Advance Directives in the EMR for HIM and Appropriate Personnel Only

Cerner PowerChart, FirstNet and Ambulatory **EDUCATION**

Directives Introduction

For Advance Directives specifics, including how to obtain blank directive documents, activation requirements, validity, reaffirming, and revocation please visit the **Advance Directives Policy**.

Directives and/or Advance Care Planning documents can include, but are not limited to:

- an Advance Directive (otherwise known as a Durable Power of Attorney for Healthcare or a Patient Advocate Designation)
- a Living Will
- a Michigan Physician Order for Scope of Treatment (MI-POST)
- a Michigan Do-Not-Resuscitate (DNR) order
- a Letter of Guardianship
- a Non-Opioid Directive

Directives EMR Storage Process

1. **Blank Directive Obtained**
   - A blank directives document is obtained. (See Advance Directives Policy for obtaining blank directives. Most are available in Forms or via the McKesson System).
2. **Directive Completed**
   - A completed directive document is provided via, fax, mail, or is presented in person.
3. **Directive Copied**
   - The MHC team member makes a copy and returns the original to the patient.
4. **Directive Scanned in to the EMR by HIM or Appropriate Personnel (3 Potential Options)**
   - The copied directive is sent (faxed, interoffice mail, or delivered) to Health Information Management (HIM).
     - The HIM directive scanning process will take place during normal business hours, Monday-Friday.
   - The copied directive is placed in the patient's bedside chart and will be scanned upon patient discharge, or
   - Appropriate personnel scan the directive into the patient chart in real time.

   > Note: The Directive will not be available to others electronically and the chart alert will not fire until it is scanned in to the EMR.

5. **Documentation of Directive by Clinical Staff and Provider**
   - Hospital Clinical Staff makes note of the directive in a Focus Note using the 'Advance Care Planning' option.
   - Provider makes note of the directive in a Provider/Progress Note.
6. **Directive Chart Alert Activated**
   - Letters of Guardianship or Non Opioid Directives scanned into the patient's EMR will fire a Chart Alert, prompting clinicians to review the document.
7. **Inactive or Revoked Directive Sent to HIM or Appropriate Personnel**
   - Follow instruction #4 to have the Inactive or Revoked Directive scanned into the EMR.
   - The HIM revoke process will take place during normal business hours, Monday-Friday.

   > Note: The Inactive or Revoked Directive will not be available to others electronically and the chart alert will continue to fire until it is scanned in to the EMR.

8. **Documentation of Inactive or Revoked Directive by Clinical Staff and Provider**
   - Hospital Clinical Staff makes note of the Inactive or Revoked Directive in a Focus Note using the 'Advance Care Planning' option.
   - Provider makes note of the Inactive or Revoked Directive in a Provider/Progress Note.

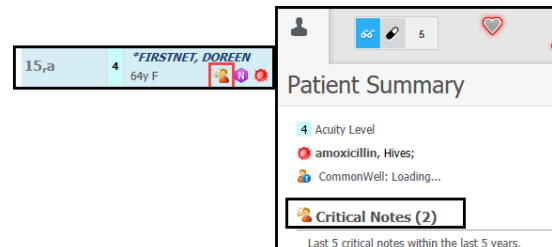# Advance Directives in the EMR for HIM and Appropriate Personnel Only

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Viewing Directives: Active, Inactive, or Revoked

1. Active, Inactive, or Revoked Directives can be viewed from the Directives Folder in Clinical Notes.
2. An Active Directive that becomes Inactive or Revoked, is removed from the active Directives folder, and placed in the corresponding Inactive or Revoked folder with Inactive or Revoked document if applicable.
3. Directives can also be viewed from Code Status-Advance Care Planning MPage/Workflow. **For additional details regarding on Code Status- Advance Care Planning visit Clinical EHR Education > Healthcare Decision Maker education.**
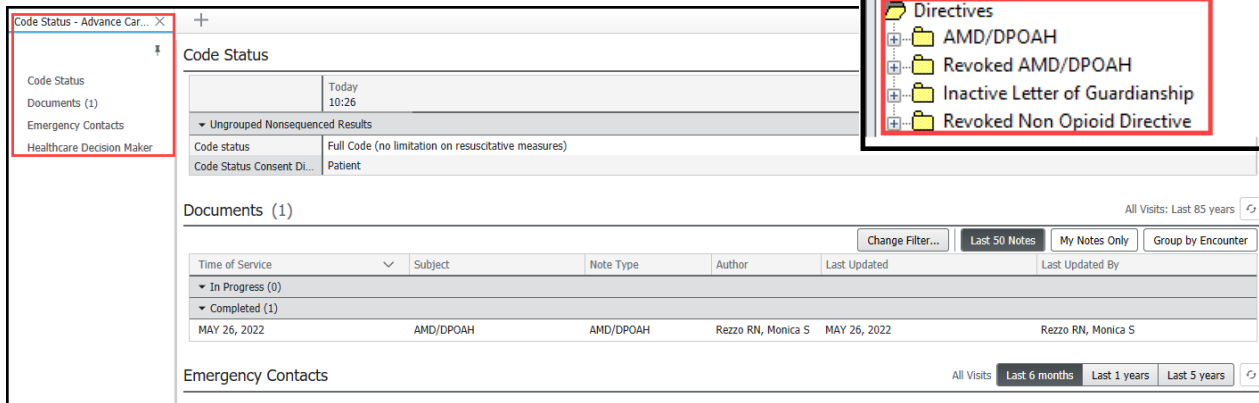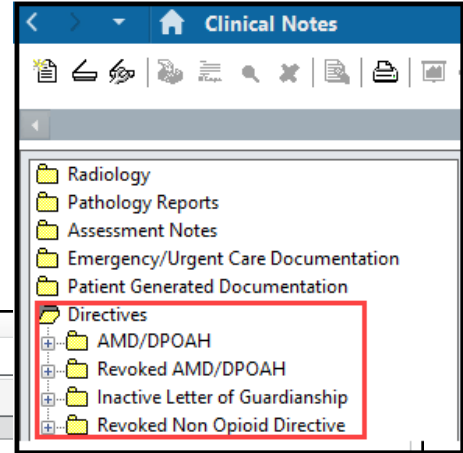
4. **ED ONLY:** Directives trigger a Critical Note Icon on LaunchPoint and are available for review in the Critical Notes section within the Patient Summary.

Directives Chart Alert

A Chart Alert will pop up when opening a patient's chart on all encounters if any of the following directives are filed into Clinical Notes:

- Letters of Guardianship
- Non Opioid Directive

NOTE: The chart alert will fire one time per day per person opening the chart. The chart alert will be discontinued when an Inactive/Revoked Guardianship or Non Opioid Directive is scanned into the chart.
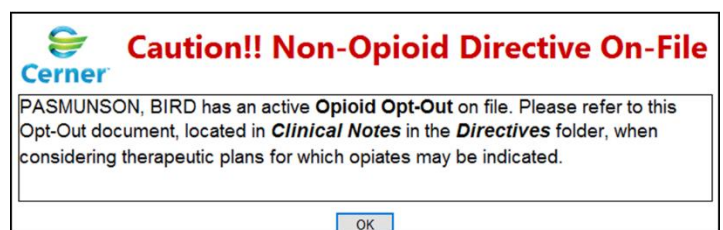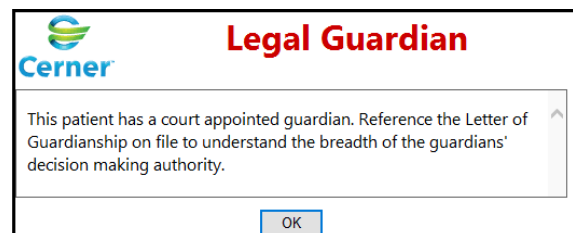
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Scanning Active Directives into the EMR (HIM and Appropriate Personnel Only)

1. Receive Active Directives document for PowerChart scanning.
2. Identify and review the document for scanning requirements using the Scanning Checklist below.
   a. Confirm the document has not been previously scanned. Do NOT scan, if the document is already in the system.
   b. Check the signed dates of the document and check each page to ensure no updates have been written in.
3. Within Clinical Notes, click the Scan icon.
4. The Add Document window will open. Verify the Patient Level Document box is checked.
5. Select the Type of document (see table below).
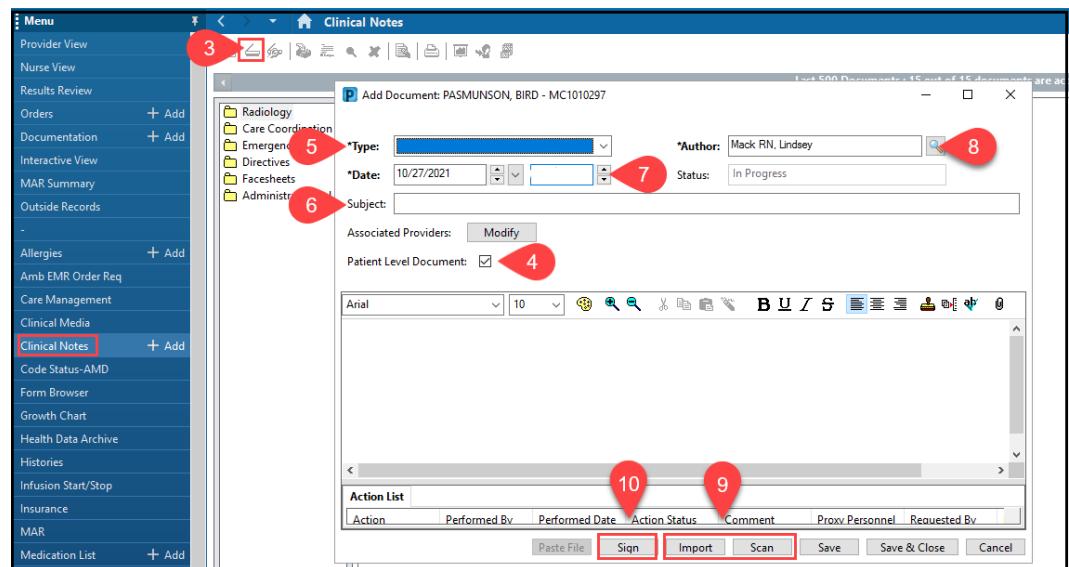6. Add the Subject field (see table below).
7. Set the date/time to the time of the document was signed, NOT the scan date.
   a. If the document does not indicate a time enter 1200.
8. Ensure your name is in the Author box.
9. Click, Import or Scan.
10. Click, Sign.

Active Advance Directives Document Type and Subject

Document	Document Type	Subject Field
AMD/DPOAH	AMD/DPOAH	AMD/DPOAH
Living Will	AMD/DPOAH	Living Will
Patient Advocate Designation	AMD/DPOAH	Patient Advocate Designation
Letters of Guardianship	Letter of Guardianship	Letters of Guardianship
Physician Letters of Incapacitation	Capacity Assessment	Letters of Capacity
Custody and Adoption Papers	Letter of Guardianship	Custody and Adoption Papers
Mi-POST	POST/DNR	POST
Michigan Do-Not-Resuscitate Order	POST/DNR	Mi-DNR
Non Opioid Directive	Non Opioid Directive	Non Opioid Directive

Scanning Inactive or Revoked Directives into the EMR (HIM and Appropriate Personnel Only)

1. Receive an Inactive or Revoked Directives document for PowerChart scanning.
2. Identify and review the document for completion and confirm the document has not previously been scanned.
   a. Do NOT scan, if the document is already in the system.
   b. Check the signed dates of the document and check page to ensure no updates have been written in.
3. Within Clinical Notes, locate the corresponding document, click Modify. The Modify Document window will open.
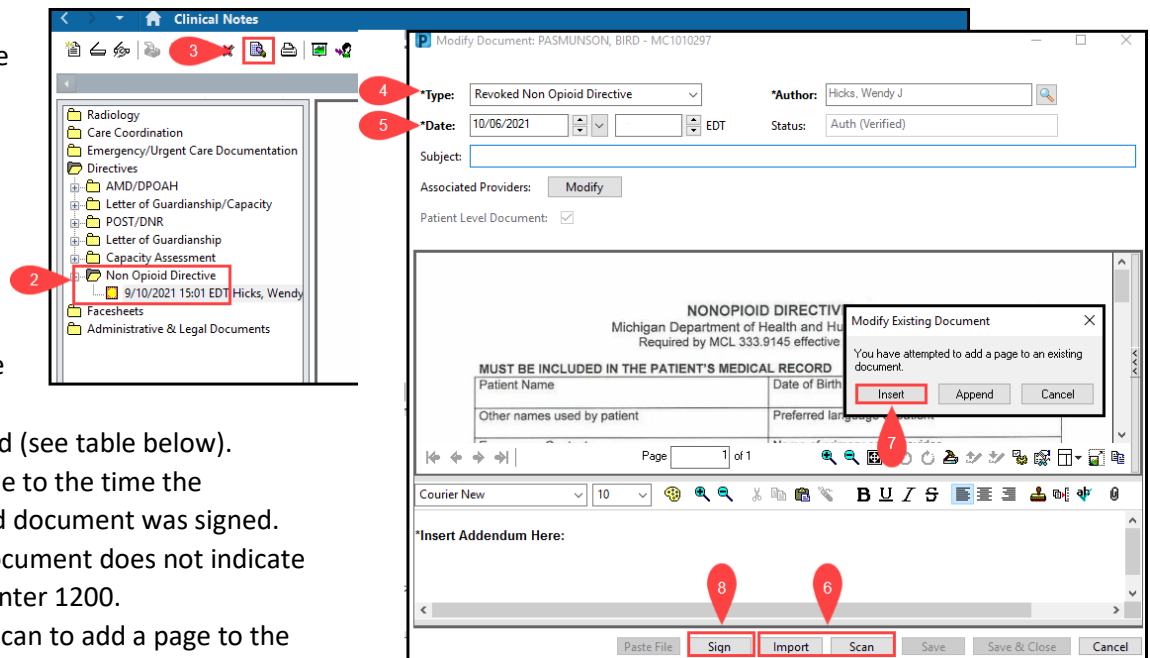4. Change the Type of document to Inactive/Revoked (see table below).
5. Set the date/time to the time the inactive/revoked document was signed.
   a. If the document does not indicate a time enter 1200.
6. Click Import or Scan to add a page to the existing document.
7. Click, Insert. Add the Inactive/Revoked document to the first page.
8. Click, Sign.

Inactive or Revoked Advance Directives Document Type	
Document	**Document Type**
Termination/Modification of Guardianship Letters	Inactive Letter of Guardianship
Revoked Non Opioid Directive	Revoked Non Opioid Directive
Revoked AMD/DPOAH	Revoked AMD/DPOAH
Revoked Living Will	Revoked AMD/DPOAH
Revoked Patient Advocate Designation	Revoked AMD/DPOAH

Scanning Checklist Requirements

Scanning Checklist Requirements
If no to any items for the corresponding directive, do NOT scan. Return to the patient to address errors.
AMD/DPOAH
☐   Signed by the patient
☐   Signed by two witnesses
LETTERS of GUARDIANSHIP
☐   Signed by judge
CAPACITY ASSESSMENT
☐   Signed by physician
☐   Date of signature less than 1 year old
MICHIGAN OUT OF HOSPITAL DNR
☐   Signed by patient/guardian/advocate
☐   Signed by 2 witnesses
☐   Signed by physician
MI-POST
☐   Signed by physician, PA, or NP
☐   Signed by patient/guardian/advocate