

Instructions for Entering Clinical Encounter Data In New Innovations

Introduction: The LCME now requires that schools establish the minimum number of patient encounters necessary to achieve the learning objectives of the courses/clerkships, establish means to track those encounters, and periodically review this information and make adjustments as needed.

MUSM has contracted with New Innovations, Inc. to provide the software to track patient encounters. The software is server based and can be accessed from any internet connection. The New Innovation software package includes many functions, but patient encounter tracking is the function you will be utilizing.

MUSM is asking that you enter patient data for each encounter type listed for the clerkship. Although the minimums are set quite reasonably, we would like to know exactly how many and what types of patients our students are seeing. (in other words, please don't stop entering encounter data simply because you have met the minimum requirements.) This information will help us adjust the learning experiences to ensure that MUSM students are seeing the appropriate diagnosis to meet our curricular goals and learning objectives, which in turn will assure that MUSM graduates are highly competent in clinical medicine.

First Time Sign on Instructions:

Step: Enter this address in your web browser: <https://www.new-innov.com/Login/Login.aspx>

Step: Click on "Client Login" in the center of the page

Step: On the Client Login page, enter MERCER (all caps) and click "submit"

Step: You will now be on a page the has "Welcome to the New Innovations Residency Management Suite" at the top of the page. **Bookmark this page for the entry site!** MERCER should be in the Institution Login box.

Step: User name: first initial and last name without punctuation. For example, Jennifer Rayhill would be jrayhill

Step: Password: same thing (for now). In the example above, jrayhill
Click "login"

You should now be on a page that says: "Welcome (your name)"

Step: On the menu on the left, click on “Procedure Logger”

Step: A new page will appear with “Procedure Logger” as the header. There are 2 sections to this page. You will only need the top half, labeled “Add/View/Confirm” beside a clipboard icon. Click on “Add Procedure Logs”

Step: A page will appear that says “New Procedure Log Entry” Congratulations! This is the data entry page! Instructions to enter data are given below.

Final Steps before Logout (first time and prn thereafter):

Change your password (and please write it down where you can find it!). To do this, click on “Change Password” on the menu on the left. A screen will appear with instructions. Make your changes and click “save”.

Sign on and data entry instructions:

Step: Go to the site you bookmarked in the First Time sign on. Enter your login and Password. (If the Institution Login box is empty, enter MERCER)

Step: On the welcome page click on “Procedure Logger”, then “Add Procedure Logs”

Enter the following fields: (most are drop down boxes making the entry process fast):

Date of Procedure Log (click on the calendar and the correct date)

Group and Diagnosis: The left hand box that says “all diagnosis” is the diagnostic group. Open the box and select a group from the pull-down

The right hand box will list the diagnosis within that group on a pull-down list. Click on the diagnosis for the appropriate clerkship.

(Example: you are rotating on Family Practice and have just seen a patient with hypertension. Select the “Cardiovascular” diagnosis group, and “FP-Hypertension”. Do NOT select IM hypertension, unless you are on the IM clerkship.

Also, you may choose “Other” for representing a non-required diagnoses.)

Ignore the ICD Code boxes

Resident Status: Select “Class of 2010” **Location of Procedure:** You have 2 choices

– Inpatient or Outpatient **Role in Procedure:** Select Level I, II, or III (see description

below). Dr. House

considers your experiences at Level I. **Patient ID:** Enter patient’s

initials and year of birth, ie, “jr1951”. **Patient Type:** Real or

Simulated **Patient Gender:** Male or Female **Patient Age:**

Enter number for adults and children at or above 2 years. (i.e. 47) Enter months for children between ages 1 and 24 months (i.e 18 m) Enter weeks for children between 1 and 4 weeks (i.e 3 w) Enter days for children less than 1 week (i.e. 4 d)

Ethnicity: several choices – choose the best descriptor

Payer Status: several choices – choose the best descriptor

To Save the Entry:

“Click Save and Retain” to keep the screen unchanged (handy for multiple entries with minor changes) A dialogue box will alert you that the data was saved. Note: **(use for 2nd diagnosis)**

Or “Save and Clear” to save the data and clear the screen Or

“View Log Listing” to view your patient log (described below)

To view your log: Step: Sign in as above for data entry. On the Welcome page click on “Procedure Logger”, then “View Procedure Logs”

Or

Click on “View Log Listing” at the lower right of the New Procedure Log Entry page.

On the Listing of Procedure Logs page, you can modify your view and search your log by dates (which will allow searching by clerkship, if you know the dates)

“Role in Procedure” descriptors:

The following are provided as suggestions for determining your role in the procedure. Please consult with your clerkship director for specific questions and/or recommendations.

Level I: Perform under supervision

Examples: Perform, document appropriate H&P (including TX plan)
Participate in daily inpatient care, including exam/progress note Perform sensitive exam with assistance/supervision Participate in trauma resuscitation (hands on eval/tx) Wound closure under supervision Perform procedure under supervision Perform counseling service under supervision

Level II: Assist with evaluation, treatment or procedure

Examples: Scrub in on surgical case Provide sterile or non-sterile assistance with procedure Perform a portion of an evaluation Perform or assist in procedure on trauma pt, but not in total care Gown for and assist with delivery procedure (but not perform

actual delivery)

Level III: Observe treatment or procedure

Examples: Directly observe procedure and participate in discussions re same Observe Eval and participate in discussion re the findings Observe treatment/therapy and participate in discussion re same

Handheld Instructions:

If you encounter any questions or problems during the installation, please reference the "Help" section of the New Innovations Web interface ("PDA -> Help"). There is a section for both Palm and Pocket PC.

1. Once you are logged into the New Innovations Website, review the menu down the left side of the screen.
2. Click PDA
3. Click appropriate platform. (PalmOS or PocketPC)
4. Click "Download Apps"
5. "Install" button should appear in right column.
6. Click "Install" button
7. If "Java Warning" box appears, click "Allow" or "Grant"
8. The installer should begin.
9. Click "Next"
10. Click "Install"
11. Click "Finish"
12. Conduit manager box should open, enter login credentials and press "Login"
13. Verify "Medical Students" department is set and your proper handheld username is set.
14. This should complete the installation, your handheld should be updated on the next sync.

Within Palm:

1. Locate and click the "NI Suite" icon.
2. Select "I want to...Enter my procedures" from the drop down list.
3. Fully complete your information and click "Save"
4. Your next sync should send the record to the online database.