5F	HR: 80	Resp: 14	BP: 180/100	Wt: 180.0	Ht: 64.0	BMI: 30.89
12/16/2002	BP: 150/90						
09/12/2002	BP: 110/65	Wt: 130.0	Ht: 64.0				

Done Print Report Delete Export Spell Template Sign

SPRINGCHARTS
Electronic Health Records

2. Building an Office Visit

➤ Features

- ❖ Additional three Vitals can be added to server
- ❖ Growth Charts are available Hgt, Wgt, BP & BMI
- ❖ Search database for Dx, Rx, Tests and Procedures
- ❖ Dx Tab - selection from PMHX, Problem List & Previous Dx

Date: 07/22/2009 last mod: 07/22/2009

DIAGNOSIS

Select Diagnosis

- Flank Pain 789.00
- Flat Warts 078.10
- Flu 487.1
- Flu Vaccine v04.8

PMHX + Problem List

- DM, Adult Onset,NID, Controlled 250.00
- HTN 401.9
- Depression - Recurrent 296.32
- Hyperglycemia 790.6
- Pneumonia, Bacterial 482.89
- DM, Adult Onset,NID, Controlled 250.00
- Hypercholesterolemia 272.0

Previous Diagnoses

- Hypercholesterolemia 272.0
- Allergic Rhinitis 477.9
- Well Adult v70.0
- Fatigue 780.79
- Flu 487.1
- Pain Disorder-Psych + Med 307.89
- HTN 401.9
- Insect Bite, Nonvenomous 919.4
- HTN 401.9

Right-hand menu: CC, PI, ROS, FS, Vitals, Exam, Dx, Rx, Test, Proc, Other Tx, F/U-Rem

2. Building an Office Visit

➤ Features

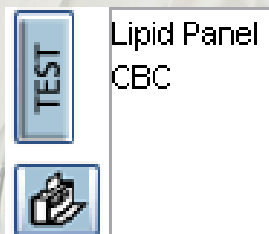
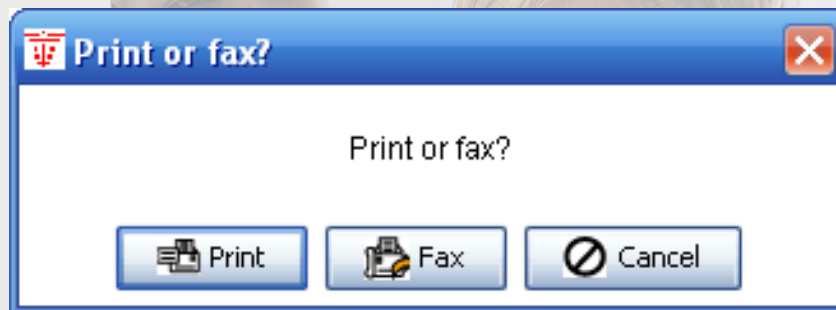
- ❖ Additional three Vitals can be added to server
- ❖ Growth
- ❖ Search
- ❖ Dx
- ❖ Problem
- ❖ Rx Tab – selection form
Routine Meds & Previous Rx
- ❖ Rx strength, dosage etc. can be edited for the OV note

- ❖ Drug Formularies & Drug Monographs available

2. Building an Office Visit

➤ Features

- ❖ Prescriptions can be faxed or printed from the OV screen
- ❖ Physician Orders (tests) can be faxed or printed from the OV note
- ❖ Procedures Are selected by choosing category
- ❖ F/U – selects follow-up notes
- ❖ Office Visit notes can be initialed or signed and permanently locked
- ❖ *Date of Service* can be added to OV note if different from note creation



Date Created: 04/26/2003
Date of Service: 04/28/2003
Patient Number: 31 Chart ID: 12
Last Modified: 11/22/2006

3 & 4. Activating a New Dx Code or Drug

3 & 4. Activating a New Dx Code or Drug

➤ New DX Code

- ❖ SpringCharts is installed with the complete AMA library of **ICD-9 codes** and **CPT codes**
- ❖ Clinic will activate the specific codes they intend to use

➤ New Drug

- ❖ SpringCharts comes with the AMA dictionary of drugs and medications
- ❖ Clinic can active additional drugs during an office visit or from the main screen

5. Discontinued Medication in the Office Visit



5. Discontinued Medication in the Office Visit

- ❖ Medication stopped in a patient encounter
- ❖ Add stopped date, reason stopped, and diagnosis

The screenshot shows a software window titled "Edit Rx" with a blue title bar. The window contains several text input fields for medication information:

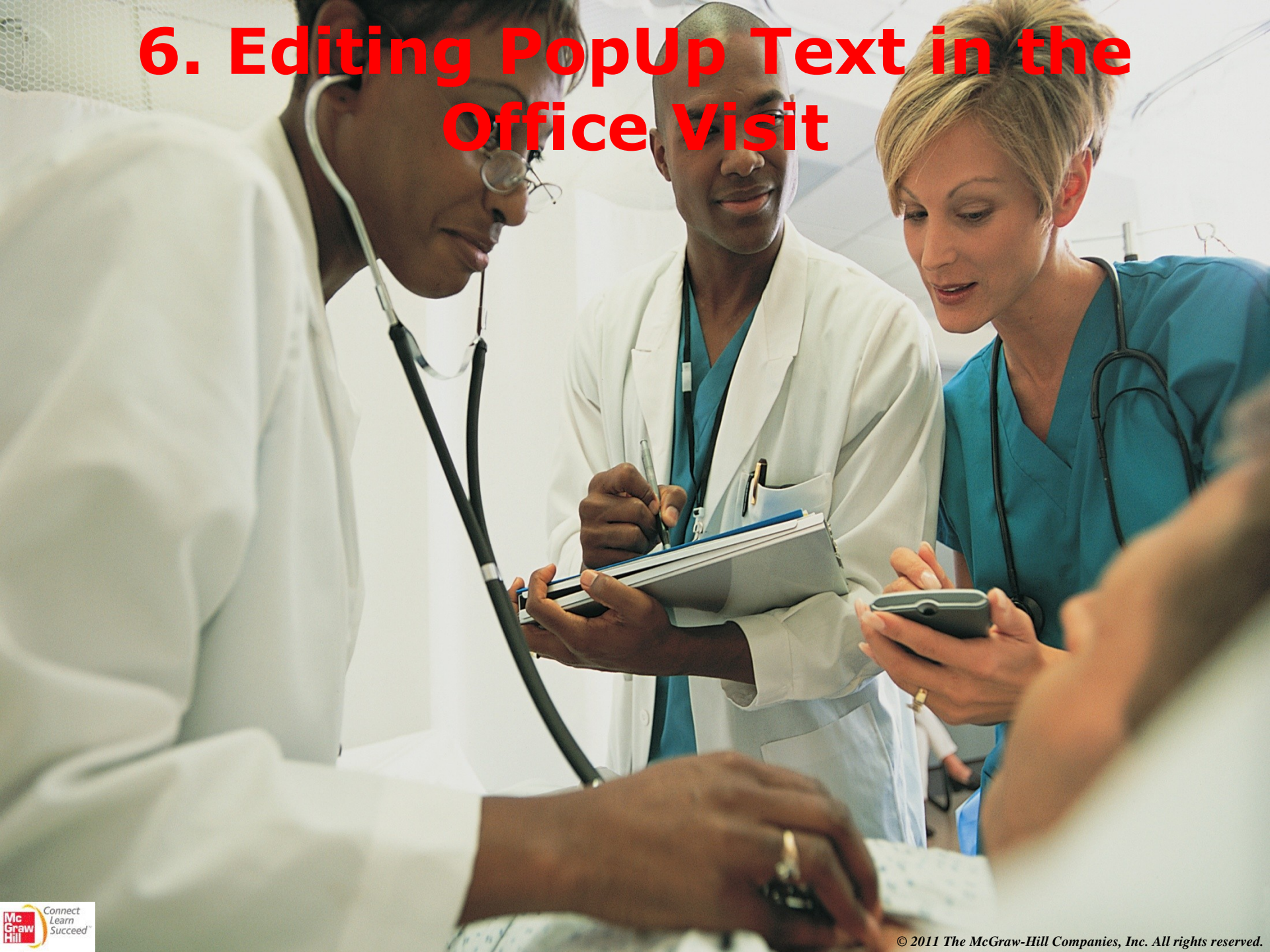
- Brand Name:** Glucophage XR
- Generic Name:** Metformin
- Strength:** 500mg
- Directions:** i po bid
- Quantity:** 60
- Refills:** prn
- Date Started:** 09/20/2004
- Date Stopped:** 11/08/2006
- Reason Stopped:** Interacted with other medic
- Diagnosis:** HTN 401.9

To the right of these fields is a dropdown menu labeled "Drug Stopped" with a red play button icon. The dropdown is open, showing a list of reasons for stopping medication:

- Treatment completed
- Medication ineffective
- Side effects
- Interacted with other medication
- Allergic reaction
- High cost

A red rectangular box highlights the "Date Stopped", "Reason Stopped", and "Diagnosis" fields. At the bottom of the window is a toolbar with icons for Save, Cancel, Lookup, Delete, Add to Routine, and other functions.

6. Editing PopUp Text in the Office Visit



6. Editing PopUp Text in the Office Visit

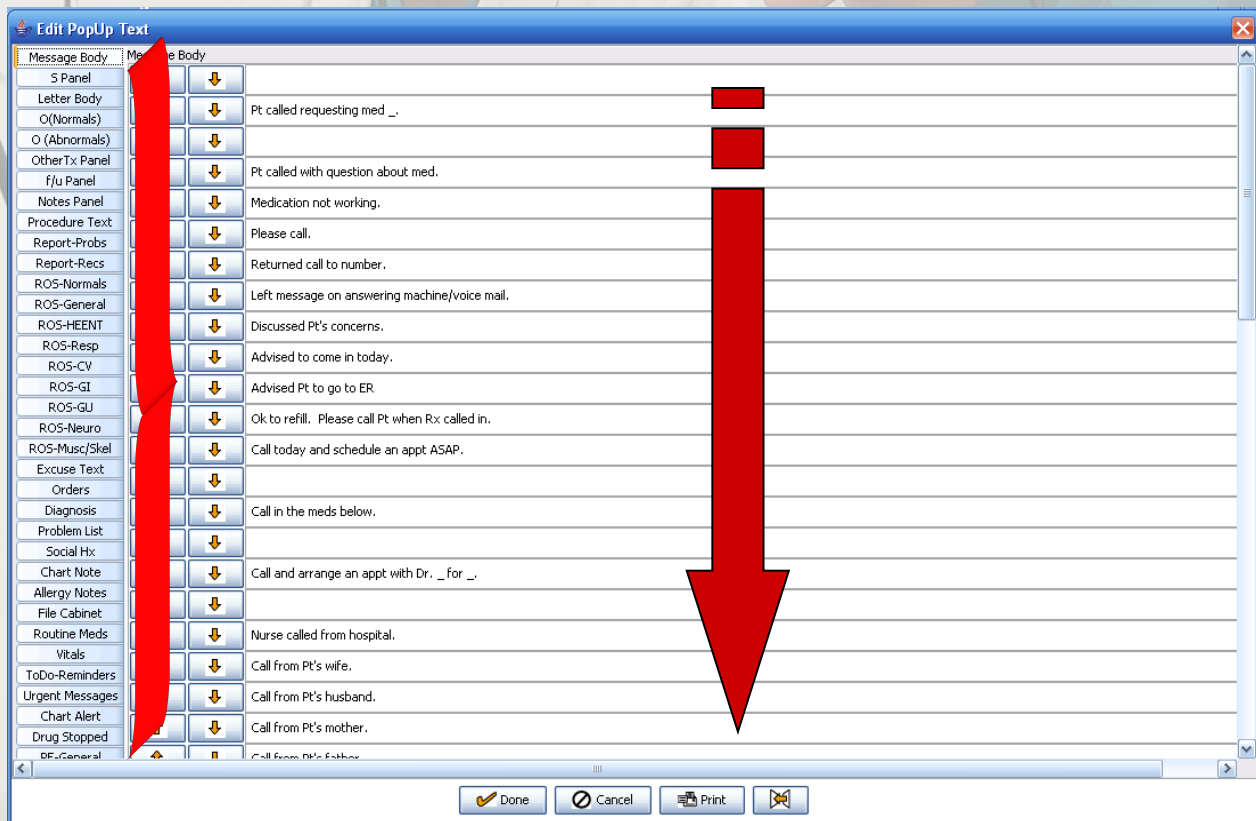
❖ Additional items can be added to existing pop-up lists by accessing the edit button to the right of the pop-up text category field



❖ Each PopUp Text category has 60 lines of type

❖ There are 34 PopUp Text categories and text that come with the program

❖ There are 20 new categories that can be defined by the user



7. Office Visit Reports



7. Office Visit Reports

➤ Report to Patient

- ❖ Enables the printing/faxing/emailing of this specific physical exam to the patient
- ❖ Includes test results ordered during Office Visit exam

➤ Office Visit Note Report

- ❖ Details the Office Visit note in the *S.O.A.P.* format
- ❖ Does not include test results

➤ History & Physical Report

- ❖ The H&P combines the patient's history such as, allergies, current medication, past medical, etc., as well as aspects of the current physical exam and test results

8 & 9. Edit & Actions Menu



8 & 9. Edit & Actions Menu

➤ Edit Menu

- ❖ Easy access to all Face Sheet items for editing
- ❖ Easy access to Immunization Record
- ❖ Immunization are selected in the procedure tab of the OV Note

➤ Actions Menu

- ❖ Actions Menu same in Pt's Chart and Office Visit screens
- ❖ Tests ordered from Actions Menu are not part of OV Note

10. Tools Menu



10. Tools Menu

➤ Chart Tab

❖ Enables the user to save an existing OV note under a different care tree tab

➤ New Excuse/Note/Order

❖ Enables the practitioner to create excuse & order note from OV screen

➤ Resend Routing Slip/Transaction

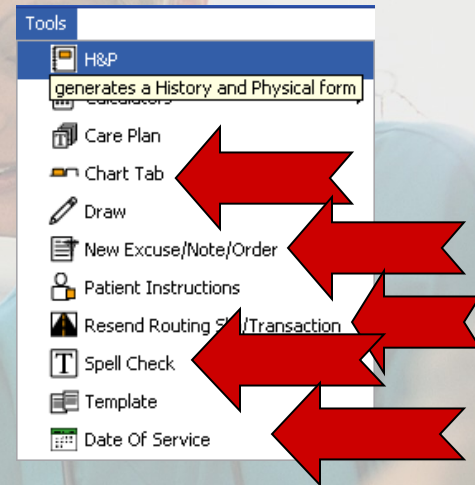
❖ Enables OV note to be sent again either as a **routing slip** or the transactions sent to the PMS interface

➤ Spell Check

❖ Will scan the entire office visit note and suggests appropriate spelling corrections

➤ Date of Service

❖ Enables the date of service on the OV note to be changed



11. Routing Slip



11. Routing Slip

- ❖ Creates billable codes from the Office Visit note and superbill
- ❖ Provides access to the **E&M coder** which will recommend the appropriate level of Evaluation & Management code

❖ E&M Code base on:

1. the patient type
2. the complexity of the problem
3. the level of history reviewed
4. the extent of the exam and ROS
5. the level of medical decision making

❖ E&M Code can be based upon time element

RS: Adams, Patti G 06/29/42

Routing Slip

Doctor: John O. Smith, M. D.

E&M Code Recommended: 99214

Diagnosis:
Insect Bite, Nonvenomous 919.4
Cellulitis 682.9

Tests:

Other Procedures: Inj Antibiotic 88

E&M Coder

E&M Code Recommended: 99214 [Use Code]

Patient Type: New Est Consult

History/Problem Complexity: BRIEF EXTENDED

Complexity of Medical Decision Making: Straightforward Low Moderate High

Counseling/Coordination of Care: Yes No

If Counseling/Coordination of Care Dominate More Than 50 %:

Time Spent: 5 [dropdown] Yes No

99201 NP-Brief -21 [Send] [Cancel] [Print]

Superbill Form

Office Visit

- New Pt Minor 99201
- New Pt Low Severity 99202
- New Pr Mod Severity 99203
- New Pt Hi Severity 99204
- New Pt Compreh 99205
- Est Pt Minimal 99211
- Est Pt Low Severity 99212
- Est Pt Mod Severity 99213
- Est Pt Hi Severity 99214
- Est Pt Compreh 99215
- Consult Minor 99241
- Consult Low Severity 99242
- Consult Mod Severity 99243
- Consult Hi Severity 99244
- Consult Compreh 99245

Procedures

- IV Catheter 36000

Lab

- Venipuncture 36415

Imaging

Injections

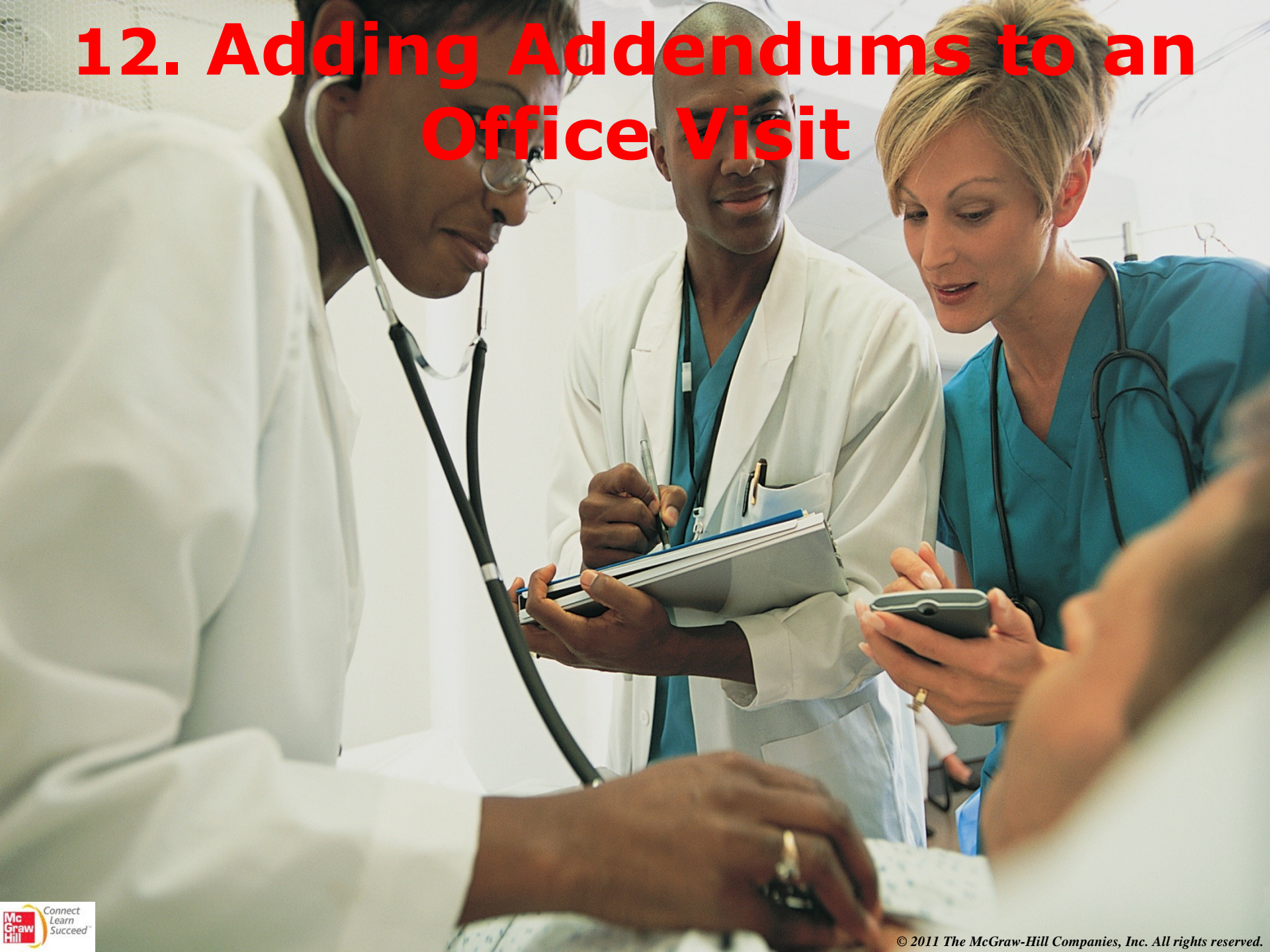
- Therapeutic Injection 90782
- Immunization 90471
- additional Immunization 90472
- Inj Antibiotic 90788

Supplies

Splint/Cast

- Splint Long Arm 29105
- Splint Shor Arm 29125
- Splint Finger 29130
- Splint Long Leg 29505
- Splint Short Leg 29515

12. Adding Addendums to an Office Visit



12. Adding Addendums to an Office Visit

- ❖ Providers have the ability to lock an office visit note so that no additional material can be entered into the note

OV 05/11/2009

Edit Actions Database Tools

Pt: Adams, Patti G 06/29/42

Chief Complaint

Date: 05/11/2009 last mod: 05/11/2009

Patient
Adams, Patti G 06/29/42
Age: 67 yrs 0 mns 24 days.
198 Elm St
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Home #: (214) 766-7676
Mobile #: (214) 777-7987
EMail: mom5645566@aol.com
SS#: 876-45-6676
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Sex: F
Employer: Home Engineer

Allergies
Demerol, Codeine
Other Sensitivities:
Causes Low BP
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Type 2 diabetes for 10 years
Hospitalized March 2006 Hyperglycemia
Hospitalized once for Pneumonia
Last Tetanus 2004
Influenza Vaccine 10/05

FMHX
Lung CA 162.9
Father CA of the Lung (contributing factor)

Social History
Alcohol: Occassionally
Nonsmoker
Wears seat belt 100%

05/11/2009 Office Visit
Subjective:
Chief Complaint:ALLERGIES, CONGESTION, ITCHY EYES,
RUNNY NOSE
Present illness: Pt reports symptoms began gradually 5 day(s)
ago and has been constant since onset. Cough. Onset 4
day(s) ago. No fever. Nature of cough is productive. Tried to
treat with . Seems worse at during the day. Associated
symptoms include . Overall is getting .
Objective:
Vitals: Temp: 98.6F HR: 75 Resp: 25 BP: 120/80
Assessment:
Plan:
Date Created: 05/11/2009
Date of Services: 05/11/2009
Patient Number: 31 Chart ID: 171
Last Modified: 05/11/2009

ALLERGIES, CONGESTION, ITCHY EY
NOSE

Initial document or Sign and Permanently Lock?

Done Print Report Delete eRx ePrescribe Export Spell Templates Sign

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- ❖ Office visit notes that have been *permanently signed and locked* can have an addendum added to the note