

# TIP SHEET

MultiCare Education Services (ILD)



## Procedure Documentation in NoteWriter

**AUDIENCE:** Intensivists logging into MC  
Pulmonary Spec Tac or Puy

**EFFECTIVE:** December 13, 2016

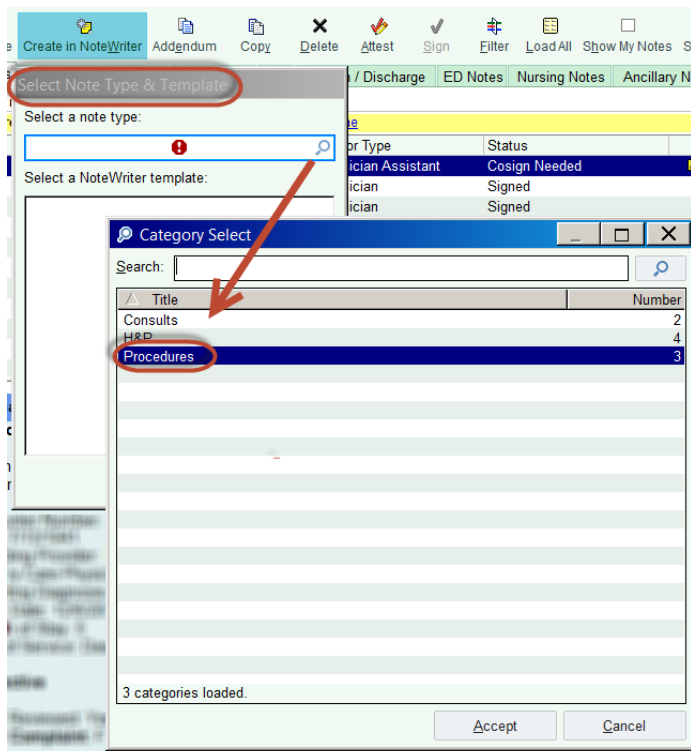
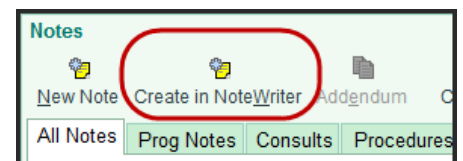
**Locations:** All MHS Hospitals

## PROCEDURE DOCUMENTATION IN NOTEWRITER

Intensivists will now be able to use NoteWriter to document procedure documentation. This procedure documentation must be used for all central lines.

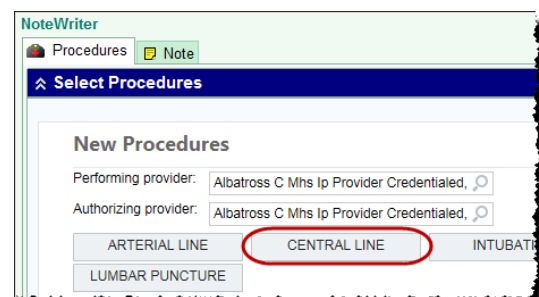
### NoteWriter – Procedure Note

In the **Notes Activity** click on the **Create in NoteWriter** button at the top of the Notes activity.




You may need to select a Note Type & Template. Type in or use the magnifying glass to search for “Procedures”.

Select the procedure performed from the selections displayed.



At the top of the document read the statement displayed and click the **Acknowledge** button.

 Medications documented here as part of the note will not automatically update the medication list or the MAR. Please ensure that any necessary medications given are appropriately ordered and/or documented in the medication list or on the MAR.

Acknowledge



Begin your documentation by reading through each section and clicking on the selection buttons, checking the boxes or typing in the free text windows provided. Each button selection row has a place to enter comments if you need to add more documentation per row.

The selected row information will automatically be entered into the note displayed at the bottom.

Click the **Notes** tab at the top of the screen to view the entire note. You may add free text documentation to the note and use any of your SmartPhrases as well.

Click the **Sign** button when you have completed the note. If you need to make any edits to the note after signing it, select your note and click the **Addendum** button.

**NOTE:** Documentation entered in the note using the NoteWriter tools can only be removed by unselecting the choices made. Those areas in the note highlighted in a salmon color cannot be removed by deleting text with your mouse or keyboard.

### Benefits of Using the Procedure Note in NoteWriter

Using the Procedure Note in NoteWriter will help Intensivist save time in ordering procedures and placing charges. When you use the Procedure note and select your procedure, the system automatically places and completes the procedure order for you. The procedure order will display in the **Order Review** activity.

Go to the **Orders** activity and click on the **Order History** tab. This will open the **Order Review** activity and you can review your procedure order.

IP/OP/FAM	Order Date-Time	Order Type	Order	Ordering Provider	Status	Phase of Care	End Date
Inpatient	07/26/2016 09:42 AM	Patient Care	O MD TO RN COMMUNICATION (...)	Teresa D Bell, MD			
Inpatient	08/10/2016 03:56 PM	Patient Care	O MD TO RN COMMUNICATION (...)	Teresa D Bell, MD			
Inpatient	08/12/2016 06:18 AM	Patient Care	O APRIA COPD CHF READMIN FO...	Teresa D Bell, MD			
Inpatient	08/24/2016 01:34 PM	Patient Care	O NOTIFY PROVIDER (ONGOING)	Andrei Ionescu, MD			
Inpatient	08/24/2016 01:34 PM	Patient Care	O NOTIFY PROVIDER (ONGOING)	Andrei Ionescu, MD			
Procedures	12/02/2016 11:40 AM	Procedures	O CENTRAL LINE PLACEMENT	Albatross C Mhs Ip Provi...	Completed		12/2/2016



Another benefit of using the Procedure Note in NoteWriter is that charges are automatically placed for you. Intensivists will no longer need to enter charges manually in **Charge Capture**.

Summary of My Charges and Notes

Zzzjw, Ildtest #3481803 (CSN:104105832) (31 year old M) (Adm: 07/13/16)

**My Charges and Notes**

12/2/2016

Code	Description	Billing Provider
36556	P Insrtn Non-Tunnld Cntrly >5	Albatross C Mhs Ip Provider Credentialed, MD

### Creating Macros for Procedure Notes

A NoteWriter macro can help you document your Procedure more efficiently. Creating a macro saves information that you commonly record in a procedure. The macro can then be applied to your procedure note quickly adding the saved information. Anything you document in the note before applying the macro is preserved and you can also make changes after applying it.



There are two ways to create Macros for NoteWriter Procedure notes. You can create macros 'On the fly' while in the patient's note or use the Macro Manager found in the Epic toolbar.

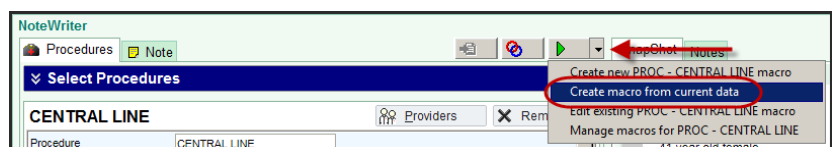
The following will show you how to build Macros both ways mentioned above.

### Creating a Procedure Macro on the Fly

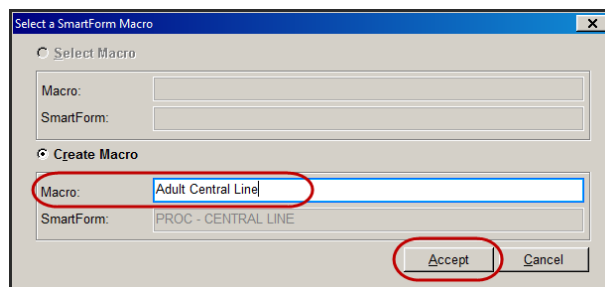
Follow these steps to create a macro on the fly based on the documentation you've recorded for the current patient.

- Choose the procedure and make your selections in the Procedure NoteWriter

- Next, click  to the right of the  button and select **Create macro from current data**



- In the **Macro Selection** window, enter a name for your macro in the **Macro** field and click **Accept**





- In the **SmartForm Macro Editor**, edit the macro by selecting any other items that you commonly record
- Click **Accept** when you are done

The next time you enter NoteWriter for the same procedure, click the and select the macro template you created that applies to the patient.

Select **Apply Macro** in the window that displays.

Once the macro is applied, review the note and make any edits as needed.

### Creating a Procedure Macro in Macro Manager (NoteWriter)

You can create and save **Procedure Macros** without entering a patient's chart by going to the **Macro Manager** located under the **Personalize** button on the Epic toolbar. If you do not have this button on your toolbar, it can be found under the **Epic** button.

- Click the **Personalize** button and select **Macro Manager (NoteWriter)**
- To create **Procedure Macros** you must select **SmartForms**



- Type 'Proc' into the **Select a SmartForm** window and press **Enter** to see the Procedure selections, find the procedure and click **Accept**. For Central Lines use **Proc-Central Line**.

Select a SmartForm:

Record Select

Search:

ID	Form Description	Use
100207	PROC - CENTRAL LINE	
100211	PROC - INTUBATION	
100209	PROC - JOINT ASPIRATION	
90003	PROCEDURE - AMBULATORY FOOT ARTHROCENTESIS	
90002	PROCEDURE - AMBULATORY LARGE JOINT ARTHROCENTESIS	
90001	PROCEDURE - AMBULATORY MEDIUM JOINT ARTHROCENTESIS	
90000	PROCEDURE - AMBULATORY SMALL JOINT ARTHROCENTESIS	
46047	PROCEDURE - ANOSCOPY/SIGMOIDOSCOPY	
46499	PROCEDURE - FIBRILLARY CARDIOVERSION	

50 records loaded, more records to load.

- Next, click the **Create a SmartForm Macro** button

Select a SmartForm:

- In the **Select a SmartForm Macro** window enter the name of your Macro in the space provided and click **Accept**
- Next, select the areas you commonly document or prep steps you frequently perform before a procedure. Click **Accept** when you are done

Select a SmartForm Macro

Select Macro

Macro:

SmartForm:

Create Macro

Macro:

SmartForm:

SmartForm Macro Editor - PROCEDURE - CENTRAL LINE

Name:  Display name:

1 General 2 Owners/Users 3 Procedures

Procedure:

Date/Time:

**Universal Protocol**

Verbal consent obtained?  Yes  No Written consent obtained?  Yes  No  Emergent situation

Risks and benefits  Risks, benefits and alternatives were discussed

Consent given by  patient  parent  guardian  spouse  power of attorney

Patient states understanding of procedure being performed  Yes  No

Patient's understanding of procedure matches consent  Yes  No

Procedure consent matches procedure scheduled  Yes  No

Relevant documents present and verified  Yes  No

Test results available and properly labeled  Yes  No

Site marked  Yes  No

Imaging studies available  Yes  No

Required items  Required blood products, implants, devices and special equipment available

Patient identity confirmed  verbally with patient  arm band  provided demographic data

hospital-assigned identification number

anonymous protocol, patient vented/unresponsive

Time out  Immediately prior to the procedure a time out was called

A time out verifies correct patient, procedure, equipment, support staff and site/site marked as required

**Indications**

Indications  vascular access  central pressure monitoring

**Anesthesia**

Anesthesia  local infiltration  see MAR for details

Local anesthetic  lidocaine 1% with epinephrine  lidocaine 1% without epinephrine

lidocaine 2% with epinephrine  lidocaine 2% without epinephrine

bupivacaine 0.25% with epinephrine  bupivacaine 0.25% without epinephrine

bupivacaine 0.5% with epinephrine  bupivacaine 0.5% without epinephrine

NaHCO3 (sodium bicarbonate)  topical anesthetics

LET (lido epi tetracaine)  lidocaine/prilocaine emulsion

co-phenylcaine spray  lidocaine spray

Anesthetic total (ml)

**Sedation**

Patient sedated  Yes  No

Sedation type  anxiolysis  moderate (conscious) sedation

Sedation  etomidate  diazepam  fentanyl  haloperidol

Active



## Finding your Procedure Macros in NoteWriter

Enter the Notes activity and select NoteWriter. Click the Procedure button you need to document a note on.

Click ▾ to the right of the ▶ button and select the macro you created.

