POLICY: UNDERGRADUATE MEDICAL STUDENT <u>EHR</u> DOCUMENTATION

I. Background:

The purpose of this policy is to set forth guidelines that will be followed by SIU SOM and SIU HC when Undergraduate Medical Students (UMS) are involved in rendering care to patients within an SIU SOM outpatient clinic and documenting their encounter in TouchWorks EHR. This policy relates only to those clinical services which are provided within one of the SOM's outpatient clinic sites. For guidance on processes to be followed in other sites of service please refer to the SOM's policy: *Undergraduate Medical Student Documentation*. An undergraduate medical student is an individual enrolled in the SIU SOM academic program leading to a doctor of medicine degree, MD. Medical information and documentation collected and recorded by UMSs is primarily for educational purposes.

II. General Access and Privileges of UMSs:

As many faculty and others are involved as mentors and preceptors for UMS the following guidelines on UMS documentation in TouchWorks EHR will depend upon the UMS's particular place in their educational path.

<u>Second Year Students</u>: "View Only" privileges without documentation or editing privileges. Y2s will have full access to "view" the patient's medical record in the official EHR but only for informational purposes. Y2s do have documentation privileges in an Educational EHR environment which mirrors the live TouchWorks system but does not interface with the live system. Year 2 UMSs only have access to document in the Educational EHR which is primarily associated with standardized patient encounters in the Simulated Patient Lab.

<u>Third and Fourth Year Students</u>: UMSs in one or more of the core outpatient clerkships will be granted documentation privileges but they are only to document on the five (5) unique encounter forms specifically developed for UMSs. These student forms are in a free-text format to encourage development of critical thinking skills. These uniquely developed encounter forms are located in the Business Record section of TouchWorks. The UMS's notes are not an official part of the SOM medical record and are strictly for educational purposes. The UMS's medical notes are not utilized or released as a part of the official patient's medical record. <u>The UMS does not copy or paste other healthcare provider information into their documentation</u>. <u>The attending physician will not copy and paste sections of the student note into his/her own note</u>.

III. Guidelines:

When a UMS is granted documentation privileges, they are instructed to only document in one of the five specifically designed student encounter forms. They are instructed to not enter or create medical notes in any other segment of the live system. Students have the privilege to sign their own notes. The five specifically designed UMS encounter forms are:

SIU Student Clinic Note
SIU Student Comprehensive Note
SIU Student Neurology Note
SIU Student Psych H&P
SIU Student Psych SOAP Note

IV. Attending Physician

The attending physician reviews the UMS documentation and provides feedback. This can be delivered in person or via a 'Task' in the EHR.
The UMS generates a 'Resident/Student Feedback' task to the faculty as outlined below.

Medical Student Workflow for Note Feedback

At the top right of the note screen, the student clicks the 'Task' icon and sends a Task to the physician requesting that he/she review the note and provide feedback. The option 'Not about a patient' is selected.
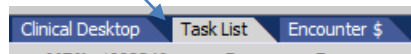
Important: Choosing 'Not about a patient' is the only way in TouchWorks that feedback provided by the physician will <u>not</u> remain a permanent part of the record.

They 'Assign to' a 'User'. From the 'Task' selections, 'Resident/Student Feedback' is selected. (See screenshot.)

In the 'Comments' section, they include the patient's name, MRN, and date of the note, as the documentation will not automatically be attached to the task.

When the 'OK' button is clicked, the task will be forward to the Physician.

Students check their 'Task List' for a response from the physician regarding feedback on their note (unless verbal feedback is given.) The 'Task List' icon is near the 'Clinical Desktop' icon at the top of the screen.

The 'Task List' includes items within the record that require action, including notes that need signed and feedback on notes. It is the students' responsibility to be sure all items on their 'Task List' are completed and removed prior to the end of each clerkship or elective.

Once feedback is received and any changes are made, they click 'Done' at the bottom of the screen. <u>Note: Once they click 'Done', the information is removed and is no longer retrievable.</u>

<u>Attending physician will not copy and paste sections of the student note into their own note.</u>

Policy Administrative Responsibility: e-HIT, ORC

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