

# Microquest Healthquest 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.

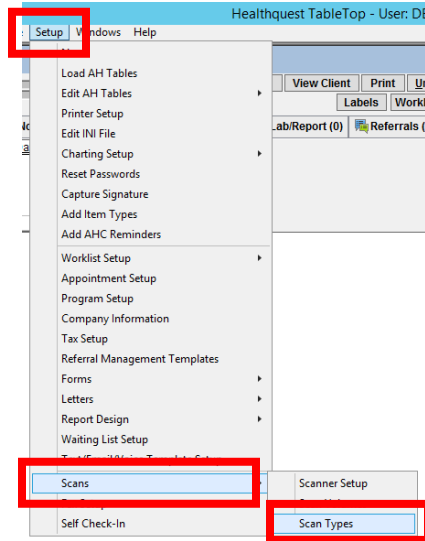
For more information on advanced directives in Alberta please visit the website:  
<http://goals.conversationsmatter.ca.s3-website-us-east-1.amazonaws.com/make-the-decision/>

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](http://www.topalbertadoctors.org/download/2113/Cogn%20Imp-Resources%20&%20Future%20Planning.pdf?_20180430204754)

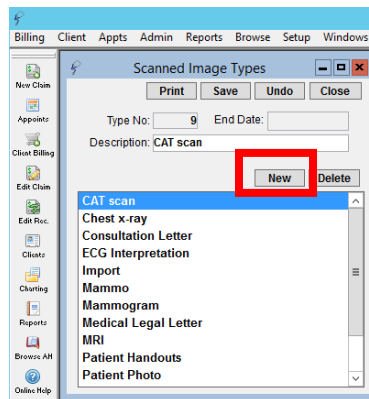
## Filing Advance Directive Documents

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, you can configure your scan types with standardized names. Set up > Scans> Scan Types> and add to the list of scan types. Create one for each of the three document types, "Personal Care Directive", "Goals of Care Designation" and "Enduring Power of Attorney" by selecting 'New'. Type the new scan type into the description field. Select 'Save' and it will now appear in the list.

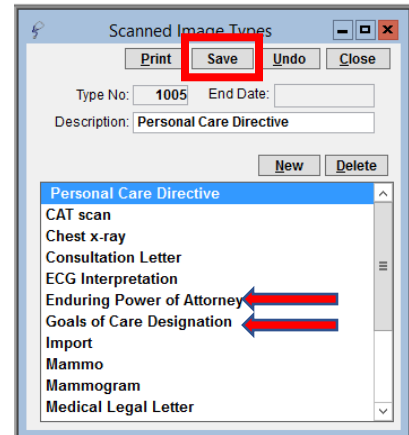
## Step 1



## Step 2



## Step 3



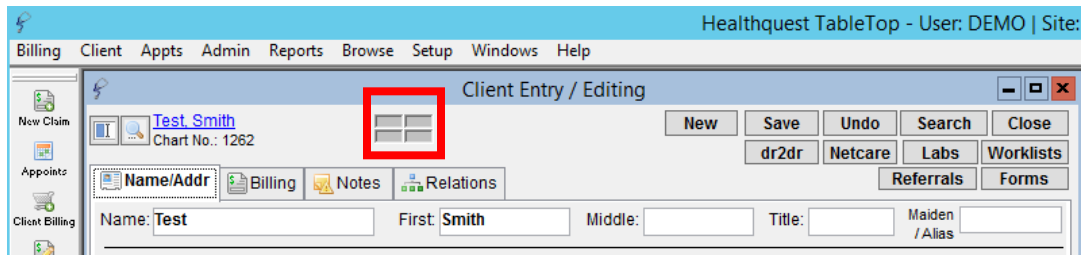
## Searching for Advance Directive Documents

Documents that are consistently classified in this fashion will be easy to search in the reports. Regular reports can be created and Healthquest can create an Ad Hoc report if required. For more information about using the Reports see Healthquest's Help files or the "TOP Healthquest 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. Once the clinic receives a copy of any of these documents, its important to have a place in the chart where other providers in the practice can easily see they are present without scrolling through extensive lists of scans. In Healthquest, there are two good options for this.

1. **Expanded Notes**- One option is to add "Advance Directive" and an associated color to one of the four available spaces. Note of caution: There are only four options for expanded notes. Many clinics operating for any length of time may already have chosen to use these, so adding one may not be an option.



To create a new expanded note, select the Notes tab of Client Entry and add a new note from the Expanded Notes field.

2. **Custom chart note for Medical History** – an ideal way indicate an Advance Directive exists in the chart is by creating a chart note for the medical history that will display presence of any or all three documents. This chart note is modifiable, contains a tick box for each document as well as a date that it was scanned into the chart. If the clinic standardizes how the documents are indexed, this will be a reliable way to track and view these documents. Providers can review and update these documents as needed.

### Screenshot

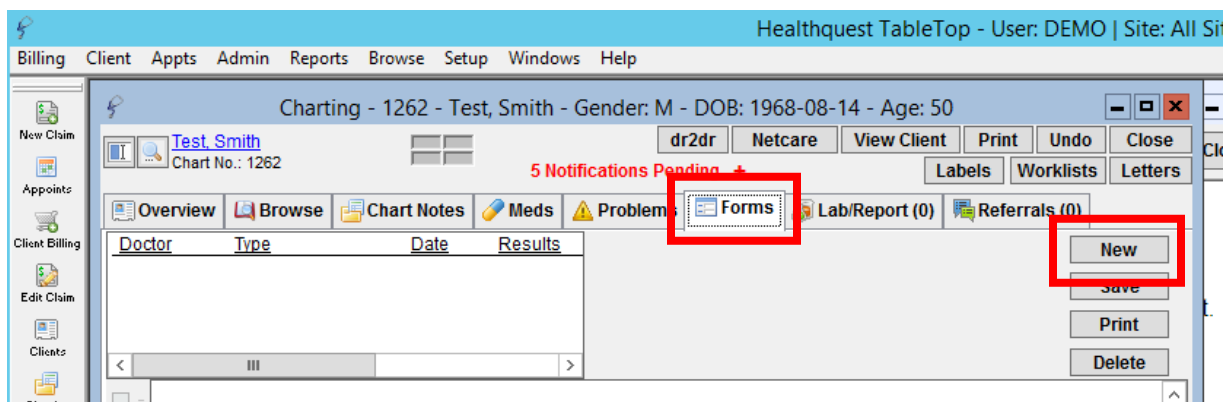
This chart note has been created by Healthquest and is available for all clinic to use. Contact support to inquire about using this chart note or if you need help making it one of your commonly used forms.

## Applying the Personal Directive Form

In the larger library of forms, Healthquest has the Alberta Government Personal Directives Form (Part 1 &2) available for use. If it is not one of your 'often' used forms, below are the instructions to use and make it one of your commonly used forms.

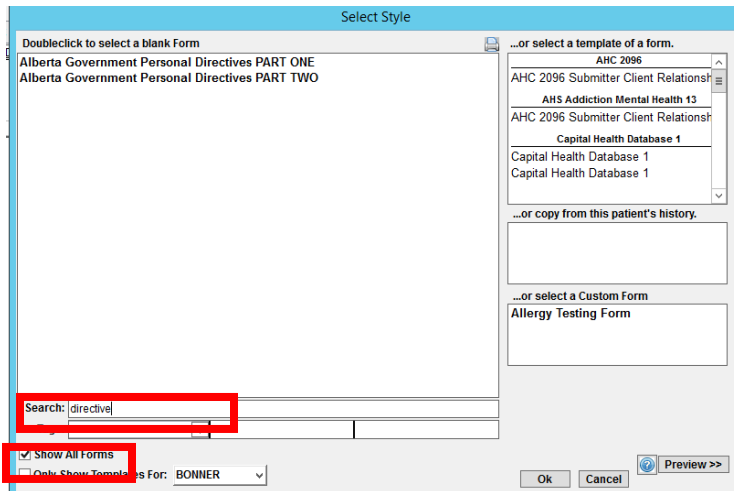
### To Insert this form into a chart

In the 'Forms' tab of the chart, select 'New'.



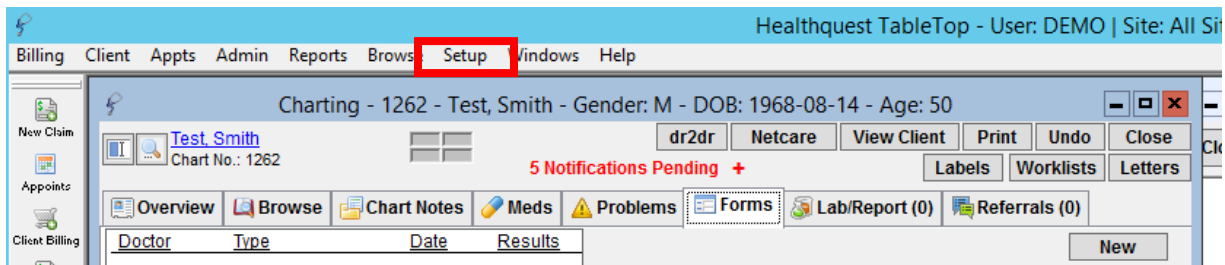
When this box comes up, tick 'Show All Forms'  
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Type "Directive" into the search bar. It will come up with the Alberta Government Personal Directives Part 1 &2 forms. Select OK to apply to the chart.

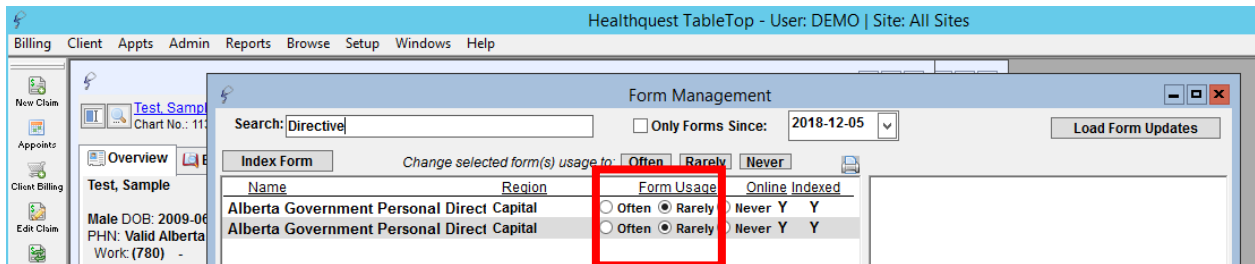


### To make Personal Directives, a commonly used form

In the chart, select "Setup" in the upper ribbon.



Then select 'Forms' > 'Forms Management' > 'All Forms'  
Search the Alberta Government Personal Directives form  
Beside the form change the radio buttons from 'Rarely' to 'Often'



Select "Apply", then 'Save and Close'  
It will now appear in your frequently used forms.