

SIU UNDERGRADUATE MEDICAL STUDENT EHR DOCUMENTATION

SIU MEDICINE TOUCHWORKS OUTPATIENT EHR EDUCATION

General Access and Privileges of Medical Students: All EHR systems

Second Year Students:

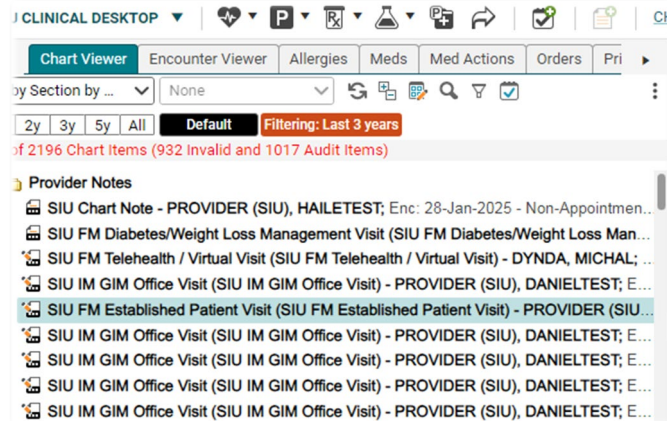
- Y2s have documentation privileges in an educational EHR environment which mirrors the live TouchWorks system, but does not interface with the live/clinic system.
 - The work done in this system is associated with standardized patient encounters hosted in the simulated patient lab as well as periodic SOAP note assignments received by their nurse educator(s).
- Y2s have full access to “view” patient medical records in the TouchWorks live/clinic environment beginning in August. They receive access to Powerchart (Springfield Memorial Hospital) in September each year and Epic (HSHS St. John’s Hospital) in May of their second year.
 - If needed, Y2 students assigned to St. John’s mentors can receive access ahead the regularly scheduled May training.
 - Y2 students assigned to Springfield Clinic mentors are granted access to “view” patient medical records in Athena as needed.
 - Students with SIU mentors may document, at the discretion of the physician, within the physician note (see workflow below).

Third and Fourth Year Students:

- Y3s and Y4s have EHR documentation privileges in TouchWorks, Powerchart, and Epic. They are granted access to “view” patient medical records in Athena as needed.
 - Students may contribute to the E/M billing document of the day as described below.
- Medical students will not document under someone else’s user name or password.
- Any contribution and participation of a medical student to the performance of a billable service must be performed **in the physical presence of a teaching physician or physical presence of a resident** in a service meeting the requirements set forth for teaching physician billing.
 - Their **documentation cannot be used during use of primary care exception.**
 - Ex: Third year general medicine resident able to see patient without physical presence of a faculty in the room.
 - **Their documentation cannot be used for admission H&Ps or discharge summaries.**
 - **Their documentation cannot be used for procedural documentation.**

What all medical students need to do in the live TouchWorks environment:

- A medical student may contribute to any section of the daily note by opening the appropriate note date with the pencil to the left of the note, indicating draft status.



- Once in the note, **students are not to document allergies, medications, medication reconciliation, or orders.**
- When finished documenting:
 - Open the attestation form and check the medical student statement box to insert the following statement:

“I participated in the documentation of this service as a medical student.”

- By inserting this statement, the name of the medical student involved in the care will be inserted and time stamped to the note.
- The medical student will then “save and close” the note to allow for a resident and/or attending to contribute.
- The medical student will not edit the note after the physician signature.

Medical student receiving feedback:

- Students check their “Task List” for a response from the physician regarding feedback (unless verbal feedback is given). Tasks can be found via the student’s inbox.

The screenshot displays a medical software interface. On the left is a dark sidebar with navigation options: Note, Prenatal, Utilities, Reporting, PMP, SIU Info, PatientLink, DRVS, Schedule, Inbox (highlighted with a red badge showing '1'), Doc Tasks, Worklist, and Pt Lists. The main area is titled 'INBOX' and shows a list of tasks under 'MY VIEWS'. The tasks are: 'STUDENTS UNSIGNED N...' (1), '.CURRENT PATIENT - ACT...' (69), '.CURRENT PATIENT - A...' (1853), 'MY ACTIVE TASKS' (1), and 'Sign-Note' (1). The 'Sign-Note' task is selected, showing a pop-up window for 'ZZTEST, CI'. This window includes a 'Sign-Note' header, a search bar, and buttons: 'Go To...', 'Done', 'In Progress', and 'Undelegate'. Below these are links: 'Reply', 'Reassign', 'Copy to Note', and 'Print'. The 'DETAILS' section shows 'Assign To' set to 'User' (selected) with a dropdown menu showing 'COLLINS (SIU), MATTHEW'. It also shows 'Priority' as 'Routine' and 'Status' as 'Active'. The 'Comments' section shows a comment from 'COLLINS (SIU),MATTHEW - 30-Jan-2025 1:03 pm' stating 'TASK EDITED' and 'Note needs finalization signature.' The 'Note Date' is '07-Aug-2024 01:09 pm', 'Note Type' is 'SIU Student Comprehensive Note', and 'Note Owner' is 'COLLINS (SIU), MATTHEW'.

- The “Task List” includes items within the record that require action, including feedback on students’ notes.
- It is a student’s responsibility to ensure all items on their “Task List” are replied to, completed, and/or done (which removes the item(s) from the list) prior to the end of each clerkship, selective, or elective.

What teaching physicians need to do when working with medical student documentation:

- The faculty must verify all student documentation or findings: history, physical exam, and/or medical decision making.
- **The faculty must personally perform (or re-perform) the physical exam and medical decision-making activities of the E/M service being billed.**
- The faculty must add the following attestation. By checking the associated box, this will be added to the note:

“A student assisted with the documentation of this service. I saw and personally examined the patient and reviewed and verified all information documented by the student and made modifications to such information, when appropriate.”

The screenshot shows the 'SIU NOTE VIEW' interface. On the left is a sidebar with a tree view containing categories like 'Plan', 'Active Problems', 'Current Meds', 'Allergies', 'Immunizations', 'Results/Data', 'Counseling', 'Attestation', and 'Signatures'. The 'SIU Teaching Attestation' option under 'Attestation' is selected. The main content area displays several attestation sections: 'In office testing INTERPRETED by Resident and Supervisor' and 'In office testing REVIEWED by Supervisor' (both unchecked); 'Psychiatry Based Services' with three radio button options; 'Attending/Medical Student Attestation' where 'Student Documentation Used (Provider)' is checked (highlighted with a red box) and 'Medical, P.A., APRN Student statement (Student)' is also checked; 'Telehealth Service Attestation' with four radio button options; 'Audio Only Telehealth Visit' with a checkbox for 'Total Visit Time' and a note '(billable only for Medicaid and Commercial Payers)'; and 'Virtual Check In' with a note '(Must select both boxes when selecting Virtual Check In)'. At the bottom are buttons for 'Sign', 'Sign & Charge', 'Final', 'Recompile', 'Copy Forward', 'Save & Close', 'Save', and 'Close'.

- If both a **medical student** and a **resident** document within a note, the teaching physician must **attest to both the student’s documentation AND the resident’s participation** in the care of the patient as shown below:

“A student assisted with the documentation of this service. I saw and personally examined the patient and reviewed and verified all information documented by the student and made modifications to such information, when appropriate”

“I saw and personally examined the patient and discussed the case with the resident. I have reviewed the resident’s note and agree with the content and plan as written”.

- The teaching physician must sign and date their documentation.

- In order to review student/resident documentation, the teaching physician can use the “Audit” feature at the bottom left of the screen when in the “View” portion of the note draft to review the content section that was authored.

The screenshot shows the TouchWorks interface for a patient named ZZTEST, CI 01-Apr-1991 (33y) F (Woman/Girl). The 'Active Problems' list includes conditions like ADHD, Anemia, and Depression. At the bottom, the 'Annotate' menu is open, and the 'Audit' option is highlighted with a red box.

Note Audit Dialog

Date	Name	Credentials	Section	Modification
23-Oct-2024 08:18 am	AMIT SAPRA	M.D.	All	Finalized

- Faculty can give verbal feedback or electronic feedback via a “Not about a patient” task.

The screenshot shows the bottom of the TouchWorks interface with the 'Task' button highlighted in a red box.

Important: Choosing 'Not about a patient' is the only way in TouchWorks that communication between the student and physician will not remain a permanent part of the record. Choosing 'Not about a patient' allows the student questions and physician feedback to be open and candid, without risk of that information being a permanent part of the record.

- At the bottom of the note screen, click the 'Task' icon to send a Task to the student.
- The option 'Not about a patient' is selected.
- Assign to 'a 'User' (name of student or resident)
- From the 'Task' selections pick: 'Resident/Student Feedback'
- In the 'Comments' section, include the patient's name, MRN, and date of the note, as documentation will not automatically be attached to the task.
- When the 'OK' button is selected, the task will send to student.

The screenshot shows the 'Task Details' dialog in TouchWorks. The 'Task' tab is selected, and the option '1 - Not about a patient' is chosen. The 'Assign To' field is set to 'User' and 'COLLINS (SIU), MATTHEW'. The 'Task' dropdown is set to 'Resident/Student Feedback'. The 'Priority' is 'Routine' and the 'Status' is 'Active'. A large text area for 'Feedback' is visible. At the bottom, there are fields for 'Activate' and 'Overdue' dates, and buttons for 'OK' and 'Cancel'.

General scenarios that satisfy the physical presence requirement:

- **Student sees patient alone and obtains history, physical exam, medical decision making** (this may be more common on outpatient):
 - Medical student may contribute to documentation.
 - Resident and/or faculty **MUST** see the patient, verify history, re-perform physical exam and medical decision making, reviews all and places **BOTH** medical student and standard resident attestation to note before signing.
- **Student and resident see patient together, obtain history, physical exam, medical decision making** (this may be more common on inpatient):
 - History, physical exam and key decision making takes place together.
 - Medical student may contribute to documentation, resident contributes.
 - Faculty **MUST** see patient, verify history, re-perform physical exam and medical decision making, reviews all and places **BOTH** medical student and standard resident attestation to note before signing.
- **Student, resident and faculty all go into exam room together at the same time** (may be more common on inpatient):
 - History, physical exam and key decision making all takes place together.
 - Medical student may contribute to documentation, resident contributes, faculty reviews all and places **BOTH** medical student and standard resident attestation to note.