## APPENDIX E Adding Group Education Documentation using Report Query and a Clinical Note Template

Last updated: August 11, 2022



We have built a query for sites to pull their number of arrivals per class named **PC Group Education Sessions ARRIVALS**.

Update the date, Type, Reason, Note and Provider (this would be the site holding the session) and Select 'Update Rule' Select 'Run Report'

roup	PC Group Education Sessions APHIVALS	
Houp Education Sessions	Paper and the set of t	or appointment is you contains choop craning change and appointment in teators contains. Obtains a setu-
roup Education Sessions ARRIVALS		
ct the current rules	No	w look to update the Rules as necessary
	8	
	New Rule	Manage Rule
	Bule Category	Appointment Update Rule Remove Rule
	Address City	
	Deceased	
	Default Insurer	
	Englisher	
	Ervoled Date	
	Ervaled Provider	
	Ethnicity	Type: Contains V Group - It Person V 0
	Family Phys.	
	File Number	Reason: Contains V Connit to Quit V 0
	Fiags	Broutland Department Straining
	Giobal Message	
	Home Language	Arrived: Vies.
	Next of Kin	
	Docupation	Bote: Contains v Bession 1
	Office Provider	O New
	Official Language	
test test	OfficialLanguage	2

## APPENDIX E Adding Group Education Documentation using Report Query and a Clinical Note Template

Last updated: August 11, 2022

An 'Alert Matches' window will appear

Select the patient(s) you would like to generate a patient handout form for.

From drop down list from 'Select Action' choose 'Create Forms' from the list of options.

Within the Create Forms window select the drop down arrow and search for the patient handout you would like to add.

6 Matche - Office Pro Office C Office C Of	Enrhdate     Terhdate     First Automatic     Select Action     Select Action     Select Action     Select Action     Trate     Select Action     Select Action     Select     Select Action     Select     Sel	F F M F M	Nome Phone           (004)         553-634           (000)	Status Unassigned Unassigned Unassigned Unassigned Unassigned Unassigned	14000111497 (2018) (2012/2018) (2012/2018) (2012/2018) (2012/2018) (2012/2018) (2012/2018) (2012/2018) (2012/2018) (2012/2018)	Apportuneit Type     Apportuneit Type     Arous-Commit to Quit     Group-Commit to Quit     Aroup-Commit to Quit	naportimet Reach 3 Session 1 9 Session 1 9
6 Matche	select Action reater Task of Participation of the select Action reater Task of Participation reater Task select Action reater Task select Action rea	F F M F F F M	Comp	urissigned Unassigned Unassigned Unassigned Unassigned	un (2022) 002292030 00229200 002000 00229200 002000 002000 0020000000000	group - Camme to Que     Group - Camme to	nparison Run Repo
6 Matche - Office PA Official LAC Office PA Office	Add Exposition     Add Sector Action     Add Sector Action     Select Action     reate Task     pply Vaccine     reate Notes     reate Forms     reate Forms     reate Forms     reate Forms     reate Forms	- W W F F M	1000) 1000) 1000) 1000) 1000) 1000) 1000) 1000) 1000) 1000) 1000) 1000) 1000) 1000) 1000) 1000 100	leted Re	102220230 002270230 002270230 002270230 002270230 002270230 002270230 002270230 002270230 002270230	Export Close     Run Con     Run Con     Intected piercing is	nparison Run Repo
6 Matche- Officie C Office C Office P Office I LC Office I LC C S S upp01 A	99 e1/3/1976 or/of/1990 or/of/1990 or/of/1980 or/of/1980 or/of/1980 or/of/1980 or/of/1980 reate Task spby Vaccine reate Tosk state of Patent State of Patent S	-	(255) 555-5555 (000) 000-000 (000)	Unassigned Unassigned Unassigned	00/29/2018 00/29/2018 00/29/2018	Group - Commit to Quit Group - Commit to Quit Group - Commit to Quit Group - Commit to Quit	Session 1 9 Session 1 9 Session 1 9 Session 1 9
6 Matche - Office Po Office Po Office I Lo Office I Lo Create For	ozios/1997 07/07/1990 Select Action reate Task upply Vaccine reate Forms reate Forms reate Forms reate forms reate of select reate forms reate forms reate forms reate forms	-	(000) 000-0000 (000)	lunassigned Unassigned leted Re	08/29/2018 08/29/2018	Group - Commit to Quit Group - Commit to Quit Export Close Run Com // Intected piercing le 22 PAP Test	Session 1 9 Sessio
6 Matche- Office Cro Office Pro A Official LC Official LC Streate For	Select Action reate Task wpby Vacine reate Notes reate Forms reate of Patient saving Plag	- -	[(000)	leted _ Re	run   Print All	Stroup - Commit to Quit  Export Close  Run Con  Han  Han  Han  Han  Han  Han  Han  H	Issession 1 9 parison Run Repo
6 Matche - : Office P A Office P C Office P C Office P C Control I A	Select Action reate Task upply Vaccine reate Forms reate Forms reate or reate or rea	- us	Comp	ieted <u>Re</u>	un Print All	Export Close Close Run Cor Close Clo	» mparison   Run Repo
Siupp01 A	et Patient Stat ssign Flag rms	us	•		×	Run Com     R	nparison Run Repo
Create For	rms				×	/ Intected piercing le	ett ear, constipation
						d an and the state of the base of	(0)
						4 removing stitches (	(2)
m					-	for sowiles left kee	e and foot
Forms						source and source and sole	
ek 🗸 🗛	eeseemante	/Dia					
- ^3	sacaamenta						
Sp	pirometry Scr	eenin	g Tool & Patier	nt Handout			
🗌 🗹 Pa	tient Hando	uts:					
BE	RN - Priority H	ome	Handout				
_	in thorag in	onno	inanoout				
_							
-							
-							
_							
n -							
n -							
in -							
		n -	n -				

Select the Provider

Check off the 'Save forms to Patients' chart box

Select 'Create Forms'

A Message window will appear

🔶 Create Forms		×
Form Commit to quit		•
Select Provider: Document, Tea	m A	▼
Print Forms		
Save Forms to Patients' Cha	rt	
Mark Result Completed	Create Forms	Cancel

Message		X
1	Finished creating forms.	
	ОК	

Select OK

## **APPENDIX E**

## Adding Group Education Documentation using Report Query and a Clinical Note Template

Last updated: August 11, 2022



An 'Alert Matches' window will appear

					Gro	up Session	5			
Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Appointment Date	Appointment Type	Appointment Reaso	n
Abdul	Paula	718828176	09/19/1980	F	(204) 555-6347	Unassigned	08/29/2018	Group - Commit to Quit	Session 1	
Armstrong	Andrew	129384399	01/27/1975	P	(000)	Ucassigned	08/29/2018	Group - Commit to Quit	Session 1	
Helberg	Simon	123548548	10/03/1965	M	(204)	Unassigned	08/29/2018	Group - Commit to Quit	Session 1	
lolie	Angelina	145865789	01/15/1976	F	(\$\$\$) \$\$\$-\$\$\$5	Unassigned	08/29/2018	Group - Commit to Quit	Session 1	
Star	Far	100000000	08/06/1997	7	(000) 000-0000	Unassigned	08/29/2018	Group - Commit to Quit	Session 1	7
Stegel	Nartin		07/07/1980	м	(000)	Unassigned	08/29/2018	Group - Commit to Quit	Session 1	1