Inter-Office Communication through Crystal PM

Protocol for City of Vision Eye Care

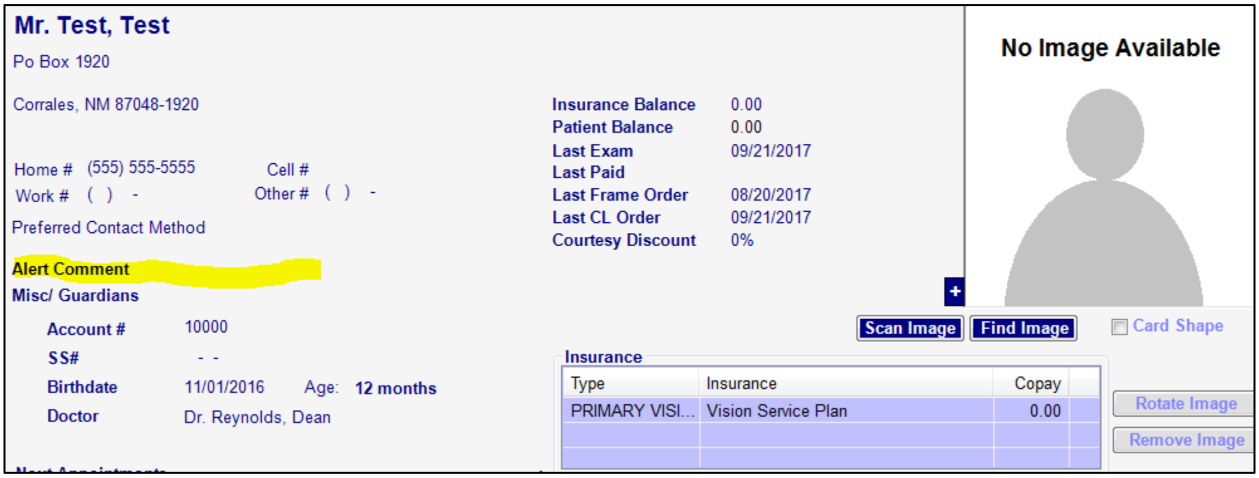
Background

Frequent, extensive, and complete notation of changes or encounters with a patient account is critical to maintaining lines of communication between departments and City of Vision personnel. These notes are never distributed to patients unless they are subpoenaed by an attorney and requested by name. In incidents of patient conflict, extensive notation of these encounters serves to protect City of Vision and its staff from false claims.

CrystalPM Options for Notation

1. Patient Alert on FaceSheet
2. Pop-Up Alerts
3. Notes
    a. Medical
    b. Personal
    c. Correspondence
4. Task List
    a. Create or send a Task
    b. Return task to sender
    c. Close out a Task

Alert Comment



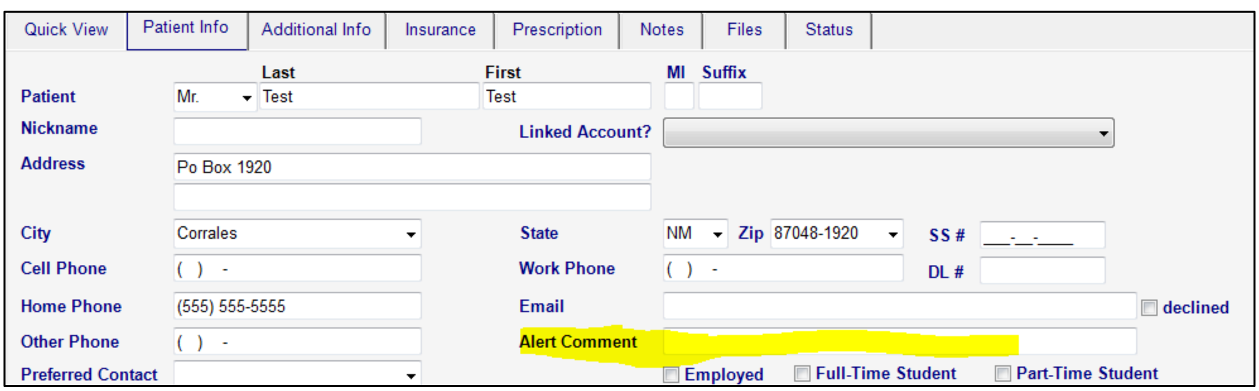
Background

Alert comments are a key form of communication as this is printed with every patient face sheet. This area should be reserved for items permanent to the account. For example:

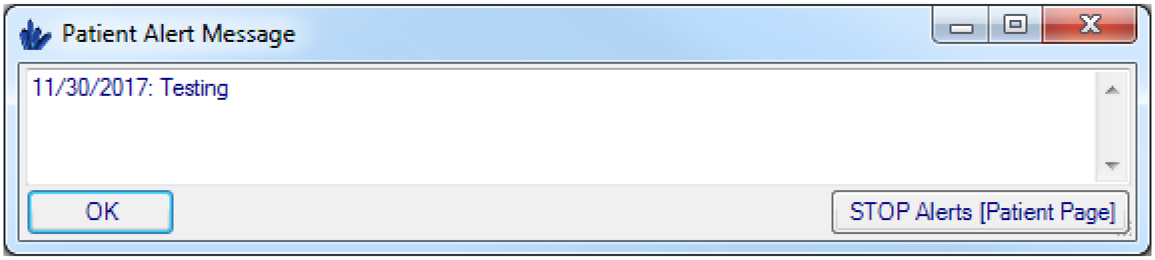
Doctor	Staff
Allergies to Antibiotics	Mobility Barriers (Wheelchair)
Restriction from dilation drops (narrow angles)	Language Barriers (Spanish Only)
Ocular Diseases (blindness from AMD)	Neurological Barriers (Autism)
	Special Requests for certain doctors (keep w/ DSR)

Instructions

CrystalPM > Patient View > Patient Info Tab > Alert Comment



Pop-Up Alerts



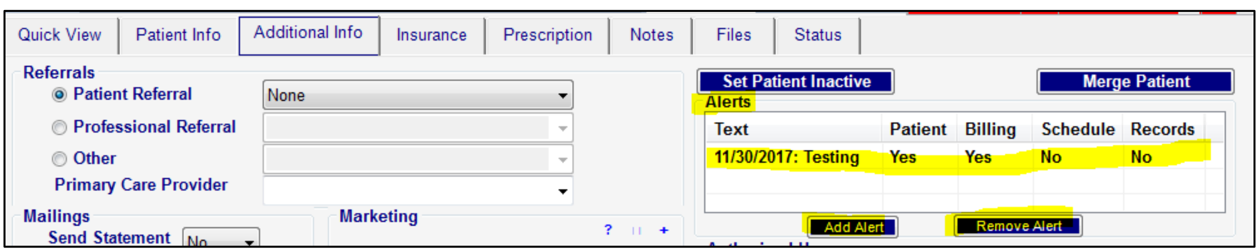
Background

Pop-Up Alerts are designed to grab the staff member's attention immediately. These are especially helpful for patients who need to be reminded about a balance owed or be given verbal warning about our no-show policy. These pop-ups will occur every time the user enters the view indicated by the alert. For those moving between views, this constant pop-up may become disruptive towards their work. Pop-ups can be disabled, but must be re-enabled afterwards if other staff members need to be notified. Examples of pop-ups include:

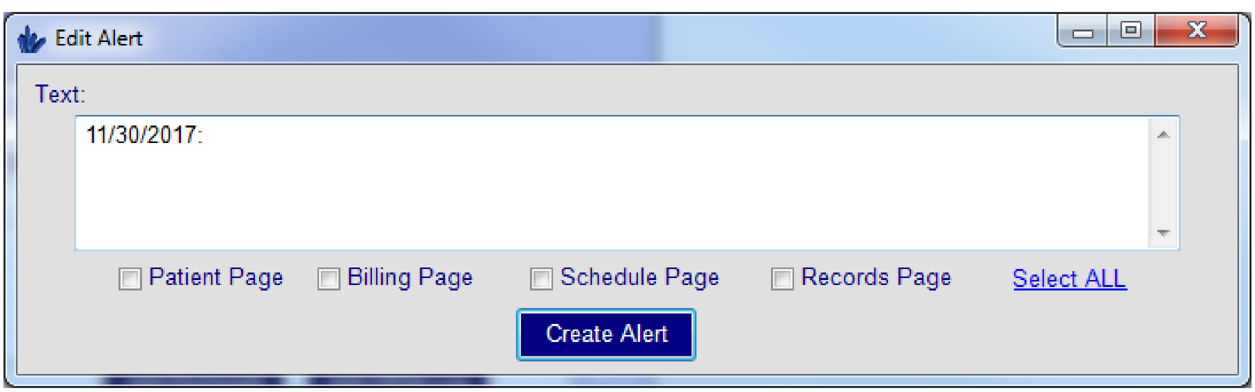
Billing	Staff
Balances Due Collection Patient Credit on account	Scanning Status "Tell patient…"

Instructions

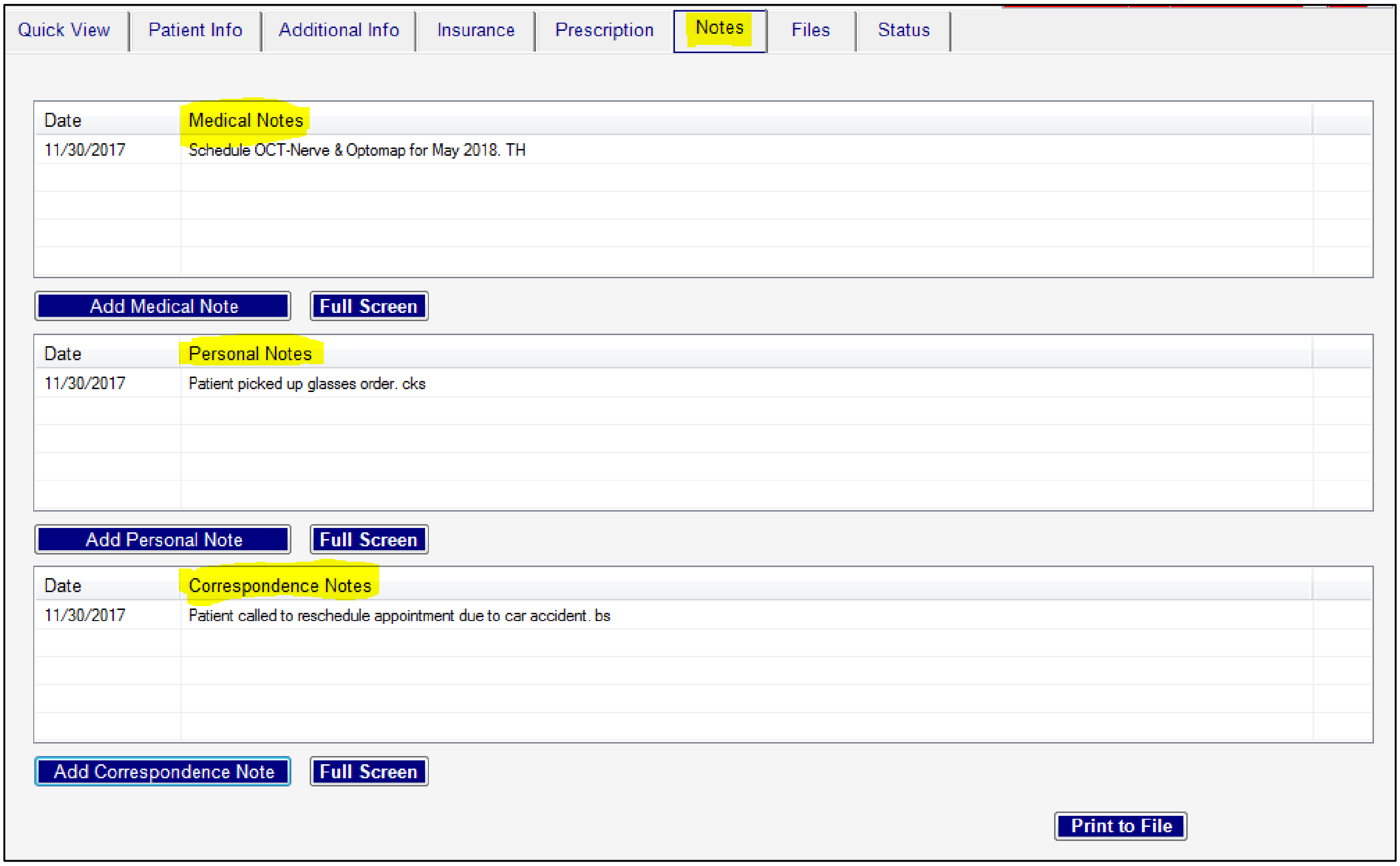
CrystalPM > Patient View > Additional Info Tab > Alerts



Add Alert > Enter pop-up message > select which views to have the pop up occur



Notes (Pink Sheet Replacement)



Background

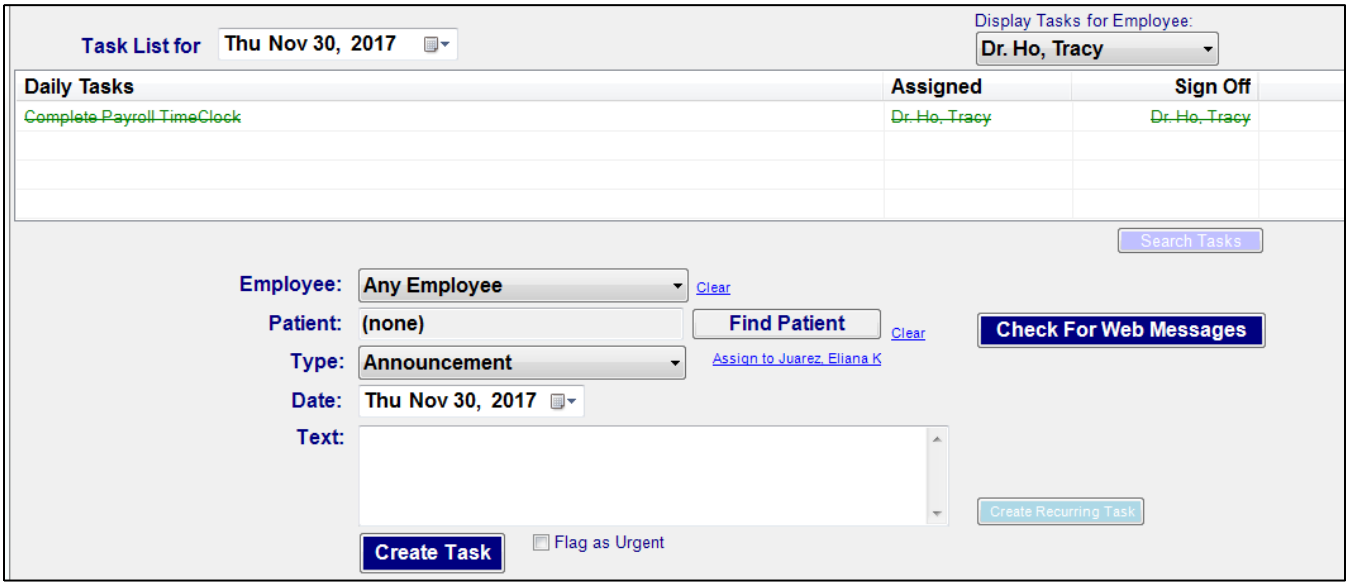
Complete notation of all encounters with patients allows the staff to quickly and effectively manage patient requests. Remember, if we do not write something down, it never happened. That said, notes cannot be deleted, and thus must be keep professional and objective at all times. CrystalPM provides 3 different areas to make notations.

Medical Notes	Personal Notes	Correspondence Notes
For Doctor Use Only	For Staff Use Only	For interactions with non-staff
If a doctor feels that information needs to be communicated to staff, but does not need to go on the face sheet, the information can be found here. This is an excellent area for doctors to communicate the reason for follow up or testing orders.	All members of staff may use this area to update billing status, optical status, contact lens status.	All members may use this area to notate any contact with patients including phone calls made, attempted, or received. This is an excellent way to take patient messages for various staff members to reference as well as respond to.

Instructions

CrystalPM > Patient View > Notes Tab > Add selected Note & remember to initial

Task List – Creating a New Task



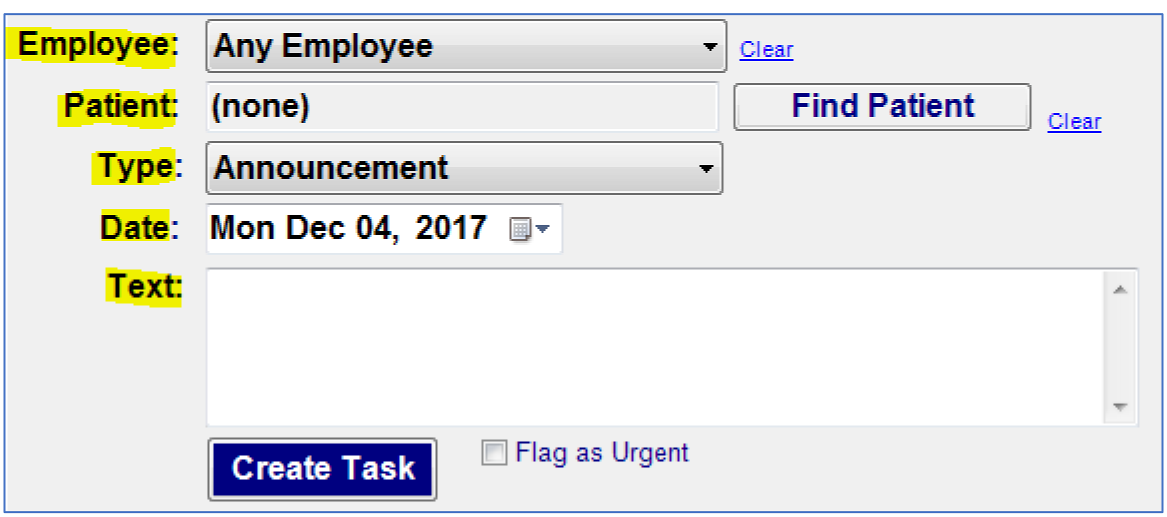
Background

Tasks are an effective way to communicate actions required of staff members. There are different types of tasks that can be sent from one staff member to another.

***Announcement**	This task type should be used for general announcements or FYI type information Displays as plain text & appears only on the date it is set for
Important	Displays as **bold text** & appears only on the date it is set for
Sign-Off	This task allows a staff member to sign-off a completed action. Displays as plain red & appears only for the date it is set for
***Keep Active Until Signed Off**	This task requires a staff member to sign-off a completed action before disappearing. Displays as bold blue & will remain on the task list until the staff member sign-off on it.

- Each task can be traced via “Show Log”
- Tasks may be bounced between task members until it is signed off

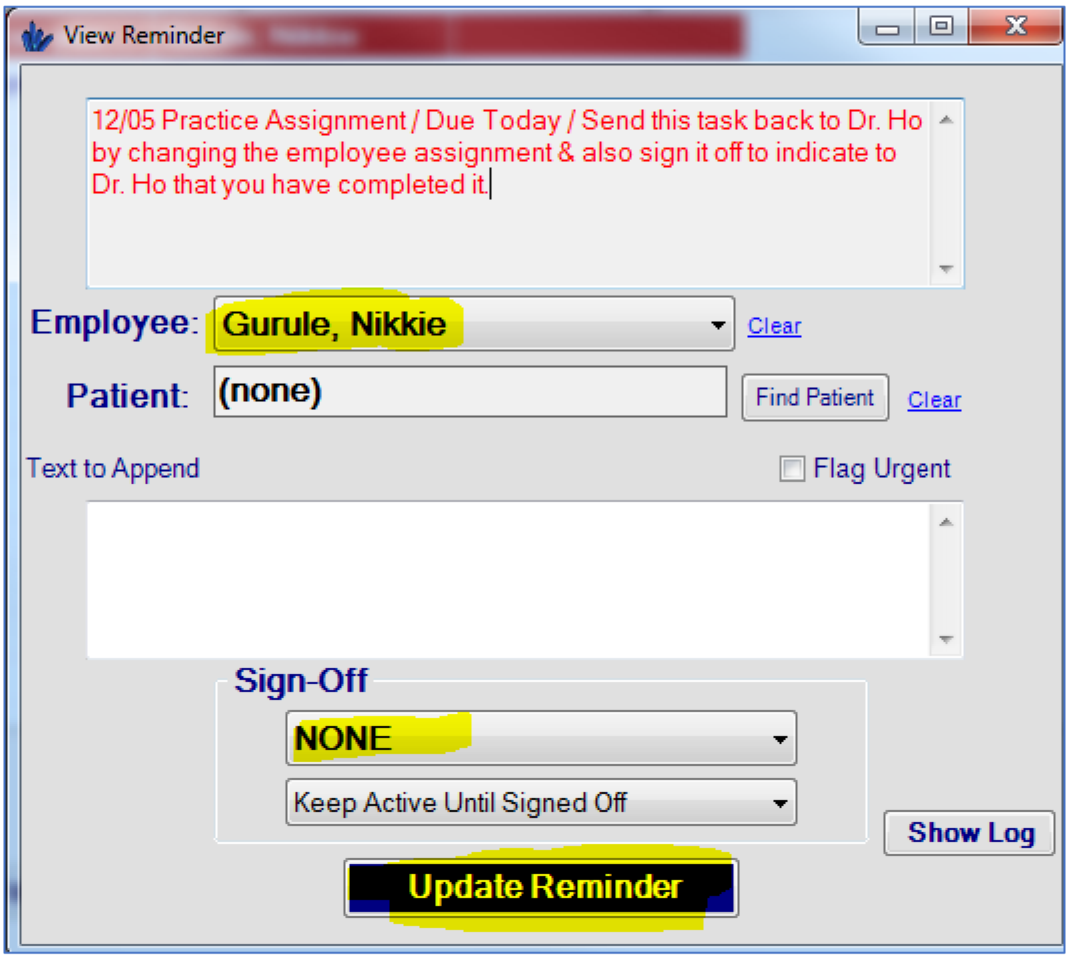
To enter a new task message:



1. Under Employee – select who you would like to send the task or announcement to

2. Under Patient – Assign a patient to the task if you want the patient name to be listed in the task
3. Under Type – Select Announcement (information only, 1 day display) or Keep Active (Action, remain on task)
4. Under Date – select a future date if you would like the staff selected to see the task displayed on a day in the future as opposed to today.
5. Text – Compose your message with as much information as possible.
6. Click the **Create Task** button to send the task message.
    a. If you are not sure that the task message looks the way you would like, you can check the receivers task list.
    b. If you have assigned a task that you are unsure has been completed, you can check on the receivers task list to see if they have signed off on it.

Task List – Sending a Task Back



1. Display the View Reminder dialog for the task for which you wish to append and send back
2. Change the **Employee** to the person you want to send the task back to
    a. If you are unsure who sent the task, check the **show log**
3. Append *additional* text to the task message
4. Click the **Update Reminder** button

Task List – Closing out a Task / Remove from Task List

1. Display the View Reminder dialog for the task for which you wish to sign off
2. Select your name from the **Sign-Off** menu.
3. Click the **Update Reminder** button to complete the sign-off process.