


EPR Core and Clinical Documentation Foundation

Procedure Note

Quick Reference Guide

This **Quick Reference Guide (QRG)** provides step-by-step instructions on how to complete the **Procedure Note**, a structured electronic document used by care providers to document care and assessment for a patient undergoing a procedure. This note can be used by all disciplines, and a new **Procedure Note** should be initiated for each procedure.

How to Document in a Procedure Note

<p>A. Place the Patient into Context and Open the Document</p>	<ul style="list-style-type: none"> Find the patient on your Status Board, Patient List or use the Find Patient functionality and place the patient visit into context. Click on the Enter Document icon  on the Main Toolbar and select the Procedure Note document.
<p>B. Documenting on a Procedure Note</p>	<ul style="list-style-type: none"> Select the Procedure Name using the drop-down <div data-bbox="469 951 1333 1352" style="border: 1px solid gray; padding: 5px;"> <p>Procedure</p> <p>Procedure Name</p> <ul style="list-style-type: none"> Anoscopy Arterial Puncture/Cannulation Arthrocentesis Cardioversion Central Line Insertion Chest Tube Dental Block Epidural Blood Patch </div> <ul style="list-style-type: none"> Once a procedure is selected, the note will open with the applicable content. Each procedure has its own specific and relevant data fields and free-text areas available for the clinician to use. The clinician decides what sections to complete.
<p>C. If the Procedure in Question is not available</p>	<ul style="list-style-type: none"> Select the Procedure Name using the drop-down and scroll to the bottom to find Other (specify procedure below). Free text the Procedure Name and utilize the generic template.

Procedure Note

Quick Reference Guide

Procedure	
Procedure Name	Other (specify below) <input type="text"/>
Procedure Name	<input type="text"/>
TIME OUT	<input type="radio"/> Patient's name, DOB, procedure, and correct site confirmed.
Procedure Date/Time	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Informed Consent	<input type="radio"/> verbal consent <input type="radio"/> written consent <input type="radio"/> emergent procedure, consent implied
Procedure Performed By	<input type="radio"/> myself <input type="radio"/> resident <input type="radio"/> other
Procedure Assisted By	<input type="radio"/> myself <input type="radio"/> resident <input type="radio"/> other
Indications	<input type="text"/>
Patient Position	<input type="checkbox"/> lateral recumbent <input type="checkbox"/> lithotomy <input type="checkbox"/> prone <input type="checkbox"/> (semi) fowlers <input type="checkbox"/> sitting <input type="checkbox"/> supine
Anatomic Location	<input type="checkbox"/> left <input type="checkbox"/> right <input type="checkbox"/> upper <input type="checkbox"/> lower
Site Prep	<input type="checkbox"/> chlorhexidine <input type="checkbox"/> hibiclens <input type="checkbox"/> normal saline <input type="checkbox"/> povidone iodine <input type="checkbox"/> shur clens <input type="checkbox"/> sterile water
Local Anesthesia	<input type="checkbox"/> 1% lidocaine <input type="checkbox"/> 2% lidocaine <input type="checkbox"/> 3% lidocaine <input type="checkbox"/> with epinephrine <input type="checkbox"/> topical anesthetic <input type="checkbox"/> bupivacaine <input type="checkbox"/> EMLA cream <input type="checkbox"/> ethyl chloride <input type="checkbox"/> marcaine <input type="checkbox"/> see MAR for additional details <input type="checkbox"/> no anesthesia administered
Procedural Sedation Used	<input type="radio"/> yes... <input type="radio"/> no...
General Procedure Details	<input type="text"/>
Complications	<input type="checkbox"/> yes <input type="checkbox"/> procedure aborted
EBL	<input type="radio"/> minimal
Tolerance	<input type="checkbox"/> patient tolerated procedure well <input type="checkbox"/> reversal agents used



Tip: Every procedure template (including Other) has a **Procedure Additional Details** that allows free text. Use of **Acronym Expansion** and **NoteCetera** is available in any free-text area.