



Documenting Assessment and Plan

MEDITECH
E X P A N S E

This course will guide you through the Assessment and Plan section of the Document.

Subtle on screen elements of the LIVE system may vary from what is shown within this course; however, the functionality is as shown.

Document T-TEST 54M - MEDITEC x +

https://webacute.mountnittany.org/cectest/s0004284158929476/

Return To Home Workload Chart Document Orders Sign Compose More Settings Suspend

Primary Care Office Visit SAVE DRAFT SIGN

Author: Christophe E. Hester, MD Last Saved at 03/20/19 13:56

Nursing Quality PFSH HPI ROS Exam Office Procedures Results Assessment and Plan Coding Departure

Nursing Intake

Nursing

Intake

Visit Reasons: Morbid obesity, Diabetes, Hypertension

Allergies/Adverse Reactions

Allergies

No Known Allergies Allergy (Verified 01/15/19 07:57)

Medication Reconciliation

insulin aspart U- (Novolog U-) 81 units (0.81 mL) subcut TID
 insulin glargine (U- (Lantus U-) 50 units (0.5 mL) subcut DAILY
 losartan 50 mg PO DAILY
 sertraline (Zoloft) 25 mg PO DAILY
Do you need a note to return

Do you need a note to return to daycare/school/sports/work: No

Vital Signs

| | 03/20/19 13:15 |
|--------|-------------------|
| Height | 5 ft 1.02 in |
| Source | Actual |
| Weight | 446 lb |

T-Test, Carl
 54, M - 01/17/1965
 MRN# M000000585

Arrived REG AMB, PG.BELIM

5ft 1.02in BSA: 2.95m²
 446lb BMI Percentile: 84.1%

Visit Date: 03/20/19

Resus Status
 Hx Avail

Search Chart

Allergies

No Known Allergies

Problems

ONSET

Morbid obesity

Vital Signs

| | Today 13:15 |
|-------|----------------|
| BP | 200/100 H |
| Pulse | 70 |
| Resp | 65 H |

we will scroll down

You will begin in the Document Routine. This document is currently in Flat Edit Mode. You can see that the Visit Reason has already been populated by the nurse, as well as other Intake Information. To view the Assessment and Plan section in this mode, we will scroll down to the bottom of the document.

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Primary Care Office Visit SAVE DRAFT SIGN

Author: Christophe E. Hester, MD Last Saved at 03/20/19 13:56

Nursing Quality PFSH HPI ROS Exam Office Procedures Results Assessment and Plan Coding Departure

Assessment and Plan Problem

Assessment and Plan

Hypertension
Status
Add to Problems
Medications

Morbid obesity
Status
Add to Problems
Medications

Diabetes mellitus
Status
Add to Problems
Medications
New:
insulin glargine (U- (Lantus U-)) 50 units (0.5 mL) subcut DAILY 10 mL 3RF
insulin aspart U- (Novolog U-) 81 units (0.81 mL) subcut TID 10 mL 2RF

T-Test, Carl
54, M · 01/17/1965
MRN# M000000585

Arrived REG AMB, PG.BELIM
5ft 1.02in BSA: 2.95m²
446lb BMI Percentile: 84.1%

Visit Date: 03/20/19
Resus Status
Hx Avail

Search Chart

Allergies
No Known Allergies

Problems
ONSET
Morbid obesity

Vital Signs

| | |
|-------|-------------|
| | Today 13:15 |
| BP | 200/100 H |
| Pulse | 70 |
| Resp | 65 H |

From this view, notice that the Visit Reason is a problem that has already been added to your documentation for today's note. It is important to note that Expense does not automatically add visit diagnoses to the ongoing Problem List. For a diagnosis you believe should be on the Problem List, you have the ability to add this problem to the Active Problem List. Click on 'Add to Problems'.

Document T-TEST 54M - MEDITEC x +

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Return To Home Workload Chart Document Orders Sign Compose More Suspend

Primary Care Office Visit SAVE DRAFT SIGN

Author: Christophe E. Hester, MD Last Saved at 03/20/19 13:56

Nursing Quality PFSH HPI ROS Exam Office Procedures Results Assessment and Plan Coding Departure

Assessment and Plan Problem

Assessment and Plan
Hypertension
Status

| | Active | R/I/R |
|-----------|----------------------------------|-----------------------|
| Acute | <input type="radio"/> | |
| Chronic | <input checked="" type="radio"/> | |
| Suspected | <input type="radio"/> | |
| Resolved | <input type="radio"/> | |
| Ruled-out | <input type="radio"/> | <input type="radio"/> |
| Inactive | <input type="radio"/> | <input type="radio"/> |
| Deleted | | <input type="radio"/> |
| None | <input type="radio"/> | <input type="radio"/> |

click on the radio button

Diabetes mellitus
Status

Add to Problems

Medications

New:

insulin glargine (U- (Lantus U-)) 50 units (0.5 mL) subcut DAILY 10 mL 3RF

insulin aspart U- (Novolog U-) 81 units (0.81 mL) subcut TID 10 mL 2RF

Orders

Plan - Tracy Sheehan, MD

T-Test, Carl
54, M · 01/17/1965
MRN# M000000585

Arrived REG AMB, PG.BELIM

5ft 1.02in BSA: 2.95m²
446lb BMI Percentile: 84.1%

Visit Date: 03/20/19

Resus Status
Hx Avail

Search Chart

Allergies
No Known Allergies

Problems
ONSET
Morbid obesity

Vital Signs

| | Today 13:15 |
|-------|-------------|
| BP | 200/100 H |
| Pulse | 70 |
| Resp | 65 H |

This presents an overlay that allows you to choose the Status of this problem. Click the radio button for 'Chronic'.

The screenshot displays a web-based medical charting application. At the top, there is a navigation bar with icons for 'Return To', 'Home', 'Workload', 'Chart', 'Document', 'Orders', 'Sign', 'Compose', 'More', and 'Suspend'. Below this is a document header for 'Primary Care Office Visit' with 'SAVE', 'DRAFT', and 'SIGN' buttons. The author is listed as 'Christophe E. Hester, MD' and the document was last saved on 03/20/19 at 13:56. A secondary navigation bar includes 'Nursing', 'Quality', 'PFSH', 'HPI', 'ROS', 'Exam', 'Office Procedures', 'Results', 'Assessment and Plan', 'Coding', and 'Departure'. The main content area is titled 'Assessment and Plan' and contains several problem entries: 'Hypertension', 'Morbid obesity', and 'Diabetes mellitus'. The 'Hypertension' entry is highlighted with a red box, and a green callout box with the text 'click on 'Hypertension'' points to it. The right sidebar provides patient details for 'T-Test, Carl' (54, M, 01/17/1965, MRN# M00000585) and a 'Vital Signs' section showing a blood pressure of 200/100 H.

Once a problem in the Assessment and Plan is an Active Problem, you can click the name of that problem to reveal more options. Click on 'Hypertension'.

The screenshot shows a medical chart for a patient named T-Test, Carl. The chart is titled 'Primary Care Office Visit' and is authored by Christophe E. Hester, MD. The chart is currently in 'Draft' status. The main section is 'Assessment and Plan', which includes a list of problems. The first problem is 'Hypertension', which is highlighted in yellow. Underneath the 'Hypertension' problem, there is a section for 'Plan' with a red box around the text 'Click to Enter Plan'. A green callout box with the text 'click in the 'Click to Enter Plan' field' points to this text. Other sections visible include 'Patient Instructions', 'Medications', and 'Orders'. On the right side of the chart, there is a patient summary section with fields for 'Arrived', 'Resus Status', 'Allergies', 'Problems', and 'Vital Signs'. The 'Vital Signs' section shows a blood pressure of 200/100 H and a pulse of 70.

Additional boxes appear to allow you to add this problem to the patient’s history, review the qualifiers, if applicable, or add to your list of problems for this patient. You also see the Medications and Orders appear here. These areas will auto-populate with orders or meds that have the problem of Hypertension associated to them at the time of ordering. Under these, you will see the Plan. Click in the ‘Click to Enter Plan’ field associated with the Plan.

The screenshot displays a medical chart for a patient named T-Test, Carl. The interface is divided into several sections:

- Document Header:** Shows the document title "Primary Care Office Visit", author "Christophe E. Hester, MD", and status buttons (SAVE, DRAFT, SIGN). A blue box highlights the "Assessment and Plan" button in the document header.
- Document Navigation:** A carousel at the top includes tabs for Nursing, Quality, PFSH, HPI, ROS, Exam, Office Procedures, Results, Assessment and Plan (highlighted with a blue box), Coding, and Departure.
- Main Content Area:** Contains a rich text editor with a toolbar. A green callout box with the text "click the 'Assessment and Plan' button" points to the "Assessment and Plan" button in the carousel. Below the editor, there are sections for "Patient Instructions", "Morbid obesity", "Diabetes mellitus", and "Orders".
- Right Sidebar:** Displays patient information for "T-Test, Carl" (54, M, 01/17/1965, MRN# M000000585). It includes vital signs (Arrived, 5ft 1.02in, 446lb, BSA: 2.95m², BMI Percentile: 84.1%), Resus Status (Hx Avail), Allergies (No Known Allergies), Problems (Hypertension, Morbid obesity), and Vital Signs (Today 13:15, BP 200/100 H, Pulse 70).

Clicking in the fields associated with the Plan or Patient Instructions will open up a Meditor field for you to enter or dictate your text. The 'Instructions' field will flow to the Visit Summary that is printed for the patient at the end of the visit. If you wish to go into Full Edit Mode for the A&P, you can do so by clicking the Assessment and Plan button in the Document header or by clicking on Assessment and Plan in the carousel at the top of the Document. Click the 'Assessment and Plan' button.

Document T-TES 54M - MEDITE... x +

https://webacute.mountnittany.org/cectest/s0004284158929476/

Return To Home Workload Chart Document Orders Sign Compose More Suspend

Primary Care Office Visit SAVE DRAFT SIGN

Author: Christophe E. Hester, MD Last Saved at 03/20/19 13:56

Nursing Quality PFSH HPI ROS Exam Office Procedures Results Assessment and Plan Coding Departure

← Assessment and Plan Problem

Assessment and Plan

▼ Hypertension ! Qualifiers

Status
Chronic
PFSH

Medications
Orders
Plan - Tracy Sheehan, MD
Click to Enter Plan
Patient Instructions
Click to Enter Patient Instructions

► Morbid obesity

► Diabetes mellitus ! Qualifiers

click on the chevron

Forms
Forms Last Generated

T-Test, Carl
54, M · 01/17/1965
MRN# M000000585

Arrived REG AMB, PG.BELIM

5ft 1.02in BSA: 2.95m²
446lb BMI Percentile: 84.1%

Visit Date: 03/20/19

Resus Status
Hx Avail

Search Chart

▼ Allergies
No Known Allergies

▼ Problems

ONSET
Hypertension
Morbid obesity

• Vital Signs

Today 13:15
BP 200/100 H
Pulse 70

This brings us into Full Edit Mode, where you can see an expanded view of everything that is offered to you in the Flat Edit Mode, as well as the plan details/follow up section. Your problems that have been populated from the Nurse's Reason for visit might be collapsed. To view this information, click on the chevron to the left of the problem name 'Diabetes mellitus'.

Document T-TES 54M - MEDITEE x +
https://webacute.mounnittany.org/cectest/s0004284158929476/

Return To Home Workload Chart Document Orders Sign Compose More Settings Suspend

Primary Care Office Visit - [SAVE] [DRAFT] [SIGN]

Author: Christophe E. Hester, MD Last Saved at 03/20/19 13:56

Nursing Quality PFSH HPI ROS Exam Office Procedures Results Assessment and Plan Coding Departure

← Assessment and Plan ... + Problem

Assessment and Plan

Hypertension ! Qualifiers

Orders

Plan - Tracy Sheehan, MD
Click to Enter Plan

Patient Instructions
Click to Enter Patient Instructions

Morbid obesity

Diabetes mellitus ! Qualifiers

Status

Add to Problems

Medications

New:

- insulin glargine (U- (Lantus U-)) 50 units (0.5 mL) subcut DAILY 10 mL 3RF
- insulin aspart U- (Novolog U-) 81 units (0.81 mL) subcut TID 10 mL 2RF

Orders

Plan - Tracy Sheehan, MD
Click to Enter Plan

Patient Instructions
Click to Enter Patient Instructions

T-Test, Carl
54, M · 01/17/1965
MRN# M000000585

Arrived REG AMB, PG.BELIM

5ft 1.02in BSA: 2.95m²
446lb BMI Percentile: 84.1%

Visit Date: 03/20/19

Resus Status
Hx Avail

Search Chart

Allergies

No Known Allergies

Problems

ONSET

Hypertension

Morbid obesity

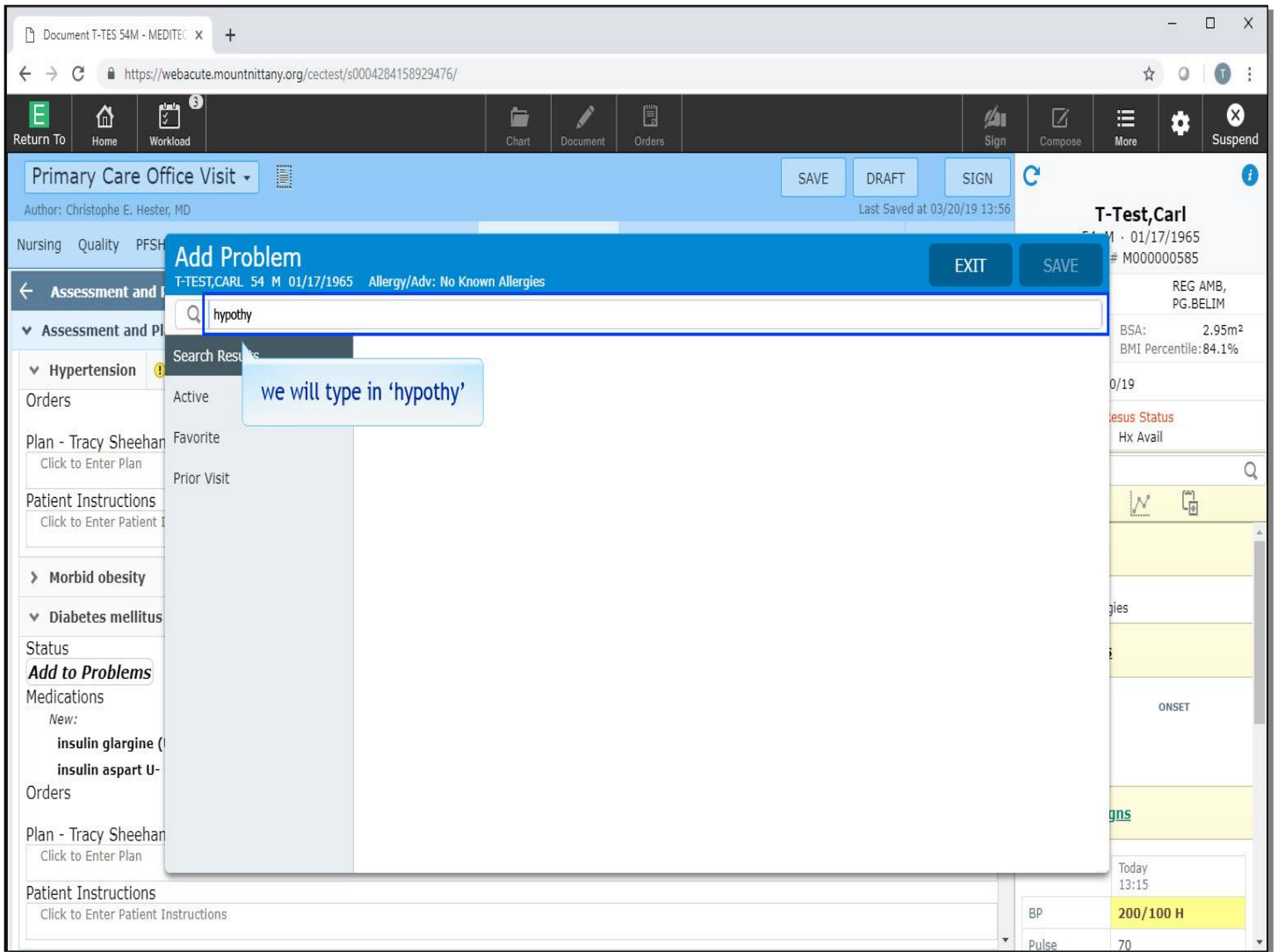
Vital Signs

Today 13:15

BP 200/100 H

Pulse 70

You'll notice the same information under this problem as we saw in the Flat Edit. To add another problem to this document, click the '+ Problem' button in the Assessment and Plan header.



This brings up the Add Problem overlay. Using the categories from the column on the left, you can select from the Active Problems, problems that you have made Favorites, and problems from this patient's Prior Visits. Alternatively, you can search for a new problem by using the Search Problems field. We will type 'hypothy' for you.

The screenshot shows a medical software interface with a search window open. The search term is 'hypothy'. The results list includes:

- ☆ Hypothyroid
- ☆ Hypothyroid coma HCC
- ☆ Hypothyroid dwarf
- ☆ Hypothyroid dwarfism
- ☆ Hypothyroid myopathy
- ☆ Hypothyroid neuropathy
- ☆ Hypothyroid obesity
- ☆ Hypothyroidism
- ☆ Hypothyroidism (acquired)
- ☆ Hypothyroidism with surgical procedure
- ☆ Hypothyroidism determined by thyroid function test
- ☆ Hypothyroidism due to acquired atrophy of thyroid

A green callout box with the text 'click in the check box' points to the checked checkbox for 'Hypothyroidism'.

From the results, click in the check box for 'Hypothyroidism'.

The screenshot displays a medical software interface. At the top, a navigation bar includes 'Return To', 'Home', 'Workload', 'Chart', 'Document', 'Orders', 'Sign', 'Compose', 'More', and 'Suspend'. Below this, a header for 'Primary Care Office Visit' shows 'Author: Christophe E. Hester, MD' and 'Last Saved at 03/20/19 13:56'. A central 'Add Problem' overlay is active, with a search bar containing 'hypothy'. The search results list several conditions, with 'Hypothyroidism' selected (checked). A green callout box with the text 'click the 'SAVE' button' points to the 'SAVE' button in the top right corner of the overlay. Below the search results, there is an 'Add to Document' section where 'Hypothyroidism' is listed. The background shows a patient chart for 'T-Test, Carl' with various medical data and navigation options.

You can see the problem now appears in the bottom half of the overlay, under the 'Add to Document' header. Additionally, the red 'x' appears to the right of this problem if you made the selection in error and wish to remove it. For now, click the 'SAVE' button.

Document T-TEST 54M - MEDITE... x +

https://webacute.mountnittany.org/cectest/s0004284158929476/

Return To Home Workload Chart Document Orders Sign Compose More Settings Suspend

Primary Care Office Visit SAVE DRAFT SIGN

Author: Christophe E. Hester, MD Last Saved at 03/20/19 13:56

Nursing Quality PFSH HPI ROS Exam Office Procedures Results Assessment and Plan Coding Departure

← Assessment and Plan Problem

▼ Assessment and Plan

▼ Hypertension ! Qualifiers

Orders

Plan - Tracy Sheehan, MD
Click to Enter Plan

Patient Instructions
Click to Enter Patient Instructions

► Morbid obesity

▼ Diabetes mellitus ! Qualifiers

Status

Add to Problems

Medications

New:

insulin glargine (U- (Lantus U-)) 50 units (0.5 mL) subcut DAILY 10 mL 3RF

insulin aspart U- (Novolog U-) 81 units (0.81 mL) subcut TID 10 mL 2RF

Orders

Plan - Tracy Sheehan, MD
Click to Enter Plan

Patient Instructions
Click to Enter Patient Instructions

Arrived REG AMB, PG.BELIM

5ft 1.02in BSA: 2.95m²
446lb BMI Percentile: 84.1%

Visit Date: 03/20/19

Resus Status
Hx Avail

Search Chart

▼ Allergies

No Known Allergies

▼ Problems

ONSET

Hypertension

Morbid obesity

• Vital Signs

Today 13:15

BP 200/100 H

Pulse 70

we will scroll down

We will scroll down to see this problem.

The screenshot displays a medical software interface for a patient named T-Test, Carl. The main area shows the 'Assessment and Plan' section for 'Hypothyroidism'. A red box highlights the 'Qualifiers' button next to the problem name. A green callout bubble points to this button with the text 'click the 'Qualifiers' button'. The right sidebar shows patient information for 'T-Test, Carl' and vital signs including a blood pressure of 200/100 H.

This problem now appears on the Problem List and has a notification that Qualifiers can be added to this problem. Click the 'Qualifiers' button next to Hypothyroidism.

The screenshot displays a medical software interface. At the top, a navigation bar includes 'Return To', 'Home', 'Workload', 'Chart', 'Document', 'Orders', 'Sign', 'Compose', 'More', and 'Suspend'. Below this, a header for 'Primary Care Office Visit' shows 'Author: Christophe E. Hester, MD' and 'Last Saved at 03/20/19 13:56'. The main content area is titled 'Hypothyroidism' for patient 'T-TEST, CARL 54 M 01/17/1965' with 'Allergy/Adv: No Known Allergies'. A modal window titled 'Hypothyroidism type' is open, listing various types: 'acquired', 'due to Hashimoto's thyroiditis', 'due to medication', 'due to non-medication exogenous substances', 'due to acquired atrophy of thyroid', 'postinfectious', 'postoperative', 'postablative', 'congenital with diffuse goiter', 'congenital without goiter', 'subclinical iodine-deficiency', and 'unspecified'. The 'unspecified' option is highlighted with a red border. A green callout bubble with the text 'click on 'unspecified'' points to this option. Below the list, there are fields for 'Qualified Description' and 'Qualified Code(s)'. The background shows a patient chart for 'T-Test, Carl' with details like 'REG AMB, PG.BELIM', 'BSA: 2.95m²', 'BMI Percentile: 84.1%', and 'BP 200/100 H'.

This brings up an overlay where you can choose the type of Hypothyroidism the patient has. Choose 'unspecified'.

The screenshot shows a medical software interface with a primary care office visit. The main content area displays a problem list entry for 'Hypothyroidism' for patient T-TEST, CARL. The 'unspecified' option is selected. A green callout box with the text 'click the 'SAVE' button' points to the 'SAVE' button in the top right corner of the problem list area. The interface includes a top navigation bar with icons for Return To, Home, Workload, Chart, Document, Orders, Sign, Compose, More, and Suspend. The left sidebar contains navigation options like Assessment and Plan, Diabetes mellitus, Hypothyroidism, Status, Add to Problems, Medications, Orders, Plan - Tracy Sheehan, Patient Instructions, Plan Details, Follow Up, Forms, and Other Medications. The right sidebar shows patient information for T-Test, Carl, including date of birth (01/17/1965), gender (M), and various clinical data points like BSA, BMI, and vital signs.

Click the 'SAVE' button

The screenshot shows a medical charting application interface. At the top, there is a navigation bar with icons for 'Return To', 'Home', 'Workload', 'Chart', 'Document', 'Orders', 'Sign', 'Compose', 'More', and 'Suspend'. Below this is a document header for 'Primary Care Office Visit' with 'SAVE', 'DRAFT', and 'SIGN' buttons. The author is listed as 'Christophe E. Hester, MD' and the document was last saved on 03/20/19 at 13:56. The main content area is titled 'Assessment and Plan' and contains a list of medical problems. The 'Hypothyroidism' problem is highlighted with a green checkmark in the 'Qualifiers' column. A green callout box with the text 'click on the 'Move To Top' arrow' points to the upward-pointing arrow icon on the right side of the 'Hypothyroidism' header. The right-hand sidebar displays patient information for 'T-Test, Carl' (54, M, 01/17/1965, MRN# M00000585) and includes sections for 'Allergies' (No Known Allergies) and 'Problems' (Hypertension, Morbid obesity). A 'Vital Signs' section shows 'BP 200/100 H' and 'Pulse 70'.

The Qualifiers icon is now a **green** check mark, indicating that the information has been filed. You can re-order the list of problems in the document by using the arrows on the right side of the Problem header. Click on the 'Move To Top' arrow associated with Hypothyroidism.

The screenshot shows a medical chart interface. At the top, there's a navigation bar with icons for Return To, Home, Workload, Chart, Document, Orders, Sign, Compose, More, and Suspend. Below this is a document header for 'Primary Care Office Visit' with buttons for SAVE, DRAFT, and SIGN. The author is listed as Christophe E. Hester, MD, and it was last saved on 03/20/19 at 13:56. The main content area is titled 'Assessment and Plan' and contains a list of medical problems. The first problem is 'Hypothyroidism', which is highlighted with a green box and a callout that says 'click on the chevron'. Below it is 'Hypertension'. The right sidebar displays patient information for 'T-Test, Carl', including demographics (54, M, 01/17/1965, MRN# M000000585), physical characteristics (5ft 1.02in, 446lb, BSA: 2.95m², BMI Percentile: 84.1%), and vital signs (BP 200/100 H, Pulse 70). There are also sections for Allergies (No Known Allergies) and Problems (Hypertension, Morbid obesity).

This moves the Hypothyroidism to the top of the problems associated with this document. To collapse the Assessment and Plan section, click on the chevron to the left of the 'Assessment and Plan' header.

The screenshot shows a web-based medical chart interface. At the top, there's a navigation bar with icons for Return To, Home, Workload, Chart, Document, Orders, Sign, Compose, More, and Suspend. Below this is a document header for 'Primary Care Office Visit' with buttons for SAVE, DRAFT, and SIGN. The author is listed as Christophe E. Hester, MD, and it was last saved on 03/20/19 at 13:56. The main content area is titled 'Assessment and Plan' and includes sections for Plan Details, Follow Up, Forms, Other Medications, and Other Orders. A green callout box with a white border and a green background points to a small calendar icon in the 'Follow Up' field, with the text 'click on the calendar icon'. On the right side, there's a patient summary for 'T-Test, Carl', including demographics (54, M, 01/17/1965, MRN# M000000585), physical characteristics (5ft 1.02in, 446lb, BSA: 2.95m², BMI Percentile: 84.1%), and vital signs (BP 200/100 H, Pulse 70). The vital signs section is highlighted in yellow.

Looking at the bottom of this document section, you'll notice the Plan Details header with addition fields for Follow Up and Forms, below this, any Medications or Orders that were not associated to a problem on this document will populate the document. Click on the 'calendar' icon underneath the Follow Up header.

The screenshot shows a web-based medical application interface. At the top, there is a navigation bar with icons for 'Return To', 'Home', 'Workload', 'Chart', 'Document', 'Orders', 'Sign', 'Compose', 'More', and 'Suspend'. Below this is a header for a 'Primary Care Office Visit' with 'SAVE', 'DRAFT', and 'SIGN' buttons. The main content area is titled 'Assessment and Plan' and includes a 'Follow Up' dialog box. The dialog box has a 'Time Frame' field and a 'Date' button, which is highlighted with a red box. A green callout bubble points to the 'Date' button with the text 'click on 'Date''. The dialog box also contains a numeric keypad and buttons for 'Weeks', 'Months', 'Years', and 'Today'. On the right side of the screen, there is a patient information panel for 'T-Test, Carl', including vital signs and a table of vital signs.

| | Today 13:15 |
|-------|-------------|
| BP | 200/100 H |
| Pulse | 70 |

You can toggle between Time Frame and Date. Click on 'Date'

The screenshot displays a web-based medical application interface. At the top, a browser window shows the URL <https://webacute.mountnittany.org/cectest/s0004284158929476/>. The application header includes navigation icons (Return To, Home, Workload, Chart, Document, Orders, Sign, Compose, More, Suspend) and document controls (SAVE, DRAFT, SIGN). The main content area is titled 'Primary Care Office Visit' and is authored by Christophe E. Hester, MD. It features a navigation menu with 'Assessment and Plan' selected. A 'Follow Up' modal window is open, showing a calendar for March 2019. The calendar has a red box around the 'March 2019' header and a green callout box with the text 'click on 'March 2019''. The calendar grid shows the days of the month, with the 20th highlighted. The background interface also shows a patient summary for 'T-Test, Carl' (54, M, 01/17/1965, MRN# M000000585) with vital signs: BP 200/100 H, Pulse 70, and other clinical data like 'Allergies' (No Known Allergies) and 'Problems' (Hypertension, Morbid obesity).

This presents you with a calendar where you can select a specific day you want this patient to Follow Up, click on 'March 2019.'

The screenshot displays a web-based medical chart interface. At the top, there's a navigation bar with icons for 'Return To', 'Home', 'Workload', 'Chart', 'Document', 'Orders', 'Sign', 'Compose', 'More', and 'Suspend'. Below this is a header for the document titled 'Primary Care Office Visit' with 'SAVE', 'DRAFT', and 'SIGN' buttons. The author is listed as 'Christophe E. Hester, MD' and it was last saved on 03/20/19 at 13:56. The main content area is divided into tabs: 'Nursing', 'Quality', 'PFSH', 'HPI', 'ROS', 'Exam', 'Office Procedures', 'Results', 'Assessment and Plan', 'Coding', and 'Departure'. The 'Assessment and Plan' tab is active, showing a 'Follow Up' calendar for 2019. The calendar has 'Mar' highlighted in green and 'Jul' highlighted with a red border. A green callout bubble points to 'Jul' with the text 'click on "July"'. The right sidebar contains patient information for 'T-Test, Carl' (54, M, 01/17/1965, MRN# M000000585) and vital signs: Arrived, REG AMB, PG.BELIM, 5ft 1.02in, 446lb, BSA: 2.95m², BMI Percentile: 84.1%, Visit Date: 03/20/19, Resus Status: Hx Avail. Below this are sections for 'Allergies' (No Known Allergies), 'Problems' (Hypertension, Morbid obesity), and 'Vital Signs' (BP: 200/100 H, Pulse: 70).

From the list of months, select 'July'.

Document T-TEST 54M - MEDITEC x +

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Return To Home Workload Chart Document Orders Sign Compose More Suspend

Primary Care Office Visit SAVE DRAFT SIGN

Author: Christophe E. Hester, MD Last Saved at 03/20/19 13:56

Nursing Quality PFSH HPI ROS Exam Office Procedures Results Assessment and Plan Coding Departure

Assessment and Plan Problem

Assessment and Plan

Plan Details

Follow Up

Forms

Other Medications

Other Orders

Follow Up

Time Frame Date

July 2019

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

click on '25'

T-Test, Carl
54, M · 01/17/1965
MRN# M000000585

Arrived REG AMB, PG.BELIM

5ft 1.02in BSA: 2.95m²
446lb BMI Percentile: 84.1%

Visit Date: 03/20/19

Resus Status
Hx Avail

Search Chart

Allergies
No Known Allergies

Problems
ONSET
Hypertension
Morbid obesity

Vital Signs

Today 13:15

BP 200/100 H
Pulse 70

Select the '25th'.

A text area becomes available next to the Follow Up date, you can put Follow Up details here, such as 'Thyroid Follow Up' or another indication for Follow Up. Also note that an additional Follow Up field appears if you would like the patient to come back at different times for different reasons. This Follow Up section is what is sent to the Check Out Routine for the front office to schedule Follow Up appointments for the patients at the end of their visit.

This concludes our lesson on Documenting Assessment and Plan.

In this lesson, we addressed how to:

- Edit the A&P in both flat and full mode
- Add problems to this section
- Toggle between documenting by problem and documenting by plan
- Use the follow-up section of the plan, including appointments and forms

MEDITECH best practice guidelines have been integrated into this lesson.

Please refer to your facility-specific workflows for process questions not covered in this course