

## Wolf EMR Guide Supplement – PaCT Test Box 3

### Content for Innovation Hub Feedback

#### 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/>

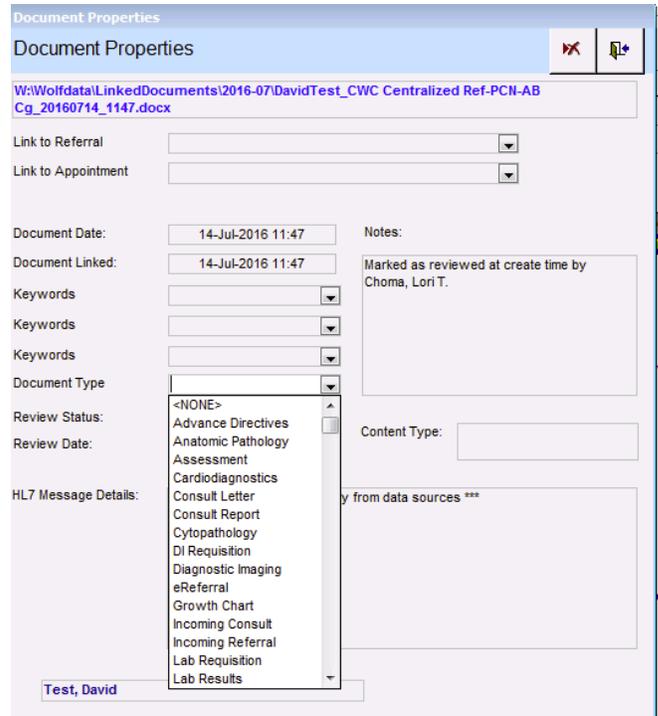
You may also reference some content on advance directives in TOP Cognitive Impairment Clinical Practice Guideline (2017):

[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)

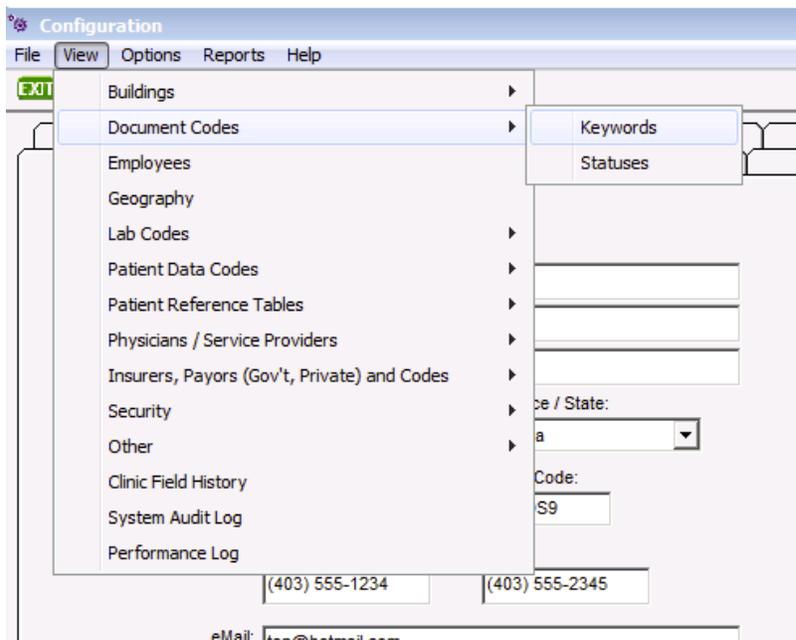
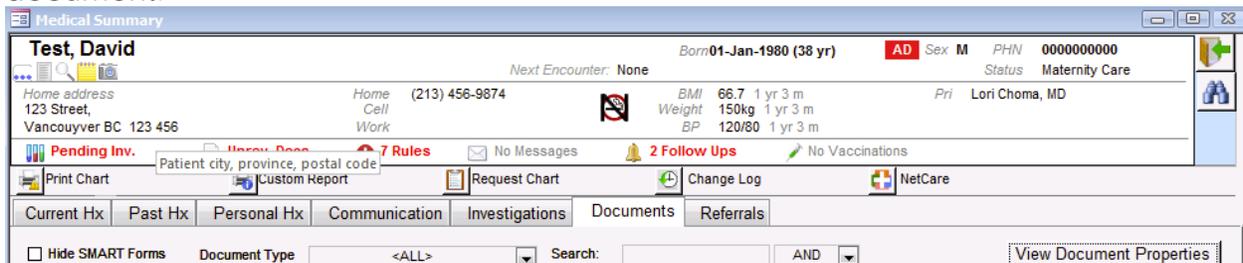
# Filing Advance Directive Documents

For advance directive documents brought to the clinic, or created at the clinic with the patient, you will want to scan and save them into the EMR. In Wolf EMR, there is a "document type" called "Advance Directives". This can be selected when an advance directive document is saved.

In the picture to the right, it is the first option in the drop-down list.



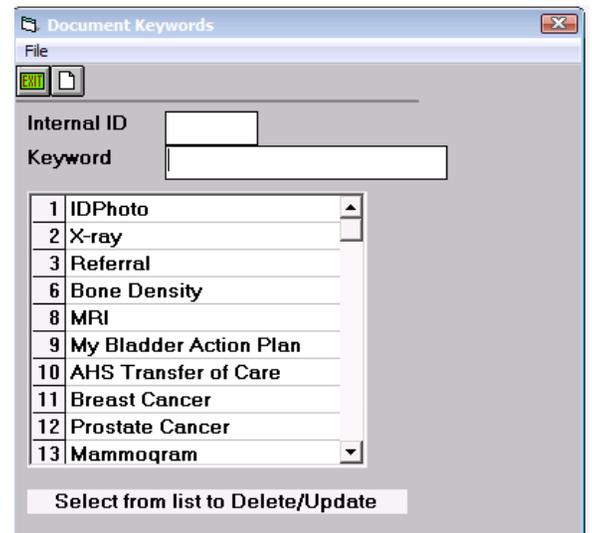
If a document has this document type associated with it; a red icon with "AD" will appear on the patient banner indicating the existence of an advance directive document.



In order to distinguish between the different types of advance directive documents, you can create 3 new document keywords for each of personal care directive; goals of care designation; and, power of attorney. You can configure document keywords by >>Configuration menu >> View >> Document Codes >> Keywords

This will bring up a pop-up box where you can add new keywords by clicking on the blank paper-looking icon near the top left and then adding your new keyword into the space beside "Keyword". Once you are happy with your keyword, select the "save" icon and the new document keyword will appear in your list.

Documents saved and tagged in this way will be searchable in Practice Search and this data could be mapped into a care plan template if applicable.



This video shows how to configure your keyword list:

<https://youtu.be/lb0vjHb0Ko0?list=PLf486cdx9WgljTeALz9ax2PznPxLCguRG>

## Searching for Advance Directive Documents

This video demonstrates a mammogram search, but the process is the same to create your search by substituting the mammogram document with the advance directive document you are interested in searching for.

<https://youtu.be/Gf8mj48pCXA?list=PLf486cdx9WgljTeALz9ax2PznPxLCguRG>

## 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 Wolf, there is no specific field created to log this information.

One option for logging this information is using the problem list. This video shows the basic functions of the problem list.

<https://youtu.be/k5-BAkivQcs?list=PLf486cdx9WgljTeALz9ax2PznPxLCguRG>

There is also the option of recording the existence of the documents in custom-built templates. Custom templates are beyond the scope of this EMR guide, however, the Wolf Help Files and Community Portal contain information on building custom templates.