# Using the eDOCSNL COPD Visit Template

eDOCSNL is pleased to introduce a Provincial COPD Patient Care Visit Template which has been produced in collaboration with the Family Practice Renewal Program (FPRP) and the Clinical Advisory Committees of both Programs.   These committees include representation from Fee For Service and Salaried Primary Care physicians, as well as Respirology consultant input.  The template supports best practice clinical guidelines as well as the requirements for the FPRP Provincial COPD Fee Code for COPD care.

This document will detail what you need to do to successfully use the template and satisfy the requirements for the COPD Fee Code (522).  Please note that eDOCSNL and FPRP have jointly produced an instructional video, with step-by-step instructions for template use, covering much of the same content presented here.  You can access the video by clicking here.

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## Finding and Using the COPD Visit Template

Before you get started with the template, you will need to favorite it for easy access and use; this will require accessing the template library.  To access the template library, click the "templates" icon in the upper right corner in your normal dashboard view (note that you cannot see this icon while in a patient chart). If you do not see the icon, it means you do not have the template library made viewable in your profile permissions. In this case, you may have to get an admin user to turn on the permission for you in order to complete some of the next steps; please reach out to eDOCSNL at info@edocsnl.ca for assistance.
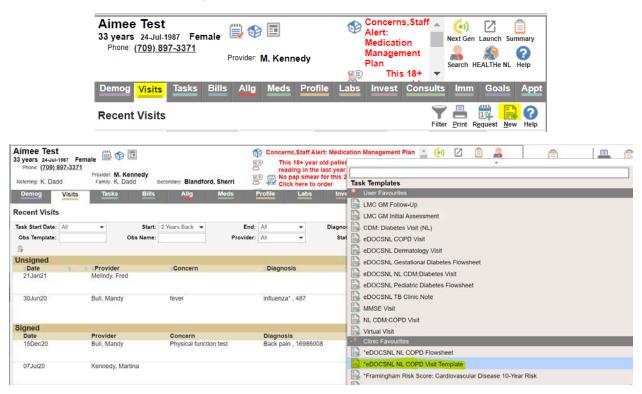


To favorite a visit template, enter the task library as described previously and select the "Visit" tab from the tabs in the horizontal line towards the top of the page. In the "Template Name" field, type "copd".

The template you need to favorite is titled **"*eDOCSNL NL COPD Visit Template".**  To favorite a template for use for yourself, click the leftmost heart which you will find to the right of the template you have selected.  If you want to favorite the template so that everyone in your clinic can use it, you will click the rightmost heart. When the color changes from grey to pink, you have successfully favorited the template.
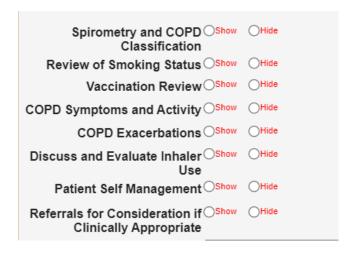
The visit template can then be accessed as you would any other documentation template in your system and can be built into an appointment type to launch automatically if desired. Right click on new and select the eDOCSNL COPD Visit Template from within the Visit tab in the patient's chart if this is your customary workflow. Otherwise, use whatever workflow you have developed for your own individual needs to access and use the template.
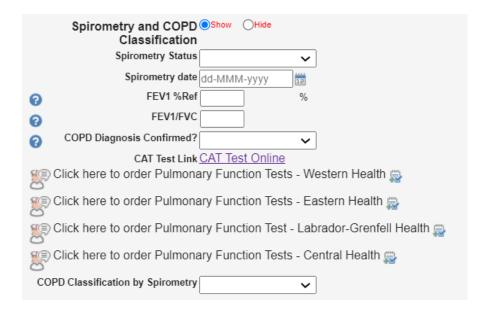




## COPD Visit Template – Initial View

The template was developed to reflect current guidelines and the development effort was informed by feedback from the FPRP and eDOCSNL clinical advisory groups and a pilot group of fee for service physicians. The template was designed to be fully featured and yet only display the information and documentation required for the components of care that you choose to focus on during a visit with your patient. This is achieved with the ability to select (or "Show" in the visual below) only the elements of documentation that apply to your chosen focus area.
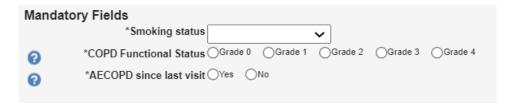
For instance, when you click "Show" for Spirometry and COPD Classification, documentation opportunities open up as seen below. When you click "Hide", the section collapses again.



## Clinical Requirements vs Fee Code Requirements

The first thing you need to be aware of is that the clinical documentation requirements for care of a COPD patient may be different from what is required for the fee code. This means that the mandatory fields that you see at the top of the visit template do not necessarily reflect what is required to bill for the visit but what has been determined to be the fundamental items that should be addressed in a visit for COPD management, as determined by the Clinical Advisory Group. The mandatory fields are found at the top of the template, as seen below:

Mandatory fields **must be completed** in order to save the template and move on with your work.

The requirements to satisfy the fee code differ somewhat from this and can be found at the following link in the template, which can be found just above the mandatory fields.



## Features of the Template

The below assumes basic knowledge of navigating and using visit templates in Med Access. A line-by-line review will produce a document that is so long and exhaustive as to almost guarantee it will never be read. What follows is an exploration of the main features of the template that may be unfamiliar to some users.

### Macros

To use a macro simply double click the bracketed word or phrase to populate the field with some system-determined information. In the example you see here, this is the start time for your visit.
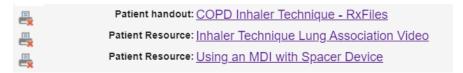


### Embedded Tasks

Completing embedded tasks involves simply clicking the document icon next to the task title. Complete the task like you would any other in Med Access and when you close it, you will be brought back to your visit template where you left off.



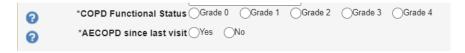### Embedded Documents and Weblinks

You can access weblinks and embedded documents by clicking the underlined title. The links will launch when clicked and when the link or document is closed you will be brought back to your visit template where you left off. In the COPD visit template, these tools and documents are sprinkled throughout and

include such examples as a link to the COPD fee code conditions, patient education, guidelines links and instructions for patients on how to use their medications.
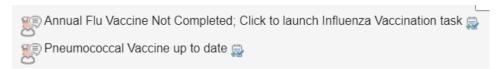


## Notes

You will see the blue question mark icon scattered throughout the template.  These indicate notes and information directly from the COPD guidelines that are hidden from view.  By hovering over the icon, the note is revealed
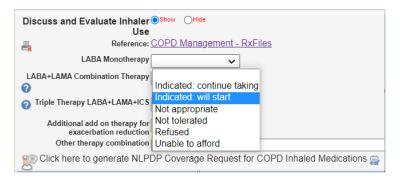


## Clinical Decision Support Triggers

Clinical decision support triggers bring together potentially disparate pieces of information from the chart to produce an alert that may help to guide clinical decision making.  When the criteria for the trigger are met, the message will appear.  No action is required to address the items in the visit template.  The message will either go away or change as appropriate. In this example, the flu vaccine is overdue whereas the patient has had a pneumococcal vaccine in the required interval.
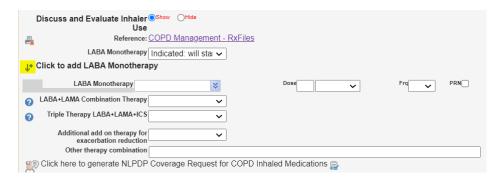


## Med Documentation from within the visit

The COPD visit template has a section for documenting current medication therapy by drug class.  In the example here, the provider is selecting to document LABA monotherapy.  The cascade of documentation starts by indicating from the dropdown that the medication is indicated.
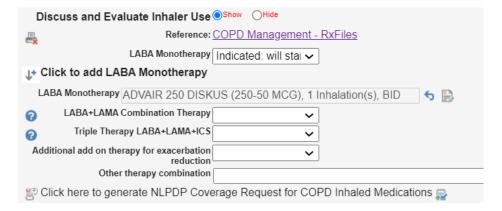
Next, clicking the drilldown arrow to the left of the message will allow the documentation of the medication itself.



When the drilldown is clicked, a dropdown appears from which the provider can select the appropriate medication from a list of the patient's currently prescribed meds.



This keeps all of the patient's COPD meds in easy view in the template for a comprehensive picture of the patient's COPD status and treatment. Please note that this cascade **does not actually prescribe a medication**, it is merely a way to document the medication in a visit record during a comprehensive review.

### Why Use the COPD Visit Template?

The visit template:

- Supports guideline-driven care
- Considers efficiency and clinical value
- Has clinical decision support elements that will improve outcomes
- Provides data for practice management reporting in your EMR instance

### Contact / Support

If you have any questions about the COPD Fee Code, please contact the FPRP at fprp@nlma.nl.ca. For questions on the template or other EMR functionality, please reach out to edocsnl at info@edocsnl.ca.