



EHR HH NURSE VISIT NOTE CHARTING CHECKLIST

Follow Up Visit Nurse Note:

- Login to Advanced MD (AMD) on EHR side
 - Enter <https://login.advancedmd.com/> in Chrome browser
 - Click on “EHR” check box at login
 - In patient search box located in the top left corner of window, identified by a magnifier glass icon, type in patient last name
 - Select the correct patient to open the patient’s chart
- Create a new Nurse Note
 - Locate the “Notes” card, identified by a clipboard icon
 - Click on the “+” sign in the top right corner of the “Notes” card to open a new note. A “New Patient Note” window should open
 - Within the “New Patient Note” window, find the “Info” tab. In the “Info” tab, locate the “Template Type” field. It should default to “PVA_Mobile”. If not, click on the drop down arrow to the right of the field and select “PVA_Mobile”
 - To the right of the “Template Type” field, locate the “Template” field. Click on the drop down arrow to the right and select “HH Nurse Visit Note”
 - Note the new tabs that populate to the right of the “Info” tab: “Pt Info/Vitals”, “Medication”, “Assessment” and “Addendum”
- Complete the Nurse Visit Note
 - It is highly recommended to click “Save” in the top left of the “New Patient Note” window when moving between tabs and after entering patient information in order to avoid losing patient information
 - When documenting in fields with a drop down arrow located outside of the field box, multiple items may be selected by simply clicking on the desired item. Free text may also be added by clicking on the field box and typing
 - In the “Pt Info/Vitals” tab, enter Coram ID# in the “**Patient ID#**” text box
 - Document “**Visit Date**” and “**Visit Start Time**” at the beginning of your visit
 - Select Diagnosis Code and description from the drop down arrow to the right of the “**Diagnosis**” field. If the diagnosis code is not listed in the drop down menu, manually enter the diagnosis code and description into the “Other Dx” text box immediately below the “Diagnosis” field
 - In the “**Medication**” tab list Drug Therapy Type
 - If a new IV must started in addition to an existing line during your visit, document the new vascular access information in the “Addendum” tab under the “Secondary Vascular Access” heading
 - Enter “**Next Nursing Visit**” and “**Next MD Visit**” information
 - Document “**Visit End Time**” at the end of your visit



PRECISION VASCULAR ACCESS

IV Nurses at your Service

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- Ensure all of your documentation is complete and click “Save” at the end of your visit, located at the top left of the “New Patient Note”/“HH Nurse Visit Note” window. *The window name changes to “HH Nurse Visit Note” once the document is saved
- Review your documentation and click “Review”, located at the top of the window
- Obtain Patient Signature
 - Once your documentation has been reviewed, click “Word Merge” located at the top of the window
 - Select “Print/Merge” from the pop up window and slide your mouse to the right towards the right side arrow to select “HH Nurse Visit Note”
 - A new Google Chrome window will pop up. Click on the “maximize” icon located in the top right of the blank window next to the red “X” box to expand the window
 - Locate the new Word Merge document located in the bottom left of the newly expanded Google Chrome window. Click to open. A new Word document will populate
 - Review the Word Document for any errors and make any corrections if necessary.
 - Click “File” in the top left corner and select “Save As”. When prompted to save the document, save the file to your desktop or to a designated folder where you can easily locate the file. Save the file as “LASTNAME NN YEARMODAY” (ie MOUSE NN 20201122 for patient Mickey Mouse seen on November 22, 2020)
 - Scroll towards the last page of the document and locate the signature lines
 - Locate and click on the “Insert” command button in the top row of the window
 - Click on the “Shapes” down arrow to reveal the Shapes tools
 - Locate and select the “Freeform:Scribble” tool
 - On the Word phone app, click on the edit icon at the top identified by a pen. On the menu that appears above the keyboard, locate the down arrow on the far right to reveal other menu options. Select “Draw” from the menu drop down options. Select “Draw with mouse or touch”
 - Have the patient or caregiver sign their name on the “Patient/Caregiver” line
 - Adjust the signature to fit within the blue box border as needed
 - Repeat the signature process above to sign your name on the designated “Visiting Nurse Signature” line
 - Click on the floppy disk icon in the top left corner of the Word Window to save your work
- Upload NN into EHR patient file
 - Open AMD and log into the EHR side
 - Enter <https://login.advancedmd.com> in Chrome browser
 - Click on “EHR” check box at login
 - In patient search box located in the top left corner of window, identified by a magnifier glass icon, type in patient last name



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- Select the correct patient to open the patient's chart
- Locate the "Documents" card in the patient's file
 - Click on the "+" icon in the top right corner
 - Select "Upload Document" from the pop-up window
- In the "Folder" field, click on the blue drop down arrow to the right and select "Notes"
- In the "Name" field located below the "Date" field, enter "NN YEARMODAY" (ie "NN 20201122" for November 22, 2020)
- In the "Description" field, enter "Signed Visit Note"
- In the "Document to Upload" field, click on the "Choose File" button
 - Select the previously saved file containing the patient signature
- Click on "Upload to Chart" at the top left of the "New Upload" tab
- The newly uploaded file should populate in the "Documents" card
 - Open the file to **review for correct patient name and verify that signature is present**
 - Click on "Review" from the top menu bar
- Email NN to the Nurse Supervisor from AMD
 - Submit original paperwork OR EHR NN via email within **48 hours** to avoid late penalty fee
 - If paper documents were completed, may return original documents to office via mail or drop off in person
 - Locate the "Documents" card in the patient's chart
 - Click on the correct NN
 - In the far right of the menu bar, locate the email icon, represented by an envelope
 - When hovering over the envelope icon, "Send new message" will appear
 - Click on the envelope icon to send a new message
 - Locate the Nurse Supervisor's name from the "Contacts" box in the top left of the "New Message" window
 - Click on the Nurse Supervisor's name
 - Click on the right-facing blue arrow in between the "Contacts" box and the "Route To" box to transfer the name into the "Route To" box
 - The highlighted name should now appear in the "Route To" box
 - In the "Message Type" field on the right side of the "New Message" window, click on the blue drop down arrow to the right of the field and select "Review ASAP"
 - In the "Message" field located in the bottom half of the "New Message" window, type a message to the Nurse Supervisor regarding your note
 - AMD will not send without a message
 - Click on the blue "Send" button located at the bottom right of the "New Message" window