The following flyer outlines the process for documenting the COVID-19 Triage Documentation for the PCP Office Triage Staff.  This flyer will be updated frequently with any changes to the workflow.
NOTE:  This flyer uses links to help you navigate the information based on patient responses.

The content associated with this **documentation** will serve as the "source of truth" regarding the rapidly shifting guidance for COVID-19 testing per the Maine Center for Disease Control.  Development of this algorithmic autotext is based on multiple factors, including likelihood of severe illness, availability of testing or Personal Protective Equipment, and disease spread.
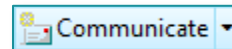
## When the patient calls the PCP Office:

➢ **From PowerChart:**

- Click the **Message Center** button in the toolbar near the top of the screen.
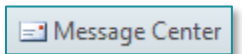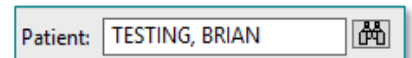
- Click the **Communicate** button.
    - A **New Message Window** opens.

- Obtain the patient's **Name, Date of Birth**, and **PCP/Ordering Provider** information.

- In the **Patient** field, type the patient's name in a **Last Name, First Name** format.

- After typing, press **Enter** or click the **Binoculars** to initiate the search.
    - A **Patient Search** window opens.

- In the **Patient Search** window, a list of search results will display in the upper right pane.

    NOTE:  A combination of several different identifiers can be used in the search. Also, a partial name search can be done by using an asterisk as a wildcard character.

- Confirm the correct patient in the upper pane using patient identifiers (DOB, SSN, etc.).

- Select the correct patient in the upper pane of the **Patient Search** window.

- In the lower pane, **DO NOT** select an encounter.

| Name | SSN | MRN | Sex | Birth Date | Age |
|------|-----|-----|-----|-----------|-----|
| TESTING, BRIAN | | 2243909 | Male | 01/06/1960 | 60 Years |
| | | | | | |

| FIN NBR | Enc Type | Enc Type(s) | Med Service | Facility | Reg Date | Disch Date |
|---------|----------|-------------|-------------|----------|----------|-----------|
| 256278169 | Ambulatory | | | NL PRIMARY CARE HAMPDEN | 08/06/2019 10:19 | 08/08/2019 23:59 |
| 244182481 | Ambulatory | | | NL ENDOCRINOLOGY AND DIABETES CARE WATER | 10/25/2018 16:10 | 10/27/2018 23:59 |
| 232754390 | Non-Patient | | | CAP SURVEY - ALI | 04/04/2018 | 04/06/2018 23:59 |

- Click **OK** in the **Patient Search** window.
    - The **New Message** window displays again, with the patient's name added to the fields at the top of the window.
- In the **To Field:** Designated RN, RN Pool, MA, MA Pool or Provider in your office.
- Leave the **Save to Chart** checkbox and **As: Phone Message** options selected as defaulted.
- In the **Subject field**, type in **Possible COVID Symptoms**.
- In the **Message Box**, type **/covid_symptoms_frontoffice**
- Click **Send**.

## Responding to the Message from Message Center

- Open the message from **Message Center**.
- Click **Forward** from the Message Center toolbar to launch the new message.
- In the **Subject Field**, choose **COVID-19 PCP Office Assessment.**
- When the Change Template box opens click Append
- Place the cursor at the end of the /covid_pcp_office_assessment and press **Enter**.

## If creating your own In-Between Note

- Click the New Message Subject dropdown and choose the **COVID-19 PCP Office Assessment** option.
- Place the cursor at the end of the **/covid19_pcp_office_assessment** phrase and press Enter.
    - The **COVID-19 PCP Office Assessment Template** displays.

    NOTE:  Due to the rapidly changing nature of this situation, this autotext phrase will be updated to reflect the most recent CDC guidelines and recommendations for screening.

- ➢ **Emergency Clinical Assessment Section:**

VERY IMPORTANT: Screening Criteria should be adhered to as it is written in the autotext when determining qualification for screening.

- The appropriate answer to the question(s) should be selected using the options available by clicking the blue arrow(s).
    - The scripted verbiage contained in the answers should be used to refer the patient to the Emergency Department, if applicable.
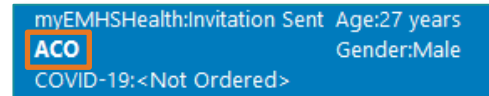
- ➢ **COVID-19 RN Medical Phone Triage Section**

- The appropriate answer to the question(s) should be selected using the options available by clicking the blue arrow(s) and activating the appropriate autotext phrases.

➢ **Decision Making by Role**
- **RN makes decision of**:
    ▪ Go to Emergency Department per **Emergency Clinical Assessment** above.
    ▪ May choose Stay Home, with education
        • **Assessment**: Choose Asymptomatic
        • **Patient Instructions:** Choose A
    ▪ Place **Open COVID Case Management** order, for ACO patients only, if indicated.
    ▪ **Assessment**: Remainder of options: Forward, in Message Center, to provider for additional assessment or verbally discuss with provider.
- **MA makes decision of** (if no RN for triage):
    ▪ Go to Emergency Department per **Emergency Clinical Assessment** above.
    ▪ For all **Assessment** and **Plan** decisions: Forward, in Message Center, to provider for additional assessment or verbally discuss with provider.
    ▪ Place **Open COVID Case Management** order, if indicated for ACO patients only.
- **Provider:**
    ▪ Communicates advice to RN/MA via Message Center or verbally:
        • Requesting PCP Telehealth visit (or phone visit if Telehealth not available).
        • Recommends On-site evaluation at Respiratory Evaluation Center/Tent.
        • Recommends the patient to Stay Home, with education.
        • If not already done, provider can place COVID test/site evaluation.

➢ **Placing Orders**
- Orders may be placed by provider or per provider request by the practice RN/MA.
    ▪ If orders are indicated, and appropriate for your role, follow the Placing COVID Orders Workflow to place the indicated orders.

    IMPORTANT:     If an Onsite Assessment, Case Management, and/or a COVID 19 Test is ordered, the patient MUST be transferred to Central Triage Line for Registration to be completed.
    ▪ If no Orders are indicated, proceed to the Finalizing Documentation section.

## Finalizing Documentation

IMPORTANT:     Please ensure that all necessary documentation is completed and only the necessary autotexts are expanded.

- If an order for a swab/assessment is place, refer the patient to the COVID Triage Hotline for registration using the established COVID registration workflow for your Member Organization.
- Click the **Send** button at the bottom of the **New Message** window.
    ▪ A message will display stating "This message will be saved to the patient's chart. Are you sure you do not want to send it to anyone?"
    ▪ Click **Yes**.

## Placing COVID-19 Orders

➢ **If an order for a Covid-19 Swab, Onsite Evaluation or Care Management is indicated:**

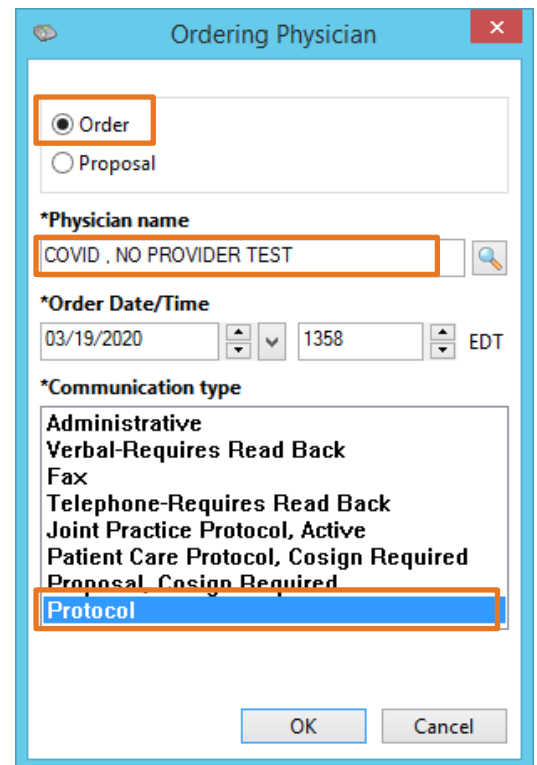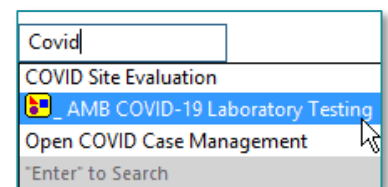- From the **New Message** window, click the **Launch Order** button from the upper right of the window.
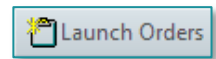
    NOTE: Refer to the Setting Default Encounter Creation Location section for location selection.
    - The **Order Profile** will display.

➢ **From the Order Profile Page:**

- Click the **+ Add** button in the upper left of the window.

- An **Add Order** window will display.

- In the **Search** field, type **COVID**.

- Select the appropriate option from the results displayed:
    - **_AMB COVID-19 Laboratory Testing PowerPlan**
    - **COVID Site Evaluation**
    - **Open COVID Case Management**

- After selecting the desired option, the **Ordering Provider** window will display.

- For Ambulatory positions, choose the **Order** option.

- **Physician Name** field:
    - Enter the name of the **PCP** or **Ordering Provider** in the **Provider field**. Both **in-system and out of system providers** can be found in this field.

- **Order Date/Time** field:
    - Enter appropriate date/time or leave as defaulted for current date/time.

- **Communication Type** field:
    - Choose the Communication Type of **Protocol.**
    - Click **OK**.
    - The **Orders Scratchpad** will now display.

- Proceed to the **Finalizing Documentation** section.

➢ **If Ordering the COVID Site Evaluation Orderable:**
  - From the **Order Scratchpad**, details will default in as appropriate.
  - Click the **Sign** button.
    - ▪ The **COVID Site Evaluation** is now placed on the in-between encounter for this patient and details display at the top of the message.
  - Proceed to the **Finalizing Documentation** section.

➢ **If Ordering the Open COVID Care Management Orderable (for ACO patients only):**
  - From the **Order Scratchpad**, details will default in as appropriate.
  - Click the Sign button.
    - ▪ The **Open COVID Case Management** now placed on the in-between encounter for this patient and details display at the top of the message.
  - Proceed to the **Finalizing Documentation** section.

➢ **If Ordering the _AMB COVID 19 Laboratory Testing PowerPlan**

  - Select the appropriate order based on the criteria highlighted in orange above the order and select **Initiate Now**.



**For all COVID 19 Orderables:**
  - From the **Order Scratchpad**, choose the appropriate option in the **Specimen Type** field.
    - ▪ Enter **Consulting Physician** information as outlined above if necessary.
      - If the **Consulting Physician** is unavailable from the field, enter the provider name in the **Special Instructions** field.
    - ▪ Enter the remaining details in the order scratchpad as applicable.
  - In the **Diagnoses** tab, enter or select the appropriate diagnosis. If other diagnosis not available, use Z11.9- Encounter for screening examination for infectious disease.
  - Once **Diagnoses** have been assigned, click the **Sign** button in the lower right to finalize the order.
    - ▪ The **COVID 19 order** is now placed on the in-between encounter for this patient and details display at the top of the message.