

# **Department of Veterans Affairs**

## **Maternity Tracker (MT) Project**



## **Dashboard User Manual**



## Revision History

Date	Description of Change	Author
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# Introduction

## **Product Description**

The Maternity Tracker project addresses the gaps in VistA for Maternity Tracking and Monitoring through a combination of field tested enhancements for better screening, tracking, monitoring, and sharing of maternity data, as well as improving women Veteran's access to earlier pre-natal care, complete postpartum care, and education information with an emphasis on care coordination in and outside of the VA. Throughout the document, Maternity Tracker (MT) Dashboard and Maternity Care Coordinator (MCC) Dashboard are used interchangeably.

## **Security Keys and Menu Options**

To access the Maternity Tracker application, all general users must have the following added to the New Person file in VistA:

Secondary Menu Option – **WEBM GUI CONTEXT**





# Getting Started Using Maternity Tracker

## Accessing Maternity Tracker

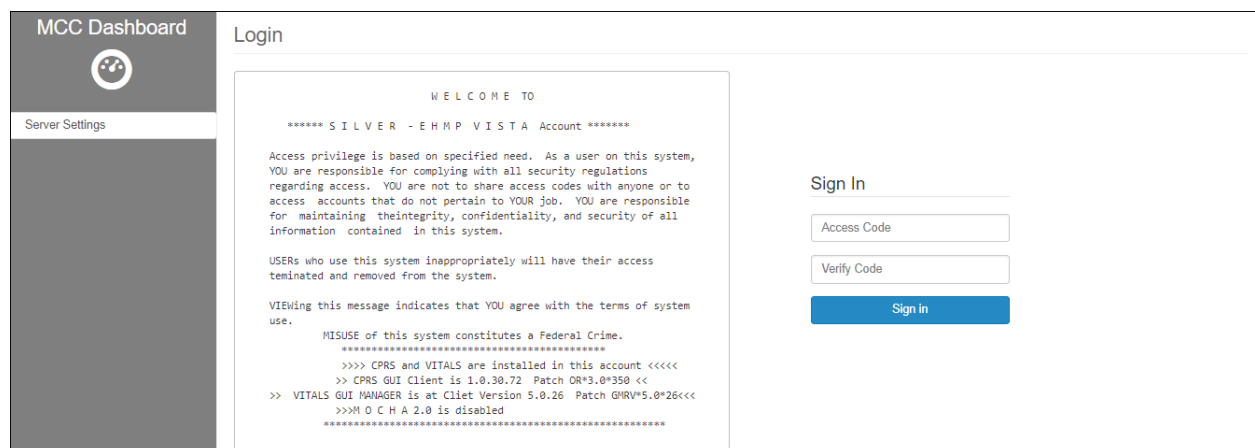
Contact the System Administrator to get the URL for the MCC Dashboard. Open a web browser and access the MCC Dashboard at the provided URL. This will redirect the user to the MCC Dashboard home screen.



**Figure 1: Welcome to the Maternity Tracker Dashboard**

Select “**here**” link at the bottom of the page to request first-time access, complete the email message, and send.

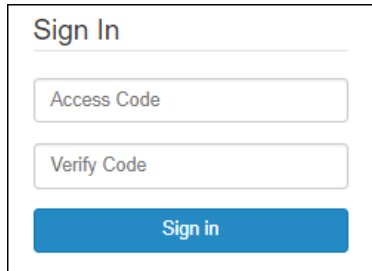
Click **Log In Now** button to access the application. This will redirect the user to the **Login** screen.



**Figure 2: Login screen**

## **Sign In**

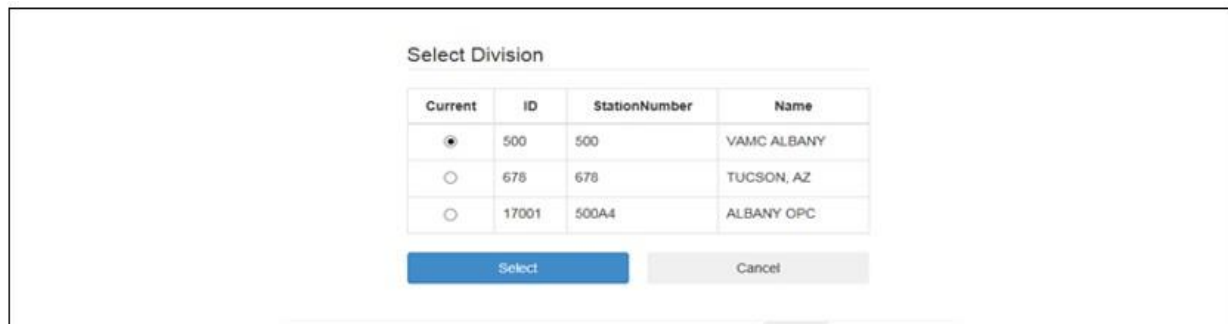
To sign in to the application, enter your VistA (CPRS) Access and Verify code provided by the System Administrator, and click **Sign In**.

A sign-in form with a title "Sign In" at the top. Below the title are two input fields: "Access Code" and "Verify Code". At the bottom of the form is a blue button labeled "Sign in".

Sign In	
Access Code	
Verify Code	
<b>Sign in</b>	

**Figure 3: Sign In**

The user may be asked to select an appropriate Division. Click the radio button for the correct Division. The user is taken to the MCC Dashboard.

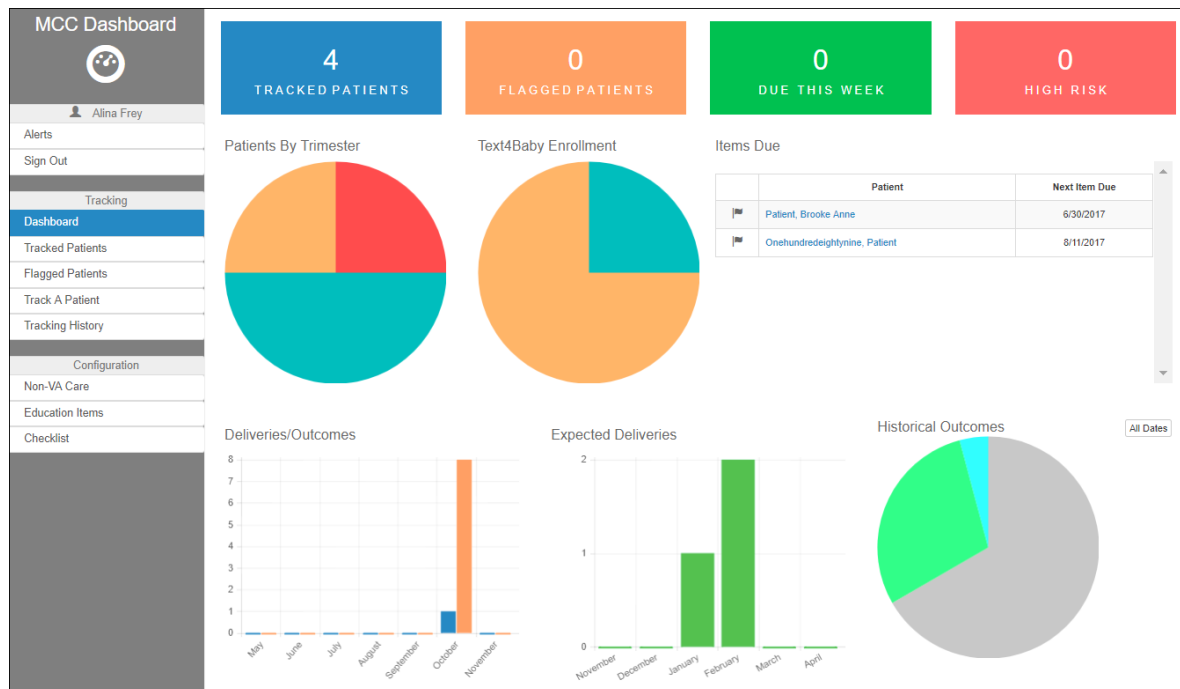
A "Select Division" dialog box containing a table with four columns: "Current", "ID", "StationNumber", and "Name". There are three rows of data. The first row has a selected radio button. Below the table are two buttons: "Select" (blue) and "Cancel" (gray).

Select Division			
Current	ID	StationNumber	Name
<input checked="" type="radio"/>	500	500	VAMC ALBANY
<input type="radio"/>	678	678	TUCSON, AZ
<input type="radio"/>	17001	500A4	ALBANY OPC

**Select** **Cancel**

**Figure 4: Select Division**

When the user is logged in, the user is directed to the default Dashboard screen, presented in section [Dashboard](#) of chapter [MCC Dashboard Elements and Functionality – Tracking / Configuration](#).



**Figure 5: User logged into MCC Dashboard**

The application shows two main areas discussed in the subsequent sections:

1. Left side pane: The left side pane changes its structure based on the view the user is in:
  - a. Tracking / Configuration view
  - b. Patient View – After a patient was selected

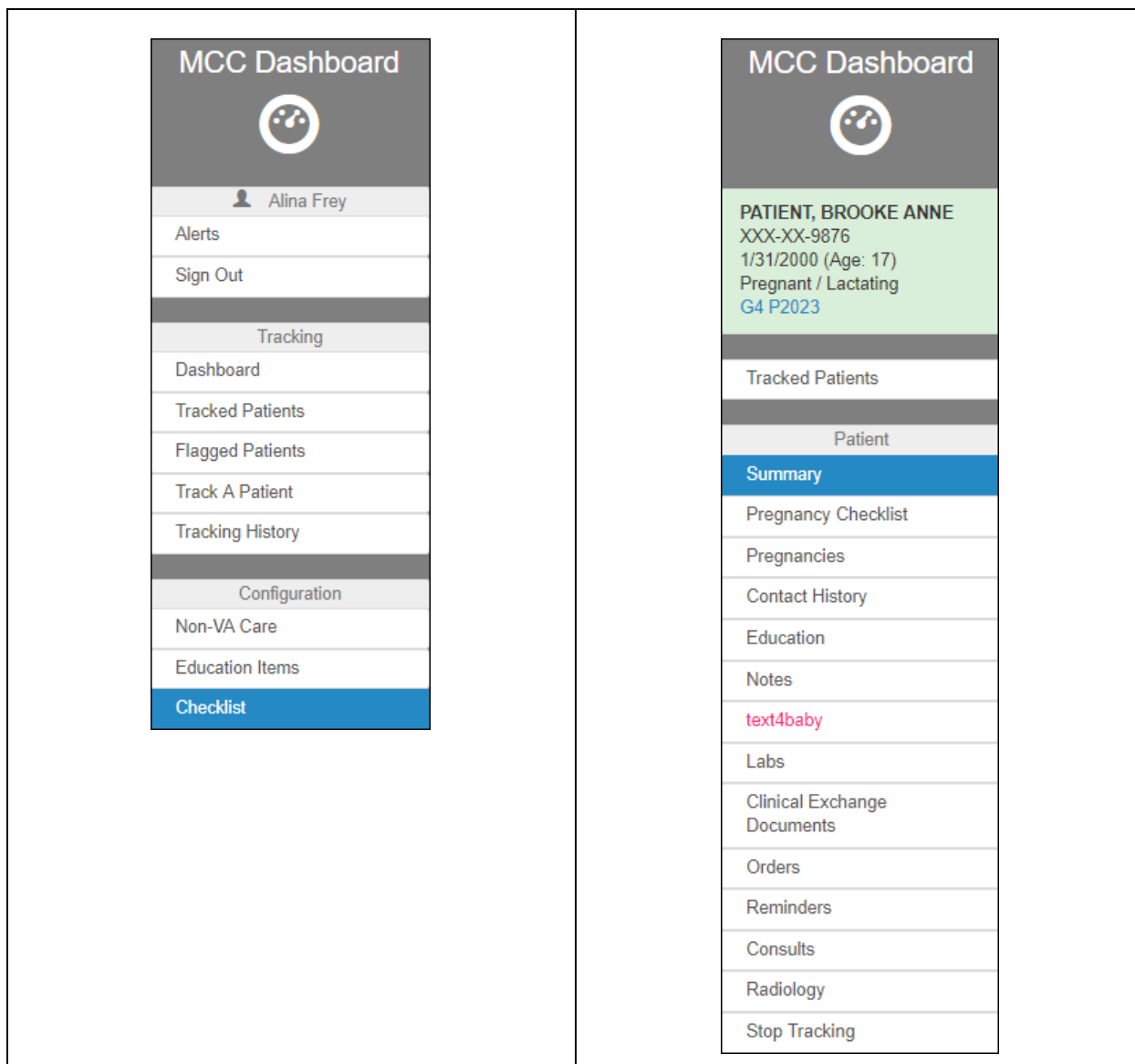


Figure 6: MCC Dashboard Left Side Panel – 2 views

2. The selected Screen (central area): displaying the details of the screen that was selected on the left side pane. For example, if Checklist tab is selected on the left side pane, the main area will show the Checklist Items screen.

MCC Dashboard

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Alerts

Sign Out

Tracking

Dashboard

Tracked Patients

Flagged Patients

Track A Patient

Tracking History

Configuration

Non-VA Care

Education Items

**Checklist**

Checklist Items

The following checklist items are the default tasks that are added for each patient upon establishment of an EDD

Click a row to select the checklist item

Type	Category	Description	Due
Education	Initial Education	Initial Education Items	Immediately
Visit	General	Testing the Visit Description	Immediately
Ultrasound	General	Initial ultrasound	8 Weeks

Add New

Edit Selected

Delete Selected

3.0.1.0

**Figure 7: MCC Dashboard – Main area**

## Alerts

The user can view their Alerts by selecting the option from the menu. The Alerts window opens to display pending work by patient. Click **Tracked Patients** to exit the Alerts page and navigate to the Tracked Patients screen (section [Tracked Patients](#)).

MCC Dashboard

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**Alerts**

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Checklist

Alerts

Info	Patient	Location	Urgency	Alert Date/Time	Message
	Patient,Brooke Anne	7A GEN MED	N/A	11/17/2017@13:54:51	PATIENT,B (P9876): Order requires electronic signature.
	Patient,Brooke Anne	7A GEN MED	N/A	11/09/2017@15:06:42	PATIENT,B (P9876): Order requires electronic signature.
	Patient,Brooke Anne	7A GEN MED	N/A	11/07/2017@10:00:09	PATIENT,B (P9876): [7A GM] New order(s) placed.
	Patient,Brooke Anne	7A GEN MED	N/A	11/07/2017@09:56:35	PATIENT,B (P9876): Order(s) needing clarification: Flagged 11/07 09:56
	Patient,Brooke Anne	7A GEN MED	N/A	11/06/2017@15:05:34	PATIENT,B (P9876): Order(s) needing clarification: Flagged 11/06 15:05
	Patient,Brooke Anne	7A GEN MED	N/A	11/06/2017@14:40:15	PATIENT,B (P9876): Order(s) needing clarification: Flagged 11/06 14:40
	Patient,Brooke Anne	7A GEN MED	N/A	11/06/2017@14:39:54	PATIENT,B (P9876): Order(s) needing clarification: Flagged 11/06 14:39
	Patient,Brooke Anne	7A GEN MED	N/A	11/06/2017@14:27:32	PATIENT,B (P9876): [7A GM] New order(s) placed.
	Patient,Brooke Anne	7A GEN MED	N/A	11/03/2017@14:57:47	PATIENT,B (P9876): Order(s) needing clarification: Flagged 11/03 14:57
	Patient,Brooke Anne	7A GEN MED	N/A	11/03/2017@14:57	PATIENT,B (P9876): Order(s) needing clarification: Flagged 11/03 14:56

«

1

2

3

»

Tracked Patients

**Figure 8: Alerts Display**

## **Sign Out**

To sign out of MT, select the **Sign Out** option from the left side pane under the Dashboard Menu. When clicking on the Sign Out link, the user is logged off and taken back to the MCC Dashboard home screen.

# MCC Dashboard Elements and Functionality – Tracking / Configuration View

Upon logging in, the user is directed to the Maternity Care Coordinator (MCC) Dashboard default screen, with the Dashboard tab selected by default on the left side pane.



**Figure 9: MCC Dashboard – Tracking / Configuration View**

The user has access to multiple selections (tabs), available from the Left side pane. Each of the menus are presented in detail in the following sections.

1. The Dashboard Menu:
  - a. Link to MCC Dashboard home screen.
  - b. Name of the user that is logged in
  - c. Link to Alerts
  - d. Link for Signing Out
2. Tracking Menu:
  - a. Dashboard
  - b. Tracked Patients
  - c. Flagged Patients
  - d. Track A Patient
  - e. Tracking History
3. Configuration Menu:
  - a. Non-VA Care
  - b. Education Items
  - c. Checklist

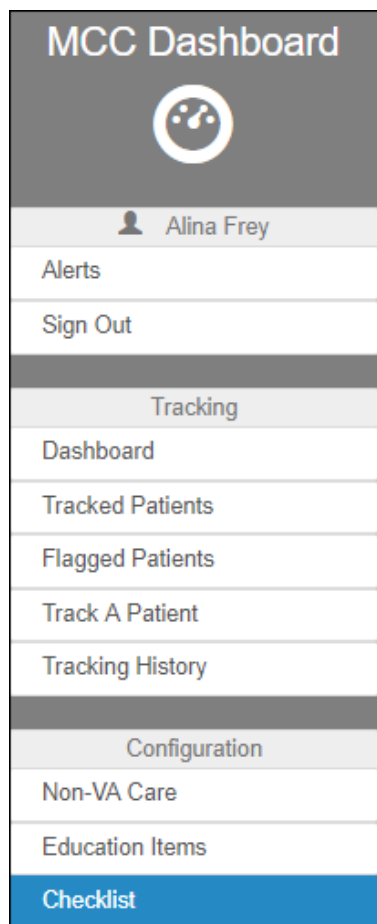


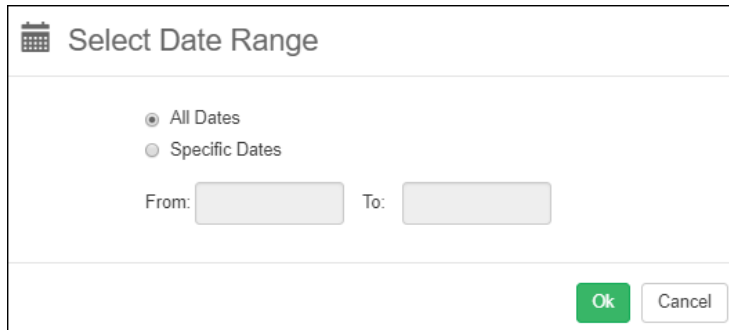
Figure 10: Dashboard Tracking / Configuration View – Left side pane

## Dashboard

The Dashboard page is a graphical representation of statistical information, such as:

1. The number of Tracked Patients, Flagged Patients, Due This Week and High Risk Pregnancies, shown at the top of the page. The first two, Tracked Patients and Flagged Patients, are links to their corresponding screens presented in sections below, which can also be accessed from the left side pane.
2. Pie charts displaying the number of patients grouped by different categories: Patient by Trimester, Text4Baby Enrollment, and Historical Outcomes.
3. Table for Items Due by Patient name and Due Date.
4. Bar charts for the number of Deliveries/Outcomes and Expected Deliveries.
5. Also, the user can choose a date range for this statistical information, by selecting the **All Dates** button:





**Select Date Range**

☒ All Dates  
☐ Specific Dates

From:  To:


**Figure 11: Dashboard – Select Date Range**

## **Tracked Patients**

To see all the patients that are tracked, click on the Tracked Patients tab on the left side pane.

The user is directed to the Tracked Patients screen, which displays an alphabetic list of the patients currently tracked using the MT application. For each patient the list includes: Name, Last 4 (digits of social security numbers), Age, Phone number, Non-VA OB, L&D facility, Pregnant status, Tri (Trimester), GA (Gestational Age), and EDD (Estimated Delivery Date). These fields cannot be edited from this page. Each column is sortable by clicking in the header of the column.

MCC Dashboard



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Alerts

Sign Out

Tracking

Dashboard

Tracked Patients

Flagged Patients

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Tracking History

Configuration

Non-VA Care

Education Items

Checklist

Tracked Patients

Trimester: 1st 2nd 3rd All

Name	Last 4	Age	Home Phone	Non-VA OB	L&D	Pregnant	High Risk	Lactating	Tri	GA	EDD	Last Contact	Next Contact	Next Item Due
Inpatient, Younggirl	4567	26	555-555-5590			Yes		No						
Onehundredeightyfour, Patient	0184	23	222-555-8235	Ob Test	Viera Hospital	Yes		Yes	1st	7w 1d	07/08/2018	10/23/2017	11/16/2017	11/16/2017
Onehundredeightynine, Patient	0189	31	222-555-8235			Yes		No	3rd	28w 3d	02/09/2018		8/11/2017	8/11/2017
Patient, Brooke Anne	9876	17	234-456-6789	Ob Test	Palm Bay Hospital	Yes		Yes	2nd	24w 4d	03/08/2018	11/16/2017	11/16/2017	7/27/2017
Trash, Elsie	9998	13				Yes		No	1st	9w 5d	06/20/2018			

3.0.1.0

**Figure 12: Tracked Patients**

The names of the patients are direct links to the Patient Details screen, as presented in section [MCC Dashboard Elements and Functionality – Patient](#).

## Trimester Filters

This list can be filtered based upon Trimester by clicking the one of the buttons at the top of the table: 1st, 2nd, 3rd, or All.

Trimester:

Figure 13: Tracked Patients – Filter Options

## Flagged Patients

In CPRS, a consult request for OB care, an addition of PREGNANT to the Problem List, or a positive lab test for pregnancy triggers that patient into the list of Flagged Patients. From this list, the user can track the patient in MT.

The Flagged Patients table includes Name, SSN, DOB, Flagged On date and time, Details and Action (Accept/ Reject). The Details column contains links to the corresponding Flagged Patient Details screen.

Flagged Patients					
Name	SSN	DOB	Flagged On	Details	Action
Acmpatient, Eight	XXX-XX-6789	12/6/1990	8/29/2014 1:16:31 PM	<a href="#">Consult Request: Consult Request Pregnant</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>
Ays, Shits	XXX-XX-3333	3/15/1990	7/21/2014 1:20:59 PM	<a href="#">Problem List: Problem List Pregnant</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>
Buxjbhus, Crin	XXX-XX-9999	1/14/1957	7/1/2014 1:13:16 PM	<a href="#">Problem List: Problem List Pregnant</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>
Buxjbhus, Jeluaxssh	XXX-XX-2222	8/2/1970	7/1/2014 11:40:49 AM	<a href="#">Lab Pregnant: Positive Serum Test</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>
Chemopatient, Two	XXX-XX-0002	5/5/1953	7/1/2014 10:52:46 AM	<a href="#">W. Vet: Pregnant Status Positive</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>
Cprspatient, Fourteen	*SENSITIVE*		7/1/2014 10:49:51 AM	<a href="#">W. Vet: Pregnant Status Positive</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>
Cprspatient, Twenty-one T	XXX-XX-1719	7/17/1982	7/23/2014 3:19:39 PM	<a href="#">Problem List: Problem List Pregnant</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>
Cprspatient, Two F	XXX-XX-0002	9/3/1952	7/1/2014 10:51:25 AM	<a href="#">W. Vet: Pregnant Status Positive</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>
Epspatient, Four F	XXX-XX-1958	8/1/1956	7/1/2014 11:41:53 AM	<a href="#">Problem List: Problem List Pregnant</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>
Epspatient, Two D	XXX-XX-1126	7/13/1960	7/1/2014 11:42:32 AM	<a href="#">Problem List: Problem List Pregnant</a>	<input type="button" value="Accept"/> <input type="button" value="Reject"/>

[«](#) [1](#) [2](#) [»](#)

Figure 14: Flagged Patients

## Flagged Patient Details

By selecting the item in the Details column for the patient, the user will get the Flagged Patient Details page that displays the data used to determine flagging and a list of the patient's most recent progress notes in CPRS.

### Flagged Patient Details

BUXJBHUS, JELUAXSSH

XXX-XX-2222

8/2/1970 (Age: 44)

Not Pregnant

G? P???

This system has flagged this patient for tracking based on the following data:

Date/Time	User	Source	Reason
7/1/2014 11:40:49 AM	Roistaff,Chief O	Lab Pregnant	Positive Serum Test

Patient's most recent progress notes:

Date/Time	Author	Location	Title	Action
8/31/2000 11:00:00 AM	HHYIUN,ZDBH	MIKES MENTAL CLINIC	DOM REHAB NOTE	<a href="#">View</a>
8/22/2000 5:53:00 PM	EDJEHAKHUFHU,YLYJN	MIKES MENTAL CLINIC	TOM BOILERPLATE	<a href="#">View</a>
8/22/2000 4:56:00 PM	EDJEHAKHUFHU,YLYJN	MIKES MENTAL CLINIC	CLINICAL WARNING	<a href="#">View</a>

Return to List

Accept

Reject

**Figure 15: Flagged Patient Details**

## Progress Notes

By clicking the **View** action, the progress note will open, and the page will include options to Return to List, Return to Details, Accept, and Reject.

CNT— Clinical Note Templates have been created for users to document patient care in CPRS. The (5) five templates are OB HISTORY NOTE, OB H&P CONSULT, OB FOLLOWUP NOTE, NURSE POSTPARTUM- Delivery, and NURSE POSTPARTUM- Maternal. These notes will be visible in MT.

Another note type in CPRS is the MD POSTPARTUM FOLLOWUP. This will also be visible in MT, but it is not a CNT.

**BUXJBHUS, JELUAXSSH**  
 XXX-XX-2222  
 8/2/1970 (Age: 44)  
 Not Pregnant  
 G? P????

Progress note:

LOCAL TITLE: DOM REHAB NOTE  
 DATE OF NOTE: AUG 31, 2000@11:10      ENTRY DATE: AUG 31, 2000@11:10:27  
 AUTHOR: HHYIUN,ZDEH      EXP COSIGNER:  
 URGENCY:      STATUS: COMPLETED

\_ attended group session  
 \_ was attentive  
 \_ was not attentive  
 \_ stayed whole session  
 \_ left early  
 \_ participated  
 \_ did not participate

/es/  
 IRM CONSULTANT  
 Signed: 12/06/2000 11:20

Return to List   Return to Details   **Accept**   **Reject**

Figure 16: Progress Note View

## Accept/Reject

To accept or reject a patient for tracking in MT, the user may make the selection on either the Flagged Patient List page in the Action column, or the Progress Note page, by choosing from the appropriate command.

Action
<div> <div>Accept</div> <div>Reject</div> </div>

Figure 17: Action Column (Flagged Patients)

Return to List

Return to Details

**Accept**

**Reject**

Figure 18: Command Buttons (Progress Note View)

By clicking **Accept**, the user will get an Accept Flagged Patient confirmation screen, where a comment can be added to a text box. The user may **Accept Tracking** or select **Back** which will return the user to the previous page without tracking this patient. Once the patient is accepted, the user will be taken to the Tracked Patients Screen and see their patient added to the list.

## Accept Flagged Patient

The following patient will appear as a tracked patient in the dashboard

**AYS, SHTS**  
 XXX-XX-3333  
 3/15/1990 (Age: 24)  
 Pregnant  
 G? P????

Comment

Back
Accept Tracking


**Figure 19: Accept Flagged Patient**

## Track A Patient

This option allows the user to find a patient to track, and then edit patient's details if necessary. The page displays with a search option.

To track a patient, click on Track A Patient tab on the left pane. The user is directed to the Tracked A Patient screen.

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## Track A Patient

Search

Name	SSN	DOB	Location	Tracking	Action
(patient results)					

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**Figure 20: Track A Patient**

## Search Patient

To search for a patient from the CPRS directory, type a last name (partial or whole) in the **Enter Search Criteria** field, and click **Search**. The user may also search by last name initial plus the last four digits of the SSN, or by the last name and partial first name. Note: At least the first two letters of the last name are required to perform the search.

The screen will display all the female patients with the last name matching the search criteria. The table includes patient info such as: Name, SSN, DOB, Location, Tracking, and Action.

### Track A Patient

Name	SSN	DOB	Location	Tracking	Action
Sdosxht, Spdybah	XXX-XX-0555	1/1/1955		<input type="radio"/> No	<input type="button" value="Start Tracking"/>
Shytdsdqh, Hzwaxnhh	Sensitive	Sensitive		<input type="radio"/> No	<input type="button" value="Start Tracking"/>
Sjehl, Jxzwahsh	XXX-XX-1010	10/10/1910		<input type="radio"/> No	<input type="button" value="Start Tracking"/>
Spxss, Alin Z	XXX-XX-2345	8/30/1964	3ES	<input type="radio"/> No	<input type="button" value="Start Tracking"/>
Spxss, Dywlsdhys	XXX-XX-7654	5/11/1937		<input type="radio"/> No	<input type="button" value="Start Tracking"/>
Spxss, Ihli Wlsdhys	XXX-XX-2345	1/3/1950		<input type="radio"/> No	<input type="button" value="Start Tracking"/>
Spxss, Wlsdhys Spx	XXX-XX-2699	12/2/1945		<input type="radio"/> No	<input type="button" value="Start Tracking"/>
Szdse, Cxlyy	XXX-XX-4444	3/4/1945		<input type="radio"/> No	<input type="button" value="Start Tracking"/>

Figure 21: Track A Patient Search

## Start Tracking

The user can choose a patient to track by clicking the **Start Tracking** command from the Action column. The user will get a confirmation page to Start Tracking a patient that requires a Reason to be selected from a drop-down list, a check box to update the pregnancy status in MT and allows for a comment to be added in a text box. If the user selects **Back**, they will get the previous page. By selecting Start Tracking, the user is taken to the Tracked Patients Screen and will see their patient added to the list.

### Start Tracking a Patient

The following patient will appear as a tracked patient in the dashboard

**CPRSPATIENT, EIGHT F**  
 XXX-XX-0008  
 2/1/1955 (Age: 60)  
 Pregnant / Lactating  
 G3 P2002

**Reason for Tracking**

Other ▼

☐ Update Pregnancy Status

**Comment**


Back Start Tracking

**Figure 22: Start Tracking a Patient Confirmation**

## Tracking History

The Tracking History screen can be accessed by clicking on the Tracking History tab on the left side pane of the Dashboard.

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Type	Date/Time	Patient	User	Source	Reason	Comment
Stop	11/20/2017 14:14	Trash, Elsie	Frey, Alina	DASHBOARD		
Stop	11/20/2017 14:01	Patient, Brooke Anne	Frey, Alina	DASHBOARD		
Start	11/20/2017 13:43	Patient, Brooke Anne	Frey, Alina	DASHBOARD	Pregnant	
Stop	11/20/2017 09:48	Inpatient, Girl	Frey, Alina	DASHBOARD		
Stop	11/20/2017 09:46	Patient, Brooke Anne	Frey, Alina	DASHBOARD	Moved Out Of Area	
Start	11/17/2017 13:52	Inpatient, Younggirl	Stephens, Josh	DASHBOARD	Pregnant	
Accept	11/16/2017 15:56	Trash, Elsie	Amrhein, Allison	DASHBOARD		
Flagged	11/13/2017 08:46	Trash, Elsie	Frey, Alina	TRIGGER	Controlled Problem (250423000)	
Stop	11/13/2017 08:42	Trash, Elsie	Frey, Alina	DASHBOARD		
Accept	11/13/2017 08:40	Trash, Elsie	Frey, Alina	DASHBOARD		

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**Figure 23: Tracking History**

The Tracking History feature provides the user with a list of all tracking activity within MT, such as:

1. Type (Start tracking, Stop tracking, Flagged or Accept)
2. Date/Time
3. Patient on which the action was performed
4. User that performed the action
5. Source
6. Reason why the patient was tracked
7. Comment.

The names of the patients are direct links to the Patient Details screen, as presented in section [MCC Dashboard Elements and Functionality – Patient](#).

By selecting a patient from the list, the user can view the Tracking History by Patient. From this window, the user can choose to **Return to All Patients**.

Tracking History - By Patient						
Type	Date/Time	Patient	User	Source	Reason	Comment
Accept	11/9/2017 15:23	Patient, Brooke Anne	Frey, Alina	DASHBOARD		
Flagged	11/9/2017 14:25	Patient, Brooke Anne	Frey, Alina	TRIGGER	Controlled Problem (250423000)	
Stop	11/9/2017 14:20	Patient, Brooke Anne	Frey, Alina	DASHBOARD		
Start	10/20/2017 16:18	Patient, Brooke Anne	Frey, Alina	DASHBOARD	Pregnant	
Stop	10/20/2017 15:31	Patient, Brooke Anne	Frey, Alina	DASHBOARD		
Start	10/20/2017 15:27	Patient, Brooke Anne	Frey, Alina	DASHBOARD	Other	
Stop	10/20/2017 14:58	Patient, Brooke Anne	Frey, Alina	DASHBOARD		
Start	10/11/2017 10:38	Patient, Brooke Anne	Frey, Alina	DASHBOARD	Pregnant	
						Return to All Patients

Figure 24: Tracking History – By Patient

## Non-VA Care

The Configuration Menu in the side left side pane, displays three links to: Non-VA Care, Education Items and Checklist.

When clicking on the Non-VA Care tab, the user is directed to the Non-VA Care Items screen. MT maintains a library of Non-VA Care Items (Facilities and Providers) for use on the patient MT record.



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Non-VA Care Items

Name	Item Type	Address	Phone Number	Fax Number	Inactive
Dr. Constantinescu	Provider	111 White Lane Melbourne 32905	(321)555-5555		False
Ob Test	Provider	123 Hwy A1A Indian Harbour Beach, FL 32904	(321)555-7485		False
Palm Bay Hospital	Facility	222 Mary Lou Lane Palm Bay, FL 11111			False
Viera Hospital	Facility	Viera Boulevard Viera, FL	(032)155-5555		False

Add New

Edit Selected

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**Figure 25: Non-VA Care Items**

The items in the list can be edited by highlighting an item and clicking **Edit Selected**.

To add a new Provider or Facility, select the **Add New** button.

At the edit/add window, the user can enter new information in the fields provided and select Save button to store the information. For the Item Type, the user can choose from a drop-down list: Provider or Facility.

By selecting **Cancel** button, the user can return to the previous window without saving.



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Click a row to select the education item

Sort:

Type

Category

Description

	Type	Category	Description	Url	Code
	Discussion Topic	Postpartum Planning	Family Medical Leave Or Disability Forms		SnomedCT - 40791000
	Discussion Topic	Contraception	Tubal Sterilization Consent Signed		SnomedCT - 408835000
	Enrollment	Postpartum Planning	Training For After The Birth		
	Enrollment	General	Test		None - test

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>

Add New

Edit Selected

Delete Selected

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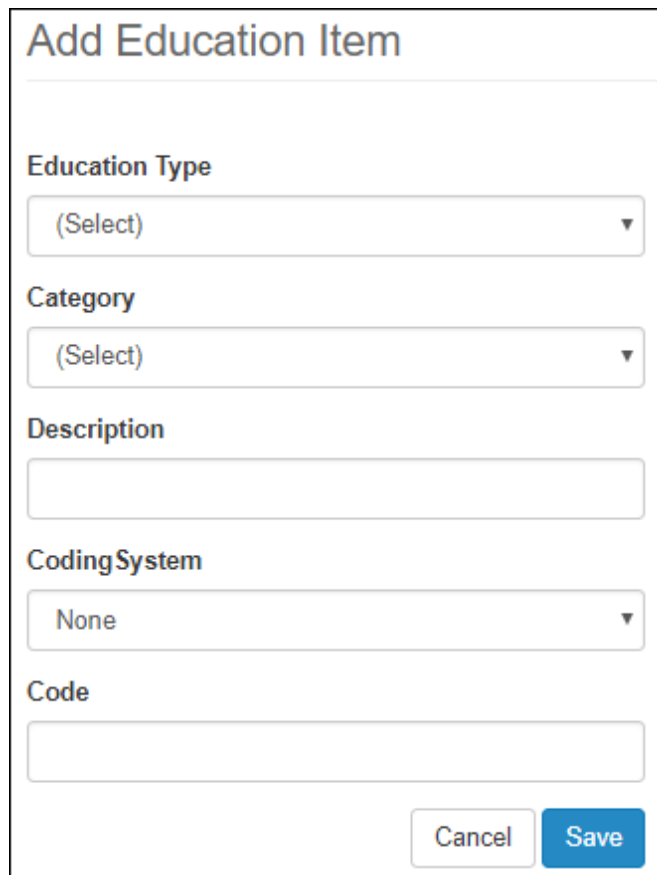
**Figure 27: Education Items**

The education items that are part of this table are going to be added to the default education items, present on the Edit Screen of the patient’s Education, as shown in section [Education](#).

Within the list of available Education Items, the user can Add, Edit or Delete, by selecting the corresponding button at the bottom of the screen.

## Add New

To add a new Education Item to the list, click **Add New**. The user will be directed to the Add Education Item screen .



**Add Education Item**

**Education Type**  
 (Select) ▼

**Category**  
 (Select) ▼

**Description**

**Coding System**  
 None ▼

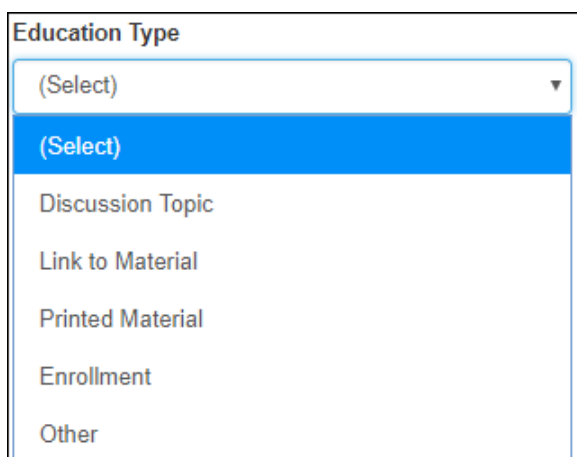
**Code**

Cancel Save

**Figure 28: Add Education Item**

Enter information into the fields provided:

1. For the Education Type, select an option from the drop-down list. The available default options are Discussion Topic, Link to Material, Printed Material, Enrollment, and Other.



**Education Type**

(Select) ▼

(Select)

Discussion Topic

Link to Material

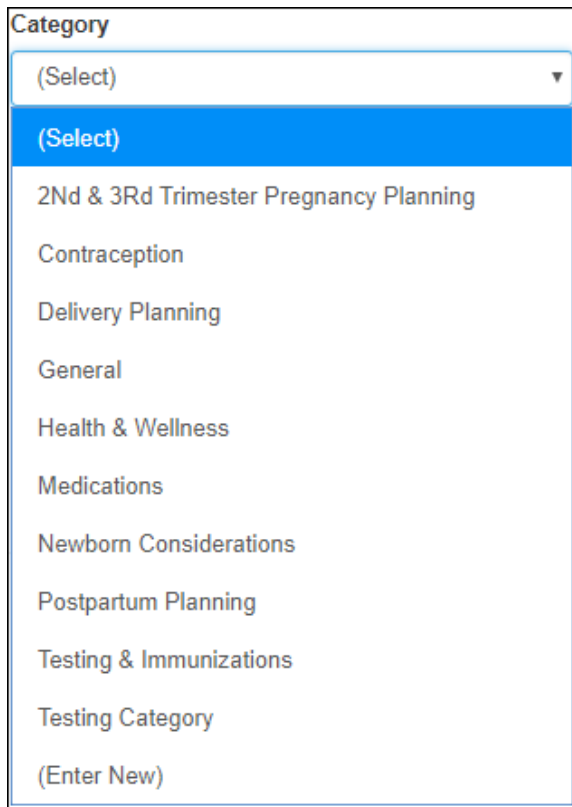
Printed Material

Enrollment

Other

**Figure 29: Education Type Drop-down List**

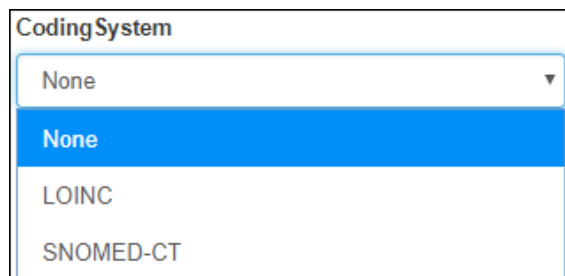
2. For the Category, select an option from the drop-down list. The (Enter New) option within the drop-down list allows the user to create a new drop-down item, and a description which is free text.



A screenshot of a web application's 'Category' drop-down menu. The menu is open, showing a list of options. The top option is '(Select)' with a downward arrow. Below it is another '(Select)' option, which is highlighted in blue. The list continues with: '2Nd & 3Rd Trimester Pregnancy Planning', 'Contraception', 'Delivery Planning', 'General', 'Health & Wellness', 'Medications', 'Newborn Considerations', 'Postpartum Planning', 'Testing & Immunizations', 'Testing Category', and finally '(Enter New)' at the bottom.

**Figure 30: Education Categories**

3. The Description is a text field, allowing the user to enter the name of the new Education Item for the selected Category.
4. For the Coding System field, select an option from the drop-down list. The available options are LOINC and SNOMED-CT.



A screenshot of a web application's 'CodingSystem' drop-down menu. The menu is open, showing a list of options. The top option is 'None' with a downward arrow. Below it is another 'None' option, which is highlighted in blue. The list continues with: 'LOINC' and 'SNOMED-CT'.

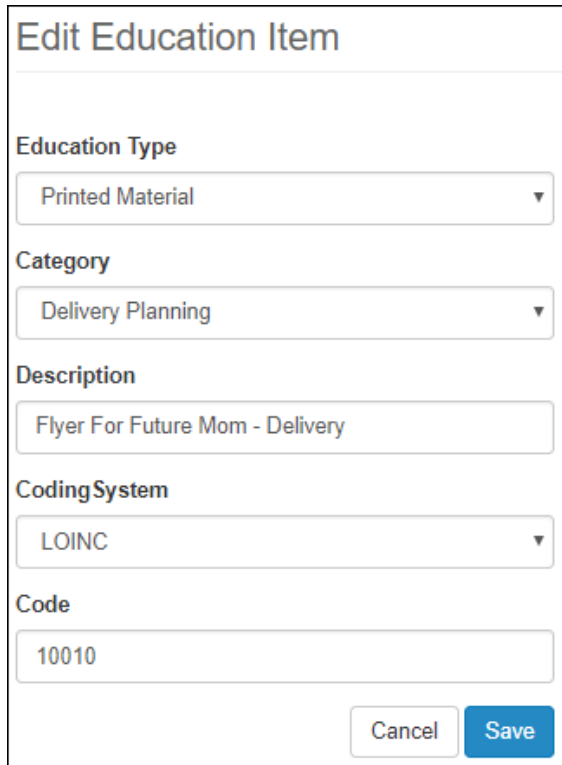
**Figure 31: Education Item – Coding System Drop-down List**

5. The Code is a text field, allowing the user to enter a code for the selected Coding System.

Click **Save** to store this information, or click **Cancel** to return to the previous page without storing the new item.

## Edit Selected

To edit an item in the list, highlight the item and click **Edit Selected**. Make changes in the fields provided, click **Save** to store the new information, or click **Cancel** to return to the previous page without storing the edits to this item.

The screenshot shows a form titled "Edit Education Item". It contains several fields: "Education Type" with a dropdown menu showing "Printed Material"; "Category" with a dropdown menu showing "Delivery Planning"; "Description" with a text input field containing "Flyer For Future Mom - Delivery"; "Coding System" with a dropdown menu showing "LOINC"; and "Code" with a text input field containing "10010". At the bottom right of the form are two buttons: "Cancel" and "Save".

Edit Education Item	
Education Type	Printed Material
Category	Delivery Planning
Description	Flyer For Future Mom - Delivery
Coding System	LOINC
Code	10010
<div>Cancel Save</div>	

Figure 32: Edit Education Item

## Delete Selected

To delete from the Education Items list, highlight the item and click **Delete Selected** button at the bottom of the screen. A message will be displayed for a successful deletion of an education item.

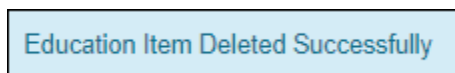


Figure 33: Education Item Deletion Confirmation

## Checklist

MT maintains a directory of Checklist items for use on the patient's record. The Checklist Items screen can be accessed by selecting the corresponding link on the left side pane.

These are the default tasks that are added for each patient upon establishment of an Estimated Delivery Date (EDD).

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Checklist Items

The following checklist items are the default tasks that are added for each patient upon establishment of an EDD

Click a row to select the checklist item

Type	Category	Description	Due
Education	Initial Education	Initial Education Items	Immediately
Visit	General	Testing the Visit Description	Immediately
Ultrasound	General	Initial ultrasound	8 Weeks

Add New
Edit Selected
Delete Selected

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**Figure 34: Checklist Items**

The user can Add a new Checklist Item, and Edit or Delete an existing Checklist Item, by selecting on one of the buttons at the bottom of the screen.



**Figure 35: Checklist Items Commands**

## Add New Checklist Item

To add a new item to the Checklist, click the **Add New** command button. The user is prompted to enter the desired information on the Add New Checklist Item screen.

**Add New Checklist Item**

The following item will be added to the list of default tasks that are added to each patient

**Type**  
 (Select) ▼

**Category**

**Description**

☐ Due Immediately  
☐ Due at  weeks gestation  
☐ Due by end of   
☐ Due at  weeks postpartum

Cancel Save

**Figure 36: Add New Checklist Item**

The following info can be edited:

1. Type – drop box with the following options:

**Type**

(Select) ▼

(Select)

MCC Call

Education

Lab

Ultrasound

Consult

Document Exchange

Visit

Other

**Figure 37: Add New Checklist Item – Type Drop-down List**

2. Note – Added when the Type selected is MCC Call. Drop down list with the following options:



Note

(Select) ▼

(Select)

Phone Call #1 (Initial Contact)

Phone Call #2 (12 Weeks)

Phone Call #3 (20 Weeks)

Phone Call #4 (28 Weeks)

Phone Call #5 (36 Weeks)

Phone Call #6a (41 Weeks, Not Delivered)

Phone Call #6b (41 Weeks, Delivered)

Phone Call #7 (6 Weeks Postpartum)

Additional Call

**Figure 38: Add New Checklist Item – Note Dropdown List**

3. Education Item – Added when the Type selected is Education. Drop down list with the following options:

**Figure 39: Add New Checklist Item – Education Item Dropdown List**

4. Category field
5. Description field
6. Due – group of radio buttons with only one option for selection

Click **Cancel** to return to the previous page without saving. Click **Save** to store the entry and return to the previous page. The newly created item should be visible on the patient's Checklist.

Also, the new items should be visible in the patient's details screen under the Pregnancy Checklist table, after the default items were added (Add Default Items button), as shown in section [Pregnancy Checklist](#).

## Edit Selected Checklist Item

To edit entries of an existing Checklist Item, highlight the item and click **Edit Selected**. Make changes as necessary. Click **Save** to store the entry and return to the previous page. Click **Cancel** to return to the previous page without storing any changes.

**Edit Checklist Item**

**Type**

Visit

**Category**

General

**Description**

Testing the Visit Description

☒ Due Immediately

☐ Due at 0 weeks gestation

☐ Due by end of (Select)

☐ Due at 0 weeks postpartum

Cancel Save

Figure 40: Edit Selected

## Delete Selected Checklist Item

To delete an existing Checklist Item, highlight the item and click **Delete Selected**. For a successful deletion, message will be displayed at the top of the screen.

The item has been deleted

Figure 41: Deleted Checklist Item message

# MCC Dashboard Elements and Functionality – Patient View

Upon selecting a patient from the Tracked Patients screen, the user is directed to the Patient View of the application, with the Summary tab selected by default on the left side pane.

**MCC Dashboard**

**PATIENT, BROOKE ANNE**  
XXX-XX-9876  
1/31/2000 (Age: 17)  
Pregnant / Lactating  
G3 P2012

Tracked Patients

Patient

**Summary**

Pregnancy Checklist

Pregnancies

Contact History

Education

Notes

text4baby

Labs

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

**Patient Summary**

**Patient Details** Action ▾

Name:	PATIENT, BROOKE ANNE
Age:	17
Pregnancy Status:	Pregnant
Postpartum:	No
Lactating:	Yes
Text4Baby Enrollment:	Not Interested

**Contact** Action ▾

Home Phone:	(234)456-6789
Work Phone:	
Mobile Phone:	(602)222-3333
Last Contact:	11/16/2017
Next Contact:	11/16/2017
Next Item Due:	7/27/2017

**Current Pregnancy** Action ▾

High Risk:	No
Estimated Delivery Date:	3/8/2018
EDD Basis:	Last Menstrual Period
EDD Is Final:	Yes
Gestational Age:	24 weeks 4 days
Trimester:	2nd
Prenatal Care Provider:	Ob Test
Planned Delivery Location:	Palm Bay Hospital
Father of Baby:	Smith, John
Last Menstrual Period:	06/01/2017
Multiple Pregnancy:	Unknown

**Pregnancy Checklist** Action ▾

Description	Due Date	Status
Initial ultrasound	7/27/2017	Overdue
Initial ultrasound	7/27/2017	Overdue
Testing the Visit Description	11/14/2017	Overdue
Initial Education Items	11/16/2017	Overdue

4 more

**Gravida/Para Details** Action ▾

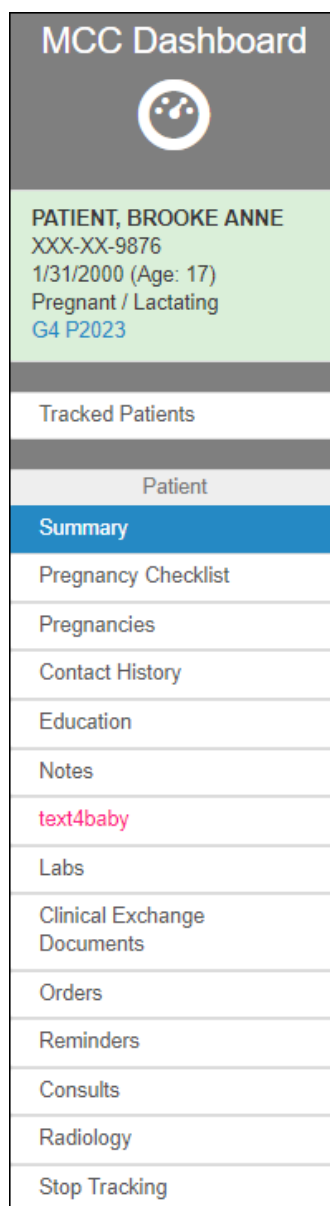
Total Pregnancies (Including Current)	3
Term Births (Live & Stillborn)	2
Preterm Births (Live & Stillborn)	0
Stillbirths	0
Spontaneous Abortions (Miscarriages)	1
Pregnancy Terminations	0
Ectopic Pregnancies	0
Living Children	2

Figure 42: MCC Dashboard – Patient View

The user has access to multiple selections (tabs), available from the Left side pane. Each of the menus are presented in detail in the following sections.

- The Dashboard Menu containing the selected patient's details:
  - Link to MCC Dashboard home screen.
  - Name of the patient that was selected from Tracking Patients screen
  - SSN
  - Date of Birth – Age
  - Status regarding pregnancy and lactation
  - GP history
- Link to Tracked Patients (presented in section [Tracked Patients](#))

3. Patient Menu:
  - a. Summary
  - b. Pregnancy Checklist
  - c. Pregnancies
  - d. Contact History
  - e. Notes
  - f. text4baby
  - g. Labs
  - h. Clinical Exchange Documents
  - i. Orders
  - j. Reminders
  - k. Consults
  - l. Radiology
  - m. Stop Tracking.



**Figure 43: Dashboard Patient View – Left side pane**

## **Tracked Patients**

Selecting this option will redirect the user to the Tracked Patients screen (see the [Tracked Patients](#) section of the [MCC Dashboard Elements and Functionality – Tracking / Configuration View](#) chapter).

## **Patient Summary**

The Patient Summary screen is the default screen that the user is directed to when switching to the Patient View, upon selecting a patient from the Tracked Patients screen. The user can enter and edit all the information concerning this patient’s pregnancy.

Patient Summary

Patient Details

Action

Name:

PATIENT, BROOKE ANNE

Age:

17

Pregnancy Status:

Pregnant

Postpartum:

No

Lactating:

Yes

Text4Baby Enrollment:

Not Interested

Contact

Action

Home Phone:

(234)456-6789

Work Phone:

Mobile Phone:

(802)222-3333

Last Contact:

11/1/2017

Next Contact:

8/11/2017

Next Item Due:

6/30/2017

Current Pregnancy

Action

High Risk:

No

Estimated Delivery Date:

2/9/2018

EDD Basis:

Last Menstrual Period

EDD Is Final:

Yes

Gestational Age:

27 weeks 3 days

Trimester:

2nd

Prenatal Care Provider:

Dr. Constantinescu

Planned Delivery Location:

Viera Hospital

Father of Baby:

Unspecified

Last Menstrual Period:

05/05/2017

Multiple Pregnancy:

Unknown

Pregnancy Checklist

Action

Description

Due Date

Status

Initial ultrasound

6/30/2017

Overdue

Test description

8/11/2017

Overdue

Test description

8/11/2017

Overdue

Initial Education Items

10/30/2017

Overdue

5 more

Gravida/Para Details

Action

Total Pregnancies (Including Current)

4

Term Births (Live & Stillborn)

2

Preterm Births (Live & Stillborn)

0

Stillbirths

0

Spontaneous Abortions (Miscarriages)

1

Pregnancy Terminations

1

Ectopic Pregnancies

0

Living Children

3

**Figure 44: Patient Summary**

## Patient Details

As part of the Patient Summary screen, the Patient Details panel displays information about the patient: Name, Age, Pregnancy Status, Postpartum and Lactating, Text4Baby Enrollment, and allows the user to edit the Pregnancy Status, Lactating status and Text4Baby status. In addition, the Action drop down at the top right corner of the panel, allows the user to update the Pregnancy Status or Lactating status.

Patient Details		Action ▾
Name:	PATIENT, BROOKE ANNE	Update Pregnancy Status
Age:	17	Update Lactation
Pregnancy Status:	Pregnant	
Postpartum:	No	
Lactating:	Yes	
Text4Baby Enrollment:	Not Interested	

**Figure 45: Patient Details Panel**

## ***Pregnancy Status***

To edit or update the patient's pregnancy status, click on the **Pregnancy Status** link in the Patient Details panel, or select **Update Pregnancy Status** from the drop-down Action list. This redirects the user to the Pregnancy Status dialog.

### Pregnancy Status

Current Pregnancy Status:	Not Pregnant
Today's Pregnancy Status:	<input type="text"/>

**Figure 46: Patient Details – Pregnancy Status**

The user has two possibilities to choose from: Pregnant or Not Pregnant.

### Pregnancy Status

Current Pregnancy Status:	Not Pregnant
Today's Pregnancy Status:	<input type="text"/> <div> Pregnant Not Pregnant </div>

**Figure 47: Patient Details – Update Pregnancy Status**



Click **Save** to store or **Cancel** to exit without saving.

If choosing Pregnant, assuming that the patient was not pregnant before, the user will be redirected back to the Patient Summary screen, showing the new Pregnancy Status in the Patient Details panel. Also, as a side note, a Current Pregnancy table will be added to the Pregnancies screen, with the details on top of the table of Past Pregnancies, as shown in section [Pregnancies](#).

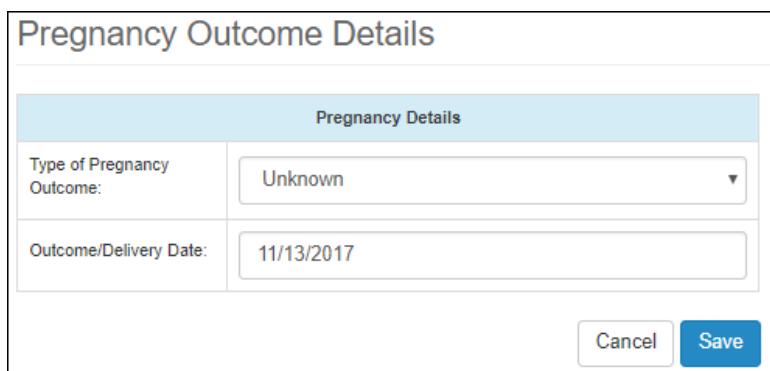
If the Pregnancy Status was previously set to Pregnant, and the user updates it to Not Pregnant, a new field is added to the dialog, Outcome/Delivery Date:



Pregnancy Status	
Current Pregnancy Status:	Pregnant
Today's Pregnancy Status:	Not Pregnant ▼
Outcome/Delivery Date:	<input type="text"/>
<div>Save Cancel</div>	

**Figure 48: Patient Details – Pregnancy Status updated to Pregnant**

Add date then click Save button. This will prompt the user to add details about the pregnancy in the Pregnancy Outcome Details screen:



Pregnancy Details	
Type of Pregnancy Outcome:	Unknown ▼
Outcome/Delivery Date:	11/13/2017
<div>Cancel Save</div>	

**Figure 49: Pregnancy Outcome Details**

The user has many outcome options to choose from in the drop-down list:

**Figure 50: Type of Pregnancy Outcome**

Each option redirects the user to a corresponding Pregnancy Outcome Details screen, which contains relevant information corresponding to the selected type of outcome. Each of them will be described in section [Pregnancies](#).

As a side note, if the patient was Pregnant before, and was marked as Not Pregnant, after saving the data on the Pregnancy Outcome Details screen, it moves Current Pregnancy to the table of Past pregnancies.

## ***Lactation Status***

To edit or update the patient's lactating status, click on the **Lactating** link in the Patient Details panel or select **Update Lactation** from the drop-down Action list. This redirects the user to the **Lactation Status** dialog.

**Figure 51: Patient Details – Lactation Status**

The user has two possibilities to choose from: Pregnant or Not Pregnant.

**Figure 52: Patient Details – Update Lactation Status**

Click **Save** to store or **Cancel** to exit without saving. After Saving, the user is redirected back to the Patient Summary screen, showing the new status under the Lactating field.

### ***Text4Baby Enrollment***

To edit or update the patient’s Text4Baby Enrollment status, click on the **Text4Baby Enrollment** link in the Patient Details panel. This redirects the user to the **text4baby** screen, which gives the option to enroll or go back to the Patient Summary screen. Enrolling the patient in **text4baby** is presented in detail in section [Text4Baby Enrollment](#).

**Figure 53: Patient Details – text4baby Status**

### **Current Pregnancy**

As part of the Patient Summary screen, the Current Pregnancy panel is visible only when the current Pregnancy Status in the Patient Details panel is set to Pregnant.

This panel shows the main details related to a patient’s pregnancy, such as:

1. High Risk (yes or no)
2. Estimated Delivery Date (EDD)
3. EDD Basis (the name of the field that the EDD computation was based on)
4. EDD is final (yes or no)
5. Gestational Age

6. Trimester
7. Prenatal Care Provider
8. Planned Delivery Location
9. Father of the Baby
10. Last Menstrual Period
11. Multiple Pregnancies

High Risk, EDD Basis, EDD Is Final, Gestational Age, Trimester, Last Menstrual Period and Multiple Pregnancy fields are view-only.

Current Pregnancy		Action ▼
High Risk:	No	Update Pregnancy Status
Estimated Delivery Date:	2/28/2018	Edit Details
EDD Basis:	Last Menstrual Period	Update EDD
EDD Is Final:	Yes	
Gestational Age:	24 weeks 5 days	
Trimester:	2 <sup>nd</sup>	
Prenatal Care Provider:	Dr. Constantinescu	
Planned Delivery Location:	Viera Hospital	
Father of Baby:	Smith, John	
Last Menstrual Period:	05/24/2017	
Multiple Pregnancy:	Unknown	

**Figure 54: Current Pregnancy Section**

To update information on this panel, the user has two options:

1. Click on the links of the editable fields, to update one field at a time:
  - a. Estimated Delivery Date
  - b. Parental Care Provider
  - c. Planned Delivery Location
  - d. Father of Baby
2. Click on the Action button on the top right corner of the panel, and select one of the available options:
  - a. Update Pregnancy Status
  - b. Edit Details – if multiple
  - c. Update EDD

The following sections are presenting each of the updating options mentioned above.

### ***Estimated Delivery Date (EDD)***

To update the Estimated Delivery Date (EDD), click on the link next to the corresponding field. This redirects the user to the EDD Observation History screen:

EDD Observation History							
Imported	Entered	User	Criteria	Event Date	Gestational Age	EDD	Is Final
	11/13/2017	Frey, Alina	Last Menstrual Period	05/24/2017		02/28/2018	✓
						<a href="#">Patient Summary</a>	<a href="#">EDD Calculator</a>

**Figure 55: EDD Observation History**

The Estimated Delivery Date (EDD) History displays any entries made when calculating the EDD. The screen includes a table that shows the name of the field that the EDD computation was based on:

1. The Last Menstrual Period or
2. The Estimated Conception Date

The screen gives the option to either go back to the Patient Summary screen, by selecting the corresponding button, or, if the dates need to be changed, to re-compute the EDD, by selecting the EDD Calculator button.

When selecting the EDD Calculator button, the user is prompted to the EDD Calculator screen, with blank fields:

EDD Calculator

Estimated Date of Delivery (EDD)

Final GA

Final EDD

EDD Criteria	Event Date	Gestational Age		EDD	Final EDD
Last Menstrual Period	<input type="text" value="mm/dd/yyyy"/>			<input type="text"/>	<input type="radio"/>
Estimated Conception Date	<input type="text" value="mm/dd/yyyy"/>			<input type="text"/>	<input type="radio"/>
Ultrasound	<input type="text" value="mm/dd/yyyy"/>	<input type="text"/> Weeks	<input type="text"/> Days	<input type="text"/>	<input type="radio"/>
Embryo Transfer	<input type="text" value="mm/dd/yyyy"/>			<input type="text"/>	<input type="radio"/>
<input type="text" value="Enter Other Criteria"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text"/> Weeks	<input type="text"/> Days	<input type="text"/>	<input type="radio"/>
Unknown	<input type="text"/>	<input type="text"/> Weeks	<input type="text"/> Days	<input type="text" value="mm/dd/yyyy"/>	<input type="radio"/>

Cancel

Save

**Figure 56: EDD Calculator**

To update the EDD:

1. Enter new values for the desired fields.
2. EDD values are computed automatically for all the fields, except for the last filed, Unknown. The EDD depends on the Entered Date or the Gestational Age.
3. In the Final EDD column, select the radio button corresponding to the field that is the desired to be the final EDD.
4. If a value for Embryo Transfer field is entered, then the Final EDD is going to be by default the one associated with this field, and no other radio buttons could be selected.
5. Click Save.

EDD Calculator

Estimated Date of Delivery (EDD)

Final GA

24w 6d

Final EDD

02/27/2018

EDD Criteria	Event Date	Gestational Age		EDD	Final EDD
Last Menstrual Period	05/23/2017			02/27/2018	<input checked="" type="radio"/>
Estimated Conception Date	06/07/2017			02/28/2018	<input type="radio"/>
Ultrasound	mm/dd/yyyy	<input type="text"/> Weeks	<input type="text"/> Days		<input type="radio"/>
Embryo Transfer	mm/dd/yyyy				<input type="radio"/>
Enter Other Criteria	mm/dd/yyyy	<input type="text"/> Weeks	<input type="text"/> Days		<input type="radio"/>
Unknown		<input type="text"/> Weeks	<input type="text"/> Days	mm/dd/yyyy	<input type="radio"/>

Cancel

Save

**Figure 57: EDD Calculator – Updating EDD**

The user is prompted back to the Patient Summary Screen. If EDD was saved successfully, a message will be displayed at the top of the screen, and the new chosen EDD is displayed in the Current Pregnancy panel.

Estimated delivery date information saved successfully

**Figure 58: Updated EDD – Confirmation Notice**

Current Pregnancy		Action ▾
High Risk:	No	
Estimated Delivery Date:	2/27/2018	←
EDD Basis:	Last Menstrual Period	
EDD Is Final:	Yes	
Gestational Age:	25 weeks 6 days	
Trimester:	2 <sup>nd</sup>	
Prenatal Care Provider:	Ob Test	
Planned Delivery Location:	Palm Bay Hospital	
Father of Baby:	Unspecified	
Last Menstrual Period:	05/23/2017	
Multiple Pregnancy:	Unknown	

**Figure 59: Current Pregnancy panel – Updated EDD**

The user will be able see the new changes related to the selection of the EDD in the EDD Observation History (by clicking again on the EDD link):

EDD Observation History							
Imported	Entered	User	Criteria	Event Date	Gestational Age	EDD	Is Final
	11/13/2017	Frey,Alina	Last Menstrual Period	05/24/2017		02/28/2018	✓
	11/13/2017	Frey,Alina	Last Menstrual Period	05/23/2017		02/27/2018	✓ ←
	11/13/2017	Frey,Alina	Estimated Conception Date	06/07/2017		02/28/2018	
	11/13/2017	Frey,Alina	Last Menstrual Period	06/01/2017		03/08/2018	✓
	11/20/2017	Frey,Alina	Last Menstrual Period	05/23/2017		02/27/2018	✓
	11/20/2017	Frey,Alina	Estimated Conception Date	06/07/2017		02/28/2018	
	11/20/2017	Frey,Alina	Last Menstrual Period	05/23/2017		02/27/2018	✓
	11/20/2017	Frey,Alina	Estimated Conception Date	06/07/2017		02/28/2018	

[Patient Summary](#)
[EDD Calculator](#)

**Figure 60: EDD Observation History Updated**

## ***Prenatal Care Provider***

To update the Parental Care Provider, click on the link next to the corresponding field. This redirects the user to the Select Non-VA Care Provider (OB/GYN) screen, which shows all the available Providers (no Facilities). The available Providers are extracted from the Non-VA Care Items table, in section [Non-VA Care](#).



Select Non-VA Care Provider (OB/GYN)

Name	Location
Unspecified	
Dr. Constantinescu	Melbourne 32905
Ob Test	Indian Harbour Beach, FL 32904

Select
Manage List
Cancel

**Figure 61: Edit Prenatal Care Provider**

The user has the option to select one of the Providers in the table, manage the list or cancel the update (using the corresponding buttons).

To manage the list of available providers, select the **Manage List** button, which redirects the user to the Non-VA Care Items table, presented in section [Non-VA Care](#).

If the provider is in the available list, then select the row with the desired provider, then click **Select** button.

Select Non-VA Care Provider (OB/GYN)

Name	Location
Unspecified	
Dr. Constantinescu	Melbourne 32905
Ob Test	Indian Harbour Beach, FL 32904

Select
Manage List
Cancel

**Figure 62: Selecting new Prenatal Care Provider**

This redirects the user back to the Patient Summary screen, showing the new selected provider in the Current Pregnancy panel.

Current Pregnancy		Action ▾
High Risk:	No	
Estimated Delivery Date:	2/27/2018	
EDD Basis:	Last Menstrual Period	
EDD Is Final:	Yes	
Gestational Age:	25 weeks 6 days	
Trimester:	2 <sup>nd</sup>	
Prenatal Care Provider:	Dr. Constantinescu	←
Planned Delivery Location:	Palm Bay Hospital	
Father of Baby:	Unspecified	
Last Menstrual Period:	05/23/2017	
Multiple Pregnancy:	Unknown	

**Figure 63: Updated Prenatal Care Provider**

### *Planned Delivery Location*

To update the Planned Delivery Location, click on the link next to the corresponding field. This redirects the user to the Planned Delivery Facility screen, which shows all the available Facilities (no Providers). The available Facilities are extracted from the Non-VA Care Items table, in section [Non-VA Care](#).

Select Planned Delivery Facility

Name	Location
Unspecified	
Palm Bay Hospital	Palm Bay, FL 11111
Viera Hospital	Viera, FL

Select
Manage List
Cancel

**Figure 64: Edit Planned Delivery Facility**

The user has the option to select one of the Facilities in the table, manage the list or cancel the update (using the corresponding buttons).

To manage the list of available facilities, select the Manage List button, which redirects the user to the Non-VA Care Items table, presented in section [Non-VA Care](#).

If the facility is in the available list, select the row with the desired facility, then click Select button.

Select Planned Delivery Facility

Name	Location
Unspecified	
Palm Bay Hospital	Palm Bay, FL 11111
Viera Hospital	Viera, FL

Select
Manage List
Cancel

**Figure 65: Selecting new Planned Delivery Facility**

This redirects the user back to the Patient Summary screen, showing the new selected facility in the Current Pregnancy panel.

Current Pregnancy		Action ▾
High Risk:	No	
Estimated Delivery Date:	2/27/2018	
EDD Basis:	Last Menstrual Period	
EDD Is Final:	Yes	
Gestational Age:	25 weeks 6 days	
Trimester:	2 <sup>nd</sup>	
Prenatal Care Provider:	Dr. Constantinescu	
Planned Delivery Location:	Viera Hospital	
Father of Baby:	Unspecified	
Last Menstrual Period:	05/23/2017	
Multiple Pregnancy:	Unknown	

**Figure 66: Updated Planned Delivery Location**

## ***Father of Baby***

To update the Father of Baby, click on the link next to the corresponding field. This redirects the user to the Select Father of Baby screen:

### Select Father of Baby

Father of Baby
Unknown/Unspecified
Doe, Joe

Select
Edit
Add New
Cancel

**Figure 67: Selecting Father of Baby**

The user has the option to Select a father from the list of names if any, to Edit an existing entry, to Add New names or Cancel the update.

To add a new name to the list of fathers, select Add New button. To Edit an existing entry, select Edit button. Both actions redirect the user to the Father of the Baby Details screen:

### Father of the Baby Details



Cancel
Save

**Figure 68: Adding/Editing new Father of Baby**

Enter the desired info, then click the Save button. If a new name was added, new person should display in the table of fathers.

Select Father of Baby

Father of Baby

Unknown/Unspecified

Doe, Joe

Smith, John

Select

Edit

Add New

Cancel

**Figure 69: Updated Father of Baby**

Select the name of the father, then click Select button. The updated father name should be reflected in the Current Pregnancy panel.

Current Pregnancy		Action ▾
High Risk:	No	
Estimated Delivery Date:	2/27/2018	
EDD Basis:	Last Menstrual Period	
EDD Is Final:	Yes	
Gestational Age:	25 weeks 6 days	
Trimester:	2 <sup>nd</sup>	
Prenatal Care Provider:	Dr. Constantinescu	
Planned Delivery Location:	Viera Hospital	
Father of Baby:	Smith, John	
Last Menstrual Period:	05/23/2017	
Multiple Pregnancy:	Unknown	

**Figure 70: Father of Baby updated**

### *Update Pregnancy Status Menu*

The user can update the Pregnancy Status from the Current Pregnancy panel, using the **Update Pregnancy Status** option in the Action drop-down menu at the top-right corner of the panel. Follow the same steps previously described in section [Pregnancy Status](#) under [Patient Details](#).

### *Edit Details Menu*

The user can update more than one field at once on the Current Pregnancy panel by using the **Edit Details** option in the Action drop-down menu at the top-right corner of the panel. This redirects the user to the Add/Edit Pregnancy Details screen.

The Add/Edit Pregnancy Details screen includes details related to the Current Pregnancy, such as:

1. Estimated Delivery Date – editable using the Calculator
2. Gestational Age – computed when setting EDD
3. EDD Basis – computed when setting EDD
4. EDD Is Final – computed when setting EDD
5. High Risk – checkbox
6. Trimester – computed when setting EDD
7. Multiple Gestation
8. Prenatal Care Provider
9. Planned Delivery Location
10. Father of Baby
11. Last Menstrual Period
12. LMP Date

### Add/Edit Pregnancy Details

Current Pregnancy	
Estimated Delivery Date:	<input type="text" value="2/27/2018"/> <input type="button" value="Calculator"/>
Gestational Age:	25 weeks 6 days
EDD Basis:	Last Menstrual Period
EDD Is Final:	Yes
High Risk:	<input type="checkbox"/>
High Risk Details:	<div></div>
Trimester:	<span>2nd</span>
Multiple Gestation:	Unknown ▼
Prenatal Care Provider:	<input type="text" value="Dr. Constantinescu"/> <input type="button" value="Manage"/>
Planned Delivery Location:	<input type="text" value="Viera Hospital"/> <input type="button" value="Manage"/>
Father of Baby:	<input type="text" value="Smith, John"/> ▼
Last Menstrual Period:	Known ▼
LMP Date:	<input type="text" value="05/23/2017"/>

**Figure 71: Edit Current Pregnancy**

To update the **Estimated Delivery Date**, use the **Calculator**, as described previously in section [Estimated Delivery Date \(EDD\)](#). If Last Menstrual Period was used in the calculation of the delivery date, the value is reflected of Last Menstrual Period and LMP Date fields.

The fields **Gestational Age**, **EDD**, **EDD Is Final** and **Trimester** are computed when setting EDD using the Calculator.

The **High Risk** checkbox, when selected, enables the text area under the **High Risk Details** field.

**Multiple Gestations** is a drop-down list, allowing the user to choose one of the following options:



Figure 72: Editing Current Pregnancy – Multiple Gestations field

**Prenatal Care Provider** is a drop-down list allowing the user to choose from a list of previously added providers. The list can be modified by clicking on **Manage** button next to the field, which redirects the user to the Non-VA Care Items screen. To add providers, follow the same steps as presented previously in [Non-VA Care](#) section.

**Planned Delivery Location** is a drop-down list allowing the user to choose from a list of previously added facilities. The list can be modified by clicking on **Manage** button next to the field, which redirects the user to the Non-VA Care Items screen. To add facilities, follow the same steps as presented previously in [Non-VA Care](#) section.

**Father of Baby** is a drop-down list allowing the user to choose from a list of previously added fathers. To add names to the list, follow the steps described in section [Father of Baby](#).

**Last Menstrual Period** is a drop-down list, allowing the user to choose from three options: Known, Unknown, or Approximate.

**LMP Date** is a text field that is updated during the computation of the EDD using the Calculator, or it can be changed ad-hoc.

Click **Cancel** to exit and return to the previous page without saving the information. Click **Save** to store the information and return to the previous page.



## Update EDD Menu

The user can update the Estimated Delivery Date (EDD) on the Current Pregnancy panel by using also the **Update EDD** option in the Action drop-down menu at the top-right corner of the panel. This redirects the user to the EDD Observation History screen. Updating the panel was described in detail in the previous section [Estimated Delivery Date \(EDD\)](#).

## Gravida/Para Details

The Gravida/Para Details panel represents a summary of patient's pregnancies. This panel can be updated the same way as all the other panels, by clicking on the Action button at the top right corner of the panel.

Gravida/Para Details	Action ▼
Total Pregnancies (Including Current)	4
Term Births (Live & Stillborn)	2
Preterm Births (Live & Stillborn)	0
Stillbirths	0
Spontaneous Abortions (Miscarriages)	1
Pregnancy Terminations	1
Ectopic Pregnancies	0
Living Children	2

Figure 73: Gravida / Para Details

This redirects the user to the Pregnancy History screen:

**Pregnancy History**

Total Pregnancies (Including Current)	Spontaneous Abortions (Miscarriages)
<input type="text" value="4"/>	<input type="text" value="1"/>
Term Births (Live & Stillborn)	Pregnancy Terminations
<input type="text" value="2"/>	<input type="text" value="1"/>
Preterm Births (Live & Stillborn)	Ectopic Pregnancies
<input type="text" value="0"/>	<input type="text" value="0"/>
Stillbirths	Living Children
<input type="text" value="0"/>	<input type="text" value="2"/>

Summary

**G4 P2022**

Cancel Save

**Figure 74: Gravida/Para Details / Edit**

To update the values, enter the desired numbers in each field, and click **Save** to store the entries or **Cancel** to exit without saving. Every time a field has a new value, the Summary field at the bottom is updated to represent the new values.

**MCC Dashboard**

PATIENT, BROOKE ANNE  
XXX-XX-9876  
1/31/2000 (Age: 17)  
Pregnant / Lactating  
**G3 P2012**

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

Education

Notes

**Pregnancy History**

Total Pregnancies (Including Current)	Spontaneous Abortions (Miscarriages)
<input type="text" value="3"/>	<input type="text" value="1"/>
Term Births (Live & Stillborn)	Pregnancy Terminations
<input type="text" value="2"/>	<input type="text" value="0"/>
Preterm Births (Live & Stillborn)	Ectopic Pregnancies
<input type="text" value="0"/>	<input type="text" value="0"/>
Stillbirths	Living Children
<input type="text" value="0"/>	<input type="text" value="2"/>

Summary

**G3 P2012**

Cancel Save

**Figure 75: Updated G/P Summary**

If the user saves the values, the Summary is updated as well under the patient details section under the Dashboard Menu in the left side pane. When this link is clicked, the user is prompted back to Update the Gravida/Para Details values under the Pregnancy History screen.

## Contact

As part of the Patient Summary screen, the Contact panel displays the contact information from the patient's CPRS record.

Contact		Action ▾
Home Phone:	(234)456-6789	View Contact History
Work Phone:		
Mobile Phone:	(602)222-3333	
Last Contact	11/16/2017	
Next Contact:	11/16/2017	
Next Item Due:	7/27/2017	

**Figure 76: Patient's Contact Info Panel**

This panel gives the user the ability to View Contact History, by clicking on the Action button at the top right corner of the panel. This redirects the user to the Patient Contact History screen. Details about editing the information on this screen is described in detail in the section [Contact History](#).

## Pregnancy Checklist (Patient Summary View)

As part of the Patient Summary screen, the Pregnancy Checklist panel is a view-only display of required examinations, tests, education or consults for the patient (only items that are not complete).

Pregnancy Checklist		Action ▾
Description	Due Date	View Checklist
Testing the Visit Description	11/14/2017	
Pregnancy Blood Test	11/19/2017	Overdue
		Due

**Figure 77: Pregnancy Checklist (Summary Page View)**

Edits can be made by selecting the **Action** drop-down to View/Edit the patient's checklist. This redirects the user to the Pregnancy Checklist screen, presented in next section [Pregnancy Checklist](#).

## Pregnancy Checklist

To access the Pregnancy Checklist screen, click on the Pregnancy Checklist link on the left side pane, under the Patient section.

MCC Dashboard

PATIENT, BROOKE ANNE  
XXX-XX-9876  
1/31/2000 (Age: 17)  
Pregnant / Lactating  
G3 P2012

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

Education

Notes

text4baby

Labs

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

Pregnancy Checklist

The patient is due on 2/27/2018

Show Status: All Overdue Due Pending Complete Canceled

	Type	Category	Description	Due	Due Date	Completed	Status	Note	
✓	Ultrasound	General	Initial ultrasound	8 Weeks	7/18/2017	11/20/2017 15:18	Complete		▼
✓	Education	Initial Education	Initial Education Items	Immediately	11/14/2017	11/17/2017 09:57	Complete		▼
✗	Visit	General	Testing the Visit Description	Immediately	11/14/2017		Overdue		▼
✓	Education	Initial Education	Initial Education Items	Immediately	11/16/2017	11/20/2017 15:18	Complete		▼
✗	Lab	Pregnancy	Pregnancy Blood Test	Immediately	11/19/2017	In Progress	Due		▼

Add Item

Add Default Items

Patient Summary

3.0.1.0

**Figure 78: Pregnancy Checklist**

The Pregnancy Checklist screen shows all the pregnancy items (tasks) that have been Completed, are In Progress, that are Due, or Overdue.

At the top of the page, an alert is presented in a green box showing the patient's Due Date.

The patient is due on 3/8/2018

**Figure 79: Pregnancy Checklist – Due Date Alert**

The screen is presented with multiple filters at the top of a table, which enables the user to see only the items of interest, based on Status.

Show Status: All Overdue Due Pending Complete Canceled

**Figure 80: Pregnancy Checklist Filter**

The table displays only items that have the Status corresponding to the green the filters, and data is shown in the following columns:

1. Symbol of the item's Status: flag if the item is due, x if the item is Cancelled, checkmark if the item is Completed.
2. Type
3. Category
4. Description
5. Due
6. Due Date

7. Completed: Based on the completion Status, the value in the column Completed could be either an empty cell, the date when the item was Completed, or In Progress if not completed.
8. Status: The possible values that could be displayed on the Status column are: Due, Overdue, Pending, Cancelled and Completed.
9. Note: Showing a pop-up icon if there is a Note associated with the item
10. Action column (drop-down).

The actions that the user can take on this screen are as follow, and presented in the subsequent sections:

1. Take an action on an existing pregnancy item, by clicking on the drop-down option at the end of the item row:
  - a. Change the status of the item without editing
  - b. Edit the item
  - c. Or Delete it

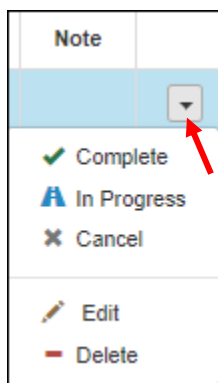


Figure 81: Pregnancy Checklist – Action on an existing item

2. Add a new item (by selecting **Add Item** button at the bottom of the screen)
3. Add the default items (by selecting **Add Default Items** button at the bottom of the screen)
4. Navigate back to the **Patient Summary** screen (by selecting the corresponding button at the bottom of the screen)

## Edit Status

To change the status of a Pregnancy Checklist item without editing it, select the pregnancy item and use the options of the drop-down list in the last column:

1. Select **Complete**: Marks the item as completed and adds a date under the Completed column.
2. Select **In Progress**: Marks the item as In Progress
3. Select **Cancel**: Marks the item as Canceled

	Type	Category	Description	Due	Due Date	Completed	Status	Note
✓	Ultrasound	General	Initial ultrasound	8 Weeks	7/18/2017	11/20/2017 15:18	Complete	
✓	Education	Initial Education	Initial Education Items	Immediately	11/14/2017	11/17/2017 09:57	Complete	✓ Complete ⓘ In Progress ✕ Cancel
📄	Visit	General	Testing the Visit Description	Immediately	11/14/2017		Overdue	
✓	Education	Initial Education	Initial Education Items	Immediately	11/16/2017	11/20/2017 15:18	Complete	✎ Edit
📄	Lab	Pregnancy	Pregnancy Blood Test	Immediately	11/19/2017	In Progress	Due	✖ Delete

**Figure 82: Edit the Status of an existing Pregnancy Checklist Item**

## Edit Item

To edit a Pregnancy Checklist item, click on the arrow at the end of the item row, then select **Edit** from the drop-down list in the last column. This redirects the user to the Edit Pregnancy Checklist Item screen.

### Edit Pregnancy Checklist Item

Type

Ultrasound

Completion Status

Complete

Category

General

Description

Initial ultrasound

Note

☐ In Progress

☐ Due Immediately

☒ Due at 8 weeks gestation

☐ Due by end of (Select)

☐ Due at 0 weeks postpartum

☐ Due on MM/DD/YYYY

Cancel

Save

**Figure 83: Edit Pregnancy Checklist Item**

The user can add or edit the following fields:

1. Type: Drop-down list showing the following options:

**Type**

(Select) ▼

(Select)

MCC Call

Education

Lab

Ultrasound

Consult

Document Exchange

Visit

Other

**Figure 84: Add/Edit Pregnancy Checklist Item – Type field**

2. Note (Call Note): Field added only when the selected Type is MCC Call, showing the following options:

**Note**

(Select) ▼

(Select)

Phone Call #1 (Initial Contact)

Phone Call #2 (12 Weeks)

Phone Call #3 (20 Weeks)

Phone Call #4 (28 Weeks)

Phone Call #5 (36 Weeks)

Phone Call #6a (41 Weeks, Not Delivered)

Phone Call #6b (41 Weeks, Delivered)

Phone Call #7 (6 Weeks Postpartum)

Additional Call

**Figure 85: Add/Edit Pregnancy Checklist Item – Note field**

3. Education Item: Field added only when the selected Type is Education, showing all the education items that come by default, plus the ones added in the Education Items, presented in section [Education Items](#):

**Education Item**

(Select) ▼

(Select)

- Abnormal Lab Values
- Alcohol
- Anesthesia/analgesia Plans
- Anticipated Course Of Prenatal Care
- Bottle Feeding
- Breast Feeding
- Childbirth Classes/hospital Facilities
- Circumcision
- Class On Newborn
- Contraception Options
- Domestic Violence
- Environmental/work Hazards
- Exercise
- Family Medical Leave Or Disability Forms
- Fetal Movement Monitoring
- Flyer For Future Mom - Delivery
- Flyer For Future Mom - Medications
- Illicit/recreational Drugs
- Indications For Ultrasound

**Figure 86: Add/Edit Pregnancy Checklist Item – Education field**

4. Category
5. Description
6. Note
7. In Progress: checkbox
8. Completion Status: Drop-down list with the following options:

**Completion Status**

Complete ▼

Not Complete

Complete

Canceled

**Figure 87: Add/Edit Pregnancy Checklist Item – Completion Status field**

9. Due: one option radio button group



After editing the existing task, the user can click **Save** to store the entry, or **Cancel** to return to the previous screen without saving. Upon a successful save, the user is presented with the success message at the top of the screen:

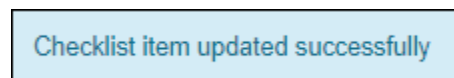


Figure 88: Editing existing Pregnancy Checklist item success message

## Delete Item

To delete a Pregnancy Checklist item, click on the arrow at the end of the item row, then select **Delete** from the drop-down list in the last column.

Upon a successful deletion, the user is presented with the message at the top of the screen, and the new task will be removed from the Pregnancy Checklist table.

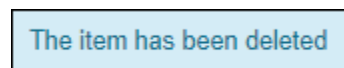


Figure 89: Deleting an existing Pregnancy Checklist item message

## Add Item

To add an item to the Pregnancy Checklist, click **Add Item** button at the bottom of the Pregnancy Checklist screen. This redirects the user to the Add Pregnancy Checklist Item screen.

Add Pregnancy Checklist Item

The following item will be added to the list of tasks for the current patient

Type

Consult

Completion Status

Not Complete

Category

General

Description

Well visit

Note

☒ Due Immediately

☐ Due at 0 weeks gestation

☐ Due by end of (Select)

☐ Due at 0 weeks postpartum

☐ Due on MM/DD/YYYY

☒ In Progress

Cancel

Save

Figure 90: Add Pregnancy Checklist Item

The user can edit the same fields as presented in the previous section [Edit Item](#).

After editing the existing task, the user can click **Save** to store the entry, or **Cancel** to return to the previous screen without saving. Upon a successful save, the user is presented with the success message at the top of the screen:

Checklist item created successfully

Figure 91: Adding new Pregnancy Checklist item success message

The new task will be displayed in the Pregnancy Checklist table, along the other tasks. If the added item was an MCC Call, it will display on both the Pregnancy Checklist and the Contact History pages.

The screenshot shows the 'Pregnancy Checklist' interface. At the top, a light blue banner displays the message 'Checklist item created successfully' with a close button (X). Below this, the title 'Pregnancy Checklist' is shown. A green banner indicates 'The patient is due on 2/27/2018'. Under 'Show Status:', there are buttons for 'All', 'Overdue', 'Due', 'Pending', 'Complete', and 'Canceled'. The main part of the screen is a table with columns: Type, Category, Description, Due, Due Date, Completed, Status, Note, and an action column. The table contains six rows of tasks. At the bottom, there are three buttons: 'Add Item', 'Add Default Items', and 'Patient Summary'. A red arrow points to the 'Due' status in the last row of the table.

	Type	Category	Description	Due	Due Date	Completed	Status	Note	
✓	Ultrasound	General	Initial ultrasound	8 Weeks	7/18/2017	11/20/2017 15:18	Complete		▼
✓	Education	Initial Education	Initial Education Items	Immediately	11/14/2017	11/17/2017 09:57	Complete		▼
📅	Visit	General	Testing the Visit Description	Immediately	11/14/2017		Overdue		▼
✓	Education	Initial Education	Initial Education Items	Immediately	11/16/2017	11/20/2017 15:18	Complete		▼
📅	Lab	Pregnancy	Pregnancy Blood Test	Immediately	11/19/2017	In Progress	Due		▼
📅	Consult	General	Well visit	Immediately	11/19/2017	In Progress	Due		▼

Figure 92: New Pregnancy Checklist Item saved successfully

## Add Default Items

Selecting the **Add Default Items** button at the bottom of the Pregnancy Checklist screen, allows the user to add the default tasks that were added to the general Checklist, as presented in section [Checklist](#) of the [MCC Dashboard Elements and Functionality – Tracking / Configuration View](#) chapter.

The user is presented with a confirmation prompt.

Confirmation

Are you sure that you want to add all of the default items to this patient's checklist?

No
Yes

**Figure 93: Add Default Items to Pregnancy Checklist – Confirmation Prompt**

Clicking **No** returns the user to the Pregnancy Checklist screen. Clicking **Yes** adds the entire list of default checklist items to the patient record.

Upon a successful addition, the user is presented with the success message at the top of the screen:

The default items have been added to the patient's checklist

**Figure 94: Adding Default Items to Pregnancy Checklist – Success message**

## Pregnancies

To access the Pregnancies screen, click on the Pregnancies tab on the left side pane, under the Patient section. The Pregnancies screen allows the user to view and add to the patient's current and past pregnancies.

MCC Dashboard

ONEHUNDREDEIGHTYFOUR, PATIENT  
XXX-XX-0184  
1/1/1994 (Age: 23)  
Pregnant / Lactating  
G1 P000

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

Education

Notes

text4baby

Labs

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

Pregnancies

Current Pregnancy

EDD	Gestational Age	Trimester	High Risk	Prenatal Provider	Delivery Facility	Father	LMP	Multiple
7/8/2018	7 weeks 1 days	1 <sup>st</sup>		Ob Test	Viera Hospital	Unspecified	10/01/2017	Unknown

Past Pregnancies

Date	High Risk	Outcome	Gestational Age	Birth Weight	Sex	Delivery Type	Place of Delivery
October 2014		Full Term Delivery (Live Infant 37 or More Weeks)	32w 0d	3629g (8 lbs. 0 oz.)	Female Unknown	Normal Spontaneous Vaginal Delivery (NSVD)	Unknown
October 2013		Full Term Delivery (Live Infant 37 or More Weeks)	30w 0d	3629g (8 lbs. 0 oz.)	Female	Normal Spontaneous Vaginal Delivery (NSVD)	Unknown

Delete Selected
View Current Pregnancy
Add Past Pregnancy
View Selected
Patient Summary

**Figure 95: Pregnancies**

The screen shows two different tables:

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1. Current Pregnancy
2. Past Pregnancies

The user can take different actions based on the selected button at the bottom of the screen:

1. View Current Pregnancy
2. View Selected past pregnancy
3. Add Past Pregnancy
4. Delete Selected past pregnancy
5. Go back to the Patient Summary screen



**Figure 96: Pregnancies Action Buttons**

## View Current Pregnancy

To view the current pregnancy, the user needs to access the Pregnancies screen first, then select the button View Current Pregnancy at the bottom of the Pregnancies screen. This redirects the user to the Pregnancy Outcome Details screen.

The screen shows the Current Pregnancy panel, containing the same information as in the [Current Pregnancy](#) panel of the [Patient Summary](#) screen.

Pregnancy Outcome Details	
Current Pregnancy <span>Edit</span>	
Estimated Delivery Date:	7/8/2018
EDD Basis:	Last Menstrual Period
EDD Is Final:	Yes
High Risk:	No
High Risk Details:	
Gestational Age:	7 weeks 1 days
Trimester:	1 <sup>st</sup>
Multiple Gestation:	Unknown
Prenatal Care Provider:	Ob Test
Planned Delivery Location:	Viera Hospital
Father of Baby:	Unspecified
Last Menstrual Period:	10/01/2017
<span>Return to Pregnancies</span> <span>Edit Pregnancy Details</span> <span>Update Pregnancy Status</span>	

**Figure 97: Current Pregnancy**

To edit and update the current pregnancy info, the user can take three actions, by selecting the corresponding button at the bottom of the screen:

1. Return to Pregnancies screen
2. Edit Pregnancy Details
3. Update the Pregnancy Status

### ***Edit Pregnancy Details***

Editing the current pregnancy can be done by either selecting the Edit link at the top right corner of the Current Pregnancy panel, or the Edit Pregnancy Details button at the bottom of the screen. Either one, redirects the user to the Add/Edit Pregnancy Details screen.

Updating the panel is described in detail in section [Current Pregnancy – Edit Details Menu](#).

### ***Update Pregnancy Status***

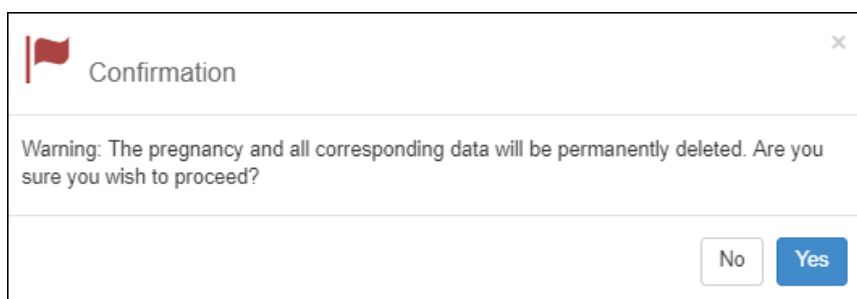
To update the Pregnancy Status, select the corresponding button at the bottom of the Pregnancy Outcome Details screen. This redirects the user to the Pregnancy Status screen. Here the user can set the status to Pregnant or Not Pregnant, just as described previously in section [Pregnancy Status](#) under [Patient Details](#).

### **View Selected past pregnancy**

To view and edit a past pregnancy, select a row in the Past Pregnancies, then click **View Selected** button at the bottom of the Pregnancies screen. This redirects the user to the Pregnancy Outcome Details screen. The Pregnancy Outcome Details screen has different layout depending on the type of the outcome. This is presented in detail in section [Pregnancy Outcome Types](#).

### **Delete Selected past pregnancy**

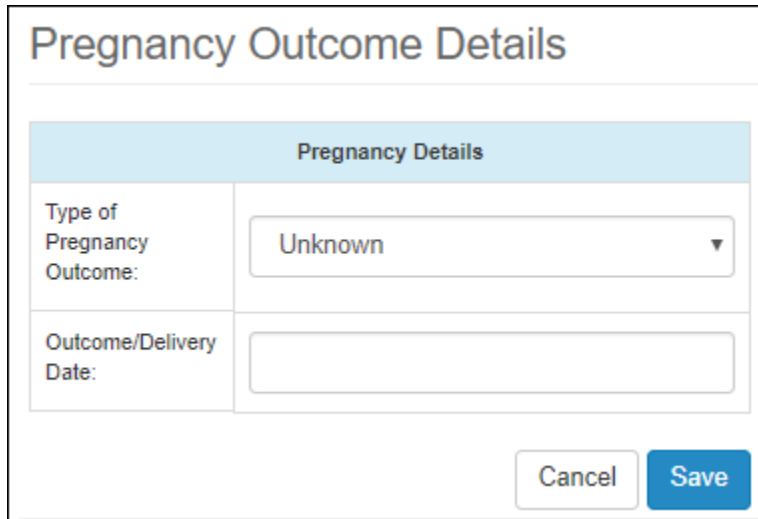
To delete a past pregnancy, select a row in the Past Pregnancies table, then click **Delete Selected** button. This should remove the selected row from the table of Past Pregnancies. Before deleting the row, the user is presented with an alert, to confirm his deletion action:



**Figure 98: Delete Pregnancy Alert**

## Add Past Pregnancy

To add a past pregnancy, select the **Add Past Pregnancy** button at the bottom of the Pregnancies screen. This will prompt the user to add details about the pregnancy in the Pregnancy Outcome Details screen:



The screenshot shows a form titled "Pregnancy Outcome Details". It contains two main input fields: "Type of Pregnancy Outcome:" with a dropdown menu currently showing "Unknown", and "Outcome/Delivery Date:" with an empty text box. At the bottom right, there are "Cancel" and "Save" buttons.

Figure 99: Pregnancy Outcome Details

The user has many outcome options to choose from in the drop-down list:



This screenshot shows the same "Pregnancy Outcome Details" form, but with the "Type of Pregnancy Outcome:" dropdown menu open. The menu lists several options: "Unknown" (highlighted in blue), "Full Term Delivery (Live Infant 37 or More Weeks)", "Preterm Delivery (Live Infant 20-36 Weeks 6 Days)", "Spontaneous Abortion (Pregnancy Loss Prior to 20 Weeks)", "Fetal Demise/Stillbirth", "Pregnancy Termination", and "Ectopic Pregnancy".

Figure 100: Pregnancy Outcome Details -Pregnancy Outcome Types

Each option redirects the user to a corresponding Pregnancy Outcome Details screen, which contains relevant information corresponding to the selected type of outcome. There are six types of pregnancy outcomes that the user can choose from when adding a new pregnancy to a patient, or editing an existing or past pregnancy:


1. Full Term Delivery (Live Infant 37 or More Weeks)
2. Preterm Delivery (Live Infant 20-36 Weeks 6 Days)
3. Spontaneous Abortion (Pregnancy Loss Prior to 20 Weeks)
4. Fetal Demise/Stillbirth
5. Pregnancy Termination
6. Ectopic Pregnancy


Screenshots for each of them will be presented in the next section, [Pregnancy Outcome Types](#).

Click **Save** button to save the data or **Cancel** to navigate back to the Pregnancies screen.

Regardless the Type of Pregnancy Outcome chosen, when saving the added pregnancy, the user is prompted to enter Other Details related to the same past pregnancy. This info will be added to the summary screen for the newly add pregnancy.

### Pregnancy Outcome Details

Other Details		Edit
Estimated Delivery Date:	Unknown	
High Risk:	No	
High Risk Details:		
Gestational Age:	Unknown	
Trimester:	Unknown	
Multiple Gestation:	Unknown	
Prenatal Care Provider:	Unknown	
Planned Delivery Location:	Unknown	
Father of Baby:	Unspecified	
Last Menstrual Period:	Unknown	


Return to Pregnancies

**Figure 101: Add Past Pregnancy – Other Details**

The user has the option to **Edit** the past pregnancy or return to the table of pregnancies, by selecting the **Return to Pregnancy** button.

To edit the details, click on the Edit link at the top right corner of the Other Details panel. This redirects the user to the Add/Edit Pregnancy Details screen for a Past Pregnancy:

The screenshot shows a web form titled "Add/Edit Pregnancy Details". At the top, there is a light blue header bar with the text "Past Pregnancy". Below this, the form is organized into several rows, each with a label on the left and a corresponding input field on the right:

- Estimated Delivery Date:** A text input field with the placeholder "Enter EDD (mm/dd/yyyy)".
- High Risk:** A checkbox that is currently unchecked.
- High Risk Details:** A large, empty text area for additional information.
- Multiple Gestation:** A dropdown menu currently set to "Unknown".
- Prenatal Care Provider:** A dropdown menu set to "(Select)" with a "Manage" button next to it.
- Planned Delivery Location:** A dropdown menu set to "(Select)" with a "Manage" button next to it.
- Father of Baby:** A dropdown menu currently set to "Unknown/Unspecified".
- Last Menstrual Period:** A dropdown menu currently set to "Unknown".
- LMP Date:** A text input field with the placeholder "Enter LMP".

At the bottom right of the form, there are two buttons: a white "Cancel" button and a green "Save" button.

**Figure 102: Add Past Pregnancy – Add/Edit Details**

After entering the desired data in the Past Pregnancy details screen, select the **Save** button. The user will be redirected back to the Pregnancy Outcome Details screen, which includes a summary of all the data added for the new pregnancy. The screen includes two panels and a button at the bottom of the screen:

1. Pregnancy Details panel
2. Other Details panel at the bottom of the screen
3. Return to Pregnancies button
4. For the cases of Full Term and Preterm Deliveries, the screen has an extra button, Add Baby button, and an extra panel for each baby that is added. This is presented in detail in the next section [Pregnancy Outcome Types](#).



The user can edit both panels, the Pregnancy Details and the Other Details by selecting either Edit link at the top right corners of the corresponding panel. Selecting Return to Pregnancies button, will direct the user back to the Pregnancies screen.

## **Pregnancy Outcome Types**

When adding a past pregnancy, or editing an existing or past pregnancy, or when changing the status of a current pregnancy to Not Pregnant, the user is prompted to add details about the outcome of the pregnancy. There are six types of pregnancy outcomes that the user can choose from:

1. Full Term Delivery (Live Infant 37 or More Weeks)
2. Preterm Delivery (Live Infant 20-36 Weeks 6 Days)
3. Spontaneous Abortion (Pregnancy Loss Prior to 20 Weeks)
4. Fetal Demise/Stillbirth
5. Pregnancy Termination
6. Ectopic Pregnancy

Screenshots for each of them will be presented below.

### ***Full Term Delivery (Live Infant 37 or More Weeks)***

Pregnancy Outcome Details screen:

Pregnancy Outcome Details		
Pregnancy Details		
Type of Pregnancy Outcome:	Full Term Delivery (Live Infant 37 or More Weeks) ▼	
Date of Delivery:	<input type="text"/>	
Gestational Age At Delivery:	<input type="text" value="0"/> Weeks	<input type="text" value="0"/> Days
Delivery Method		
Normal Spontaneous Vaginal Delivery (NSVD):	<input type="checkbox"/>	
Forcep or Vacuum Delivery:	<input type="checkbox"/>	
Failed Forcep or Vacuum Delivery:	<input type="checkbox"/>	
Cesarean Delivery:	<input type="checkbox"/>	
Cesarean Incision Type:	<input type="text" value="Enter cesarean incision type"/>	
Other Delivery:	<input type="checkbox"/>	
<input type="text" value="Other Delivery Details"/>		
Infant Feeding		
Breast Feeding:	<input type="checkbox"/>	
Bottle Feeding:	<input type="checkbox"/>	
Formula:	<input type="checkbox"/>	

**Figure 103: Full Term Delivery (Live Infant 37 or More Weeks) – Edit Details**

Other	
Place of Delivery:	<input type="text" value="Enter place of delivery"/>
Delivery Provider:	<input type="text" value="Enter delivery provider"/>
Mother Discharge Date:	<input type="text" value="Enter date"/>
Days In Hospital Following Delivery:	<input type="text" value="Enter # of days"/>
Postpartum Complications:	<input type="text" value="Enter complications"/>
Postpartum Depression Screening:	<input type="text" value="Enter details"/>
Risk of IPV:	<input type="text" value="Enter risks"/>
Notes:	<div><div></div></div>
Postpartum Hospital Treatment	
Treatment:	<div><div>Enter treatment</div></div>
Procedures:	<div><div>Enter procedures</div></div>
Discharge Diet:	<div><div>Enter discharge diet</div></div>
Plan of Care:	<div><div>Enter care plan</div></div>
<div> <div>Cancel</div> <div>Save</div> </div>	

**Figure 104: Full Term Delivery (Live Infant 37 or More Weeks) – Edit Details (continued)**

Pregnancy Details panel:

Pregnancy Details <a href="#">Edit</a>	
Type of Pregnancy Outcome:	Full Term Delivery (Live Infant 37 or More Weeks)
Outcome/Delivery Date:	10/14/2014
Gestational Age At Delivery:	32w 0d
Delivery Method	
Normal Spontaneous Vaginal Delivery (NSVD):	<input checked="" type="checkbox"/>
Forcep or Vacuum Delivery:	<input type="checkbox"/>
Failed Forcep or Vacuum Delivery:	<input type="checkbox"/>
Cesarean Delivery:	<input type="checkbox"/>
Cesarean Incision Type:	
Other Delivery:	
Other Delivery Details:	
Infant Feeding	
Breast Feeding:	<input type="checkbox"/>
Bottle Feeding:	<input type="checkbox"/>
Formula Feeding:	<input type="checkbox"/>
Other	
Delivery Hospital:	
Delivery Provider:	
Mother Discharge Date:	
Days in Hospital Following Delivery:	
Postpartum Complications:	
Postpartum Depression Screening:	
Risk of IPV:	
Notes:	
Postpartum Hospital Treatment	
Postpartum Hospitalization Treatment:	
Postpartum Hospitalization Procedures:	
Postpartum Hospitalization Discharge Diet:	
Postpartum Hospital Care Plan:	

**Figure 105: Full Term Delivery (Live Infant 37 or More Weeks) – Pregnancy Details Panel**

Other Details		Edit
Estimated Delivery Date:	Unknown	
High Risk:	<span>No</span>	
High Risk Details:		
Gestational Age:	Unknown	
Trimester:	Unknown	
Multiple Gestation:	Unknown	
Prenatal Care Provider:	Unknown	
Planned Delivery Location:	Unknown	
Father of Baby:	Unspecified	
Last Menstrual Period:	Unknown	

[Return to Pregnancies](#)
[Add Baby](#)

**Figure 106: Full Term Delivery (Live Infant 37 or More Weeks) – Pregnancy Details Panel (continued)**

The user has also the option to associate a baby to a past pregnancy, by selecting Add Baby button at the bottom of the summary screen.

This redirects the user to the Baby Details screen.

### Baby Details

Baby Details	
First Name:	<input type="text" value="Enter First Name"/>
Birth Weight:	<div> <input type="button" value="Grams"/> <input type="button" value="Lbs/Oz"/> </div> <input type="text"/> g
Gender:	Unknown ▾
1 Minute APGAR:	<input type="text" value="Enter value between 0 and 10"/>
5 Minute APGAR:	<input type="text" value="Enter value between 0 and 10"/>
Admitted to ICU:	<input type="checkbox"/>
Newborn Delivery Information:	<input type="text" value="Enter details"/>

More Details	
Physical Examination:	<input type="text"/>
Newborn Procedures:	<input type="text"/>
Circumcision:	<input type="checkbox"/>
Status at Maternal Discharge:	<input type="text"/>
Care Plan:	<input type="text"/>
Pediatrician:	<input type="text"/>

[Cancel](#)
[Save](#)

**Figure 107: Edit Baby Details**

After the baby's details are saved, the info is presented in a new panel on the Pregnancy Outcome Details summary screen:

Baby A Details		Edit
Name:	Johnny Smith	
Birth Weight:	3374g (7 lbs. 7 oz.)	
Sex:	Male	
1 Minute APGAR:		
5 Minute APGAR:		
Admitted to ICU:		
Newborn Delivery Info:		
Physical Exam:		
Procedures:		
Circumcised:		
Status at Maternal Discharge:		
Care Plan:		
Pediatrician:		

**Figure 108: Baby Details panel**

The Baby Details panel can be edited the same way as the other two panels, by selecting the Edit button at the top right corner of the panel.

The user can continue to add multiple babies to the past pregnancy, just as shown above. For each baby that is added, there will be a corresponding panel in the Pregnancy Outcome Details summary screen.

### ***Preterm Delivery (Live Infant 20-36 Weeks 6 Days)***

Pregnancy Outcome Details screen:

Pregnancy Outcome Details	
Pregnancy Details	
Type of Pregnancy Outcome:	Preterm Delivery (Live Infant 20-36 Weeks 6 Days) ▼
Date of Delivery:	10/10/2010
Gestational Age At Delivery:	40 Weeks 0 Days
Delivery Method	
Normal Spontaneous Vaginal Delivery (NSVD):	<input checked="" type="checkbox"/>
Forcep or Vacuum Delivery:	<input type="checkbox"/>
Failed Forcep or Vacuum Delivery:	<input type="checkbox"/>
Cesarean Delivery:	<input type="checkbox"/>
Cesarean Incision Type:	Enter cesarean incision type
Other Delivery:	<input type="checkbox"/>
Other Delivery Details	
Infant Feeding	
Breast Feeding:	<input checked="" type="checkbox"/>
Bottle Feeding:	<input type="checkbox"/>
Formula:	<input type="checkbox"/>

**Figure 109: Preterm Delivery (Live Infant 20-36 Weeks 6 Days) – Edit Details**

Other	
Place of Delivery:	<input type="text" value="Viera Hospital"/>
Delivery Provider:	<input type="text" value="Dr. Constantinescu"/>
Mother Discharge Date:	<input type="text" value="10/12/2010"/>
Days In Hospital Following Delivery:	<input type="text" value="2"/>
Postpartum Complications:	<input type="text" value="Enter complications"/>
Postpartum Depression Screening:	<input type="text" value="Enter details"/>
Risk of IPV:	<input type="text" value="Enter risks"/>
Notes:	<div><div></div></div>
Postpartum Hospital Treatment	
Treatment:	<div><div>Enter treatment</div></div>
Procedures:	<div><div>Enter procedures</div></div>
Discharge Diet:	<div><div>Enter discharge diet</div></div>
Plan of Care:	<div><div>Enter care plan</div></div>
<div> <div>Cancel</div> <div>Save</div> </div>	

**Figure 110: Preterm Delivery (Live Infant 20-36 Weeks 6 Days) – Edit Details (continued)**



Pregnancy Details panel:

Pregnancy Details		Edit
Type of Pregnancy Outcome:	Preterm Delivery (Live Infant 20-36 Weeks 6 Days)	
Outcome/Delivery Date:	10/10/2010	
Gestational Age At Delivery:	40w 0d	
Delivery Method		
Normal Spontaneous Vaginal Delivery (NSVD):	<input checked="" type="checkbox"/>	
Forcep or Vacuum Delivery:	<input type="checkbox"/>	
Failed Forcep or Vacuum Delivery:	<input type="checkbox"/>	
Cesarean Delivery:	<input type="checkbox"/>	
Cesarean Incision Type:	<input type="checkbox"/>	
Other Delivery:	<input type="checkbox"/>	
Other Delivery Details:	<input type="text"/>	
Infant Feeding		
Breast Feeding:	<input checked="" type="checkbox"/>	
Bottle Feeding:	<input type="checkbox"/>	
Formula Feeding:	<input type="checkbox"/>	
Other		
Delivery Hospital:	Viera Hospital	
Delivery Provider:	Dr. Constantinescu	
Mother Discharge Date:	10/12/2010	
Days in Hospital Following Delivery:	2	
Postpartum Complications:	<input type="text"/>	
Postpartum Depression Screening:	<input type="text"/>	
Risk of IPV:	<input type="text"/>	
Notes:	<input type="text"/>	
Postpartum Hospital Treatment		
Postpartum Hospitalization Treatment:	<input type="text"/>	
Postpartum Hospitalization Procedures:	<input type="text"/>	
Postpartum Hospitalization Discharge Diet:	<input type="text"/>	
Postpartum Hospital Care Plan:	<input type="text"/>	

**Figure 111: Preterm Delivery (Live Infant 20-36 Weeks 6 Days) – Pregnancy Details Panel**

The user has also the option to associate a baby to a past pregnancy, by selecting Add Baby button at the bottom of the summary screen. To add a baby, follow the instructions in previous section [Full Term Delivery \(Live Infant 37 or More Weeks\)](#).

### ***Spontaneous Abortion (Pregnancy Loss Prior to 20 Weeks)***

Pregnancy Outcome Details screen:

Pregnancy Outcome Details		
Pregnancy Details		
Type of Pregnancy Outcome:	Spontaneous Abortion (Pregnancy Loss Prior t ▼	
Outcome Date:	10/10/2010	
Details		
A pregnancy loss that occurs at or after 20 weeks gestation should be classified as a stillbirth or preterm birth		
Gestational Age:	<input type="text"/> Weeks	<input type="text"/> Days
Trimester:	(Select) ▼	
Completed Without Surgery or Medication:	<input type="checkbox"/>	
Dilation and Curettage (D&C):	<input type="checkbox"/>	
Vacuum Aspiration in Office or Emergency Room:	<input type="checkbox"/>	
Medications Needed (Cytotec, Methergin):	<input type="text"/>	
Cervical Incompetence (Painless Dilation of Cervix with Delivery):	<input type="checkbox"/>	
Notes:	<input type="text"/>	
		<input type="button" value="Cancel"/> <input type="button" value="Save"/>

**Figure 112: Spontaneous Abortion (Pregnancy Loss Prior to 20 Weeks) – Edit Details**

Pregnancy Details panel:

Pregnancy Details <a href="#">Edit</a>		
Type of Pregnancy Outcome:	Spontaneous Abortion (Pregnancy Loss Prior to 20 Weeks)	
Outcome/Delivery Date:	10/10/2010	
Details		
A pregnancy loss that occurs at or after 20 weeks gestation should be classified as a stillbirth or preterm birth		
Gestational Age:	12 Weeks	Days
Trimester:	-1	
Completed Without Surgery or Medication:		
Dilation and Curettage (D&C):		
Vacuum Aspiration in Office or Emergency Room:		
Medications Needed (Cytotec, Methergin):		
Cervical Incompetence (Painless Dilation of Cervix With Delivery):		
Notes:		

**Figure 113: Spontaneous Abortion (Pregnancy Loss Prior to 20 Weeks) – Pregnancy Details Panel**

## ***Fetal Demise/Stillbirth***

Pregnancy Outcome Details screen:

Pregnancy Outcome Details		
Pregnancy Details		
Type of Pregnancy Outcome:	Fetal Demise/Stillbirth ▼	
Outcome Date:	10/10/2010	
Details		
Should include pregnancy outcomes at or beyond 20 weeks gestation		
Gestational Age:	<input type="text"/> Weeks	<input type="text"/> Days
Known Fetal Abnormalities:	<input type="checkbox"/>	
Notes:	<div></div>	
		<div>Cancel Save</div>

**Figure 114: Fetal Demise/Stillbirth – Edit Details**

Pregnancy Details panel:

Pregnancy Details			Edit
Type of Pregnancy Outcome:	Fetal Demise/Stillbirth		
Outcome/Delivery Date:			
Details			
Should Include Pregnancy Outcomes at or Beyond 20 Weeks Gestation			
Gestational Age:	Weeks	Days	
Known Fetal Abnormalities:			
Notes:			

**Figure 115: Fetal Demise/Stillbirth – Pregnancy Details Panel**

## ***Pregnancy Termination***

Pregnancy Outcome Details screen:

Pregnancy Outcome Details	
Pregnancy Details	
Type of Pregnancy Outcome:	Pregnancy Termination ▼
Outcome Date:	
Details	
Trimester:	(Select) ▼
Indication:	Unknown ▼
Known Fetal Abnormalities:	<input type="checkbox"/>
Notes:	
<div>Cancel Save</div>	

**Figure 116: Pregnancy Termination – Edit Details**

Pregnancy Details panel:

Pregnancy Details		Edit
Type of Pregnancy Outcome:	Pregnancy Termination	
Outcome/Delivery Date:		
Details		
Trimester:	0	
Indication:		
Known Fetal Abnormalities:		
Notes:		

**Figure 117: Pregnancy Termination – Pregnancy Details Panel**

## ***Ectopic Pregnancy***

Pregnancy Outcome Details screen:

Pregnancy Outcome Details	
Pregnancy Details	
Type of Pregnancy Outcome:	Ectopic Pregnancy ▼
Date of Treatment Initiation:	
Details	
Retain patient in tracking until negative pregnancy test documented	
Methotrexate:	<input type="checkbox"/>
Salpingostomy (Surgery with Removal of Pregnancy but not Fallopian Tube):	<input type="checkbox"/>
Salpingectomy (Surgery with Removal of Pregnancy AND Fallopian Tube):	<input type="checkbox"/>
Spontaneous Resolution (Followed with Pregnancy Tests, No Surgery or Medicine):	<input type="checkbox"/>
Notes:	<div></div>
<div>Cancel Save</div>	

**Figure 118: Ectopic Pregnancy – Edit Details**

Pregnancy Details panel:

Pregnancy Details <span>Edit</span>	
Type of Pregnancy Outcome:	Ectopic Pregnancy
Outcome/Delivery Date:	
Details	
Retain patient in tracking until negative pregnancy test documented	
Methotrexate:	
Salpingostomy (Surgery with Removal of Pregnancy but not Fallopian Tube):	
Salpingectomy (Surgery with Removal of Pregnancy AND Fallopian Tube):	
Spontaneous Resolution (Followed with Pregnancy Tests, No Surgery or Medicine):	
Notes:	

Figure 119: Ectopic Pregnancy – Pregnancy Details Panel

## Contact History

To access the Patient Contact History screen, click on the Contact History tab on the left side pane, under the Patient section.

MCC Dashboard

**PATIENT, BROOKE ANNE**  
 XXX-XX-9876  
 1/31/2000 (Age: 17)  
 Pregnant / Lactating  
 G3 P2012

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

**Contact History**

Education

Notes

text4baby

Labs

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

Patient Contact History

Last Contact  
11/20/2017  
Today

Next Contact Due  
11/19/2017  
Yesterday

Home: (234)456-6789  
 Work:  
 Mobile: (602)222-3333

Filter: Past Pregnancy (5/5/2017 - 11/13/2017)

Description	Due	Due Date	Completed	Status	Action
Additional Call			In Progress	Pending	Continue
Phone Call #1 (Initial Contact)			10/27/2017 15:00	Complete	View
Phone Call #1 (Initial Contact)	Immediately	11/19/2017	10/26/2017 15:00	Complete	View
Phone Call #2 (12 Weeks)	1st Trimester	8/11/2017		Overdue	Call Now
Phone Call #2 (12 Weeks)	1st Trimester	8/11/2017		Overdue	Call Now
Phone Call #4 (28 Weeks)			11/1/2017 15:56	Complete	View
Phone Call #5 (36 Weeks)			In Progress	Pending	Continue
Phone Call #5a (41 Weeks, Not Delivered)			In Progress	Pending	Continue
Phone Call #5b (41 Weeks, Delivered)			In Progress	Pending	Continue
Phone Call #7 (6 Weeks Postpartum)			11/1/2017 13:48	Complete	View

Add Call Note

Patient Summary

3.0.1.0

Figure 120: Contact History screen

The Contact History screen allows the user to view, edit and add patient contact events.

The screen shows at the top of the screen contact details such as:

1. Last Contact
2. Next Contact Due

### 3. Contact info

The screen displays a table of all the Notes related to the calls that were made to the patient regarding related pregnancies. These call notes are also visible in the table of notes presented in section [Notes](#).

The table includes the following info related to each note:

1. Description
2. Due
3. Due Date
4. Completed
5. Status: Pending, Complete, Overdue
6. Action: action that the user can take
7. Continue
8. View
9. Call Now

The information on the table can be filtered by Pregnancy, which can be selected from the Filter drop-down list, right above the table:



**Figure 121: Contact History Pregnancy Filter**

The user can navigate back to the Patient Summary screen or add a new note by selecting the **Add Call Note** button.

### Add a Call Note

Adding a call note can be done in two ways:

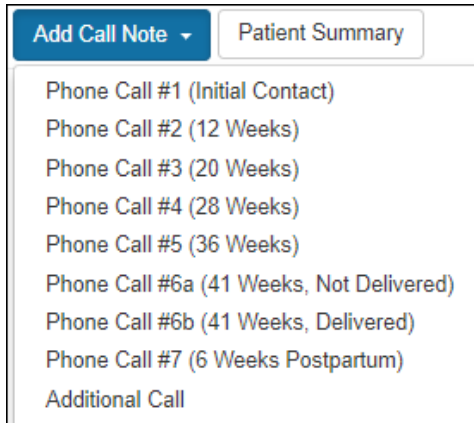
1. Add an MCC Call Item (default item or new item) to the current Pregnancy Checklist, (see sections [Add Item](#) and [Add Default Items](#) under [Pregnancy Checklist](#)). The item will display on both the Pregnancy Checklist and the Contact History pages.
2. Selecting the Add Call Note button at the bottom of the Contact History screen. This will add a call note to the selected pregnancy from the Filter drop-down.

To add a note from the Contact History screen, select the Add Call Note button. The button presents multiple options for the type of a note the user desires to add.

1. Phone Call #1 (Initial Contact)



2. Phone Call #2 (12 Weeks)
3. Phone Call #3 (20 Weeks)
4. Phone Call #4 (28 Weeks)
5. Phone Call #5 (36 Weeks)
6. Phone Call #6a (41 Weeks, Not Delivered)
7. Phone Call #6b (41 Weeks, Delivered)
8. Phone Call #7 (6 Weeks Postpartum)
9. Additional Call



The screenshot shows a user interface with two tabs: 'Add Call Note' (active) and 'Patient Summary'. Below the tabs is a dropdown menu containing the following options:

- Phone Call #1 (Initial Contact)
- Phone Call #2 (12 Weeks)
- Phone Call #3 (20 Weeks)
- Phone Call #4 (28 Weeks)
- Phone Call #5 (36 Weeks)
- Phone Call #6a (41 Weeks, Not Delivered)
- Phone Call #6b (41 Weeks, Delivered)
- Phone Call #7 (6 Weeks Postpartum)
- Additional Call

**Figure 122: Call Note Types**

Based on the selection, the user is redirected to the screen corresponding to the type of the note that was selected, presented in next section Call Note. Whenever a note is created, it will be added to the Contact History, even when the note was not signed.

## Call Note Details

There are two ways to access the Call Note Details screen:

1. Create a new note (as described in the previous section Add a Call Note)
2. Open a previously added call note by clicking **Continue** or **Call Now** action at the end of the call note row in the Contact History table.

Phone Call #2 (12 Weeks)	1st Trimester	8/11/2017		Overdue	Call Now
Phone Call #2 (12 Weeks)	1st Trimester	8/11/2017	In Progress	Overdue	Continue

**Figure 123: Open previously added Call Note**

The call note presents a standardized way to conduct a call with a patient and a way to capture all the information from the conversation with the patient.

**Figure 124: Call Note Details**

The call note screen contains the following information:

1. The title refers to the type of the Call Note that was selected: for example, Phone Call #1 (Initial Contact).
2. At the top of the screen the user can see details about patient contact:
  - a. Last Contact
  - b. Next Contact Due
  - c. Contact info

**Figure 125: Call Note – Contact Info**

3. Each call note can be associated to a specific pregnancy, available in the Pregnancy drop-down list.
4. Call Note Tabs described in the next section Call Note Tabs.
5. Navigation buttons:
  - a. **Previous**: allows to navigate to the previous tab
  - b. **Next**: allows to navigate to the next tab
  - c. **Cancel**: allows the user to cancel capturing the call notes
  - d. **Contact History**: allows the user to navigate back to the table of calls made.

**Figure 126: Call Note Buttons**

- e. As soon as the user navigates through the sections, away from the first tab (Intro), the call note gets recorded, and Cancel button changes to a **Delete** button, which allows to delete the call note recorded so far.



**Figure 127: Call Note Buttons (continued)**

- f. **Preview/Finish:** allows the user to preview the note and finish it at any point during the call.
- g. **Contact History:** gives the user the option to navigate back to the Contact History screen.

When the call is ended, the user can decide to save the captured notes by selecting the **Preview/Finish** button. The user will be redirected to the Contact Note screen, text note version of the call event, showing a summary of all the fields that were checked and comments that were added.

Contact Note

<b>Last Contact</b> 11/16/2017 <i>Today</i>	<b>Next Contact Due</b> 11/15/2017 <i>Yesterday</i>	Home: (234)456-6789 Work: Mobile: (602)222-3333
---	---	---

Pregnancy: Current Pregnancy (Due 3/8/2018)

LOCAL TITLE: PHONE CALL #4 (28 WEEKS)  
DATE OF NOTE: NOV 16, 2017@14:57:14 ENTRY DATE: NOV 15, 2017@10:30:27  
AUTHOR: FREY,ALINA EXP COSIGNER:  
URGENCY: STATUS: UNSIGNED

Introduction

Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

Coverage

Asked about questions or problems with VA maternity care benefits, help problem-solve

Classes

Mentioned a refresher course in childbirth preparation  
Described the mechanism for VA payment for these classes

Breastfeeding

Assessed patient interest in breastfeeding, clarified misinformation, Patient interested breastfeeding: Yes  
Informed patient regarding lactation support services provided by hospitals  
Patient intends to breastfeed

Depression

In the past 2 weeks, patient has been bothered by little interest or pleasure in doing things not at all (0)  
Patient Score: 0

Contact Information & End Call

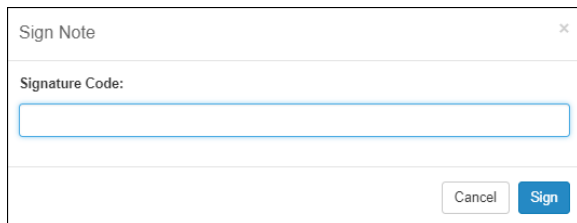
Asked Patient if they had any questions  
Summarized call, explained next steps and timing of next call

Sign Now Edit Delete Contact History

**Figure 128: Preview/Finish – Call Note Summary**

The user can take different actions from the note summary screen, by selecting the corresponding buttons at the bottom of the screen:

1. **Edit:** still modify the call note if necessary.
2. **Delete:** delete the call note totally.
3. Navigate back to **Contact History**
4. **Sign Now:** allows the user to signing the note, which prompts to Sign Note dialog box.

A screenshot of a 'Sign Note' dialog box. The dialog has a title bar with 'Sign Note' and a close button (X). Below the title bar, there is a label 'Signature Code:' followed by a text input field. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Sign'.

**Figure 129: Signing Call Note**

To Sign the note, the user should enter their Electronic Signature Code. Contact the System Administrator for setting up the Electronic Signature Code in VistA.

Once the Call Note is signed, no more changes could be made to it, nor it could be deleted.

The signed task should display in the Contact History table with Complete Status and the View Action, as the only action that could be taken on the note.

## Call Note Tabs

Depending on the type of the call, the Call Note will present different tabs in which the caller can enter info discussed with the patient. In general, the same tab, if part of a call note, contains the same information, no matter the type of the call.

The following are all the possible tabs.

1. Intro
2. Coverage
3. Classes
4. Breastfeeding
5. WIC
6. Contraception
7. Health
8. Smoking
9. Alcohol
10. Depression
11. IPV
12. PP Visit
13. VA Primary

14. End

### ***Phone Call #1 (Initial Contact)***

This type of Call Note includes the following tabs:

1. Intro
2. Coverage
3. Health
4. Smoking
5. Alcohol
6. Depression
7. IPV
8. End

The screenshot shows a web form titled "Phone Call #1 (Initial Contact)". At the top, there are three colored boxes: a light blue box for "Last Contact" (11/16/2017, Today), a light yellow box for "Next Contact Due" (11/15/2017, Yesterday), and a light pink box for contact numbers (Home: (234)456-6789, Work: (602)222-3333, Mobile: (602)222-3333). Below these is a "Pregnancy" section with a dropdown menu set to "Current Pregnancy (Due 3/8/2018)". A horizontal row of tabs follows: "Intro" (active, blue), "Coverage", "Health", "Smoking", "Alcohol", "Depression", "IPV", and "End". The main content area is titled "Introduction" and contains two checkboxes: "Introduce self and role" and "Ask if patient free to discuss private topics, and available to speak for 10-15 minutes". At the bottom right, there are five buttons: "Previous" (blue), "Next" (blue), "Preview/Finish" (green), "Cancel" (white), and "Contact History" (white).

**Figure 130: Phone Call #1 (Initial Contact)**

### ***Phone Call #2 (12 Weeks)***

This type of Call Note includes the following tabs:

1. Intro
2. Coverage
3. Health
4. Smoking
5. End

Phone Call #2 (12 Weeks)

Last Contact  
11/16/2017  
Today

Next Contact Due  
11/15/2017  
Yesterday

Home: (234)456-6789  
Work:  
Mobile: (602)222-3333

Pregnancy

Current Pregnancy (Due 3/8/2018)

Intro

Coverage

Health

Smoking

End

Introduction

☐ Re-introduce self and role

☐ Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

← Previous

Next →

✓ Preview/Finish

Cancel

Contact History

**Figure 131: Phone Call #2 (12 Weeks)**

### ***Phone Call #3 (20 Weeks)***

This type of Call Note includes the following tabs:

1. Intro
2. Coverage
3. Classes
4. Health
5. Smoking
6. Depression
7. IPV
8. End

Phone Call #3 (20 Weeks)

Last Contact  
11/16/2017  
Today

Next Contact Due  
11/15/2017  
Yesterday

Home: (234)456-6789  
Work:  
Mobile: (602)222-3333

Pregnancy

Current Pregnancy (Due 3/8/2018)

Intro

Coverage

Classes

Health

Smoking

Depression

IPV

End

Introduction

☐ Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

← Previous

Next →

✓ Preview/Finish

Cancel

Contact History

**Figure 132: Phone Call #3 (20 Weeks)**

### ***Phone Call #4 (28 Weeks)***

This type of Call Note includes the following tabs:

1. Intro
2. Coverage
3. Classes
4. Breastfeeding
5. WIC
6. Contraception
7. Health
8. Depression
9. End

**Phone Call #4 (28 Weeks)**

**Last Contact**  
11/16/2017  
*Today*

**Next Contact Due**  
11/15/2017  
*Yesterday*

Home: (234)456-6789  
Work:  
Mobile: (602)222-3333

**Pregnancy**

Current Pregnancy (Due 3/8/2018) ▼

<b>Intro</b> ✎	Coverage	Classes	Breastfeeding	WIC	Contraception	Health	Depression	End
----------------	----------	---------	---------------	-----	---------------	--------	------------	-----

Introduction

☐ Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

← Previous

Next →

✓ Preview/Finish

Cancel

Contact History

**Figure 133: Phone Call #4 (28 Weeks)**

### ***Phone Call #5 (36 Weeks)***

This type of Call Note includes the following tabs:

1. Intro
2. Coverage
3. Breastfeeding
4. Contraception
5. Health
6. Depression
7. IPV
8. End

**Phone Call #5 (36 Weeks)**

**Last Contact**  
11/16/2017  
*Today*

**Next Contact Due**  
11/15/2017  
*Yesterday*

Home: (234)456-6789  
Work:  
Mobile: (602)222-3333

**Pregnancy**

Current Pregnancy (Due 3/8/2018) ▼

<b>Intro</b> ✎	Coverage	Breastfeeding	Contraception	Health	Depression	IPV	End
----------------	----------	---------------	---------------	--------	------------	-----	-----

Introduction

☐ Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

← Previous

Next →

✓ Preview/Finish

Cancel

Contact History

**Figure 134: Phone Call #5 (36 Weeks)**



### ***Phone Call #6a (41 Weeks, Not Delivered)***

This type of Call Note includes the following tabs:

1. Intro
2. Coverage
3. Health
4. Depression
5. Breastfeeding
6. End

The screenshot shows a web interface for a phone call note titled "Phone Call #6a (41 Weeks, Not Delivered)". At the top, there are three colored boxes: a light blue box for "Last Contact" (11/16/2017, Today), a light yellow box for "Next Contact Due" (11/15/2017, Yesterday), and a light pink box for contact information (Home: (234)456-6789, Work: (602)222-3333, Mobile: (602)222-3333). Below these is a "Pregnancy" dropdown menu set to "Current Pregnancy (Due 3/8/2018)". A horizontal tab bar contains six tabs: "Intro" (active, blue), "Coverage", "Health", "Depression", "Breastfeeding", and "End". The main content area has a green header "Introduction" and a checkbox labeled "Ask if patient free to discuss private topics, and available to speak for 10-15 minutes". At the bottom, there are five buttons: "Previous" (blue), "Next" (blue), "Preview/Finish" (green), "Cancel" (grey), and "Contact History" (grey).

**Figure 135: Phone Call #6a (41 Weeks, Not Delivered)**

### ***Phone Call #6b (41 Weeks, Delivered)***

This type of Call Note includes the following tabs:

1. Intro
2. Coverage
3. Health
4. Depression
5. IPV
6. Breastfeeding
7. Contraception
8. PP Visit
9. End

Phone Call #6b (41 Weeks, Delivered)

Last Contact  
11/16/2017  
Today

Next Contact Due  
11/15/2017  
Yesterday

Home: (234)456-6789  
Work:  
Mobile: (602)222-3333

Pregnancy

Current Pregnancy (Due 3/8/2018)

Intro Coverage Health Depression IPV Breastfeeding Contraception PP Visit End

Introduction

☐ Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

Previous

Next

Preview/Finish

Cancel

Contact History

**Figure 136: Phone Call #6b (41 Weeks, Delivered)**

### ***Phone Call #7 (6 Weeks Postpartum)***

This type of Call Note includes the following tabs:

1. Intro
2. Coverage
3. Health
4. Breastfeeding
5. Depression
6. PP Visit
7. VA Primary
8. End

Phone Call #7 (6 Weeks Postpartum)

Last Contact  
11/16/2017  
Today

Next Contact Due  
11/15/2017  
Yesterday

Home: (234)456-6789  
Work:  
Mobile: (602)222-3333

Pregnancy

Current Pregnancy (Due 3/8/2018) ▼

Intro 
Coverage
Health
Breastfeeding
Depression
PP Visit
VA Primary
End

Introduction

☐ Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

← Previous

Next →

✓ Preview/Finish

Cancel

Contact History

Figure 137: Phone Call #7 (6 Weeks Postpartum)

### Additional Call Note

This type of Call Note includes the following tabs:

1. Subject
2. Dashboard Note Text

Additional Call Note

Last Contact  
11/16/2017  
Today

Next Contact Due  
11/15/2017  
Yesterday

Home: (234)456-6789  
Work:  
Mobile: (602)222-3333

Pregnancy

Current Pregnancy (Due 3/8/2018) ▼

Subject

Dashboard Note Text

✓ Preview/Finish

Cancel

Figure 138: Additional Call Note

From the Contact History page, select **Add Call Note**. Enter the Subject and add any notes in the Dashboard Note Text section. Click **Preview/Finish** to sign the note. At the Sign Note Signature Code page, enter an electronic signature. Click **Cancel** to exit without saving the note and return to the previous page.

## Call Note Tabs Details

Each of the tabs that could be part of a Call Note will be presented below, and where different, it will be pointed out. For each of the tabs, the user is instructed to perform the tasks and mark them as completed. Click the **Next** button to proceed to the next tab in the call.

### *Intro*

Used in Phone Call #1:

Introduction
<input type="checkbox"/> Introduce self and role
<input type="checkbox"/> Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

**Figure 139: Intro Tab 1**

Used in Phone Call #2:

Introduction
<input type="checkbox"/> Re-introduce self and role
<input type="checkbox"/> Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

**Figure 140: Intro Tab 2**

Used in Phone Call #3 – Phone Call #7:

Introduction
<input type="checkbox"/> Ask if patient free to discuss private topics, and available to speak for 10-15 minutes

**Figure 141: Intro Tab 3-7**

### *Coverage*

The Coverage tab instructs the user to confirm information with the patient regarding their VA maternity benefits.

Used in Phone Call #1:

VA Coverage of Maternity/Newborn Care
Verify receipt of VA Maternity/Newborn Care Materials
<input type="checkbox"/> VA Authorization for Maternity Benefits
<input type="checkbox"/> Letter Describing Benefits
<input type="checkbox"/> Purple Book
Identified Prenatal Care Provider?
<input checked="" type="radio"/> Yes
<input checked="" type="radio"/> Select Existing Prenatal Care Provider
<div>Ob Test ▼</div>
<input type="radio"/> Enter New Obstetrician
<input type="radio"/> No
Identified Planned Delivery Facility?
<input checked="" type="radio"/> Yes
<input checked="" type="radio"/> Select Existing Hospital
<div>Palm Bay Hospital ▼</div>
<input type="radio"/> Enter New Hospital
<input type="radio"/> No

**Figure 142: Coverage Tab 1**

Review Benefits
<input type="checkbox"/> Written VA authorization for maternity benefits = insurance card
<input type="checkbox"/> Routine Prenatal Care
<input type="checkbox"/> If OB refers for additional care, verify coverage with MCC or VA first
<input type="checkbox"/> If Emergency, go to nearest ED
Other
<input type="checkbox"/> Obtaining medications and medical supplies from VA
<input type="checkbox"/> VA newborn care coverage and obtaining non-VA newborn health insurance coverage
<input type="checkbox"/> VA-provided dietician & weight management and Non-VA pregnancy-related classes
Assess interest in VA Authorization for Tubal Ligation and Intrauterine Device
Interested in Tubal Ligation?
<input type="radio"/> Yes
<input type="radio"/> No
Interested in IUD?
<input type="radio"/> Yes
<input type="radio"/> No
<input type="checkbox"/> Patient response to receiving a bill from Non-VA Maternity Care provider

**Figure 143: Coverage Tab 1 (continued)**

Used in Phone Call #2:

VA Coverage of Maternity/Newborn Care
Verify receipt of VA Maternity/Newborn Care Materials
<input type="checkbox"/> VA Authorization for Maternity Benefits
<input type="checkbox"/> Remind patient to carry with them like an insurance card
<input type="checkbox"/> Describe local processes for correcting situation when patient receives bill
<input type="checkbox"/> Letter Describing Benefits
<input type="checkbox"/> Purple Book
Identified Prenatal Care Provider?
<input checked="" type="radio"/> Yes
<input checked="" type="radio"/> Select Existing Prenatal Care Provider
Ob Test ▼
<input type="radio"/> Enter New Obstetrician
<input type="radio"/> No
Identified Planned Delivery Facility?
<input checked="" type="radio"/> Yes
<input checked="" type="radio"/> Select Existing Hospital
Palm Bay Hospital ▼
<input type="radio"/> Enter New Hospital
<input type="radio"/> No
<input type="checkbox"/> Ask for questions regarding getting prescriptions or medical supplies filled at the VA

Figure 144: Coverage Tab 2

Used in Phone Call #3:

VA Coverage of Maternity/Newborn Care
<input type="checkbox"/> Ask about questions or problems with VA maternity care benefits, help problem-solve
<input type="checkbox"/> If previously interested in TL/IUD, ask if patient had opportunity to discuss with OB

Figure 145: Coverage Tab 3

Used in Phone Call #4 – Phone Call #7:

VA Coverage of Maternity/Newborn Care
<input type="checkbox"/> Ask about questions or problems with VA maternity care benefits, help problem-solve

Figure 146: Coverage Tab 4-7

## ***Classes***

The user is instructed to discuss appropriate classes with the patient, assess their interest and record any notes.

Used in Phone Call #3, Phone Call #4:

Pregnancy-Related Classes
<input type="checkbox"/> Refresh patient's memory about childbirth preparation class benefits and assess interest
<input type="checkbox"/> If delivered previously and took course previously, mention refresher course
<input type="checkbox"/> If not interested, assess reasons and answer questions as appropriate
<input type="checkbox"/> Describe mechanism for VA payment for these classes
Notes on Patient Interest
<div>Enter Details</div>

**Figure 147: Classes Tab 3, 4**

## ***Breastfeeding***

The user is instructed to discuss and record the patient's plans for infant feeding and inquire about the patients need for supplies.



Used in Phone Call #4:

Breastfeeding Supplies
<input checked="" type="checkbox"/> Assess patient interest in breastfeeding, clarify misinformation
Is patient planning to breastfeed?
<input checked="" type="radio"/> Yes
<input type="radio"/> No
<input type="radio"/> Maybe
<input type="checkbox"/> Provide overview of breastfeeding and benefits
Would patient like more information?
<input checked="" type="radio"/> Yes
<input type="radio"/> No
<input type="radio"/> Maybe
<input checked="" type="checkbox"/> Inform patient regarding lactation support services provided by hospitals
<input type="checkbox"/> Provide information on nursing supplies and breast pump, order breast pump as needed
Would patient like to obtain breastfeeding supplies?
<input checked="" type="radio"/> Yes
<div>Enter Supplies Requested</div>
<input type="radio"/> No
<input type="radio"/> Maybe

Figure 148: Breastfeeding Tab 4

Used in Phone Call #5:

Breastfeeding Supplies
<input checked="" type="checkbox"/> Patient intends to breastfeed
<input checked="" type="checkbox"/> Offer to order nursing supplies (nipple cream, pads, nursing bra)
Breast Pump Previously Ordered?
<input type="radio"/> Yes
Has it been received?
<input type="radio"/> Yes
<input type="radio"/> No
<input checked="" type="radio"/> No
<input checked="" type="checkbox"/> Re-offer to order breast pump
<input checked="" type="checkbox"/> Advise patient to call if ordered items not received in expected time period
Notes
<div>Breastfeeding &amp; Supplies Notes</div>

Figure 149: Breastfeeding Tab 5

Used in Phone Call #6a:

Breastfeeding Supplies
<input checked="" type="checkbox"/> Confirm breastfeeding supplies and/or pump delivered. (If not, follow-up )
<div>Breastfeeding &amp; Supplies Notes</div>

Figure 150: Breastfeeding Tab 6a

Used in Phone Call #6b:

Breastfeeding Supplies
<input type="checkbox"/> Assess for difficulties with breastfeeding, answer questions, refer to pediatrician as needed
<input type="checkbox"/> As needed, confirm breast pump and supplies delivered. (If not, follow-up)
<input type="checkbox"/> If received breast pump/supplies, assess for difficulties with use, answer questions, and provide support
<div>Breastfeeding &amp; Supplies Notes</div>

Figure 151: Breastfeeding Tab 6b

Used in Phone Call #7:

Breastfeeding Supplies
<input type="checkbox"/> Assess for difficulties with breastfeeding, answer questions, refer to pediatrician as needed
<input type="checkbox"/> If received breast pump/supplies, assess for difficulties with use, answer questions, and provide support
<div>Breastfeeding &amp; Supplies Notes</div>

Figure 152: Breastfeeding Tab 7

## ***WIC (Women, Infants and Children)***

The user is instructed to educate the patient on resources available through the WIC program.

Used in Phone Call #4:

WIC (Nutrition Program for Women, Infants, and Children)
<input type="checkbox"/> Inform patient that WIC provides low-income families with healthy food, breast feeding support, and connections to community resources.
<input type="checkbox"/> Encourage patient to discuss with OB if would like more information
<input type="checkbox"/> Inform patient regarding lactation support services provided by hospitals
<input type="checkbox"/> Provide WIC contact information: 1-888-WIC-WORKS (1-888-942-9675) or website <a href="http://www.fns.usda.gov/wic">http://www.fns.usda.gov/wic</a>

Figure 153: WIC Tab 4

## ***Contraception***

The user is instructed to assess and record the patient's contraceptive plans.

Used in Phone Call #4:

Family Planning (Contraception)
<input type="checkbox"/> Assess if patient has discussed family planning with OB. If not, encourage patient to discuss with OB.
Notes
<div>Enter Details</div>

**Figure 154: Contraception Tab 4**

Used in Phone Call #5:

Family Planning (Contraception)
<input type="checkbox"/> Assess if patient has discussed family planning with OB. If not, encourage patient to discuss with OB.
<input type="checkbox"/> Clarify misconceptions: When resuming sexual relations after having a baby, you can get pregnant - No safe period - breastfeeding does not prevent pregnancy
Notes
<div>Enter Details</div>

**Figure 155: Contraception Tab 5**

Used in Phone Call #6b:

Family Planning (Contraception)
<input type="checkbox"/> Assess if patient has discussed family planning with OB. If not, encourage patient to discuss with OB.
<input type="checkbox"/> If patient previously verbalized contraceptive plan, verify patient obtained contraception. Troubleshoot as needed.
Notes
<div>Enter Details</div>

**Figure 156: Contraception Tab 6b**

## ***Health***

The Health tab instructs the user to report any new health issues and new medications.

Used in Phone Call #1 – Phone Call #6a, Phone Call #7:

Health Problems
<input type="checkbox"/> Update health problems, advise patient to tell OB about all problems
<input type="checkbox"/> No New Health Problems
<input type="text" value="Health Problem Update"/>
<input type="text" value="Health Problem Update"/>
<input type="text" value="Health Problem Update"/>
<input type="text" value="Health Problem Update"/>
<input type="text" value="Health Problem Update"/>
<input type="checkbox"/> Ask about new medications
<input type="checkbox"/> No New Medications
<input type="text" value="Medication Update"/>
<input type="text" value="Medication Update"/>
<input type="text" value="Medication Update"/>
<input type="text" value="Medication Update"/>
<input type="text" value="Medication Update"/>

Figure 157: Health Tab 1-6a, 7

Used in Phone Call #6b:

Health Problems
<input type="checkbox"/> Update health problems, advise patient to tell OB about all problems
Does the patient have pregnancy-related hypertension?
<input type="radio"/> Yes
<input type="radio"/> No
Does the patient have pregnancy-related diabetes?
<input type="radio"/> Yes
<input type="radio"/> No
Other Health Problems
<input type="checkbox"/> No New Health Problems
<input type="text" value="Health Problem Update"/>
<input type="text" value="Health Problem Update"/>
<input type="text" value="Health Problem Update"/>
<input type="text" value="Health Problem Update"/>
<input type="text" value="Health Problem Update"/>
<input type="checkbox"/> Ask about new medications
<input type="checkbox"/> No New Medications
<input type="text" value="Medication Update"/>
<input type="text" value="Medication Update"/>
<input type="text" value="Medication Update"/>
<input type="text" value="Medication Update"/>
<input type="text" value="Medication Update"/>

Figure 158: Health Tab 6b

## Smoking

The user is instructed to complete an assessment of the patients smoking status.

Used in Phone Call #1:

Smoking
Assess/Verify smoking status (complete clinical reminder if not done)
<input type="radio"/> Non-Smoker: Assess/educate on second and third hand smoke
<input type="radio"/> Past Smoker: Recently Quit?
<input type="radio"/> Yes
<input type="checkbox"/> Offer resources and referral
<input type="radio"/> No
<input type="radio"/> Current Smoker
<input type="text"/> Cigarettes/Day
Contemplating Quitting?
<input type="radio"/> Yes (Offer resources/referral)
<input type="radio"/> No (Educate on importance for baby)

Figure 159: Smoking Tab 1

Used in Phone Call #2, Phone Call #3:

Smoking
Assess/Verify smoking status (complete clinical reminder if not done)
<input type="radio"/> Non-Smoker: Assess/educate on second and third hand smoke
<input type="radio"/> Past Smoker: Recently Quit?
<input type="radio"/> Yes
<input type="checkbox"/> Congratulate
<input type="checkbox"/> Reinforce Importance
<input type="checkbox"/> Offer resources and referral
<input type="checkbox"/> Educate about second and third-hand smoke
<input type="radio"/> No
<input type="radio"/> Current Smoker
<input type="text"/> Cigarettes/Day
Contemplating Quitting?
<input type="radio"/> Yes (Offer resources/referral)
<input type="radio"/> No (Educate on importance for baby)

Figure 160: Smoking Tab 2, 3

## Alcohol

The user is instructed to record and educate the patient regarding alcohol consumption.

Used in Phone Call #1:

Alcohol
<input type="checkbox"/> Verify alcohol use status (complete clinical reminder if not done)
<input type="radio"/> Patient Drinks Alcohol
<input type="text" value="0"/> Per <input type="text" value="Day"/>
<input type="radio"/> Patient Does Not Drink Alcohol
<input type="checkbox"/> Educate: Danger of alcohol to fetal development. No amount of alcohol is safe

Figure 161: Alcohol Tab

## Depression

The user is instructed to assess and record the patient's depression status. Every time one of the radio buttons is selected, the Total Score at the bottom of the screen is updated. If the score is greater than 3, then the user is advised to flag the patient for the suicide screen.

Used in Phone Call #1, Phone Call #3 – Phone Call #7:

Depression & Suicide
In the past 2 weeks, how often have you been bothered by little interest or pleasure in doing things?
<input type="radio"/> Not at all (0)
<input type="radio"/> Several Days (1)
<input checked="" type="radio"/> More than half the days (2)
<input type="radio"/> Nearly every day (3)
In the past 2 weeks, how often have you been bothered by feeling down, depressed or hopeless?
<input type="radio"/> Not at all (0)
<input type="radio"/> Several Days (1)
<input checked="" type="radio"/> More than half the days (2)
<input type="radio"/> Nearly every day (3)
Total Score: 4
<input checked="" type="checkbox"/> Suicide screen and referral to resources if total score = 3 or more

Figure 162: Depression Tab 1, 3-7



### ***IPV (Interpersonal Violence):***

The user is instructed to assess the patient's interpersonal violence status, record any incidents and offer referral assistance.

Used in Phone Call #1, Phone Call #3, Phone Call #5, Phone Call #6b:

Interpersonal Violence	
Within the last year, have you been hit, slapped, kicked, or otherwise physically hurt by someone?	
<input type="radio"/> Yes	
<input type="text" value="Enter Details"/>	
<input type="text" value="Enter Follow Up Actions Needed"/>	
<input type="radio"/> No	
Within the last year, has anyone forced you to engage in sexual activities?	
<input type="radio"/> Yes	
<input type="text" value="Enter Details"/>	
<input type="text" value="Enter Follow Up Actions Needed"/>	
<input type="radio"/> No	
<input type="checkbox"/> Refer to resources as appropriate	

**Figure 163: IPV Tab 1, 3, 5, 6b**

### ***PP Visit (Postpartum Visit)***

The user is instructed to assess the patient's postpartum appointment status, review importance and purpose, and record any notes.

Used in Phone Call #6b, Phone Call #7:

Post-Partum Visit
<input type="checkbox"/> Assess if patient has scheduled post-partum visit. If not, encourage patient to do so.
<input type="checkbox"/> Offer VA PCP visit if patient not planning to return to OB for this visit.
<input type="checkbox"/> Review importance and purpose of post-partum visit
Notes
<div>Enter Details</div>

Figure 164: PP Visit Tab 6b, 7

## VA Primary

Used in Phone Call #7:

VA Primary Care Provider Follow-up Care
<input type="checkbox"/> Encourage and assist patient to make appointment with PCP:
<input type="radio"/> If patient has medical/mental health conditions, within 2 months
<input type="radio"/> If patient does not have medical/mental health condition(s), within 3 months
<input type="checkbox"/> If patient declines to make appointment with PCP, determine reasons
Notes
<div>Enter Details</div>

Figure 165: VA Primary Tab 7

## End

The last tab for each possible phone call is the End tab, which instructs the user to offer to answer questions the patient has, record notes, summarize the call and confirm next call. The user is further instructed to encourage patient to contact the MCC or OB at the VA and reiterate what the patient should do in an emergency.

Used in Phone Call #1 – Phone Call #7:

Contact Information & End Call	
<input type="checkbox"/>	What questions can I answer for you?
<div>Questions/Answers</div>	
<input type="checkbox"/>	Summarize call, next steps and timing of next call
<div>Next Steps</div>	
The Next Call Is Due On: <input type="text"/>	
<input type="checkbox"/>	Provide MCC & VA PCP contact information, encourage calls for VA-related questions
<input type="checkbox"/>	Re-iterate to call OB with pregnancy-related questions, go to ER for emergencies
Additional Comments	
<div>Enter Additional Comments Here</div>	

Figure 166: End Tab

## **Education**

To access the Patient Education Items screen, click on the Education tab on the left side pane, under the Patient section.

MCC Dashboard

**PATIENT, BROOKE ANNE**  
 XXX-XX-9876  
 1/31/2000 (Age: 17)  
 Pregnant / Lactating  
 G3 P2012

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

**Education**

Notes

text4baby

Labs

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

Patient Education Items

Completion Status:
 Due
Incomplete
Complete
All

	Description	Due	Due Date	Completed	Status	Action
	Initial Education Items	Immediately	11/14/2017	11/17/2017 09:57	Complete	<a href="#">Details</a>
	Initial Education Items	Immediately	11/16/2017	11/20/2017 15:18	Complete	<a href="#">Details</a>
	Anticipated Course Of Prenatal Care	Immediately	11/19/2017		Due	<a href="#">Complete Now</a>

[Select Education Items](#)
[Patient Summary](#)

3.0.1.0

**Figure 167: Patient Education Items**

The Education screen shows a table of all the Education tasks that the Patient is recommended to complete. Completed education items added here do not appear on the Pregnancy Checklist.

Some education items may be displayed by default for every patient. That is due to the tasks being added in the Checklist tasks required for all the patients, as presented in section Checklist.

The information on the table can be filtered by selecting one of the Completion Status buttons at the top of the table:

1. Filter by tasks that are Due
2. Filter by tasks that are Incomplete
3. Filter by tasks that are Complete
4. Show All the tasks

Completion Status:
 Due
Incomplete
Complete
All

**Figure 168: Education Items Filter**

The screen presents two buttons as well:

1. **Select Education Items:** for adding new tasks to the table
2. **Patient Summary:** to navigate back to the Summary

The information in the table is displayed in the following columns:

1. **Description** of the task
2. **Due** status (Immediately, etc.)

3. **Due Date**
4. **Completed:** date when the task was completed, available only for the completed tasks
5. **Status:** Completed, Due, etc.
6. **Action:**
  - a. Complete Now: Allows the user to mark the task as completed
  - b. Details: Allows the user to view the details of the completed task

### Completed Education Item Details

Description:	Anticipated Course Of Prenatal Care
Category:	General
Type:	Discussion Topic
Coding System:	SnomedCT
Code:	17629007
Completed By:	
Completed On:	11/17/2017 09:58

Return To List

**Figure 169: View Details of Completed Task**

## Add Education Item

To add Education Items (tasks to complete) to the patient record, click **Select Education Item**. This redirects the user to Select Patient Education Items screen.

Select Patient Education Items

2nd & 3rd Trimester Pregnancy Planning	Delivery Planning (continued)	Health & Wellness (continued)
<input type="checkbox"/> Fetal Movement Monitoring	<input type="checkbox"/> Flyer For Future Mom - Delivery	<input type="checkbox"/> Illicit/Recreational Drugs
<input type="checkbox"/> Labor Signs	<input type="checkbox"/> Intended Facility For Delivery Plan	<input type="checkbox"/> Mom Mood Booster
<input type="checkbox"/> Postterm Counseling	<input type="checkbox"/> Test	<input type="checkbox"/> Nutrition And Weight Gain Counseling
<input type="checkbox"/> Signs & Symptoms Of Pregnancy-Induced Hypertension	<input type="checkbox"/> Training On Delivery	<input type="checkbox"/> Risk Factors Identified By Prenatal History
<input type="checkbox"/> Signs And Symptoms Of Preterm Labor	<input type="checkbox"/> Vbac Counseling	<input type="checkbox"/> Seatbelt Use
<input type="checkbox"/> Test		<input type="checkbox"/> Sexual Activity
Contraception	General	<input type="checkbox"/> Smoking/Tobacco Counseling
<input type="checkbox"/> Contraception Options	<input type="checkbox"/> Anticipated Course Of Prenatal Care	<input type="checkbox"/> Special Diet
<input type="checkbox"/> Postpartum Family Planning	<input type="checkbox"/> Presentation On Contraception	<input type="checkbox"/> Toxoplasmosis Precautions (Cat/raw Meat)
<input type="checkbox"/> Tubal Sterilization	<input type="checkbox"/> Test	<input type="checkbox"/> Travel
<input type="checkbox"/> Tubal Sterilization Consent Signed	Health & Wellness	Medications
Delivery Planning	<input type="checkbox"/> Alcohol	<input type="checkbox"/> Flyer For Future Mom - Medications
<input type="checkbox"/> Anesthesia/analgesia Plans	<input type="checkbox"/> Domestic Violence	<input type="checkbox"/> Test Medication
<input type="checkbox"/> Childbirth Classes/hospital Facilities	<input type="checkbox"/> Environmental/work Hazards	<input type="checkbox"/> Use Of Any Medications
	<input type="checkbox"/> Exercise	
Newborn Considerations	Testing & Immunizations (continued)	
<input type="checkbox"/> Bottle Feeding	<input type="checkbox"/> Indications For Ultrasound	
<input type="checkbox"/> Breast Feeding	<input type="checkbox"/> Influenza Vaccine	
<input type="checkbox"/> Circumcision	<input type="checkbox"/> Vaccine Education	
<input type="checkbox"/> Class On Newborn	Testing Category	
<input type="checkbox"/> Selecting A Newborn Care Provider	<input type="checkbox"/> Test	
<input type="checkbox"/> Test Newborn		
Postpartum Planning		
<input type="checkbox"/> Family Medical Leave Or Disability Forms		
<input type="checkbox"/> Newborn Education (Newborn Screening, Jaundice, Sids, Car Seat)		
<input type="checkbox"/> Postpartum Depression		
<input type="checkbox"/> Test		
<input type="checkbox"/> Training For After The Birth		
Testing & Immunizations		
<input type="checkbox"/> Abnormal Lab Values		

Other Cancel Save

**Figure 170: Add Education Items to patient's Education**

Select Patient Education Items screen shows multiple educational checkboxes for tasks that a patient could be recommended to complete. The tasks are grouped by different categories, such as:

1. 2nd & 3rd Trimester Pregnancy Planning
2. Contraception
3. Delivery Planning
4. General
5. Health & Wellness
6. Medications
7. Newborn Considerations
8. Postpartum Planning
9. Testing & Immunizations

Also, new categories could be added:

1. For an individual patient, by selecting **Other** button at the bottom of the screen
2. For all the patients, as presented in section Education Items.

Selecting **Other** button redirects the user to the Add New Patient Education Item screen:

Add New Patient Education Item

Education Type  
(Select) ▼

Category

Description

CodingSystem  
None ▼

Code

Cancel Save

**Figure 171: Add New Patient Education Item**

The user has the option to create a new Category, just as it was presented in section Education Items.

Select Save button at the bottom of the screen. The user should be redirected back to the Select Patient Education Items screen, which should show the new Category created specifically for the selected patient.

Select the checkboxes for the recommended tasks that the patient should complete.

Click **Cancel** to exit without saving and return to the previous page. Click **Save** to store the checked items and return to the Patient Education Items screen. The items that were selected should display.

## **Notes**

To access the Dashboard Notes screen, click on the Notes tab on the left side pane, under the Patient section.

MCC Dashboard

**PATIENT, BROOKE ANNE**  
 XXX-XX-9876  
 1/31/2000 (Age: 17)  
 Pregnant / Lactating  
 G3 P2012

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

Education

**Notes**

text4baby

Labs

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

Dashboard Notes

Filter: Current Pregnancy (Due 2/27/2018)

Click on a note to select it

Date/Time	Title	Subject	Author	Signature Status	Addenda
11/17/2017 11:12	MCC DASHBOARD NOTE	Health	FREYALINA	<span>✓ Signed</span>	
11/20/2017 16:06	PHONE CALL #2 (12 WEEKS)		FREYALINA	<span>Unsigned</span>	
11/20/2017 16:05	PHONE CALL #1 (FIRST CONTACT)		FREYALINA	<span>✓ Signed</span>	
11/16/2017 17:19	PHONE CALL #6A (41 WEEKS NOT DELIVERED)		FREYALINA	<span>Unsigned</span>	
11/16/2017 17:22	PHONE CALL #5 (36 WEEKS)		FREYALINA	<span>Unsigned</span>	
11/16/2017 17:30	PHONE CALL #7 (6 WEEKS POSTPARTUM) TOPICS		FREYALINA	<span>Unsigned</span>	
11/16/2017 17:23	PHONE CALL #6B (41 WEEKS DELIVERED) TOPICS		FREYALINA	<span>Unsigned</span>	
11/16/2017 17:21	PHONE CALL #4 (28 WEEKS)		FREYALINA	<span>Unsigned</span>	
11/20/2017 16:04	PHONE CALL #3 (20 WEEKS)		FREYALINA	<span>Unsigned</span>	
11/16/2017 12:13	PHONE CALL #1 (FIRST CONTACT)		FREYALINA	<span>✓ Signed</span>	

Addendum Edit Sign Delete View + New Note Patient Summary

3.0.1.0

**Figure 172: Dashboard Notes**

Dashboard Notes allow the user to document in MT any activities deemed appropriate. These notes populate into the patient's CPRS record.

The screen displays different notes:

1. Dashboard Notes created from this screen
2. Call Notes that were created by different users, as presented in section Contact History.

The notes can be filtered by the pregnancy Filter at the top of the table.

The Note's information in the table includes:

1. Date/Time
2. Title
3. Subject
4. Author
5. Signature Status
6. Addenda

The user has the multiple action options on a note, by selecting the corresponding button at the bottom of the screen:

1. Addendum
2. Edit
3. Sign
4. Delete



5. View
6. Create a New Note
7. Navigate back to the Patient Summary screen



**Figure 173: Action options on a note**

## Edit a Dashboard Note

Only MCC Dashboard Notes that are not Signed can be edited. The Call Notes described in section Contact History, can only be viewed.

To edit an existing note, highlight and select the note from the list and choose the **Edit** option. An edit window opens and allows the user to edit text in the fields provided. Click **Save** to store the edits or **Cancel** to return to the previous page without saving.

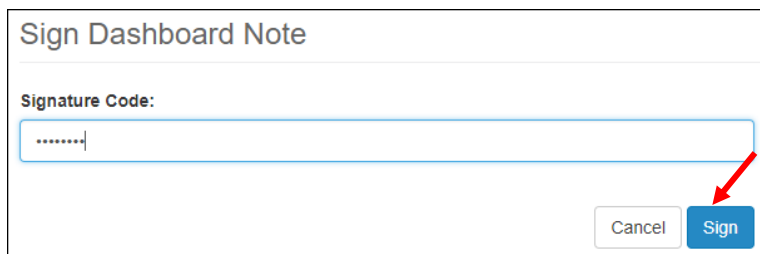
 The screenshot shows a form titled 'Edit Dashboard Note'. It contains a 'Pregnancy' dropdown menu with the selected option 'Current Pregnancy (Due 3/8/2018)'. Below this is a 'Dashboard Note Text' section with a large text area containing the text 'New pregnancy'. At the bottom right of the form are 'Cancel' and 'Save' buttons.

**Figure 174: Edit Dashboard Note**

## Sign a Dashboard Note

Only MCC Dashboard Notes can be signed from this screen. To sign the other notes, follow instructions in section Contact History.

To sign a Note, select a note from the Dashboard Notes table and click **Sign** button at the bottom of the screen. At the Sign Dashboard Note window, type in the CPRS electronic signature code in the field provided. Click **Cancel** to return to the previous page without signing.



Sign Dashboard Note

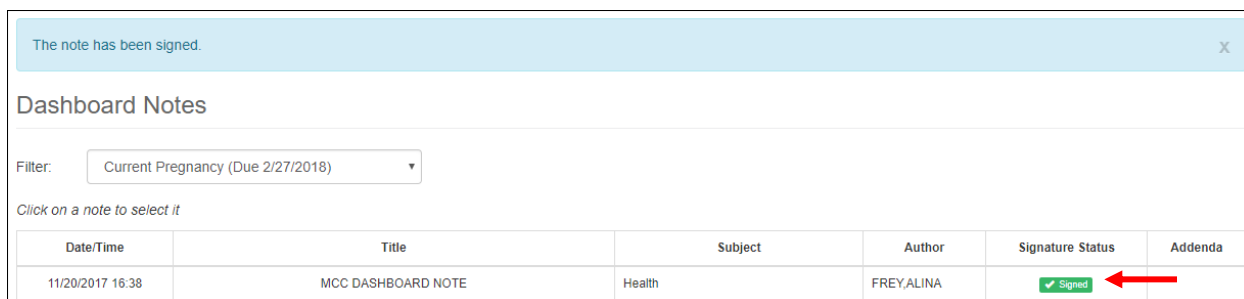
Signature Code:

.....

Cancel Sign

**Figure 175: Sign Dashboard Note**

Back in the Dashboard Notes Screen, the field Signature Status should now be updated to Signed.



The note has been signed. X

Dashboard Notes

Filter: Current Pregnancy (Due 2/27/2018)

Click on a note to select it

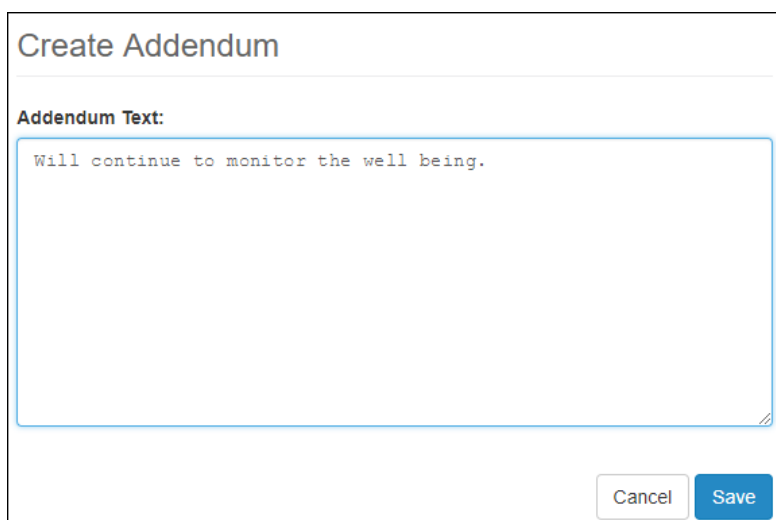
Date/Time	Title	Subject	Author	Signature Status	Addenda
11/20/2017 16:38	MCC DASHBOARD NOTE	Health	FREY,ALINA	✓ Signed	

**Figure 176: Updated Signed Status**

## Add Addendums to a Dashboard Note

The user may make an addendum to a signed Dashboard Note. Only the MCC Dashboard Notes that are signed could have an Addendum added.

To add an addendum to the signed note, highlight an MCC Dashboard Note from the Notes table, and click **Addendum**.



Create Addendum


Addendum Text:

Will continue to monitor the well being.

Cancel Save

**Figure 177: Create Addendum**

The Create Addendum page opens with a free-text box for the user to type additional information. Click **Cancel** to exit without saving and return to the previous page. Click **Save** to store the addendum text to the Dashboard Note. The saved note now displays the **Addendum** button at the end of the note's row.

Addendum Created					
Dashboard Notes					
Filter: <span>Current Pregnancy (Due 2/27/2018)</span>					
Click on a note to select it					
Date/Time	Title	Subject	Author	Signature Status	Addenda
11/20/2017 16:38	MCC DASHBOARD NOTE	Health	FREY,ALINA	<span>✓ Signed</span>	

**Figure 178: Note – Addendum added**

To view the addenda from the Dashboard Notes screen, click the blue Addendum button. This redirects the user to the Dashboard Note Addenda screen, showing a list of addendums, along with the original note.

Dashboard Note Addenda					
Click on a note or addendum to select it					
Type	Date/Time	Title	Subject	Author	Signature Status
Original Note	11/20/2017 16:38	MCC DASHBOARD NOTE	Health	FREY,ALINA	<span>✓ Signed</span>
Addendum	11/20/2017 16:40	MCC DASHBOARD NOTE	Health	FREY,ALINA	<span>Unsigned</span>
<span>+ New Addendum</span> <span>Edit</span> <span>Sign</span> <span>Delete</span> <span>View</span> <span>All Notes</span>					

**Figure 179: Adding Addendum to MCC Dashboard Note**

From the Dashboard Note Addenda screen, the user has multiple options, by selecting the corresponding button at the bottom of the screen:

1. Add a **New Addendum** to the selected MCC Dashboard Note. Follow the same steps as adding the first addendum. Every added addendum is displayed in the table in the Dashboard Note Addenda screen.

Addendum Created
X

### Dashboard Note Addenda

Click on a note or addendum to select it

Type	Date/Time	Title	Subject	Author	Signature Status
Original Note	11/20/2017 16:38	MCC DASHBOARD NOTE	Health	FREY,ALINA	<span>✓ Signed</span>
Addendum	11/20/2017 16:40	MCC DASHBOARD NOTE	Health	FREY,ALINA	<span>Unsigned</span>
Addendum	11/20/2017 16:43	MCC DASHBOARD NOTE	Health	FREY,ALINA	<span>Unsigned</span>

+ New Addendum
Edit
Sign
Delete
View
All Notes

**Figure 180: More Addendums Added to the note**

2. **Edit** an Addendum that was not signed yet
3. **Sign** an Addendum that was not signed yet
4. **Delete** an Addendum that was not signed yet. To delete an addendum, highlight the corresponding row, and select Delete button. The user will be prompted to enter a reason for why the addendum is being deleted. Select Cancel to cancel the deletion of the note, or Delete, to remove the addendum from the note.

Delete Dashboard Note

Reason:

Cancel
Delete

**Figure 181: Delete Addendum**

5. **View** the details of the selected addendum.

Note

Pregnancy: Not associated with a pregnancy

LOCAL TITLE: Addendum

DATE OF NOTE: NOV 20, 2017@16:40:40 ENTRY DATE: NOV 20, 2017@16:40:40

AUTHOR: FREY,ALINA EXP COSIGNER:

URGENCY: STATUS: UNSIGNED

Will continue to monitor the well being.

-----

--- Original Document ---

11/20/17 MCC DASHBOARD NOTE:  
New pregnancy

/es/ ALINA FREY

Signed: 11/20/2017 16:38

Return to List

**Figure 182: View Addendum Details**

- Navigate back to the Dashboard Notes screen by selecting **All Notes** button.

## View the details of a Note

To view the details of a Note, highlight the Note row from the Dashboard Notes screen and select View button at the bottom of the screen. The note opens for review but cannot be edited. Any note can be viewed: Call Notes and MCC Dashboard Notes.

The Note details page should show all the details of the note, including all the Addendums made to that note, in order they were added, if any.

Note

Pregnancy: Current Pregnancy (Due 2/27/2018)

LOCAL TITLE: MCC DASHBOARD NOTE  
 DATE OF NOTE: NOV 20, 2017@16:38:23 ENTRY DATE: NOV 20, 2017@16:38:23  
 AUTHOR: FREY,ALINA EXP COSIGNER:  
 URGENCY: STATUS: COMPLETED  
 SUBJECT: Health

\*\*\* MCC DASHBOARD NOTE Has ADDENDA \*\*\*

New pregnancy  
 /es/ ALINA FREY  
 Signed: 11/20/2017 16:38  
 11/20/2017 ADDENDUM STATUS: UNSIGNED  
 Will continue to monitor the well being.

Return to List

**Figure 183: View Dashboard Note**

Select **Return to List** to return to the Dashboard Notes screen.

## Create a new note

To add a Dashboard Note, click **New Note** at the bottom of the Dashboard Notes screen.

New Dashboard Note

Pregnancy  
 Current Pregnancy (Due 3/8/2018)

Subject

Dashboard Note Text  
 Patient going out of town.

Cancel Save

**Figure 184: New Dashboard Note**

At the New Dashboard Note, select the Pregnancy (if any), which this note should be associated with, enter text in the provided fields: Subject and Dashboard Note text.

Click **Cancel** to return to the previous page without saving. Click **Save** to store the note and return to the previous page.

The user should see the New Note added to the list of Dashboard Notes, with the Title MCC Dashboard Note. The note crosses into CPRS as unsigned.

To return to the patient summary, click Patient Summary button at the bottom of the screen.

## Delete

Only the MCC Dashboard Notes that are not signed could be deleted. Highlight the unsigned note and click **Delete**. A window displays requiring the user to indicate a reason for deleting this note. Click **Cancel** to return to the previous page without deleting. Click **Delete** to return to the previous page that no longer displays the note.

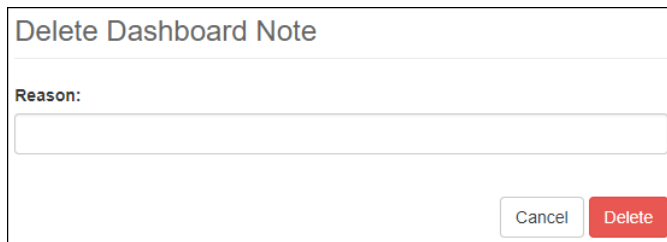
A dialog box titled "Delete Dashboard Note" with a light gray border. Inside, there is a label "Reason:" followed by a text input field. At the bottom right, there are two buttons: "Cancel" (white with gray border) and "Delete" (red with white text).

Figure 185: Delete Dashboard Note

## Text4Baby Enrollment

To access the Text4Baby screen, click on the Text4Baby link on the left side pane, under the Patient section.

**MCC Dashboard**

**PATIENT, BROOKE ANNE**  
 XXX-XX-9876  
 1/31/2000 (Age: 17)  
 Pregnant / Lactating  
 G3 P2012

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

Education

Notes

**text4baby**

Labs

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

**text4baby**

Text4Baby Enrollment

Text4Baby Enrollment Status: Not Interested

Not Interested Enroll Now Patient Summary

**Figure 186: Text4baby Enrollment**

The user has options for three actions, by selecting the corresponding button at the bottom of the screen:

1. Navigate back to **Patient Summary**
2. Not enroll, by selecting **Not Interested** button. That should update the status of the field Text4Baby Enrollment in the Patient Summary.
3. Enroll, by selecting the button **Enroll Now**.

When selecting to Enroll, the user is prompted to the text4baby – Enroll Patient screen:



text4baby

Enroll Patient	
Participant Type	Pregnant ▼
First Name	BROOKE ANNE
Email Address	Enter email address
Due Date Is Known	<input checked="" type="checkbox"/>
Estimated Due Date	3/8/2018
Last Menstrual Period	6/1/2017
Baby Date of Birth	N/A
Mobile Number	(602)222-3333
Zip Code	10003
Participant Code	

Cancel

**Figure 187: Text4Baby Patient Enrollment Form**

The included fields in the enrollment form are:

1. Participant Type
2. First Name
3. Email Address
4. Due Date is Known checkbox
5. Estimated Due Date
6. Last Menstrual Period
7. Baby Date of Birth
8. Mobile Number
9. Zip Code
10. Participant Code

The field Pregnant Type is a dropdown list with two options:

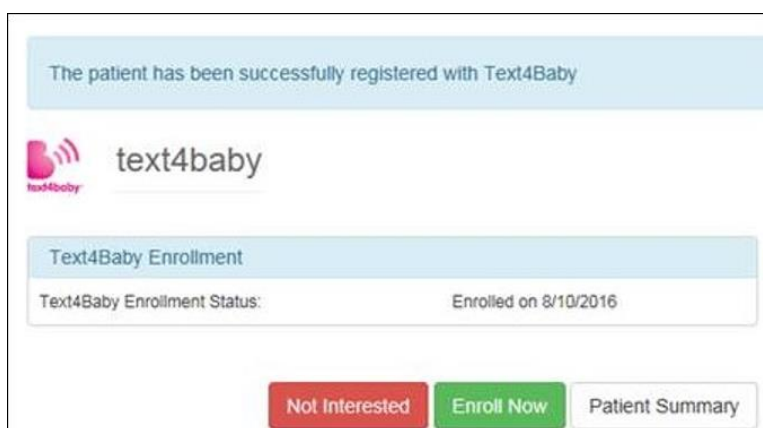
Pregnant ▼
(Select)
Pregnant
New Mom

**Figure 188: Text4Baby Patient Enrollment – Participant Type Field**

The information in the fields is already pre-populated, but it can be edited if anything needs to be changed.

Also, the information changes based on the selection of the Pregnant Type field. Depending on the selection for **Participant Type**, different fields will be unavailable. For instance, selecting **Pregnant** (for Participant Type) will result in the field **Baby Date of Birth** being set to N/A. By selecting **New Mom**, the fields **Due Date Is Known**, **Estimated Due Date**, and **Last Menstrual Period** will be set to N/A.

After specifying the requested information, clicking **Enroll** will submit the request for registration, for the text4baby service. If registration was successful, then the following window will display.



**Figure 189: Text4Baby successful enrollment**

To edit or update the patient's Text4Baby Enrollment status, can be done also as described in [Patient Details](#) panel of [Patient Summary](#) screen, by clicking on the **Text4Baby Enrollment** link.

## **Labs**

To access the Labs screen, click on the Labs link on the left side pane, under the Patient section. The Labs option from the Dashboard allows the user to view lab results from the patient's CPRS record.

MCC  
Dashboard

**PATIENT, BROOKE ANNE**  
 XXX-XX-9876  
 1/31/2000 (Age: 17)  
 Pregnant / Lactating  
 G3 P2012

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

Education

Notes

text4baby

**Labs**

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

Lab Results

Show: All Labs Prenatal Only
 Show Labs From: Current Pregnancy All Pregnancies

Specimen	Collected	Test	Result/Status	Flag	Units	Ref Range
(No Lab Results)						

Patient Summary
 3.0.1.0

Figure 190: Lab Results

Show: <span>All Labs</span> <span>Prenatal Only</span>		Show Labs From: <span>Current Pregnancy</span> <span>All Pregnancies</span>				
Specimen	Collected	Test	Result/Status	Flag	Units	Ref Range
SERUM	10/24/2001 09:44	GLUCOSE	91		mg/dL	60 - 123
SERUM	10/24/2001 09:39	GLUCOSE	91		mg/dL	60 - 123
PLASMA	10/5/2001 16:33	GLUCOSE	131	H	mg/dL	60 - 123
SERUM	3/23/2001 00:06	JMS TEST 0322	YEARLY2			2 - 6
SERUM	2/2/2001 11:00	GLUCOSE	232	H	mg/dL	60 - 123
SERUM	1/12/2001 11:00	GLUCOSE	123		mg/dL	60 - 123
SERUM	1/12/2001 11:00	UREA NITROGEN	24		mg/dL	11 - 24
SERUM	1/12/2001 11:00	SODIUM	146	H	meq/L	135 - 145
SERUM	1/12/2001 11:00	POTASSIUM	3.1	L	meq/L	3.8 - 5.3
SERUM	1/12/2001 11:00	CHLORIDE	124	H	meq/L	100 - 108

< 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 >

 Patient Summary

Figure 191: Lab Results (continued)

The Labs can be filtered by the one of the Filters at the top of the table:

1. All Labs/Prenatal Only
2. Current Pregnancy/All Pregnancies



The screenshot shows a filter interface for the Labs table. It consists of two main sections. The first section, labeled 'Show:', contains two buttons: 'All Labs' (highlighted in green) and 'Prenatal Only'. The second section, labeled 'Show Labs From:', contains two buttons: 'Current Pregnancy' (highlighted in green) and 'All Pregnancies'.

**Figure 192: Labs – Filters**

The Lab's information in the table includes:

1. Specimen
2. Collected
3. Test
4. Result/Status
5. Flag
6. Units
7. Ref Range

The user has two options, by selecting the corresponding buttons at the bottom of the Labs screen:

1. **View Selected** lab
2. Navigate to back to **Patient Summary** screen

To view the Lab's details, select the corresponding row in the Labs table and click View Selected.

## **Clinical Exchange Documents**

To access the Clinical Exchange Documents screen, click on the Clinical Exchange Documents link on the left side pane, under the Patient section.

This menu option allows the user to share documents with and retrieve documents from outside providers. Inbound documents are stored as a TIU note in CPRS.

MCC Dashboard

**PATIENT, BROOKE ANNE**  
 XXX-XX-9876  
 1/31/2000 (Age: 17)  
 Pregnant / Lactating  
 G3 P2012

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

Education

Notes

text4baby

Labs

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

Clinical Exchange Documents

Click a row to select the document

Direction	Date	Type	Title	Sender	Recipient
Outbound	11/3/2017 10:39	APS	CAMP MASTER Antepartum Summary	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 10:44	PPVS	CAMP MASTER Postpartum Visit Summary	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 11:29	XDR_I	CAMP MASTER Imaging Report	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 11:33	APS	CAMP MASTER Antepartum Summary	CAMP MASTER	Veratics
Inbound	11/3/2017 12:43	APS	Antepartum Summary	CAMP MASTER	Veratics
Outbound	11/3/2017 12:49	APL	CAMP MASTER Antepartum Laboratory	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 13:04	APE	CAMP MASTER Antepartum Education	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 13:07	PPVS	CAMP MASTER Postpartum Visit Summary	CAMP MASTER	Veratics, Inc.
Outbound	11/17/2017 15:09	APHP	CAMP MASTER Antepartum History & Physical	CAMP MASTER	Veratics, Inc.
Inbound	11/17/2017 15:22	APHP	Antepartum History & Physical	CAMP MASTER	Veratics, Inc.

« 1 2 »

View Selected

Receive Document

Send Document

Patient Summary

3.0.1.0

**Figure 193: Clinical Exchange Documents**

The screen shows a table of all the shared clinical documents that were generated or imported, containing the following info:

- Direction:
  - Outbound: if the document was sent
  - Inbound: if the document was received
- Date when it was generated
- Type of document. The available types are:
  - Antepartum History & Physical (APHP)
  - Antepartum Summary (APS)
  - Antepartum Laboratory (APL)
  - Antepartum Education (APE)
  - Postpartum Visit Summary (PPVS)
  - Imaging Report (XDR-I)
  - Newborn Discharge Summary (NDS) \*\*\* Receiving Only \*\*\*

- h. Maternal Discharge Summary (MDS) \*\*\* Receiving Only \*\*\*
4. Title of the document
5. Sender
6. Recipient

The user has the following options, by selecting the corresponding button at the bottom of the screen:

1. View Selected document
2. Receive a Document
3. Send a Document
4. Navigate back to the Patient Summary screen.



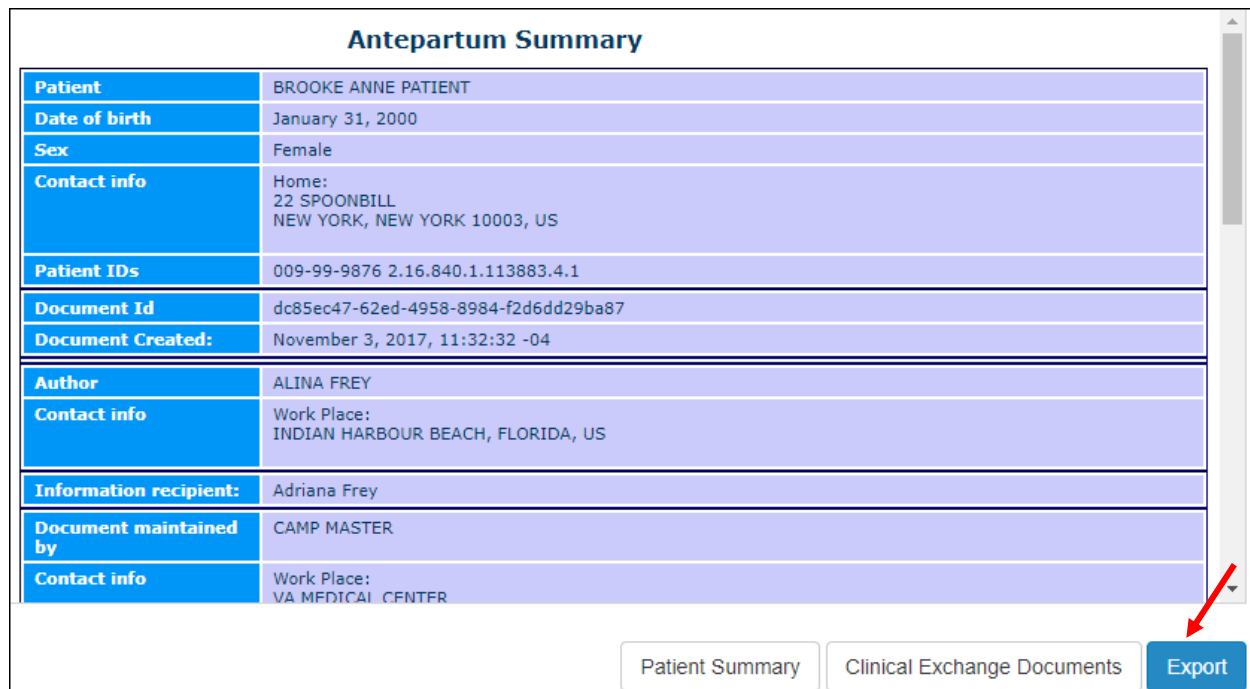
**Figure 194: Clinical Exchange Documents Options**

To be able to Export documents (after sending/generating one or after viewing an existing one), the user needs to make sure that the CDA export folder exists. By default, the path to the CDA export folder is set `c:\cda\outgoing`, but it can be changed to be anywhere on the local machine, as long as the user creates the corresponding folders.

## **View a Clinical Exchange Document**

To view details of a clinical document that was already created, select the document row from the table, then click **View Selected** button.

This redirects the user to the Summary page of the document.



**Antepartum Summary**

<b>Patient</b>	BROOKE ANNE PATIENT
<b>Date of birth</b>	January 31, 2000
<b>Sex</b>	Female
<b>Contact info</b>	Home: 22 SPOONBILL NEW YORK, NEW YORK 10003, US
<b>Patient IDs</b>	009-99-9876 2.16.840.1.113883.4.1
<b>Document Id</b>	dc85ec47-62ed-4958-8984-f2d6dd29ba87
<b>Document Created:</b>	November 3, 2017, 11:32:32 -04
<b>Author</b>	ALINA FREY
<b>Contact info</b>	Work Place: INDIAN HARBOUR BEACH, FLORIDA, US
<b>Information recipient:</b>	Adriana Frey
<b>Document maintained by</b>	CAMP MASTER
<b>Contact info</b>	Work Place: VA MEDICAL CENTER

Patient Summary Clinical Exchange Documents **Export**

Figure 195: Document View

The user has the following options:

1. **Export** the viewed document
2. Navigate back to the **Patient Summary** screen
3. Navigate back to **Clinical Exchange Documents** screen

To Export the viewed document, select the corresponding button. Also, the user needs to make sure that the export folder exists, as specified above. Clicking **Export** allows the user to store the document locally.

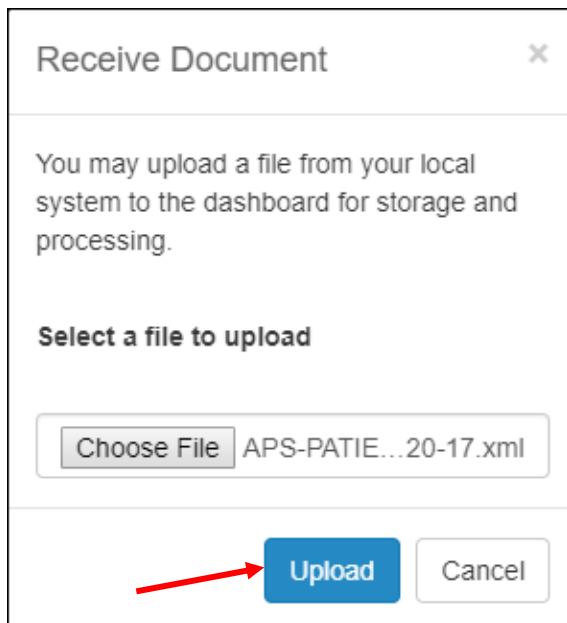
The user should see an info message where the file was exported to:

The document has been saved to 'c:\cda\outgoing\XDR-I-PATIENT, BROOKE ANNE-11-03-17.xml'

## Receive a Clinical Exchange Document

This option is available for the cases where the user would like to import a clinical document that is not loaded in the Clinical Exchange Documents table. Documents from outside providers will be placed in a pre-arranged location.

By Selecting the **Receive Document** option, the user can upload a locally stored document into MT.



**Figure 196: Receive Document**

Select the appropriate clinical document from the location on filesystem where it was saved previously and select **Upload** to store the document. **Cancel** to return to the previous page without storing the document.

Just as a note, any file that was exported to the CDA export folder ([c:\cda\outgoing](#)) can be uploaded as well. That will create a duplicate record in the table of Clinical Exchange Documents.

Upload will first enable the viewing of the document.



**Antepartum Summary**

<b>Patient</b>	BROOKE ANNE PATIENT
<b>Date of birth</b>	January 31, 2000
<b>Sex</b>	Female
<b>Contact info</b>	Home: 22 SPOONBILL NEW YORK, NEW YORK 10003, US
<b>Patient IDs</b>	009-99-9876 2.16.840.1.113883.4.1
<b>Document Id</b>	dc85ec47-62ed-4958-8984-f2d6dd29ba87
<b>Document Created:</b>	November 3, 2017, 11:32:32 -04
<b>Author</b>	
<b>Contact info</b>	Work Place: INDIAN HARBOUR BEACH, FLORIDA, US
<b>Information recipient:</b>	Adriana Frey
<b>Document maintained by</b>	CAMP MASTER
<b>Contact info</b>	Work Place: VA MEDICAL CENTER

**Figure 197: Clinical Exchange Documents – Review uploaded document**

Clicking **Continue** will then allow the conformation of the current patient with the patient in the document.

### Verify Patient Matching

*Please select the appropriate patient for this document*

Patient In Document	Matching Patient	Match Type	Action
<b>PATIENT, BROOKE ANNE</b> 009-99-9876 1/31/2000 (Age: 17)	Patient, Brooke Anne XXX-XX-9876 1/31/2000 (Age: 17)	Partial	<div style="background-color: #28a745; color: white; padding: 5px 15px; display: inline-block;">             ✓ Confirm Match           </div>

**Figure 198: Clinical Exchange Documents – Confirm Patient on upload**

The user is redirected to the **Select Data To Import** window, which allows the selection of the data elements to import, either by clicking on Select All, or checking the individual elements. Clicking **Finish** will then import the selected data elements into a note.



The document has been successfully imported into the dashboard X

## Clinical Exchange Documents

*Click a row to select the document*

Direction	Date	Type	Title	Sender	Recipient
Outbound	11/3/2017 10:39	APS	CAMP MASTER Antepartum Summary	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 10:44	PPVS	CAMP MASTER Postpartum Visit Summary	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 11:29	XDR_I	CAMP MASTER Imaging Report	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 11:33	APS	CAMP MASTER Antepartum Summary	CAMP MASTER	Veratics
Inbound	11/20/2017 17:03	APS	Antepartum Summary	CAMP MASTER	Veratics
Outbound	11/3/2017 12:49	APL	CAMP MASTER Antepartum Laboratory	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 13:04	APE	CAMP MASTER Antepartum Education	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 13:07	PPVS	CAMP MASTER Postpartum Visit Summary	CAMP MASTER	Veratics, Inc.
Outbound	11/17/2017 15:09	APHP	CAMP MASTER Antepartum History & Physical	CAMP MASTER	Veratics, Inc.
Inbound	11/17/2017 15:22	APHP	Antepartum History & Physical	CAMP MASTER	Veratics, Inc.

« 1 2 »

View Selected
Receive Document
Send Document
Patient Summary

**Figure 201: Clinical Exchange Documents – successful upload**

## Send a Clinical Exchange Document

Clicking **Send Document** (from the Clinical Exchange Documents page) allows the user to choose a document by title then by source (Note or Date range) and enter the recipient information in the fields provided. Clicking **Patient Summary** returns the user to the Summary page.

To send/generate a Clinical Document, click **Send Document** button at the bottom of the screen.

The user has multiple options to select from for the type of document to send.

Please select the type of document to send

Antepartum History & Physical (APHP)

Antepartum Summary (APS)

Antepartum Laboratory (APL)

Antepartum Education (APE)

Postpartum Visit Summary (PPVS)

Imaging Report (XDR-I)

Cancel

**Figure 202: Clinical Exchange Documents – Send Documents Types**

This redirects the user to their corresponding Options screens.

1. Antepartum History & Physical
2. Antepartum Summary
3. Antepartum Laboratory
4. Antepartum Education
5. Postpartum Visit Summary
6. Imaging Report

All the screens have the same initial layout, with two panels:

1. Source Panel: for choosing the Source of the document data
2. Recipient Information Panel: for the Information about the recipient.

Antepartum History & Physical - Options

Please select the source of the document data:

(Select)

Please enter information about the intended recipient:

Recipient First Name

Recipient Last Name

Recipient Organization Name

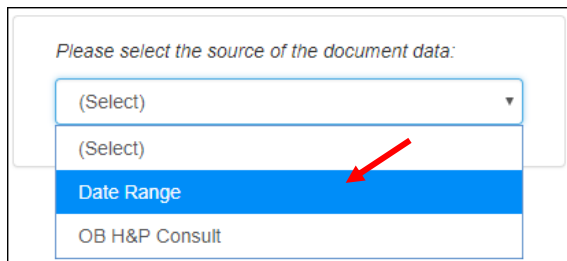
Patient Summary Generate Cancel

**Figure 203: Clinical Exchange Documents – Send Documents Options**

For each of the IHE documents available to send, this screen will be similar. The source is what differs between the various IHE documents. While the Recipient Info panel doesn't change, the Source panel changes its layout based on the selected Source.

The following are the layouts for the Source panel for every Options screen:

1. Antepartum History & Physical – same as Antepartum Summary
2. Antepartum Summary – Source panel layout:



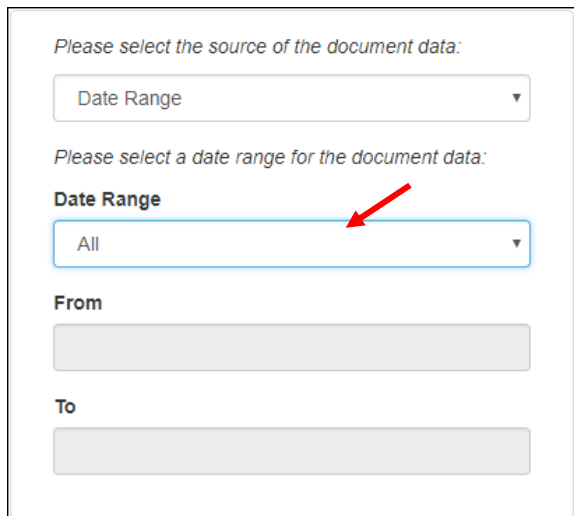
Please select the source of the document data:

(Select) ▼

(Select)

**Date Range**

OB H&P Consult



Please select the source of the document data:

Date Range ▼

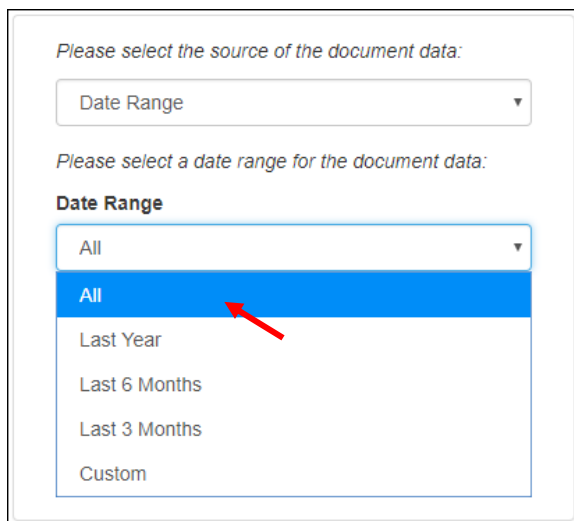
Please select a date range for the document data:

**Date Range**

All ▼

**From**

**To**



Please select the source of the document data:

Date Range ▼

Please select a date range for the document data:

**Date Range**

All ▼

All

Last Year

Last 6 Months

Last 3 Months

Custom

**Figure 204: Sending Clinical Documents – APHP and APS – Source Panel – Selecting Date**


Please select the source of the document data:

(Select) ▼

(Select)

Date Range

**OB H&P Consult**



Please select the source of the document data:


OB H&P Consult ▼

Please select an item to use as the source of the document data:

**Selected Item**

(No OB H&P Consult/History Notes Found) ▼

(No OB H&P Consult/History Notes Found)



**Figure 205: Sending Clinical Documents – APHP and APS – Source Panel – Selecting Consult**


3. Antepartum Laboratory – same as Antepartum Education
4. Antepartum Education – Source panel layout:

Please select the source of the document data:

(Select) ▼

(Select)

**Date Range**



Please select the source of the document data:

Date Range ▼

Please select a date range for the document data:

**Date Range**

All ▼


**All**

Last Year

Last 6 Months

Last 3 Months

Custom



**Figure 206: Sending Clinical Documents – APL and APE – Source Panel**

5. Postpartum Visit Summary – Source panel layout:

Please select the source of the document data:

(Select) ▼

(Select)

Pregnancy

Please select the source of the document data:

Pregnancy ▼

Please select an item to use as the source of the document data:

**Selected Item**

(Select) ▼

(Select)

Current Pregnancy (Due 3/8/2018)

Past Pregnancy (Unknown - 2/2/2002)

Past Pregnancy (6/28/2008 - 8/8/2008)

Past Pregnancy (3/6/2011 - 3/3/2003)

**Figure 207: Sending Clinical Documents – PPVS – Source Panel**

## 6. Imaging Report – Source panel layout:

Please select the source of the document data:

(Select) ▼

(Select)

Report

Please select the source of the document data:

Report ▼

Please select an item to use as the source of the document data:

**Selected Item**

(No Radiology Report Notes Found) ▼

(No Radiology Report Notes Found)

**Figure 208: Sending Clinical Documents – XDR-I – Source Panel**

Select the options from the dropdown lists in the Source Panel, and enter the Recipient Info, then select **Generate** button.

**Figure 209: Generate Clinical Documents**

At any point in time the user has the option to **Cancel** the process or navigate back to the Patient Summary, by selecting the corresponding buttons at the bottom of the screen.

If no style sheet has been selected before generating a document, the user has the option to select one in the alert screen, by clicking on **Style Sheet** button:

**Figure 210: Clinical Documents – Style Sheet**

The following is an example of generating a document. Use similar steps for generating documents for all the other options:



1. Choose the Source and the Recipient:

### Antepartum History & Physical - Options

*Please select the source of the document data:*

Date Range ▾

*Please select a date range for the document data:*

**Date Range**

All ▾

**From**

**To**

*Please enter information about the intended recipient:*

**Recipient First Name**

Alina

**Recipient Last Name**

Frey

**Recipient Organization Name**

Veratics

Patient Summary

Generate

Cancel

Figure 211: Generating Clinical Document

2. Generate the document:

### Antepartum History & Physical

Patient	BROOKE ANNE PATIENT
Date of birth	January 31, 2000
Sex	Female
Contact info	Home: 22 SPOONBILL NEW YORK, NEW YORK 10003, US
Patient IDs	009-99-9876 2.16.840.1.113883.4.1
Document Id	ac979eb6-94d0-46b8-9c41-11c0f573cbf3
Document Created:	November 17, 2017, 16:31:03 -05
Author	ALINA FREY
Contact info	Work Place: INDIAN HARBOUR BEACH, FLORIDA, US
Next of kin	MICHAEL PATIENT
Contact info	Home: 1 MAIN STREET NEW YORK, NEW YORK 10003, US

You will need two files to exchange this document. The style sheet is the same for all documents. If you already have downloaded the style sheet you do not need to download it again. However, please make sure both are included when sending to a third party.

Patient Summary

Clinical Exchange Documents

Return to Options

Style Sheet

Save & Download

Figure 212: Clinical Document generated

Select **Style Sheet** (if not selected already), then **Save & Download** button. This generates the document and redirects the user back to the Clinical Exchange Documents screen, showing the newly created clinical document in the table.

The document has been saved to 'c:\cda\outgoing\APHP-PATIENT, BROOKE ANNE-11-17-17-1.xml'
X

## Clinical Exchange Documents

*Click a row to select the document*

Direction	Date	Type	Title	Sender	Recipient
Outbound	11/3/2017 10:39	APS	CAMP MASTER Antepartum Summary	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 10:44	PPVS	CAMP MASTER Postpartum Visit Summary	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 11:29	XDR_I	CAMP MASTER Imaging Report	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 11:33	APS	CAMP MASTER Antepartum Summary	CAMP MASTER	Veratics
Inbound	11/3/2017 12:43	APS	Antepartum Summary	CAMP MASTER	Veratics
Outbound	11/3/2017 12:49	APL	CAMP MASTER Antepartum Laboratory	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 13:04	APE	CAMP MASTER Antepartum Education	CAMP MASTER	Veratics, Inc.
Outbound	11/3/2017 13:07	PPVS	CAMP MASTER Postpartum Visit Summary	CAMP MASTER	Veratics, Inc.
Outbound	11/17/2017 15:09	APHP	CAMP MASTER Antepartum History & Physical	CAMP MASTER	Veratics, Inc.
Inbound	11/17/2017 15:22	APHP	Antepartum History & Physical	CAMP MASTER	Veratics, Inc.

«
1
2
»

View Selected
Receive Document
Send Document
Patient Summary

**Figure 213: Generated document saved to Clinical Documents**

## Orders

To access the Orders screen, click on the Orders link on the left side pane, under the Patient section. The Orders menu option allows the user to view all orders for the patient from their CPRS record.

MCC Dashboard

ONEHUNDREDEIGHTYFOUR PATIENT  
XXX-XX-0184  
1/1/1994 (Age: 23)  
Pregnant / Lactating  
G1 P0000

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

Education

Notes

text4baby

Labs

Clinical Exchange Documents

Orders

Reminders

Consults

Radiology

Stop Tracking

Orders

Click a row to select the order

Service	Order	Start / Stop	Provider	Nurse	Clerk	Chart	Status	Location
CHEMISTRY	CO2 2 BLOOD SERUM SP LB #18561	Start: 11/3/2015 13:44	Khan,Vihaan					Mammogram
CHEMISTRY	GLU 2 BLOOD SERUM SP LB #18561	Start: 11/3/2015 13:44	Khan,Vihaan					Mammogram
CHEMISTRY	CO2 1 BLOOD SERUM SP LB #18558	Start: 10/28/2015 15:58	Khan,Vihaan					General Medicine
CYTOLOGY	CYTOLOGY CYTO AP SPECIMEN CYTOPLASM SP LB #18558	Start: 10/28/2015 15:58	Khan,Vihaan					General Medicine
GENERAL RADIOLOGY	CHEST 2 VIEWS PA&LAT [02]	Start: 4/17/2003 00:00	Vehu,Thirtyseven					Cardiology
GENERAL RADIOLOGY	KNEE 2 VIEWS RIGHT	Start: 4/17/2003 00:00	Vehu,Thirtyseven					Cardiology

View Selected Patient Summary

3.0.1.0

**Figure 214: Orders**

The screen displays a table of all the orders associated with the selected patient, containing the following info:

1. Service
2. Order
3. Start/Stop
4. Provider
5. Nurse
6. Clerk
7. Chart
8. Status
9. Location

The user has the following options, by selecting the correspondent button at the bottom of the screen:

1. **View Selected** order
2. Navigate back to the **Patient Summary** screen.

To view the Order's details, highlight the corresponding row in the Orders table and click View Selected.

### Order Details

1

KNEE 2 VIEWS RIGHT

Activity:

04/17/2003 14:19 New Order entered by VEHU,THIRTYSEVEN (Physician)

Order Text: KNEE 2 VIEWS RIGHT

Nature of Order: ELECTRONICALLY ENTERED

Elec Signature: VEHU,THIRTYSEVEN (Physician) on 04/17/2003 14:19

Current Data:

Treating Specialty:

Ordering Location: CARDIOLOGY

Start Date/Time: 04/17/2003

Stop Date/Time:

Current Status: PENDING

Orders that have been placed but not yet accepted by the service filling the order. e.g., Pharmacy orders awaiting verification, Lab orders awaiting collection.

Order #13877

Order:

Procedure: KNEE 2 VIEWS

Procedure Modifiers: RIGHT

Clinical History: R/O Arthritis

Category: OUTPATIENT

Date Desired: TODAY

Mode of Transport: AMBULATORY

Is patient on isolation procedures? NO

Urgency: ROUTINE

Return to List

Figure 215: Order Detail

The order details display. To exit the order details and return to the list of Orders, click **Return to List** button at the bottom of the screen.

## Reminders

To access the Clinical Reminders screen, click on the Reminders link on the left side pane, under the Patient section. The **Reminders** option allows the user to view the clinical reminders for this patient.

MCC Dashboard

**PATIENT, BROOKE ANNE**  
 XXX-XX-9876  
 1/31/2000 (Age: 17)  
 Pregnant / Lactating  
 G3 P2012

Tracked Patients

Patient

Summary

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Contact History

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text4baby

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**Reminders**

Consults

Radiology

Stop Tracking

Clinical Reminders

Click a row to select the reminder

Description	Due
Hepatitis C risk Factor Screening	Due Now
Primary Care Depression Screening	Due Now

View Selected

Patient Summary

3.0.1.0

**Figure 216: Clinical Reminders**

The screen shows a table of all the Clinical Reminder associated with the selected patient, containing the following info:

1. Description
2. When is it Due

The user has the following options, by selecting the correspondent button at the bottom of the screen:

1. View Selected reminder
2. Navigate back to the Patient Summary screen.

To view the Clinical Reminder's details, highlight the corresponding row in the Clinical Reminders table and click View Selected.

Reminder Detail

--STATUS--
--DUE DATE--
--LAST DONE--

DUE NOW
DUE NOW
unknown

Frequency: Due every 1 year

Cohort:

Problem Diagnosis:

07/23/2014 V72.42 PREGNANCY TEST-POSITIVE Priority: UNDEFINED Status: ACTIVE

Prov. Narr. - Pregnancy test positive

Patient is Pregnant

Encounter Diagnosis:

11/13/2007@11:58 535.01 AC GASTRITIS W HEMORRHAGE rank: PRIMARY

Prov. Narr. - Acute gastritis, with hemorrhage

Patient has MTN

Return to List

**Figure 217: Reminder Detail**

The Reminder Detail window displays. Click **Return to List** to return back to Clinical Reminders screen.

## Consults

To access the **Consults** screen, click on the Consults link on the left side pane, under the Patient section.

MCC Dashboard

**TRASH, ELSIE**  
 XXX-XX-9998  
 2/3/2004 (Age: 13)  
 Pregnant  
 G? P????

Tracked Patients

Patient

Summary

Pregnancy Checklist

Pregnancies

Contact History

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text4baby

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**Consults**

Radiology

Stop Tracking

Consults

Click a row to select the consult

Date	Status	Category	Service
05/28/2015	Discontinued	GMRCR ENDOSCOPY	GASTROENTEROLOGY
05/28/2015	Discontinued	CATHETERIZATION	CARDIOLOGY
05/28/2015	Discontinued	Consult	DIABETIC EYE EXAM CONSULT
04/23/2015	Discontinued	Consult	CP GI ENDOSCOPIC PROCEDURE
04/23/2015	Complete	GI ENDOSCOPIC PROCEDURE	CP GI ENDOSCOPIC PROCEDURE
04/23/2015	Complete	GI ENDOSCOPIC PROCEDURE	CP GI ENDOSCOPIC PROCEDURE
04/23/2015	Complete	EKG	CARDIOLOGY
04/23/2015	Discontinued	BONE MARROW ASPIRATE	HEMATOLOGY NEW NAME
04/23/2015	Discontinued	EKG	CARDIOLOGY
04/20/2015	Complete	GMRCR ENDOSCOPY	GASTROENTEROLOGY

« 1 2 »

View Selected

Patient Summary

3.0.1.0

**Figure 218: Consults**

The screen shows a table of all the Consults associated with the selected patient, containing the following info:

1. Date
2. Status
3. Category
4. Service

The user has two options, by selecting the corresponding buttons at the bottom of the Consults screen:

1. **View Selected** consult
2. Navigate to back to **Patient Summary** screen

To view the Consult's details, highlight the corresponding row in the Consults table and click **View Selected**.



Consult Detail

Current PC Team: SILVER

Current Pat. Status: Outpatient

Patient Type: NSC VETERAN

OEF/OIF: NO

Service Connection/Rated Disabilities

SC Percent: 90%

Rated Disabilities: NONE STATED

Order Information

To Service: GASTROENTEROLOGY

From Service: DIABETIC

Requesting Provider: PROGRAMMER,ONE

Service is to be rendered on an OUTPATIENT basis

Place: Consultant's choice

Urgency: Routine

Clinically Ind. Date: Apr 20, 2015

Orderable Item: GMRCR ENDOSCOPY

Procedure: GMRCR ENDOSCOPY

Reason For Request: testing GI ENDOSCOPY

Inter-facility Information

This is not an inter-facility consult request.

Status: COMPLETE

Last Action: COMPLETE/UPDATE

Facility

Activity

Date/Time/Zone

Responsible Person

Entered By

-----

CPRS RELEASED ORDER04/20/15 14:51PROGRAMMER,ONEPROGRAMMER,ONE

COMPLETE/UPDATE04/20/15 15:00PROGRAMMER,ONEPROGRAMMER,ONE

Note# 11477

Note: TIME ZONE is local if not indicated

-----

LOCAL TITLE: GASTROENTEROLOGY CONSULT NOTE

STANDARD TITLE: GASTROENTEROLOGY NOTE

DATE OF NOTE: APR 20, 2015@14:58ENTRY DATE: APR 20, 2015@14:59

AUTHOR: PROGRAMMER,ONEEXP COSIGNER:

URGENCY:STATUS: COMPLETED

This is a test for GI

/es/ ONE PROGRAMMER

MD

Signed: 04/20/2015 15:00

=====

===== END =====

Return to List

**Figure 219: Consult Detail**

To return to Consults screen, select **Return to List** button at the bottom of the Consult Detail screen.

## **Radiology**

To access the **Radiology Reports** screen, click on the **Radiology** tab on the left side pane, under the Patient section. The page displays a list of Radiology Reports for the patient from their CPRS record.

**MCC Dashboard**

**PATIENT, BROOKE ANNE**  
 XXX-XX-9876  
 1/31/2000 (Age: 17)  
 Pregnant / Lactating  
 G3 P2012

Tracked Patients

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text4baby

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**Radiology**

Stop Tracking

**Radiology Reports**

Click a row to select the report

Date	Procedure	Report Status	CPT Code
3/29/2016 14:08	ABDOMEN 1 VIEW	No Report	74000

View Selected Patient Summary

3.0.1.0

**Figure 220: Radiology Reports**

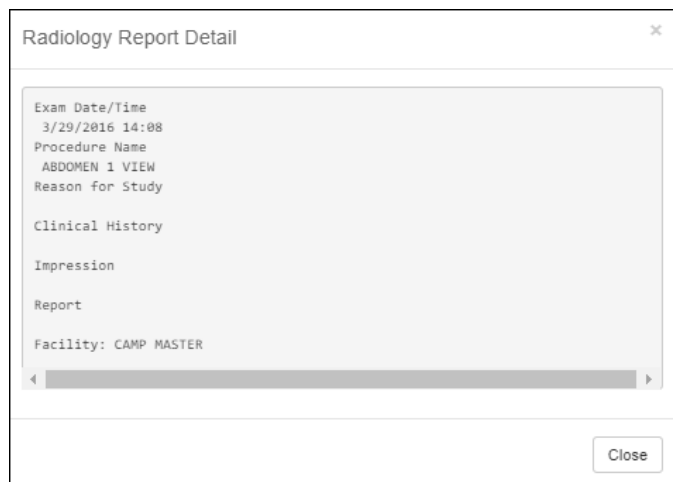
The screen shows a table of all the Radiology Reports associated with the selected patient, containing the following info:

1. Date
2. Procedure
3. Report Status
4. CPT Code

The user has the following options, by selecting the correspondent button at the bottom of the screen:

1. **View Selected** reminder
2. Navigate back to the **Patient Summary** screen.

To view a Radiology Report's details, highlight the corresponding row in the Radiology Reports table and click **View Selected**.



**Figure 221: Radiology Report Detail**

The Radiology Report Details should now open in a separate window. To close the window, select **Close** or click the X in the top right.

## **Stop Tracking**

To stop tracking the patient, click on the **Stop Tracking** tab on the left side pane, under the Patient section.

MCC Dashboard

**PATIENT, BROOKE ANNE**  
 XXX-XX-9876  
 1/31/2000 (Age: 17)  
 Pregnant / Lactating  
 G3 P2012

Tracked Patients

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Stop Tracking

Stop Tracking a Patient

Patient will no longer appear as a tracked patient in the dashboard

**Most Recent Outcome Information**

Outcome:	Unknown
Outcome/Delivery Date:	

**Stop Tracking Reason**

(Select) ▼

**Comment**

Stop Tracking

Patient Summary

**Figure 222: Stop Tracking Patient**

The user is redirected to **Stop Tracking a Patient** screen, which allows the user to enter pregnancy outcome information, select a reason from the drop-down list, and add a comment related to the tracking ending, by using the following fields:

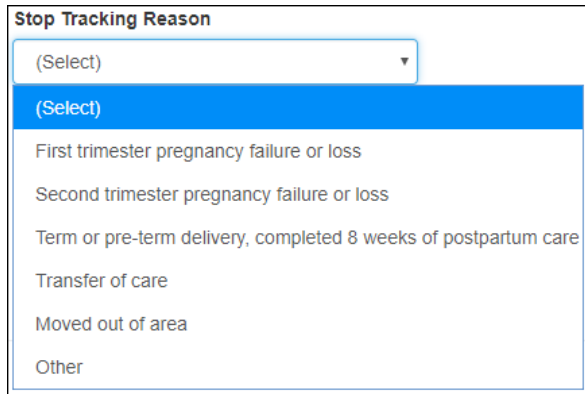
1. Most Recent Outcome Information
2. Stop Tracking Reason
3. Comment section

The user has the following options, by selecting the correspondent button at the bottom of the screen:

1. **Stop Tracking**
2. Navigate back to the **Patient Summary** screen.

To Stop Tracking:

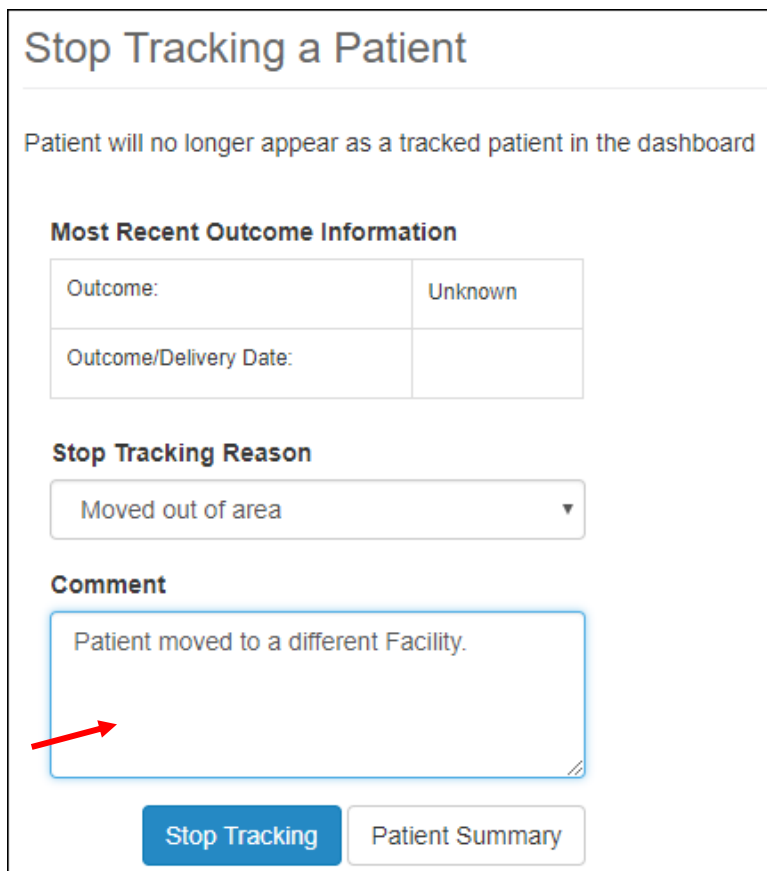
1. Ensure the Most Recent Outcome Information for Outcome and Outcome/Delivery Date is correct.
2. Select a reason in the Stop Tracking Reason dropdown list:



The screenshot shows a dropdown menu titled "Stop Tracking Reason". The menu is open, displaying a list of options. The first option, "(Select)", is highlighted in blue. The other options are: "First trimester pregnancy failure or loss", "Second trimester pregnancy failure or loss", "Term or pre-term delivery, completed 8 weeks of postpartum care", "Transfer of care", "Moved out of area", and "Other".

Figure 223: Select Reason for Stop Tracking

3. Add an additional comment in the Comment textbox.



The screenshot shows the "Stop Tracking a Patient" form. At the top, it says "Patient will no longer appear as a tracked patient in the dashboard". Below this, there is a section titled "Most Recent Outcome Information" with two input fields: "Outcome:" (containing "Unknown") and "Outcome/Delivery Date:". Below this is a "Stop Tracking Reason" dropdown menu with "Moved out of area" selected. Below that is a "Comment" section with a text area containing "Patient moved to a different Facility." and a red arrow pointing to it. At the bottom, there are two buttons: "Stop Tracking" (in blue) and "Patient Summary" (in grey).

Figure 224: Stop Tracking Details

4. Select **Stop Tracking** button.

The user should be redirected to the **Tracked Patients** screen and the patient should no longer be listed as being tracked.

To see a history of patient's tracking, the user could select the **Tracking History** tab, as presented in section Tracking History.

# Glossary

## Glossary of Terms

Term	Definition
Dashboard	Menu
Estimated Delivery Date	Anticipated date the patient will deliver newborn(s).
Flagged	A patient whose health status in CPRS indicates pregnant will be flagged for tracking in MT.
Gestational Age	The age of the fetus.
Lactation	Production of breast milk.
Pregnant	A patient's health status.
Provider	Licensed Medical Practitioner
Tracking	Using the software to manage the clinical and educational tasks of a patient.
User	Person viewing or entering information into the application.

## Acronyms

Acronym	Definition
CNT	Clinical Note Template
CPRS	Computerized Patient Record System
DOB	Date Of Birth
EDD	Estimated Delivery Date
F/U	Follow-up
GA	Gestational Age
GP	Gravida Para
H&P	History and Physical
HPI	History Of Present Illness
IHE	Integrating the Healthcare Enterprise
IPV	Interpersonal Violence
L&D	Labor And Delivery
LMP	Last Menstrual Period
MCC	Maternity Care Coordinator
MCCD	Maternity Care Coordinator Document
MD	Medical Doctor
MT	Maternity Tracker
OBGYN	Obstetrics and Gynecology



PP	postpartum
ROS	Review Of Systems
SSN	Social Security Number
VA	Veterans Affairs
VHA	Veterans Health Affairs
WIC	Women, Infants and Children