










## Occupational Health TB Mantoux Placement and Documentation



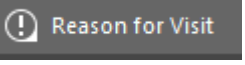
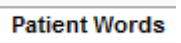
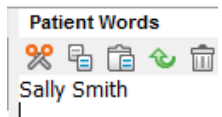
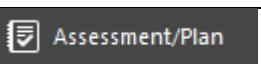
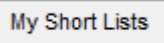



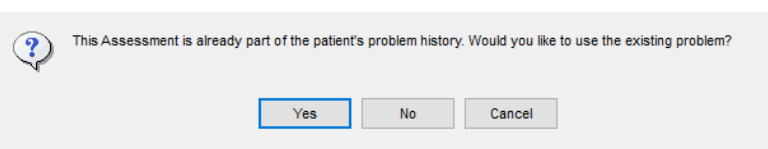
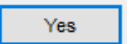

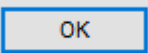
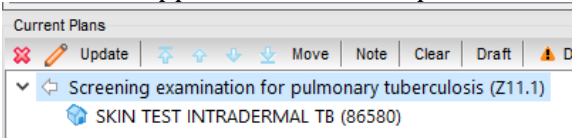
Purpose: To provide consistent and accurate documentation and billing for occupational health accounts.

Patient tracking screen – four columns shown:




Pending	Upcoming appointments for the day
Checked In	Patients waiting in lobby to be seen
Started	Support staff rooming patient/seeing provider
Checked Out	Patients who have completed visit with provider

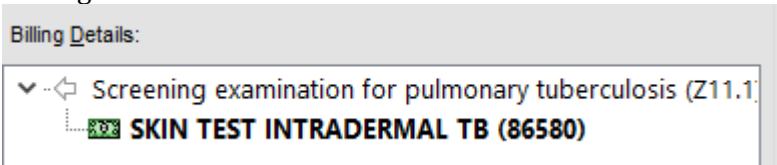
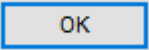
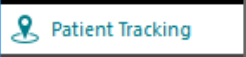
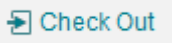
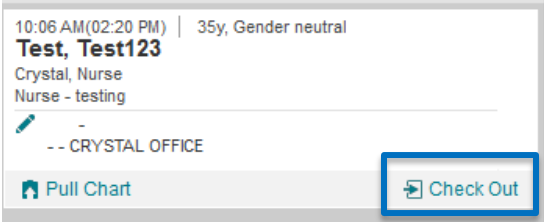
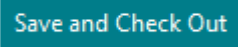
### Ordering and billing for TB testing

Step	EHR Section	Detail								
1.	Start appointment	 Patient Tracking from upper left corner of desktop screen								
		Click on patient name to select appointment. A popup will appear								
		Click on  on bottom right corner of popup to begin appointment. Click on  to activate appointment								
		To begin encounter, select  from patient's name in the started column.								
		Chart will automatically open attached to the appointment provider and time of visit								
		If another encounter is open the system will automatically prompt you to select the correct encounter								
		<div>Encounter Selection</div> <div><div><div><input type="radio"/> Create a new encounter associated with this appointment, 1:00 PM on 6/5/2024</div><div><input type="radio"/> Create a new encounter that is not associated with an appointment</div><div><input checked="" type="radio"/> Join an existing encounter from below:</div></div><div><div>Details... H&amp;P Report...</div><div></div></div><table><thead><tr><th>Appointment Date</th><th>Kept Open By</th><th>Encounter Date</th><th>Location</th><th>Diagnoses</th></tr></thead><tbody><tr><td> No associated a...</td><td>Manager, System</td><td>8/18/2023 9:50 AM</td><td>ROGERS OFFICE</td><td>Hypertension, essential, ...</td></tr></tbody></table></div>	Appointment Date	Kept Open By	Encounter Date	Location	Diagnoses	 No associated a...	Manager, System	8/18/2023 9:50 AM
Appointment Date	Kept Open By	Encounter Date	Location	Diagnoses						
 No associated a...	Manager, System	8/18/2023 9:50 AM	ROGERS OFFICE	Hypertension, essential, ...						
Select correct encounter – either new encounter or join existing encounter if the chart was prepped.										
<div><div><input checked="" type="radio"/> Create a new encounter associated with this appointment, 1:00 PM on 6/5/2024</div><div><input type="radio"/> Create a new encounter that is not associated with an appointment</div><div><input type="radio"/> Join an existing encounter from below:</div></div>										
and click OK										

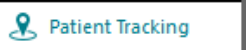


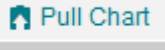
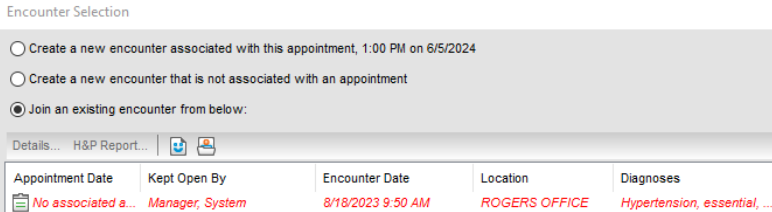
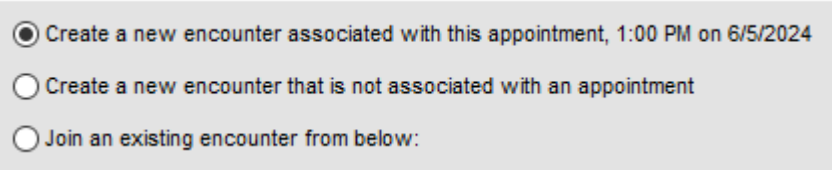
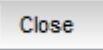

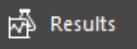
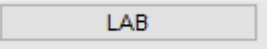
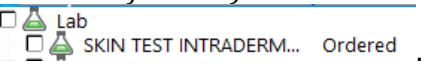
		<p>A reminder screen will popup if there are applicable Reminders.</p> <p>Review for needed information click  or  on the top bar of the popup to close the reminder screen.</p>
2.	Review chart or paperwork from patient	<p>Review paperwork and/or chart for what patient is needing.</p> <ul style="list-style-type: none"> <li>Mantoux TB testing</li> </ul>
3.	Reason for visit	<p>Click  from the left-hand column to add reason patient is seeing provider to encounter. A new screen will appear.</p> <p>In  click in text box and add patient's name to the</p> <p> Sally Smith</p> <p>box.</p>
4.	Ordering TB placement	<p>Click  from the left-hand column to change screens to the assessment and plan section for ordering and billing.</p> <p>Select  from the top bar on the screen. Locate the</p> <p>▼  MD NWFP short list and navigate to the &gt;  Lab In House folder. Scroll down the list to</p> <p>&gt;  Screening examination for pulmonary tuberculosis (Z11.1) . Double click the diagnosis code. If the diagnosis code is already part of the account a popup will appear</p> <p>Confirm</p> <p></p> <p>Select  . A new popup will appear</p> <p>▼  Active</p> <p>◀ Screening examination</p> <p>◀ Screening examination</p> <p>◀ Screening examination . Select one of the diagnosis codes and</p> <p></p> <p>click from the right bottom corner.</p> <p>The diagnosis code and test will appear in the current plans</p> <p></p> <p>section of the screen</p>


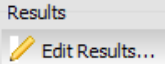
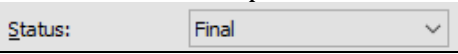
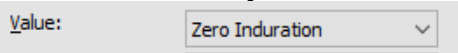
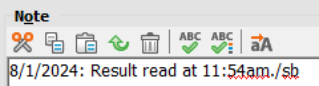
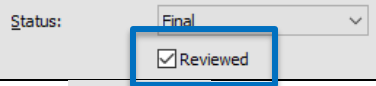
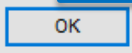
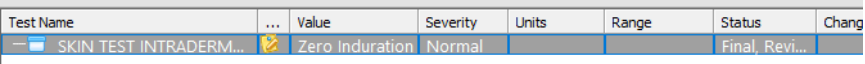
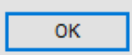
		<p>Highlight the test and double click to open the ordering properties screen. In the middle of the popup using the drop-down list locate the primary provider and update the Ordered for and Notify lines.</p> <p>Ordered for: Reichel, Scott MD</p> <p>Notify: Reichel, Scott MD</p> <p>Click OK</p> <p>from the bottom right corner. The primary provider is found in the</p> <p>Usual Caregiver Reichel, Scott MD</p> <p>upper left corner in the patient banner</p>
5.	Document placement of test	<p>Click Results from the left-hand column on the screen. A new screen will appear.</p> <p>Click the LAB filter button in the middle of the screen. (See the how to set filters document if needed). The screen will update to show the ordered test</p> <p>Lab SKIN TEST INTRADERM... Ordered</p> <p>Highlight the test and double click</p> <p>SKIN TEST INTRADERM... Ordered</p> <p>A popup will appear to allow you to document the appropriate information.</p> <p>In the result note section, located at the top of the popup in the middle you can type the auto-replace text .companyinj once you are done typing press the spacebar on your keyboard and the phrase</p> <p>will appear in the text box. You may also use the aA button to open your auto-replace text list. Locate the appropriate auto-replace text and click on the text you want. It will automatically</p> <p>Result Note</p> <p>Name: DOB: Serum/Vaccine: Lot: Expiration: Site: Manufacturer: Time Administered:</p> <p>appear in the text box.</p> <p>Complete the appropriate sections on the auto-replace text.</p> <p>Result Note</p> <p>Name: Sally Smith DOB: 1/1/1990 Serum/Vaccine: TB Lot: VVT124E Expiration: 12/30/2024 Site: Left forearm Manufacturer: Sanofi Time Administered: 9:30 am</p> <p>Click OK in the bottom right corner to save information.</p>


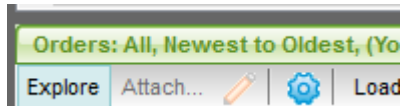

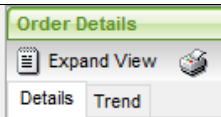

6.	Billing and closing note	<p>Click  History &amp; Physical from the left-hand column to review verify information was entered correctly. A new screen will appear showing the below information.</p> <p><b>Test123 Z Test</b>  Documented: 7/16/2024 11:39 AM  Location: CRYSTAL OFFICE  Patient #: TEST1  DOB: 1/1/1989  Undefined / Language: English / Race: Black or African American  Gender neutral</p> <p><b>History of Present Illness</b> (Stacey Balken RN; 8/1/2024 8:27 AM)  Patient words: Sally Smith.</p> <p>The patient is a 35 year old.</p> <p><b>Assessment &amp; Plan</b> (Stacey Balken RN; 8/1/2024 8:47 AM)  <b>Screening examination for pulmonary tuberculosis (Z11.1)</b>  <u>Current Plans</u>  <ul style="list-style-type: none"> <li>SKIN TEST INTRADERMAL TB (86580)</li> </ul> </p> <p>Click  Sign Off from the top left corner under the patient banner. A popup will appear showing the billing details.</p> <p>From the top left corner on the popup enter your EHR or Netgain password <input type="password"/> Password: <input type="password"/>.</p> <p>Using the drop-down menu change the encounter type to Nurse/Lab visit</p> <p>Encounter Type: <input type="text" value="NURSE/LAB VISIT (billable)"/></p> <p>Appointment drop-down will automatically be associated with the appointment. Appointment: <input type="text" value="Today 2:20 PM, Crystal, Nurse"/></p> <p>Using the drop-down menu change the Billing Provider to the primary provider attached to the chart</p> <p>Billing Provider: <input type="text" value="Reichel, Scott (REICSCO)"/> . The primary provider is found in the upper left corner in the patient banner  Usual Caregiver Reichel, Scott MD .</p> <p>Using the drop-down menu update the Billing level to &amp;ZERO (NO E&amp;M CHARGE)</p> <p>Billing 1 Billing 2  Billing Level: <input type="text" value="&amp;ZERO (NO E&amp;M CHARGE)"/></p>
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		<p>The Billing details will show the diagnosis code along with the test and a green bill next to the name</p> 
		<p>Click  from the bottom right corner to close the encounter and send the billing information to the business office.</p>
7.	End appointment	<p>Select Patient Tracking  from upper left corner of desktop screen if you are not already on the patient tracking screen.</p> <p>Click  from the patient's appointment</p>  <p>Click  and the appointment will be moved to the checked-out column.</p>

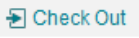
### Documenting TB testing

Step	EHR Section	Detail
1.	Start appointment	Select Patient Tracking  from upper left corner of desktop screen
		Click on patient name to select appointment. A popup will appear
		Click on  on bottom right corner of popup to begin
		appointment. Click on  to activate appointment
		To begin encounter, select  from patient's name in the started column.
		Chart will automatically open attached to the appointment provider and time of visit
		If another encounter is open the system will automatically prompt you to select the correct encounter 
2.	Review chart or paperwork from patient	Select correct encounter – either new encounter or join existing encounter if the chart was prepped. 
		and click OK A reminder screen will popup if there are applicable Reminders. Review for needed information click  or  on the top bar of the popup to close the reminder screen.
3.	Document test result	Click  from the left-hand column on the screen. A new screen will appear.
		Click the  filter button in the middle of the screen. (See the how to set filters <a href="#">document if needed</a> ). The screen will update to show the ordered test 

		<p>Highlight the test and double click</p>  <p>A popup will appear to allow you to document the appropriate information.</p>
		<p>Click  located on the left side of the popup near the top. A new popup will appear to enter the results.</p>
		<p>From the status drop-down select Final</p> 
		<p>From the value drop-down select the correct induration result</p> 
		<p>In the note section enter the date, time, and your initials</p> 
		<p>Check the reviewed box located under the status drop-down</p> 
		<p>Click  to save result to order</p> 
		<p>Click  in the bottom right corner to finalize documentation.</p>

		<p>All information for the test will now appear on the original order</p> <p><b>Final, Reviewed</b> Diagnosis: Screening examination for pulmonary tubercul Ordered by Stacey Balken RN on behalf of Scott Reichel, Collected on 7/30/2024 10:46 AM Reported on 8/1/2024 11:55 AM (LABORATORY) Reviewed by Stacey Balken RN on 8/1/2024 11:55 AM</p> <p><b>Result Note:</b> Name: Sally Smith DOB: 1/1/1990 Serum/Vaccine: TB Lot: VYT124F Expiration: 12/30/2024 Site: Left forearm Manufacturer: Sanofi Time Administered: 9:30 am Info given</p> <table><tr><td><b>Test Name</b> SKIN TEST INTRADERMAL TB <b>Note:</b> 8/1/2024: Result read at 11:54am./sb</td><td><b>Result</b> Zero Induration</td></tr></table> <p>There is no billing associated with the reading of the mantoux. The cost of the reading the result is included in the placement of the test.</p>	<b>Test Name</b> SKIN TEST INTRADERMAL TB <b>Note:</b> 8/1/2024: Result read at 11:54am./sb	<b>Result</b> Zero Induration
<b>Test Name</b> SKIN TEST INTRADERMAL TB <b>Note:</b> 8/1/2024: Result read at 11:54am./sb	<b>Result</b> Zero Induration			
4.	Print result – if needed	<p>Click  <b>Face Sheet</b> from the left-hand column in the patient's chart.</p> <p>Locate the Orders section on the screen. This can be found on the lower right side of the screen</p>  <p>Click  <b>Explore</b> for a new popup to open with all the orders showing in the left-hand column</p> <p>Select the desired test from the list and the order will appear on the right side of the screen.</p> <p>From the Order detail header , select the printer .</p> <p>The test result will automatically print to the EHR default printer you are connected to.</p>		



5.	End appointment	<p>Click  from the patient's appointment</p>  <p>Click  and the appointment will be moved to the checked-out column.</p>
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Created 8/1/2024