

Electronic Health Record (RPMS-EHR) Template Use & Design

PURPOSE: To establish policy and procedure on the use and design of templates in the RPMS-EHR.

POLICY: It is extremely important that a process be in place for how templates and template dialogues will be reviewed and approved for use in the EHR. Template designs should be limited and structured either around specialty clinics, and clinic type, not centered on individual provider wishes. Templates need to be able to be structured, categorized, and defined so when reports are needed the information sought can be printed around a designated template design, in order to have the most accurate data possible.

It is highly recommended that existing templates which have already been tested for quality and quantity of documentation is available on the IHS EHR website at www.ihs.gov.

PROCEDURE: All templates are to be reviewed by the appropriate committee for review and approval prior to the template being entered into the EHR. Consideration of the following should be given when creating new templates.

1. The templates that are submitted to the committee for review should have been tested by the requesting EHR users in the “my template” area. Demo patients should be used during the testing phase. Testing is the responsibility of the Clinical Application Coordinator (CAC) or the designated requestor.
2. Each template reviewer will apply the template approval criteria, answer the template approval questions and submit these to the Template Review Committee.
3. The Health Information Management (HIM) Director along with the CAC will utilize the template approval criteria to determine if the template is acceptable.
4. Members of the appropriate committee who review templates should be representative of all the disciplines that may be affected, (i.e., nursing, provider, HIM, Business Office, Utilization Review, Performance Improvement/Quality Improvement (PI/QI) Coordinator, etc.)
5. Once the template is approved, it will be placed in the “shared” directory.
6. Minor template revisions do not need to be approved by the Template Review Committee. This includes changes to check boxes and structural items. Content changes, however, need to be reviewed and approved by the Template Review Committee.

Template Approval Criteria:

- Template Name:
- Submitted by :
- Written justification for this template/form is attached?
- Has Risk Management review/approval?

- Does this meet Government Performance and Results Act (GPRA) requirements?
- Billing/Coding: Does this comply with the coding requirements?
- Which standards of care were utilized to design this template?
- Usability: Has this been tested by two providers and used on 10 patients?
- Uniformity of Content: Does this note follow the (Subjective, Objective, Assessment, Plan) SOAP format?
- Redundancy: Is there another template that addresses the same content? If so, why are you adding a separate template?
- General Comments: