QHR Accuro EMR Guide: Advance Directives

There are 3 advanced directive documents that Alberta primary care clinics will commonly discuss with and/or complete with their patients. These are:

1. Personal Care Directive
2. Goals of Care Designation
3. Enduring Power of Attorney

The first 2 documents may be completed at the clinic with the provider or a team member. A copy is always provided to the patient with a copy also kept by the clinic. One or both of these documents may also be completed by another provider in another part of the health system. Enduring Power of Attorney documents are not created/completed at the clinic.

If the documents are in existence, it is best practice that a copy is on file in the patient's medical record in the medical home.

Clinics will want to create *standardized* processes for filing these documents so they can search for them, create rules for them, and/or be able to map them to other documents. In the event that the clinic does not have a copy but the patient lets them know they exist, there are also some suggestions provided on how this may be captured in a standard way.

For more information on advanced directives in Alberta please visit the website: http://goals.conversationsmatter.ca.s3-website-us-east-1.amazonaws.com/make-the-decision/

You may also reference some content on advance directives in TOP Cognitive Impairment Clinical Practice Guideline (2017): http://www.topalbertadoctors.org/download/2113/Cogn%20Imp-Resources%20&%20Future%20Planning.pdf?_20180430204754
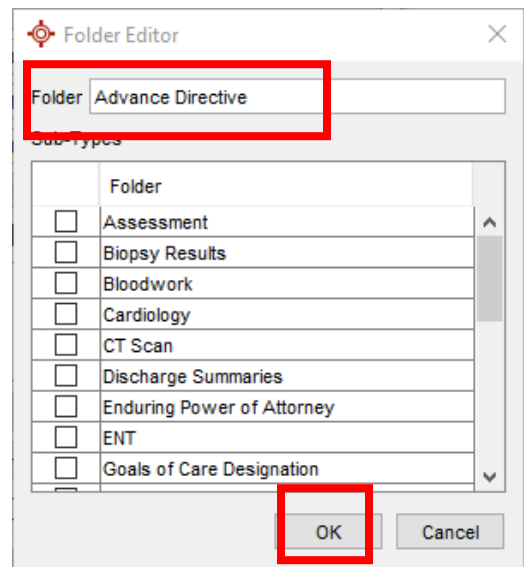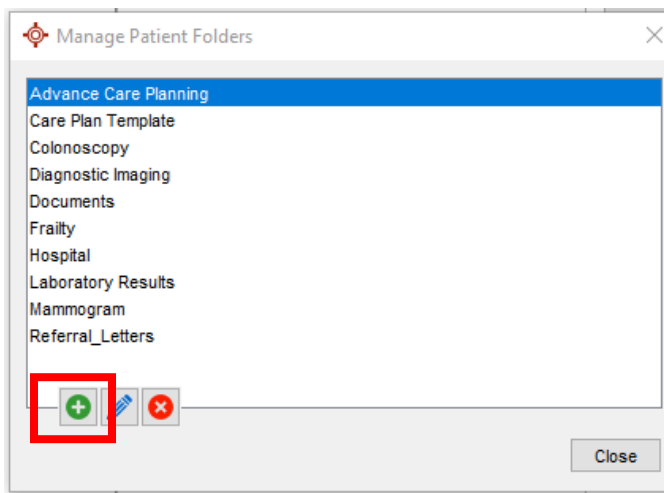
Filing Advance Directive Documents

For advance directives documents brought to the clinic, or created at the clinic with the patient, you will want to scan and save them into the EMR. It is important that they are saved in a consistent manner so that they are easy to find. If you do not already have a workflow for this, the "Documents" tab in Accuro EMR can be easily modified to create a document type "Advance Directive" with three sub-types: "Personal Care Directive", "Goals of Care Designation", and "Enduring Power of Attorney" ideal for storing these types of documents.

1. Navigate to the "Documents" area of the EMR.
2. Click the "Document Type" dropdown and choose "Manage"
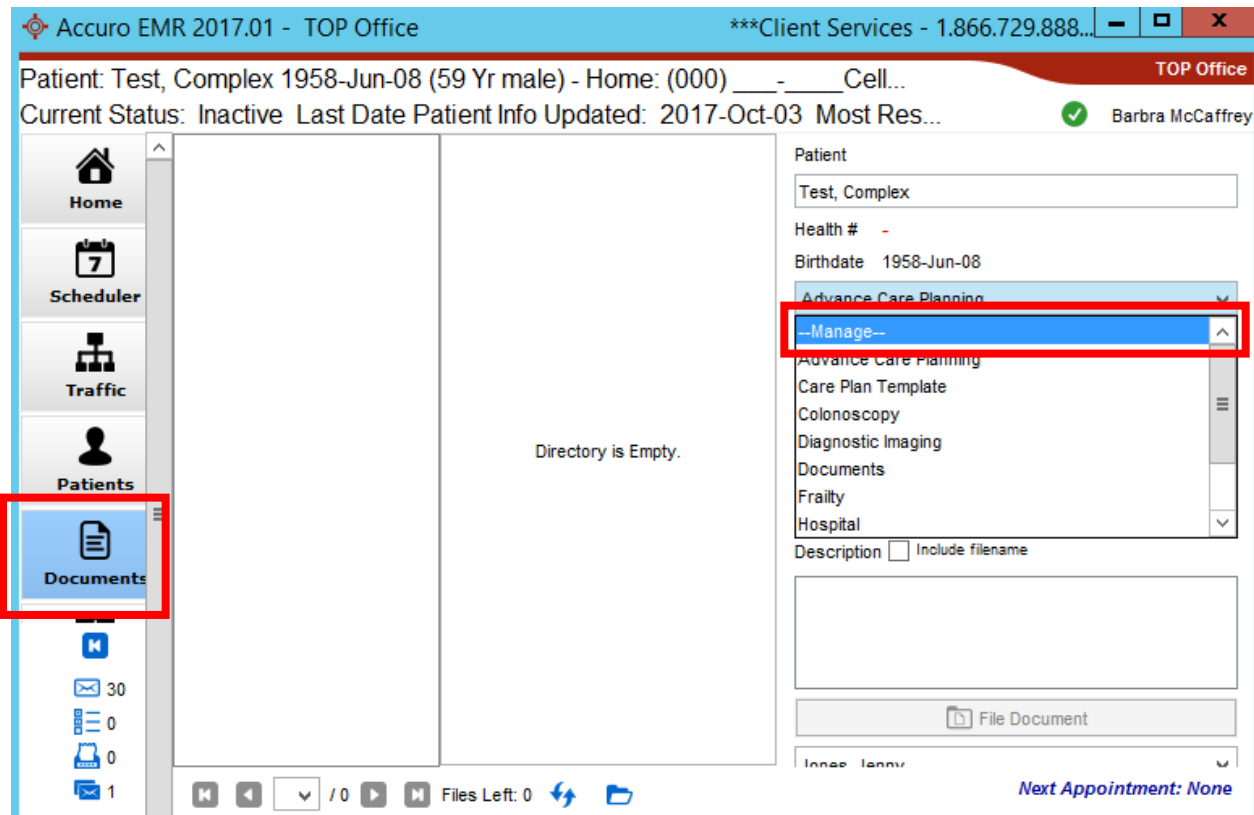
1. The Manage Patient Folders Window Appears. Click the green plus sign. The Folder Editor appears. Type "Advance Directive" in the "Folder" field and click "OK" to add a new folder.

2. You will now see "Advanced Directive" as one of your options in the "Document Type" dropdown. Go back to the main "Documents' tab and select the next drop down menu which is the "Document Sub-Type" drop down and choose "Manage"
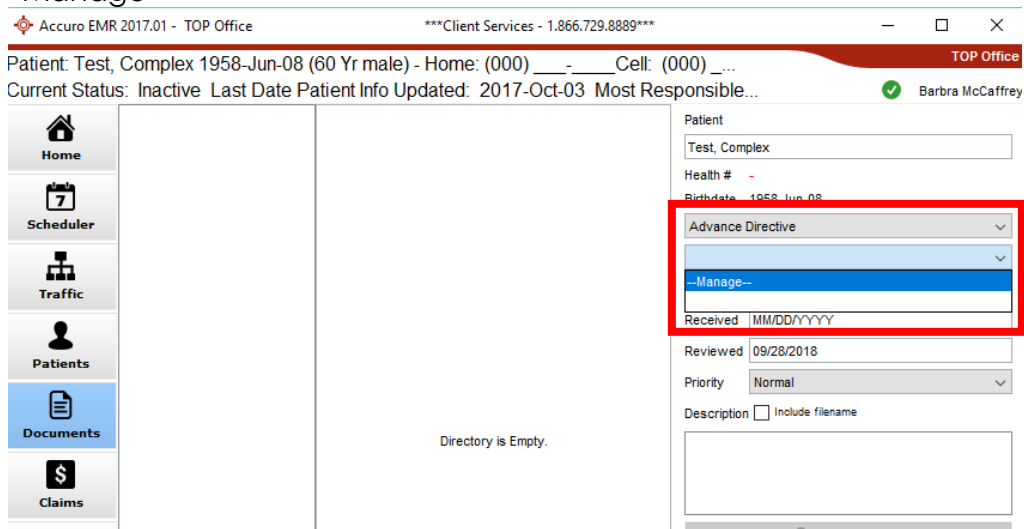
3. The "Manage Folder Sub Types" window appears. Enter a Sub-Type such as "Enduring Power of Attorney" and select the folder it will be the sub type to. Select 'OK'.
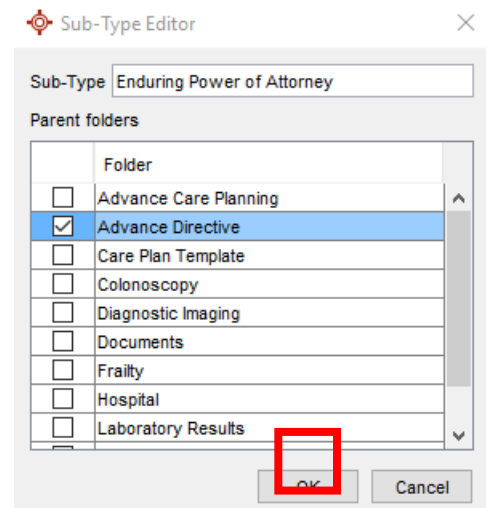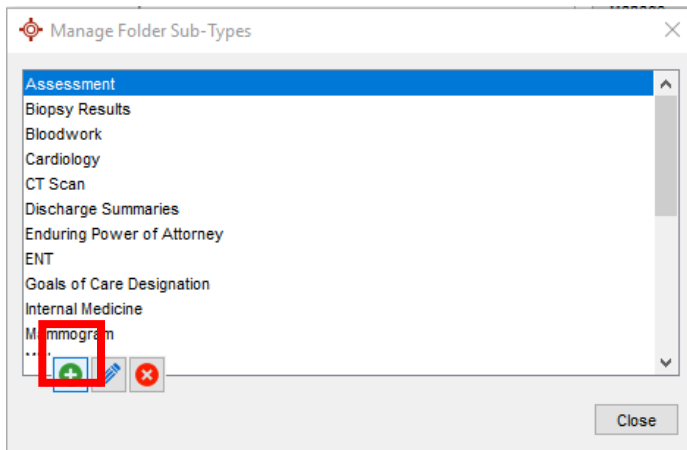
4. Repeat this process for the other document sub-types: "Personal Directive" and "Goals of Care Designation"

Now your EMR is set up to easily and correctly classify Advance Directive documents as they are imported.

Searching for Advance Directive Documents

Documents that are consistently classified in this fashion will be easy to search in the query builder using the "Documents" rule category and selecting a "Type contains Advanced Directive" rule. For more information about using the query builder see the Accuro Help files or the "TOP Accuro EMR Guide for Patient's Medical Home".

# Logging Existence of Advance Directive Documents

There may be instances where the patient informs the clinic that the documents are in existence but there is not yet a copy at the clinic. In Accuro, there is no specific field created to log this information.

There are two options in Accuro to indicate that Advance Directives exist in the chart.

1. **History of Problems**- One option is to add "Advance Directive" to the History of Problems in the Medical History band. Click the green plus sign
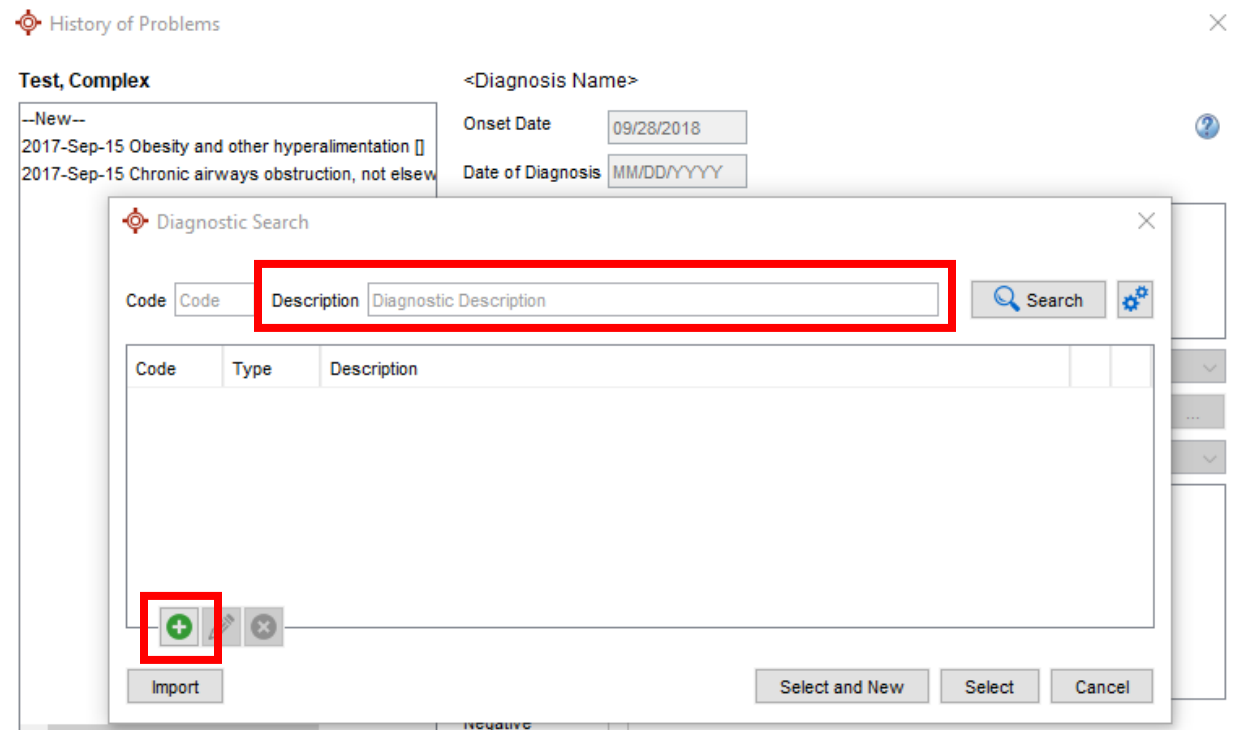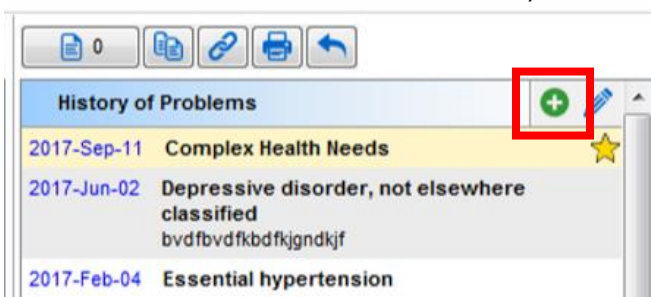
2. **Custom Patient Flags -** As a secondary identifier in a patient's chart one can create unique customizable Patient Flags (icon) for problem or conditions that displays in the patients Demographic Bar. The description of the icon appears when you hover over it. (The below example illustrates Complex Health Needs, however you can customize any choice).
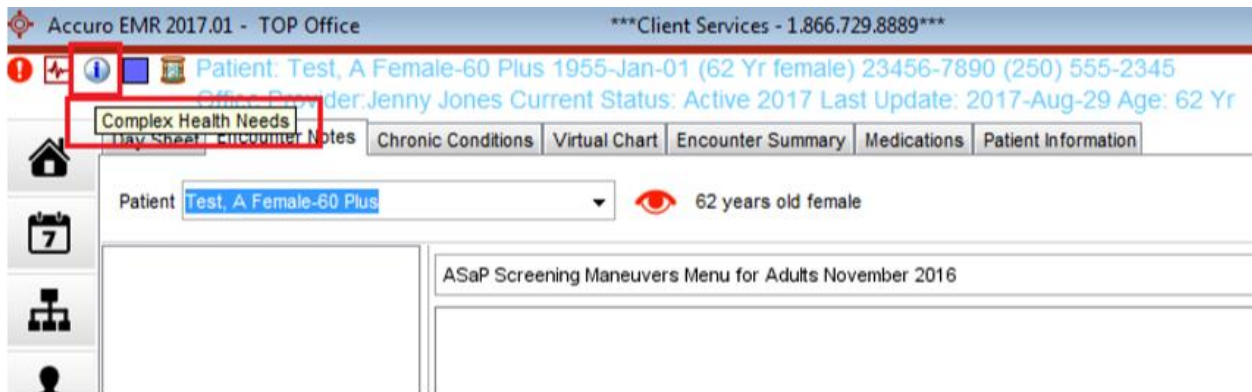
Recommended Accuro Help files:
- Encounter Notes (Add a History of Problem in Encounter Notes)
- List of Patients with a Diagnosis (Tech Tuesday #118)
- Re-order the History of Problems (Tech Tuesday #72)
- Customized Patient Flags
- Patient Flags (Tech Tuesday #74)