Management of Information and Communication

Learning Outcomes

At the end of this chapter, the student should be able to:

8.1 Use software as an internal communication tool.
8.2 Differentiate the steps used to import documents using scanning technology.
8.3 Build master files and templates using PrimeSUITE.
8.4 Create custom screens within PrimeSUITE.
8.5 Develop a task list within PrimeSUITE.
8.6 Set up system flags within PrimeSUITE.

Key Terms

Default values
Flags
Internet
Intranet
Live

Master file
Optical character recognition (OCR)
Resolution
Scanner
Templates
What You Need to Know and Why You Need to Know It

So far in this text, we have mainly looked at information being collected. In this chapter we will look at communicating that information. The information collected in a healthcare environment is shared with external sources such as public health agencies, Medicare, insurance companies, and professional organizations. The information included may be in the form of a summary of a patient’s chart, a report that answers a question, such as the local public health office asking how many cases of flu-related illnesses were seen during a given time period, or a piece of correspondence from one care provider to another. Additionally, the communication may be internal—within the facility. With PM and EHR software, communicating internally through use of an internal e-mail system is efficient. Information is key to almost everything we do, personally and professionally, so having the information we need at our fingertips and communicating that information accurately and in a timely fashion are key to a well-run organization. Taking it a step further, patients who receive timely, accurate information and who experience good communication within the practice will have more confidence in the practice as a whole.

8.1 Internal Communications

The [Internet](http://www.example.com) is a series of networks that allows instant access to information from around the world. Internet sites may be private, requiring a user ID and password to gain access, or they may be public sites that are viewable by anyone. Within an organization, however, the [intranet](http://www.example.com) exists. An intranet is a secure environment or private internal network that is available only to a select group, e.g., the staff, within an organization. Examples of what might be shared on an intranet site include:

<table>
<thead>
<tr>
<th>Facility's mission and value statements</th>
<th>Directory of staff and care providers</th>
<th>Compliance officer's name and contact information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies and procedures</td>
<td>FAQs</td>
<td>Forms, publications, newsletters</td>
</tr>
<tr>
<td>Organization charts</td>
<td>Office meeting minutes</td>
<td>Calendar of events</td>
</tr>
<tr>
<td>Link to the IT department</td>
<td>Calendar of upcoming events</td>
<td>Internal webmail link</td>
</tr>
</tbody>
</table>

The intranet is a one-stop-shop of all the information needed to stay informed about a company and a way to send and receive messages from colleagues. Of course, someone (usually a webmaster) has to keep the information up-to-date; otherwise, the outdated information is not information at all, and there is no benefit to having an intranet. When staff starts noticing that the site is not being kept current, they will stop accessing it and information will no longer be
shared. If your current employer does have an intranet, take some
time to really navigate it—look for the information stated above, and
see if you can find other useful information there.

The use of internal messaging improves communication within
an office. It is particularly helpful in avoiding the “no one ever told
me” syndrome. When internal e-mail is used to communicate work-
related information, and is not cluttered with personal communica-
tions, it is even more valuable. Many organizations have policies
regarding work e-mail for personal use, and though they may not
mandate that it cannot be used as a personal means of communica-
tion, such use is most likely frowned upon and may lead to more
stringent policies. Some offices use a priority rating on their work-
related e-mails. This is particularly helpful to the care providers in
sifting out what needs to be done immediately versus what can wait
for a later time. High-priority messages would include patient care
matters, medium priority would include changes in meeting dates
or time-sensitive information, and low priority might be information
such as lunch is ready in the lounge or FYI messages. When estab-
lishing rules for the priority system, everyone should at least be clear
on what is and is not considered high priority.

### Send an Electronic Message Using
PrimeSUITE Messaging

In this exercise we will look at carrying out an internal communication using
PrimeSUITE. In the exercise that follows, Dr. Ingram is to attend an EMR
meeting, but the date and time have been changed. In this instance, the
message would only be sent to Dr. Ingram; if the message were for all of the
care providers, then it would be sent using a group rather than typing in one
name.

This function is accessible from the desktop screen.

Follow these steps to complete the exercise on your own once you
have watched the demonstration and tried the steps with helpful prompts in
practice mode. Use the information provided in the scenario above to com-
plete the information.

1. Click **No unread messages**.
2. Click **Compose Message**.
3. The **To:** field is filled out with **jingram**. Press the tab key to confirm
your entry.
4. Press **Tab** again to advance to the next field.
5. The **Subject:** field is filled out with **EMR Meeting**. Press the tab key
to confirm your entry.
6. Click **Priority:**.
7. Click **Medium**.
8. The **Salutation** (Dr. Ingram) is added. Press the tab key to confirm
your entry.

(continued)
Communication involves many forms other than e-mail messages. Reports, test results, or verifications of insurance coverage, just to name a few, are communicated many times throughout the day. These reports may be sent to the practice in digital or hard-copy format but in the end must be merged into the appropriate patient’s record.

For example, Dr. Ingram sent Max Shaw to Memorial Hospital for a chest x-ray. The x-ray is completed and the report of the radiologist’s findings is sent electronically to Greensburg Medical Center. It then needs to be merged (attached) to the patient’s chart—the flow of this is depicted in Figure 8.1.

Not all documents can be sent electronically, however. Case in point—let’s say a patient, David Malone, had his chest x-ray at Duffields Hospital, which does not have electronic capability yet. Instead, the report of the x-ray findings is in hard-copy form only. It can be faxed, mailed, or picked up from the hospital by a staff member. Since the goal of Greensburg Medical Center is a paperless office with a unit record for all patients, a hard-copy image would need to be manually scanned into the EHR once it arrives at the office (Figure 8.2).

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**Figure 8.1** Flow of report from hospital to merging with appropriate record in PrimeSUITE

**Figure 8.2** Flow of faxed report from hospital to PrimeSUITE

9. The message body (Just as a reminder, the EMR meeting this week has been moved to Thursday at 3:30 p.m.) is filled out. Press the tab key to confirm your entry.
10. Click **Send message**.
11. Click the “x” to **Close**.

You have completed Exercise 8.1

8.2 Importing Documents to the EHR
When a hard-copy document needs to be scanned, the healthcare professional simply feeds the document through the scanner (or lays the document flat on a screen) (see Figure 8.3), follows the prompts that appear on the computer screen, and finally merges (attaches) the document with the proper patient’s record within PrimeSUITE. The process of scanning is much like the process of making a photocopy. Just as a hard-copy document can be misfiled, so can a scanned image. Before a scanned image is attached to a patient’s health record, the healthcare professional verifies that the correct patient and the correct visit are selected. Also, the type of document (correspondence, authorization, history or physical exam, for example) may be bar-coded so that the document is easily retrievable electronically.

Scanners digitize documents into a format that is readable by the computer. The scanning of documents utilizes optical character recognition technology to convert the document into a format that is computer readable. There are other scanning functions that you may be aware of and may not even realize it—in a grocery store, the cashier passes the bar code from a can of green beans across a small light source; he has just scanned the bar code so that the computer reads it as a 15.5-ounce can of green beans with a price of $1.25. In that case, the optical reader has read a bar code rather than words. This process not only results in a price for the item, it is also part of an inventory control system—the person(s) responsible for re-order now know that there is one less can of beans on the shelf!

Figure 8.3 Scanner used to import a document

**Scan an Insurance Card into a Patient’s Record**

In the scenario that follows, Jessie Hamilton’s insurance card is scanned using a desktop scanner at the time he checks in. Once it is scanned, the document is merged (attached) with Jessie’s chart in PrimeSUITE. If your doctor’s office is automated, the next time you arrive for an appointment and present your insurance card, watch this process. In all, it only takes a minute. In the exercise that follows, you are asked to enter the resolution, that is, the quality of the image as it will appear in the record. Obviously, in a legal record, the highest resolution would be selected.

Follow these steps to complete the exercise on your own once you have watched the demonstration and tried the steps with helpful prompts in practice mode. Use the information provided in the scenario above to complete the information.

(continued)
Care providers and all healthcare professionals are extremely busy. Their first concern is the patient, not documentation. So, to make documenting easier and faster, master files (datasets that provide structure and are the building blocks for parts of the chart notes) and templates (preformatted documents built into the PM and EHR systems) are used. If you think back to the exercises in Chapter 4, you saw many master files. Figure 8.4 is an example of a master file for selecting conditions in a patient’s past medical history.

At Greensburg Medical Center, before the EHR went live (in use in real time), members of the staff built these master files with input from care providers. Master files list common conditions and diagnoses that patients at Greensburg Medical Center have had. Diagnoses can be added to an individual’s record, or to the master file itself. Other master files in PrimeSUITE include PE, ROS, orders, diagnosis favorites, and HPI.

Figure 8.4  Past medical history master file
Building templates within the system is an administrative task that is done prior to going live, but they can be added to as necessary. Templates are preformatted documents that allow screenshots to be built, letters to be written, and progress notes to appear out of individual selections from master files. Care providers may prefer their documentation to look a certain way, so a practice that has five care providers may have five templates for written progress notes.

8.4 Customization

Care providers, registration staff, medical assistants, nurses, therapists, billers, and coders all use the information in the PM and EHR software. But not all of the users “see” things the same way. The way information and subsets of information display in relation to one another on a computer screen is often most effective when the user is...
satisfied with how the information appears. Much PM and EHR software includes flexibility to allow customization of screen configurations, and PrimeSUITE is no exception. Care providers and healthcare professionals in general will be more accepting of an EHR if they know they have some say in the appearance of the information.

**EXERCISE 8.4**

**Customize a Facesheet Screen**

We will now look at a couple of exercises where customization is possible. The first task is to customize a Facesheet screen. In this scenario, the healthcare professional is going to customize a Facesheet. He starts by entering the User Settings Admin within the System Setup module that is in the Chart menu. Watch as he chooses the elements that will show on the Facesheet, and then how he changes the order in which they appear.

Follow these steps to complete the exercise on your own once you have watched the demonstration and tried the steps with helpful prompts in practice mode.

1. Click **User Settings Admin**.
2. Clicking the **Facesheet & History** tab selects it.
3. Click **History Sections**.
4. Click **Facesheet Sections**.
5. Click **Save User Preferences**.
6. Click **Patient Charts**.
7. Click **Customize Facesheet**.
8. Click **Reason For Visit**.
9. Click **Allergy List**.
10. Click **Clinical Alerts**.
11. Click **Confidential**.
12. Click **Family Medical History**.
13. Click **Flowsheets**.
14. Click **Medication List**.
15. Click **Orders Tracking History**.
16. Click **Past Medical History**.
17. Click **Past Surgical History**.
18. Click **Problem List**.
19. Click **Social History**.
20. Click **Task List**.
21. Click **Visit History**.
22. Click **Vital Signs**.
23. Click anywhere to the left of the **Customize Facesheet** menu to close it.
24. Drag **Medication List**.
25. Drop on **Confidential**.

In addition to the Facesheet, the desktop can also be customized to meet the individual user’s preferences.

✓ You have completed Exercise 8.4
Customize a Clinical Desktop

Watch as this user sets up the Desktop (the first screen that appears when a user logs on) to meet her needs and preferences.

Follow these steps to complete the exercise on your own once you have watched the demonstration and tried the steps with helpful prompts in practice mode.

1. Click **Customize Desktop**.
2. Click **Patient List**.
3. Click **Use Clinician Desktop**.
4. Click **Show Orders Tracking**.
5. Click **Show Unsigned Documents List**.
6. Click **Show Task List**.
7. Click **Section First**.
8. Clicking the down-arrow opens a drop-down list.
9. Click **Patient List**.
10. Click **Save**.

☑ You have completed Exercise 8.5

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### 8.5 Using Software to Organize Your Work—Task Lists

With all the requirements we deal with in healthcare, having help with organizational skills is certainly an advantage! In PrimeSUITE, there is a functionality called a Task List or Tasks, where a care provider or other healthcare professional assigns tasks to another staff member or to an entire group. For instance, Dianna Pike, a care provider, wants a particular report to be run by the office administrator, Jon Viria. The request is simply put into Jon’s task list so that he is aware that he has a task that needs to be completed. Or, if it is a task to be completed by an entire group, for instance, the health information department staff, the task—completion of a computerized in-service—can be assigned to the group rather than to each individual, saving the office administrator much time and ensuring that everyone gets the same message!

Some examples of tasks include:

- Renewing magazine subscriptions for the reception area
- Registering for an upcoming seminar
- Calling a patient regarding the need for a follow-up laboratory test
- Making reservations for the office holiday party

As you can see, the tasks may not be clinical in nature; they can be anything that needs to be done by an individual or individuals in the practice.
Create a Task for the Receptionist

In the scenario that follows, a task is set up for Charlotte Baker to schedule a training session on ePrescribing. The message is “Charlotte, will you please contact Greenway and arrange a training session covering ePrescribe? I would like to have this done between April 15th and May 30th. Thanks!” (without the quotes).

This function also allows the user to select the priority of the task—high, medium, or low. Practice policy may dictate what circumstances dictate each, and whether prioritization is used at all.

Follow these steps to complete the exercise on your own once you have watched the demonstration and tried the steps with helpful prompts in practice mode. Use the information provided in the scenario above to complete the information.

1. Click Tasks.
2. Click Add New Task.
3. Click Type:.
4. Clicking the entry General Task selects it.
5. Click Send To:.
6. Click scroll button.
7. Click Baker, Charlotte (cbaker).
8. Click OK.
9. Click Subject:.
10. The Subject: field is filled out with eRX training. Press the tab key to confirm your entry.
11. Click Due Date
12. Click 15.
13. Click Status.
14. Clicking the entry New selects it.
15. Click Add Comment:.
16. The Comment: field is filled out. Press the tab key to confirm your entry.
17. Click OK.
18. Click Save & Return.
19. Click Close.

✓ You have completed Exercise 8.6

8.6 Using Software as a Reminder

If you work in healthcare you have a lot to remember, as you have already seen. It would be next to impossible to remember every situation about every patient. Using the functionality of PM or EHR software, including PrimeSUITE, makes keeping on top of everything easier, though, by including alerts or reminders in a patient’s
chart, through a series of flag alerts (reminders), or icons, each of which has a particular meaning.

**Flags** can be added in the system and can be used for any and all patients.

Examples of common flags include:

- Frequently cancels appointments
- Phone number on file is no longer in service
- Confidentiality messages (such as do not leave message on home phone)
- Co-pay required (and can include amount)
- Patient is noncompliant
- Account in collections
- Do not charge late fee
- Payment plan set up
- Allergic to penicillin (can have several different medications)
- Environmental allergy to _____
- Sensitive information contained in chart
- Clinical alerts
  - Bone density scan due
  - Diabetic patient
  - Requires patient education
  - Pap smear due

A flag can be set up in the system for just about anything the office sees a need for. A word of caution though; do not set up so many flags that it is difficult to remember their meaning, or so that the alert becomes the rule rather than the exception and therefore is ignored!

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### Assign a Flag to a Patient’s Chart

In our final exercise, you will set up a system flag for a patient. In this case, Jessie Hamilton is allergic to bee stings, so the healthcare professional will add that flag to Jessie’s chart.

Follow these steps to complete the exercise on your own once you have watched the demonstration and tried the steps with helpful prompts in practice mode. Use the information provided in the scenario above to complete the information.

1. Click **Search for Patient.**
2. The **Last Name** field is filled out. Press the tab key to confirm your entry.
3. Click **Search.**
4. Click **Select.**

*(continued)*
5. Click **View/Edit Patient Flags**.
6. Click **Allergic to Bee Stings**.
7. Click **Save**.

So as you can see, computerization of the practice management and health record functions has many other benefits to care providers and staff than just maintenance of the information they collect. The use of software streamlines the processes and increases efficiency as well.

✅ You have completed Exercise 8.6
<table>
<thead>
<tr>
<th>LEARNING OUTCOME</th>
<th>CONCEPTS FOR REVIEW</th>
</tr>
</thead>
</table>
| **8.1** Use software as an internal communication tool. pp. 160–162 | - Difference between Internet and intranet  
- Examples of information commonly shared on an intranet  
- Send a message using PrimeSUITE |
| **8.2** Differentiate the steps used to import documents using scanning technology. pp. 162–164 | - Reports within a chart are a type of communication  
- Documents may be imported from within PrimeSUITE or from an external source  
- Scanning a document involves a process of feeding (or laying flat) the document in the scanner, then attaching the document to the appropriate patient’s chart  
- Scanning digitizes documentation into readable format  
- Optical character recognition (OCR) allows scanned images to be edited  
- Scan an insurance card and import it into the record of Jessie Hamilton |
| **8.3** Build master files and templates using PrimeSUITE. pp. 164–165 | - A master file is a listing of possible choices, e.g., a list of allergies, list of conditions, list of surgeries  
- Templates allow for building an end-product such as a progress note, a piece of correspondence, or a screen view  
- Build a master file for an ROS |
| **8.4** Create custom screens within PrimeSUITE. pp. 165–167 | - Allow flexibility and personalization for individual users  
- Design a Facesheet view for a user |
| **8.5** Develop a task list within PrimeSUITE. pp. 167–168 | - Tasks are reminders that a job has been assigned  
- Can be made by any user  
- Can be a task set for a single user or a group  
- Assign a task to a user in PrimeSUITE |
| **8.6** Set up system flags within PrimeSUITE. pp. 168–170 | - Flags are alerts or reminders  
- Use them sparingly; otherwise, they no longer point out the exception to the rule, but rather become the rule  
- Set up a flag on a patient’s record in PrimeSUITE |
MATCHING QUESTIONS
Match the terms on the left with the definitions on the right.

1. [LO 8.6] flag  
   a. secure internal environment available only to a select group

2. [LO 8.5] task list  
   b. device that digitizes documents into a format readable by computers

3. [LO 8.3] master file  
   c. an alert or reminder that appears in a patient’s chart

4. [LO 8.3] templates  
   d. dataset that provides structure and is the building block for parts of the chart notes

5. [LO 8.1] intranet  
   e. software that allows a saved document to be edited

6. [LO 8.3] live  
   f. using something in real time

7. [LO 8.2] scanner  
   g. area where work can be assigned to staff members and progress can be monitored

8. [LO 8.2] optical character recognition (OCR)  
   h. preformatted documents built into an EHR or PM system

MULTIPLE-CHOICE QUESTIONS
Select the letter that best completes the statement or answers the question:

1. [LO 8.1] The Internet is _______ and an intranet is _______.
   a. public; private  
   b. private; public  
   c. private; private  
   d. public; public

2. [LO 8.2] A hard-copy document is attached to a patient’s electronic chart by:
   a. copying.  
   b. e-mailing.  
   c. scanning.  
   d. shredding.

3. [LO 8.3] Using templates makes it easier for care providers to focus on their first priority, which is:
   a. documentation.  
   b. patient care.  
   c. office staff.  
   d. training.
4. [LO 8.4] PrimeSUITE allows each user to _______ certain features to their liking.
   a. access
   b. customize
   c. delete
   d. revise

5. [LO 8.1] A facility needs to make sure that the information on their intranet does not become:
   a. outdated.
   b. overused.
   c. private.
   d. secure.

6. [LO 8.6] It is _______ to have too many flags set up in PrimeSUITE.
   a. impossible
   b. possible
   c. necessary
   d. required

7. [LO 8.3] The Review of Systems menu choices in PrimeSUITE is an example of a/an:
   a. index.
   b. master file.
   c. real-time menu.
   d. template.

8. [LO 8.5] A healthcare professional may assign work to another user with PrimeSUITE’s _______ functionality.
   a. assignment
   b. groups
   c. tasks
   d. workload

9. [LO 8.6] Which of the following is another term for “flag”?
   a. Alert
   b. Avatar
   c. Decal
   d. Symbol

10. [LO 8.4] Which of the following PrimeSUITE functions may be customized by a user?
    a. Access rights
    b. Insurance policies
    c. Patient information
    d. Screen layout
SHORT ANSWER QUESTIONS:
1. **[LO 8.1]** List four things that might be found on an organization’s intranet.

2. **[LO 8.3]** Could one medical office have more than one template for a referral letter? Explain.

3. **[LO 8.2]** Explain the process of scanning.

4. **[LO 8.1]** What will happen if an office’s intranet is not kept current?

5. **[LO 8.3]** List four advantages of using master files and templates in a healthcare office.

6. **[LO 8.6]** List at least eight common flags used in PrimeSUITE.

7. **[LO 8.6]** Why might it be good to have a “Sensitive information contained in chart” alert pop-up when users access specific patient charts?

8. **[LO 8.5]** Explain how using the Task List function in PrimeSUITE helps to organize work.

9. **[LO 8.4]** Why might healthcare professionals be more accepting of an EHR if they are able to customize it in some way?

APPLYING YOUR KNOWLEDGE
1. **[LO 8.4]** How might a care provider “see” the information display in PrimeSUITE in the same way a patient registration staff member would?

2. **[LOs 8.1, 8.2, 8.6]** As office manager, what are some ways for you to ensure that staff members remember to attach hard-copy documents to the patient charts they are working on?

3. **[LO 8.3]** Discuss two advantages and any potential disadvantages to using templates for communication documents.

4. **[LOs 8.5, 8.6]** You are the office manager for a small practice. Since your office recently implemented an EHR system, you would like to have a staff training session to set forth guidelines and best practices for using system flags. Explain how you would use PrimeSUITE to assist you in your task, and come up with four talking points about proper use of flags and alerts.