Guide for Documenting, Registering, and Departing Patients from ACN UCCs During Remote Visits

1. If you are documenting on an encounter that has already been generated, select the “Provider” list that corresponds to the site (OVM Provider shown below) and then click on the arrow symbol on the far left of the trackboard next to the patient you are documenting on to open that patient’s chart. (You can skip to step 6 of the documentation instructions below.)
2. If you are documenting on a patient who is not yet on the track board, select the Triage/WR list for corresponding to the ACN UCC location where you would like to register the patient, and click the “Quick Reg” button.
3. Enter the patient’s first name, last name, and date of birth in the “Person Search” dialogue and click “Search.” MRNs for corresponding patients will be listed on the top right of the box and encounters associated with this MRN are listed on the bottom right. If there are multiple MRNs for the patient, select the MRN with the most and/or most recent encounters listed. Then click “Add Encounter.” If there is no patient that comes up when you search, click “Add Person.” Before clicking “Add Person,” be very, very careful and ensure that you cannot find the patient searching for them with different variations of name/DOB, because we want to avoid accidentally creating multiple MRNs for a patient, so you want to be sure there isn’t an MRN listed under a slightly different name, etc for the same patient.
4. After the Quick Reg dialogue launches, enter a free text “Chief Complaint” and enter “Priority” as “Routine” and then click “Complete.”
5. You should now see the patient on the track board of the UCC and you can open the patient chart by clicking the arrow at the far left of the patient’s name on the trackboard. If you do not see the patient, double check to make sure the filter drop down is set to “none.”
6. If you put the patient on the track board. You should take a moment to assign the patient a bed and assign yourself to the patient so that the local UCC staff does not get confused before you open the chart. To assign the bed, double click in the bed column, and then a dialogue launches allowing you to select the bed. Select “Shelter” if you are at Parks & Recreation shelter site, select “MATCall” if you are documenting an off site visit for the MAT Hotline, and select “Phone” if you are doing a simple phone visit in one of our urgent care clinics.
7. To assign yourself to the patient, right click on the patient on the trackboard and click “Assign Provider” from the dropdown that appears.
8. Once the patient chart is open, click “Provider Notes” and then click “Add” to start a provider note. (By default, a Power Note will launch when you click add, if you prefer to document using the Phone Note in Dynamic Documentation—as is used in the clinics—you can click the dropdown next to the “Add” button and select “Dynamic Documentation.”)
9. If you are completing a phone visit, select “Precompleted” from the new note menu, and then select the “ACN UCC Phone Visit Note.” If you do not see this note available, make sure you do not have any boxes checked under “Restrict Display By.” The note template will open and you can write a note as you normally would. If you prefer to use the Dynamic Documentation phone note template, that is also okay. If you are completing an in-person visit off-site, you can use whatever preferred note template you normally use for in-person encounters.
10. If you prescribe any medications to a patient at a Los Angeles County homeless shelter site, you can switch the pharmacy by clicking on the “Send to” drop down on the prescription dialogue. If you prescribe to a DHS pharmacy that has set things up to courier medications to patients at a shelter (e.g. Roybal), please make sure to put the name of the shelter in the “Special instructions” portion of the prescription before eprescribing.
11. When you are ready to depart the patient, click the depart icon at the top of the patient chart and the Depart Process dialogue will launch. You click the small pencil icon to the right of each section of the depart highlighted in yellow to complete all the required components of the encounter. Then, click the small check box to indicate that the patient understands your instructions in the bottom right. Finally, click the pencil icon next to “Discharge” to take the patient off the trackboard.
12. If you left any required components of the depart process incomplete, the “Depart Process Gap Checking” dialogue will launch. At this point, you can either click “cancel” and go back and complete the required components or you can select “Phone visit” as the reason for any off site encounter that you did not complete all the components.
13. Finally, the “Discharge Encounter” dialogue launches, you enter the patient’s discharge disposition, date, and time of discharge and then click complete, and you are done! For the Discharge Disposition, please enter Phone Visit for all off site encounters including in-person encounters that take place at a Parks & Rec shelter site.
Appendix: Pharmacy/Medication Tips

If a patient is unsure of their medications, you can import medications based on outside pharmacy records. You open the patient chart, click on the “Home Meds” tab, then select “Import” under “External RX History.”
Any staff member can set the patient’s preferred pharmacy in FirstNet by clicking on the “Patient Pharmacy” button at the top of FirstNet.

This launches a dialogue where you can search for pharmacies. When you find the pharmacy the patient wants, right click on the pharmacy and then select “Add to Patient Preferred”.

The default pharmacy is displayed in the Patient Preferred tab with bold text.
If sending to pharmacy is not listed as an option when you are trying to eprescribe, this is most commonly because a full address is not entered for the patient in Orchid. As a provider, you can fix the address using “PM Conversation.” To do this select “Providers / MyWellness Invitation” from the PM Conversation button at the top of the screen.

A window will pop up called “Available Conversations,” and you should select “1. Providers”
In the providers conversation, select “Patient Information.” If the patient is homeless, you can select “Homeless” and it should automatically enter a dummy address that allows eprescribe. If they are not homeless enter in their whole address (make sure to include country) and it should then allow you to eprescribe. If entering a full address does not enable eprescription, it means that something else is causing the problems with eprescribe and it would have to be investigated separately.