

Group Notes/Encounter Collection

User Manual



October 2004

Revised March 2017

**Department of Veterans Affairs
Office of Information and Technology (OIT)
Product Development**

Revision History

Date	Version	Description	Author
03/2017	1.4	<p>Updated Title Page, Revision History, and Table of Contents</p> <p>Updated the Login section for use with two-factor authentication (2FA) 4</p>	<p>VA PM: K. Condie TW: T. Robinson</p>
08/2014	1.3	<p>Updated Title Page, Revision History, Table of Contents and renumbered pages.</p> <p>Updated Index, page 19.</p> <p>Updated for ProPath template compliance. Made corrections to reference a generic Provider and Clinic in screenshots. Added ICD-10 information to screenshots on pages 10-16.</p> <p>For patch OR*3*353, changed “ICD-9” to ICD-10, or just “ICD” where appropriate.</p>	<p>VA PM: Kristen Templet HP PM: Mike Klein TW: Corrie DeCapua</p>
08/2014	1.2	<p>Updated for ProPath template compliance. Made corrections to reference a generic Provider and Clinic in screenshots. Added ICD-10 information to screenshots on pages 9 - 15.</p> <p>For patch OR*3*353, changed “ICD-9” to ICD-10, or just “ICD” where appropriate.</p>	<p>VA PMs: Rich Holmes/ Kristen Templet HP PM: Mike Klein TW: Corrie DeCapua</p>
11/01/2004	1.1	Name Sanitation	Charles Arceneaux
10/18/2004	1.0	First Draft	Charles Arceneaux

(This page intentionally left blank)

Table of Contents

<i>Introduction</i>	<i>1</i>
Purpose of Group Notes	1
Scope of the Manual	1
Audience	1
<i>User Section</i>	<i>3</i>
Group Notes Operation	3
Visit Information	4
Patient Selection	5
Common Encounter Data Entry	6
Common Note Title	7
Common Encounter Entry	9
Individual Note Text Entry	11
Individual Encounter Entry	12
Group Signing	13
Repeat	15
<i>Glossary</i>	<i>17</i>
<i>Index</i>	<i>19</i>

(This page intentionally left blank)

Introduction

Purpose of Group Notes

This program was designed to assist providers in documenting group therapy sessions and events such as immunization clinics. It allows the easy assembly of patient groups based on Clinics, Specialties, Wards, Teams, or Provider lists. It then allows the note author to specify parts of a note that apply to the entire group and parts that apply to individuals. It does the same with encounter data. After the note and encounter information is complete, it provides for a single signature for the entire group.

Scope of the Manual

Tasks associated with Group Notes are: System setup, workstation setup, creation of notes for a group, and collection of encounter data. This manual provides information deemed necessary to carry out these functions.

From time to time improvements are made to the TIU package, including improvements to Group Notes. The latest information about TIU, as well as the latest version of this manual, is posted on the Text Integration Utilities (TIU) Web Page at:

`vista.med.va.gov/tiu/html/Enhance.htm`

or

`vaww.vista.med.va.gov/tiu/html/Enhance.htm`

This document is intended for use during development and testing of the Group Notes executable. When Group Notes is released this document will cease to exist as a living document and the information in it will be inserted into the appropriate VistA manuals. (However, the document will continue to be available on the above page—it will not be updated with post-release changes.)

Also on release, information about Group Notes will be available on the TIU page of the VDL (VistA Document Library) at <http://www.va.gov/vdl/application.asp?appid=142>.

Audience

Information in this manual is intended for end users. This usually means providers conducting group sessions and limited scope clinics such as for training or vaccination.

(This page intentionally left blank)

User Section

Group Notes Operation

Group Notes is a companion to the CPRS (Computerized Patient Record System) Notes tab. If you are familiar with creating clinical notes in CPRS you will have little trouble with Group Notes.

Creating notes for a group of patients who have just participated in a group therapy session, education, or an immunization clinic follows these steps:

1. Set the visit location and the date/time for the encounter.
2. Select the patients involved, compiling them into a list.
3. Select a note title common for the group.
4. Enter note information common for the group.
5. Enter encounter data that is common for the group.
6. Select individual patients and enter encounter and note information unique to each individual.
7. Sign the notes.
8. Go back to the patient selection screen and repeat for additional groups.

If you are interrupted and exit the session before signing the notes, Group Notes will file notes individually unsigned and generate notifications that there are notes awaiting signature. Any work subsequent to exiting Group Notes must be accomplished in CPRS.

Log In

Users will use two-factor authentication (2FA) to login to Group Notes. To provide increased security, VistA applications now use two-factor authentication, which means using something you have and something you know. The something you have is your PIV (Personal Identification Verification) card, the something you know is your Personal Identification Number (PIN).

1. Launch the Group Notes application using the icon or the start menu.
2. In the dialog that displays, enter your PIN and select OK.

Note: In an emergency, such as a lost card, you can select Cancel and then use your Access and Verify codes.

Visit Information

Information filled in or provided in the Group fields (upper right corner) is carried forward by the program into the encounter fields.

The screenshot shows the 'Group Notes in use by: Cprprovider,Seven' window. It features a 'Patients (all)' list on the left, a 'Group Encounter Provider' dropdown set to 'Cprprovider,Seven - Staff Physici...', a 'Group Visit Location' dropdown set to 'Clinic One', and a 'Group Visit Date/Time' field set to 'Nov 4,2004@12:58'. A patient record for 'Gnpatient,Fourteen' is displayed, including SSN, DOB, gender, and veteran status. A table at the bottom lists patients for group notes/encounters.

Callouts in the image:

- Check that the provider is correct.
- Set Location here.
- Check that the visit time is correct.

Name	SSN	Age	Sex	Location	Admission	Primary Team	Primary Provider
CPRSPATIENT,FOURT...	666-44-4226	72	M	2AS	6/30/2004		
CPRSPATIENTDRG,TEN	666-23-4334	68	M				
GNPATIENT,FOURTEEN	666-34-8765	60	F				

Patient Selection

As with CPRS, Group Notes opens with the patient selection screen. This screen is very similar to the CPRS patient selection screen with a number of fields and buttons added to facilitate group notes.

The screenshot shows the 'Group Notes in use by: Cprsprvider,Seven' window. It features a 'Patient List' sidebar with radio buttons for 'Providers', 'Clinics', 'Team/Personal', 'Wards', 'Specialties', and 'All'. The main area displays a list of patients under 'Patients (all)', with 'Gnpatient.Fourteen' selected. A callout points to this list with the text 'Select a patient list.' Another callout points to the patient names with the text 'Select patients by clicking on their names'. To the right, there are fields for 'Group Encounter Provider' (Cprsprvider,Seven - Staff Physici...), 'Group Visit Location' (Clinic One), and 'Group Visit Date/Time' (Nov 4,2004@12:58). Below these is a detailed demographic view for 'Gnpatient.Fourteen', including SSN (666-34-8765), DOB (Apr 02,1944), and status (Female, Veteran, 70% Service Connected). A callout points to an 'Inquiry' button with the text 'This button supplies additional demographic information.' At the bottom, a table titled 'Patient list for group notes/encounters' shows columns for Name, SSN, Age, Sex, Location, Admission, Primary Team, and Primary Provider. The table contains three rows of patient data. A callout points to the table with the text 'Patients are listed here.' At the bottom right, there is a 'Group Notes' button with a red arrow. A callout points to it with the text 'Click here when the list is complete.'



Note: If the patients are being selected from a clinic appointment list, the date and time of the visit **MUST** match exactly the date and time of the appointment. If there is a mismatch, you will create a duplicate encounter.

An extra button is added below patient demographics that, when pressed, displays detailed patient demographic information. Finally there is a list box provided showing the patient list as you build it.

With the patient list there are two additional buttons: Remove and Remove All. These have the obvious function allowing you full edit control over the list. Once you are satisfied press the Group Notes button.

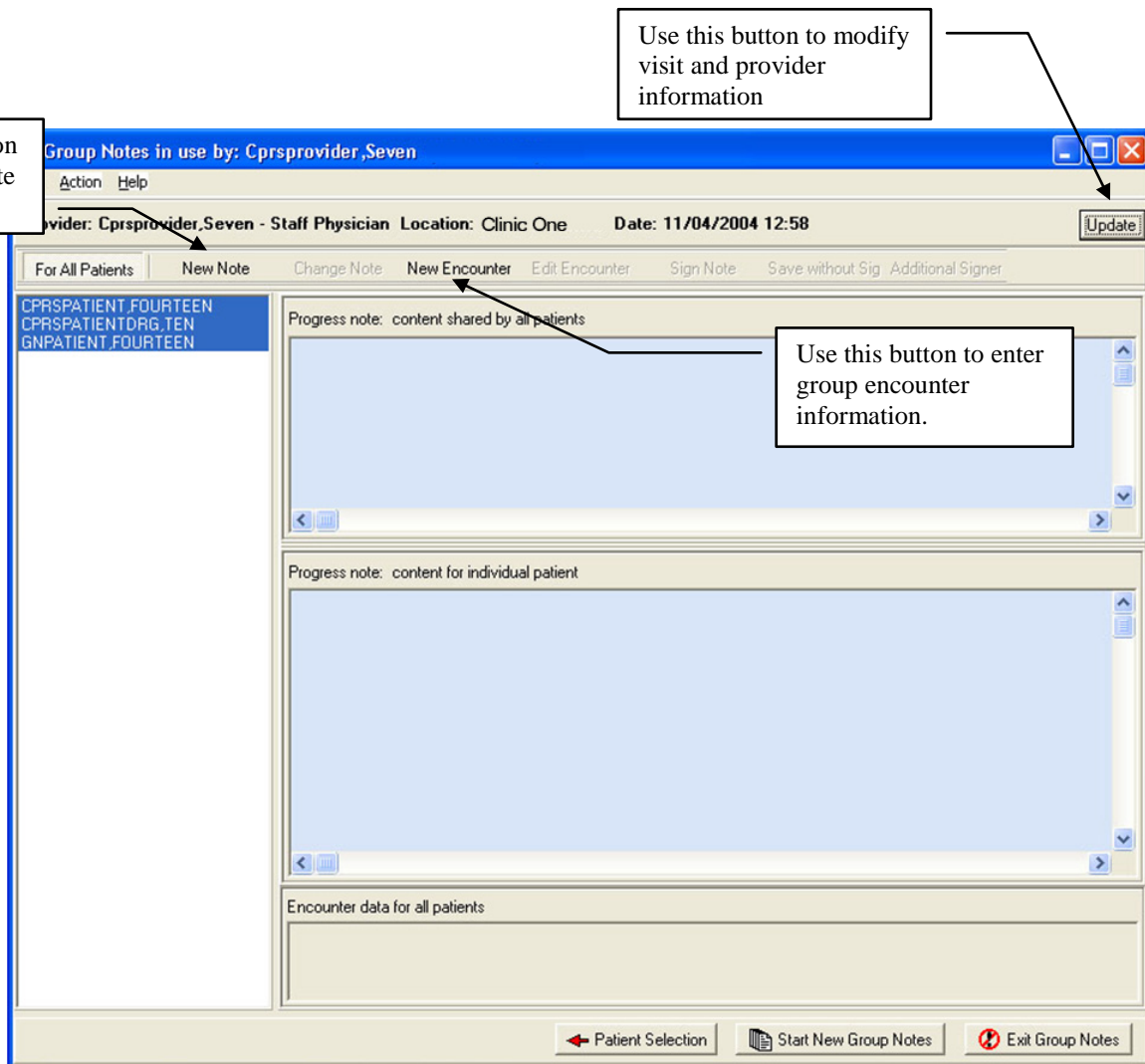
Common Encounter Data Entry



Note: Information common to the entire group must be entered before data for an individual patient.

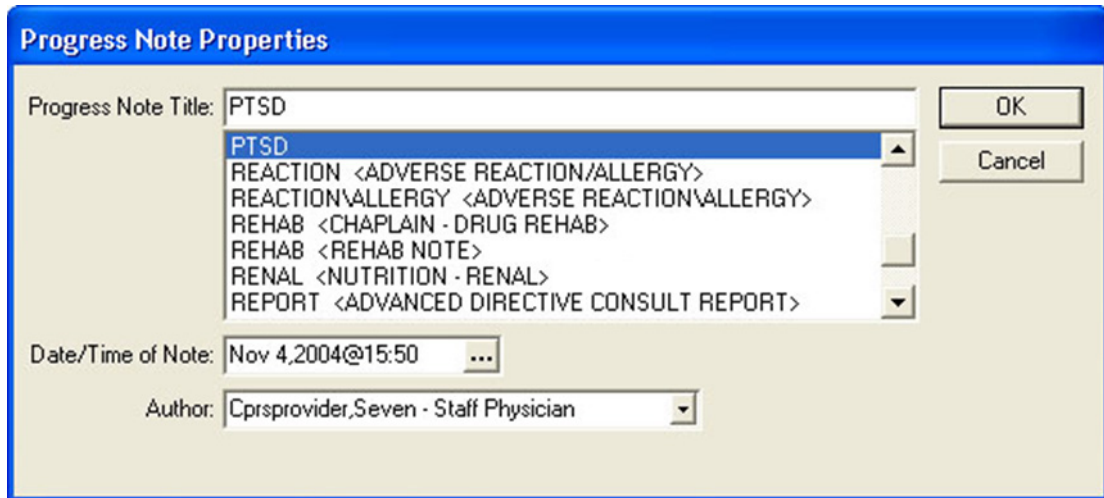
Pressing the Group Notes button moves to the note-building dialog screen. To return to patient selection (to add or subtract patients) use the Patient Selection button.

Until you change it by selecting an individual patient, all actions will apply to the entire group.



Common Note Title

Pressing the New Note button will allow you to select a note title. This will be the note title used for each member of the group:



Note: If the provider requires a co-signer, the co-signer must be designated at the time of note title selection. The field for designating a cosigner appears only if the author of the note requires a cosigner. The requirement for cosigner is a product of the author's User Class and the set up of the document in TIU.

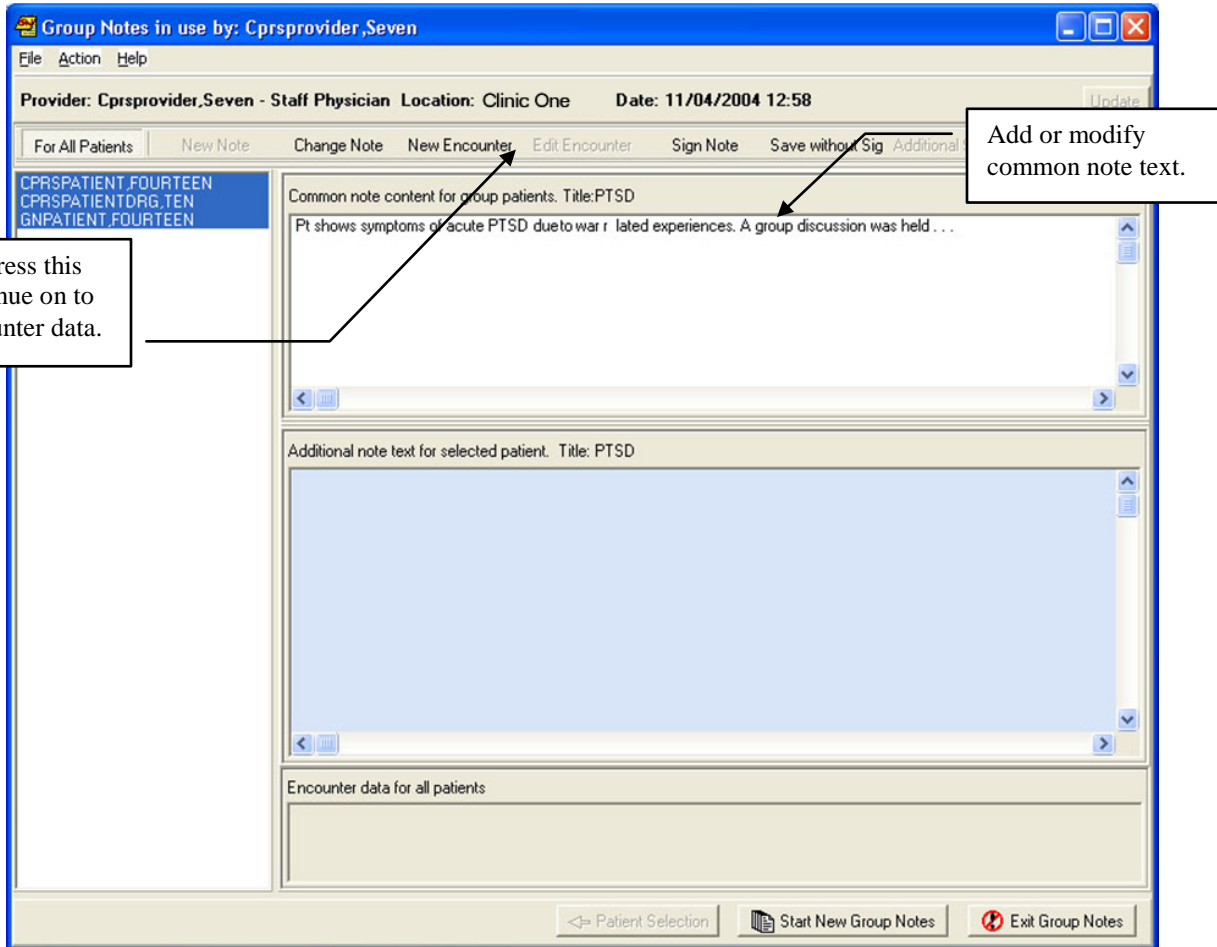
This is the "point of no return." Once you select a title, a note will be created for each member of the group. If you exit the program without signing, unsigned notes are created for each member of the group and notifications will appear in CPRS that a note awaiting signature is available for each of these patients.



Warning: Objects in boilerplate are problematic for group notes. The first patient on the list gets filled in and then the note text is given to each patient. So, do not use objects in the boilerplate of these notes titles that would be different for each patient.

Common Note Text Entry

If the note title selected contains boilerplate text, it will appear in the Common note content pane. You may edit the contents of this boilerplate and/or add additional text.



Note: For CACs and ADPACs: When setting up boiler plate that will be used in Group Notes be aware that inserted objects that import specific patient data will not work properly. Generally speaking, do not put TIU objects in this boiler plate. Exceptions to this rule are objects that are general in nature such as the current date.

Common Encounter Entry

The Group Notes encounter form is customized for group entry. At this point in the program only tabs that would be common to all patients are displayed:

Group Notes in use by: Cprsprovider,Seven

Provider: Cprsprovider,Seven - Staff Physician Location: Clinic One Date: 11/04/2004 12:58

For All Patients New Note Change Note New Encounter Edit Encounter Sign Note Save without Sig Additional Signer

Encounter Form for Clinic One (Nov 04, 2004 @ 12:58)

Visit Type Diagnoses Procedures Patient Ed Immunizations Health Factors

Type of Visit Section Name Modifiers for Comprehensive Exam 51+ Min

Type of Visit	Section Name	Duration	Code	Modifier
NEW PATIENT	Brief Exam	1-15 Min	99201	Dressing For Eight Wounds A8
ESTABLISHED PATIENT CONSULTATIONS	Limited Exam	16-25 Min	99202	Dressing For Five Wounds A5
NEW PATIENT	Intermediate Exam	26-35 Min	99203	Dressing For Four Wounds A4
ESTABLISHED PATIENT CONSULTATIONS	Extended Exam	36-50 Min	99204	Dressing For Nine Or More Wounds A9
NEW PATIENT	Comprehensive Exam 51+ Min	51+ Min	99205	Dressing For One Wound A1
				Dressing For Seven Wounds A7

Service Connection & Rated Disabilities

Service Connected: NO
Rated Disabilities: NONE STATED

Available providers

- Cprsprovider,Seven - Staff Physician
- Cprsdoctor,Ten - Physician
- Cprsdoctor,Two G - Physician
- Cprsnurse,One - Nurse
- Cprsprovider,Eight
- Cprsprovider,Seven - Staff Physician
- Cprsproviderfieldsupport,Three - F
- Cprsprovidermedtab,Two - Brain St

Current providers for this encounter

- Cprsprovider,Seven - Staff Physician

Yes No Visit Related To

- Service Connected Condition
- Combat Vet (Combat Related)
- Agent Orange Exposure
- Ionizing Radiation Exposure
- Environmental Contaminants
- MST
- Head and/or Neck Cancer

OK Cancel

When finished press the OK button.

← Patient Selection Start New Group Notes Exit Group Notes

Fill out the encounter form the way you would normally perform this operation, and then press the OK button.

Select an individual patient by clicking on the patient's name:

When finished with common data, select a single patient that you need to enter individual data for.

Group encounter data appears in this pane.

ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date.

ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.

Individual Note Text Entry

When an individual patient is selected, the Additional note text pane becomes active.

The screenshot shows the 'Group Notes in use by: Cprsprovider,Seven' application window. The window title bar includes 'File Action Help' and a date/time stamp: 'Date: 11/04/2004 12:58'. The main menu bar contains: 'For All Patients', 'New Note', 'Change Note', 'New Encounter', 'Edit Encounter', 'Sign Note', 'Save without Sig', and 'Additional Signer'. The left pane lists patients: 'CPRSPATIENT.FOURTEEN', 'CPRSPATIENTDRG.TEN', and 'GNPATIENT.FOURTEEN'. The main text area is titled 'Common note content for CPRSPATIENTDRG.TEN (666-23-4334) Title: PTSD' and contains the text: 'Pt shows symptoms of acute PTSD dueto war related experiences. A group discussion was held . . .'. Below this is the 'Additional note text for CPRSPATIENTDRG.TEN (666-23-4334) Title: PTSD' area, which contains: 'Pt showed increased hostility . . .'. At the bottom is the 'Encounter data for CPRSPATIENTDRG.TEN (666-23-4334)' area, which contains: 'NEW PATIENT Comprehensive Exam 51+ Min', 'Diagnoses: Posttraumatic Stress Disorder * (ICD-9-CM 309.81) (Primary)', and 'Patient Educations: DEPRESSION SCREENING'. The bottom of the window has three buttons: '<- Patient Selection', 'Start New Group Notes', and 'Exit Group Notes'. Four callout boxes provide instructions: 1. 'When finished customizing individual notes, press this button to customize individual encounter data.' points to the 'Edit Encounter' button. 2. 'Type information specific to the selected patient here.' points to the 'Additional note text' area. 3. 'Repeat for each patient that needs specific note text.' points to the patient list. 4. 'ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date. ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.' points to the 'Encounter data' area.

When finished customizing individual notes, press this button to customize individual encounter data.

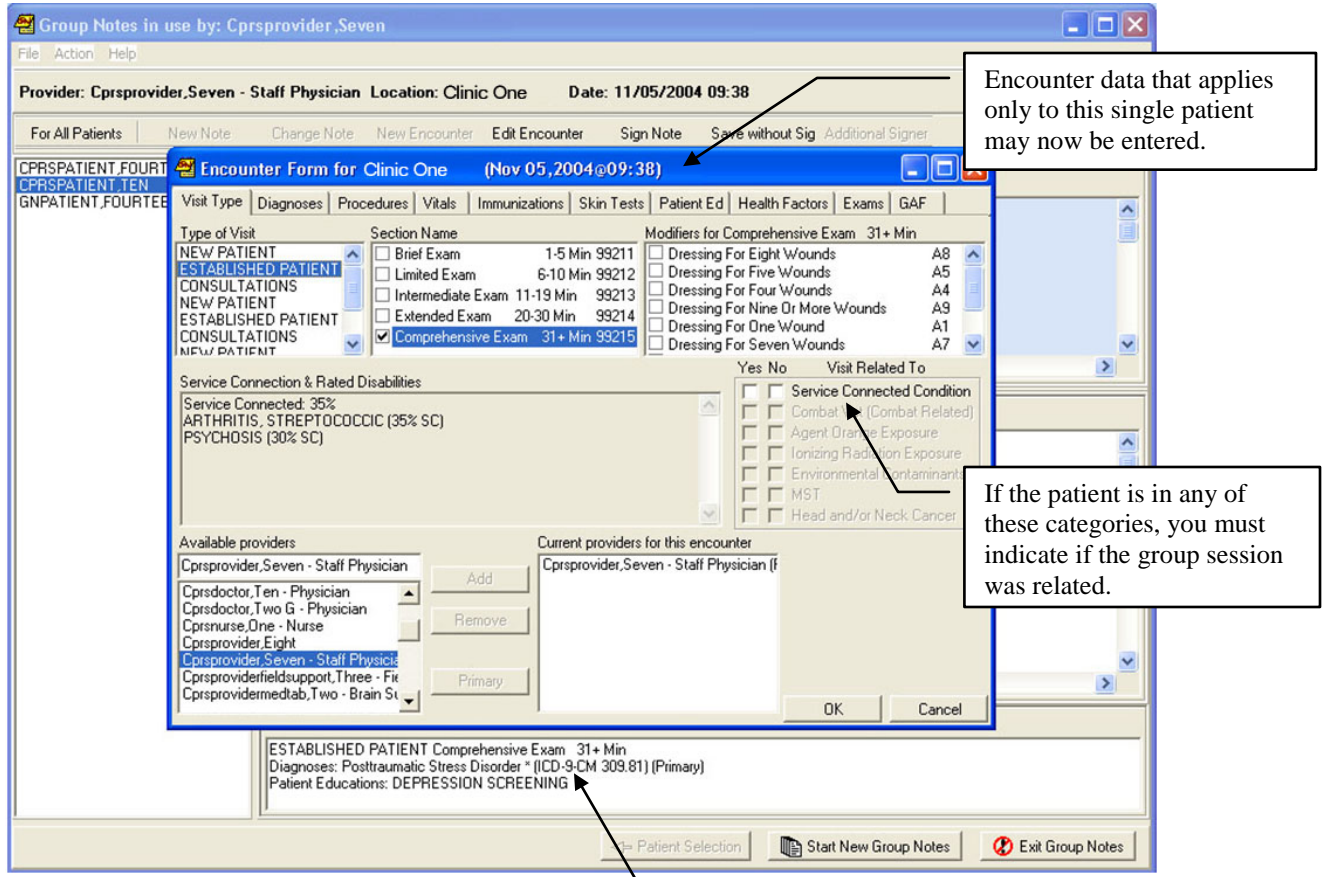
Type information specific to the selected patient here.

Repeat for each patient that needs specific note text.

ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date.
ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.

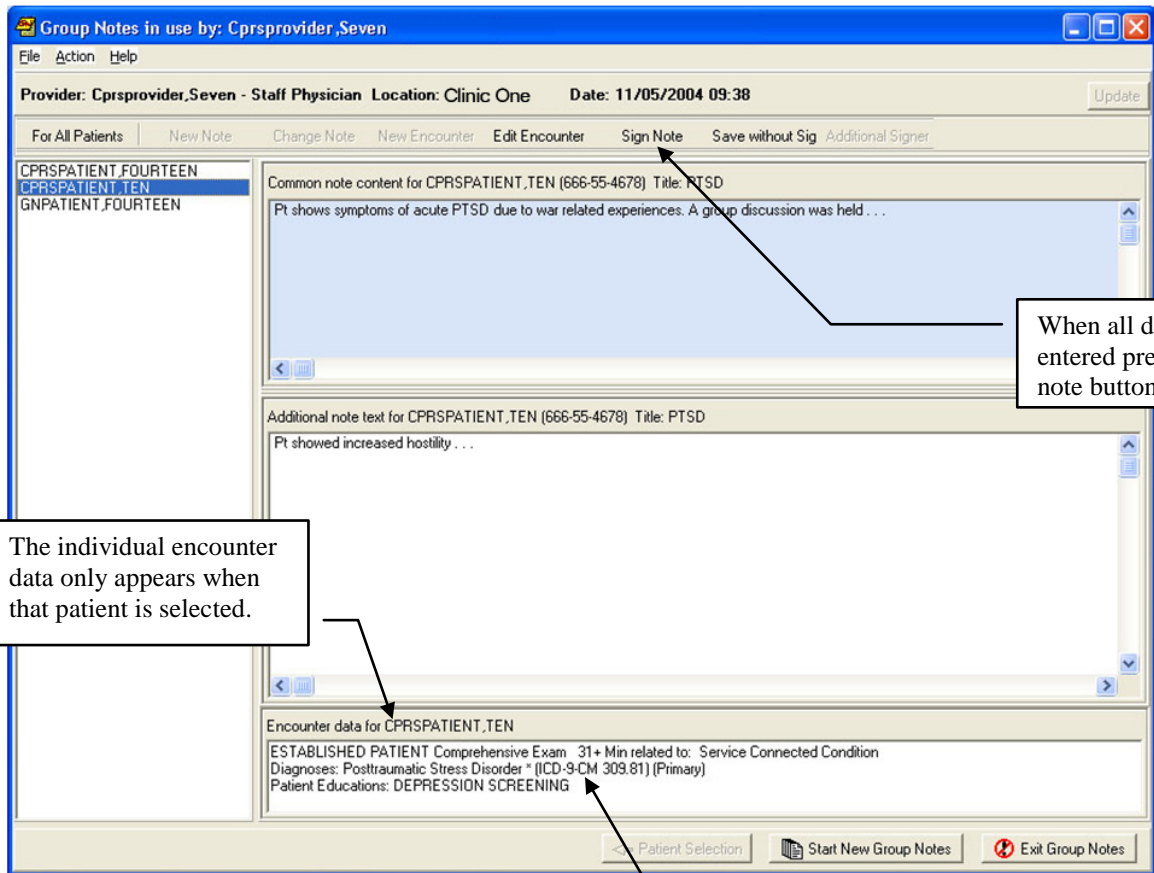
Individual Encounter Entry

When an individual patient is selected the encounter form now shows all tabs.



ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date.

ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.



When all data has been entered press the sign note button.

The individual encounter data only appears when that patient is selected.

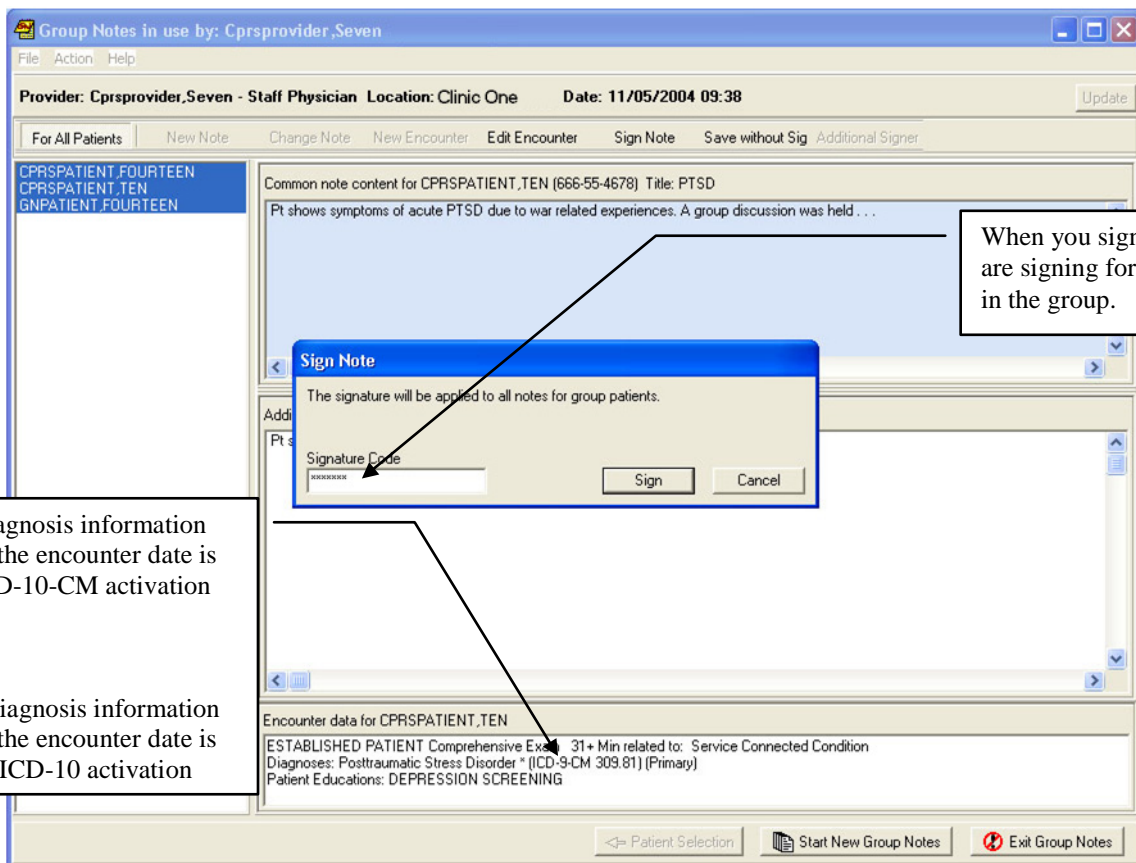
ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date.

ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.

Group Signing

When the sign note button is pressed the program automatically selects For All Patients. If any encounter data is missing such as service connected status, the program will prompt you for it at this time.

When you sign the note, you are signing for every patient in the group:



If business rules specify that you need a cosigner, then notifications will appear in CPRS to the effect that the expected cosigner has notes ready to sign.

After the signature has been accepted, the Additional Signer button becomes active. If this button is pressed the following dialog appears:

The screenshot shows a software window titled "Group Notes in use by: Cprprovider,Seven". The window header includes "Provider: Cprprovider,Seven - Staff Physician", "Location: Clinic One", and "Date: 11/05/2004 09:38". A menu bar contains "File", "Action", and "Help". Below the header, there are buttons for "For All Patients", "New Note", "Change Note", "New Encounter", "Edit Encounter", "Sign Note", "Save without Sig", and "Additional Signer". The main area shows a list of patients: "CPRSPATIENT_FOURTEEN", "CPRSPATIENT_TEN", and "GNPATIENT_FOURTEEN". A dialog box titled "Identify Additional Signers" is open, showing "Author (not editable)" as "Cprprovider,Seven" and "Expected Cosigner (not editable)" as a dropdown. It has two panes: "Select or enter additional signers" and "Current additional signers". The "Current additional signers" pane contains "Cprprovider,Eight". At the bottom of the dialog are "OK" and "Cancel" buttons. A callout box points to the "Additional Signer" button in the main window, stating: "Notice that the Additional Signer button is now active." Another callout box points to the patient list, stating: "Only a single patient can be selected." A third callout box points to the encounter data at the bottom of the window, stating: "ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date. ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date." The encounter data includes: "Encounter data for CPRSPATIENT_TEN (666-55-4678)", "ESTABLISHED PATIENT Comprehensive Exam 31+ Min related to: Service Connected Condition", "Diagnoses: Posttraumatic Stress Disorder * (ICD-9-CM 309.81) (Primary)", and "Patient Educations: DEPRESSION SCREENING". At the bottom of the window are buttons for "Patient Selection", "Start New Group Notes", and "Exit Group Notes".

Repeat

To return to the patient selection dialog with a clean slate to enter another group, press the Start New Group Notes button. Otherwise press the Exit Group Notes button

The screenshot shows the 'Group Notes' application window. The title bar reads 'Group Notes in use by: Cprprovider,Seven'. The menu bar includes 'File', 'Action', and 'Help'. The status bar shows 'Provider: Cprprovider,Seven - Staff Physician Location: Clinic One Date: 11/05/2004 09:38'. The main area is divided into several sections: a patient list on the left, a 'Signed by' section, a 'Common note content' section, an 'Additional note text' section, and an 'Encounter data' section. The 'Signed by' section shows 'Signed by: CPRSPROVIDER,SEVEN at 11/5/2004 11:52:43 AM'. The 'Common note content' section contains the text 'Pt shows symptoms of acute PTSD due to ware related experiences. A group discussion was held...'. The 'Additional note text' section contains 'Pts shows increased hostility...'. The 'Encounter data' section shows 'Encounter data for CPRSPATIENT,TEN (666-55-4678)' and 'ESTABLISHED PATIENT Comprehensive Exam 31+ Min related to: Service Connected Condition Diagnoses: Posttraumatic Stress Disorder * (ICD-9-CM 309.81) (Primary) Patient Educations: DEPRESSION SCREENING'. The bottom bar contains three buttons: 'Patient Selection', 'Start New Group Notes', and 'Exit Group Notes'. Three callout boxes provide additional information: one points to the 'Signed by' section, another points to the 'Start New Group Notes' button, and a third points to the 'Encounter data' section.

When signed, this notice appears and you may not make any further changes.

Press this button to start over on a new group.

ICD-9-CM Diagnosis information will display if the encounter date is prior to the ICD-10-CM activation date.

ICD-10-CM Diagnosis information will display if the encounter date is on or after the ICD-10 activation date.

Glossary

ADPAC	Automated Data Processing Application Coordinator. A VistA software expert who usually works for IRMS.
Boilerplate	<p>A pre-defined TIU template that can be filled in for Titles, speeding up the text entry process. TIU exports several Titles with boilerplate text which can be modified to meet specific needs; sites can also create their own.</p> <p>For Group Notes a title with information that would be common for each member of the group works well. Any TIU objects used in boilerplate are filled in as if for the first patient, so avoid objects in Group Notes boilerplate.</p>
CAC	Clinical Application Coordinator. A software specialist who usually works for one of the medical center services.
CPRS	Computerized Patient Record System. A front-end program that attempts to provide all VistA functionality in a Windows interface. Currently CPRS is being re-written to work in any windowing system that supports a web browser. This will allow users to access VistA from UNIX and Macintosh based systems. The target date for release of this advanced system is third quarter 2005.
IRMS	Information Resource Management Service.
TIU	Text Integration Utilities. An umbrella package with the purpose of combining all clinical note processing into a single entity. In CPRS, TIU is represented by the Notes tab.
VDL	VistA Document Library. A service of the Department of Veterans Affairs to provide documentation to all users. Anyone can access the VDL at web address: www.va.gov/vdl/

(This page intentionally left blank)

Index

2	Introduction, 1
2FA. <i>See two-factor authentication</i>	IRMS, 17
A	N
Additional Signer, 15	New Note, 7
ADPAC, 8, 17	Note Text, 8, 11
Audience, 1	Note Title, 7
B	O
boilerplate, 8	objects, 8, 17
Boilerplate, 7, 17	Operation, 3
C	P
CAC, 8, 17	patient list, 3
Common Encounter Data, 6	Patient Selection, 5
Common Encounter Entry, 9	Purpose, 1
Common Note Text Entry, 8	R
Common Note Title, 7	Repeat, 16
co-signer, 7	S
CPRS, 17	Scope of the Manual, 1
E	sign note, 14
encounter data, 1, 3, 6	Start New Group Notes, 16
Encounter Entry, 9, 12	T
encounter fields, 4	Text Entry, 8
encounter form, 9	Title, 7
Exit Group Notes, 16	TIU, 1, 17
G	two-factor authentication, 4
Group Signing, 14	V
I	VDL, 1, 17
Individual Encounter Entry, 12	Visit, 4
Individual Note Text, 11	W
Individual Note Text Entry, 11	Web Page, 1

(This page intentionally left blank)