



## Policy & Procedure

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Owner: Graduate Medical Education	Authorized by: Graduate Medical Education Committee
<b>Student Documentation in the EMR</b>	

### APPLICATION

All Samaritan Health Services (“SHS”) teaching providers and visiting medical and advanced practice students.

### POLICY

SHS teaching providers to include residents and fellows will adhere to the rules outlined by the Centers for Medicare and Medicaid Services (CMS) related to student documentation regulations and billing processes.

### PROCEDURE

#### DEFINITIONS:

1. Medical and Advanced Practice Students: Students involved in advanced clinical education: e.g. Medical ,Nurse Practitioner; Physician Assistant; Certified Nurse Anesthetist; Certified Nurse Midwife
2. E/M Service: Evaluation and Management Service
3. EMR: Electronic Medical Record

#### IMPLEMENTATION:

Any contribution and participation of a student (as defined under Procedure) to the performance of a billable service (other than the review of systems and/or past family/social history which are not separately billable, but are taken as part of an E/M service) must be performed in the physical presence of a teaching physician or physical presence of a resident in a service meeting the requirements for teaching physician billing.

Students may document services in the EMR. However, the teaching physician must verify in the EMR all student documentation or findings, including history, physical exam and/or medical decision making. The teaching physician must personally perform (or re-perform) the physical exam and medical decision making activities of the E/M service being billed, but may verify any student documentation of them in the medical record, rather than re-documenting this work.

- The following attestation must be used to document the encounter in the EMR: “I have seen this patient with the student. The student documented the visit and I have edited and verified the history, physical examination, assessment and plan. The examination and medical decision making was performed by me.” The smart phrase for the attestation is .medstudatt or .stuatt

## Patient Orders

Medical and advanced practice students may write patient orders following these guidelines:

- A. While under the direct supervision of the approved teaching physician. The preceptor or attending physician oversees the student while the order is being written
- B. All student orders are automatically pended and must be reviewed, revised and cosigned.
- C. Students may NOT give telephone or verbal orders to hospital staff under any circumstance.
- D. Students may NOT obtain informed consent from patients.
- E. Students may NOT function independently or be considered a substitute for a licensed physician in any area where care is delivered, including surgery and/or in labor delivery.
- F. All students must follow pertinent policies when documenting, including the use of acceptable abbreviations and compliance with the National Patient Safety Goals.

Outpatient workflow for utilization of student notes:

- A. Students may document any note type within a patient encounter
- B. Residents or attending physicians/provider will automatically take ownership of the student note when they join and edit it, utilizing the "Make me the author" functionality.
- C. Supervising resident or attending/provider will edit and attest the note using the above mentioned attestation
- D. Student signature must be maintained within the note

Inpatient workflow for utilization of student notes:

- A. Students may write the following note types:
  - Progress Notes
  - Consults
  - H&P
  - Discharge Summaries
  - Student
- B. Students are able to sign only designated, "Student" note types, but are restricted to pending all other note types. All pended notes are found in the incomplete tab in the notes activity. Pended notes will display a banner indicating the note is written by a student and has not been reviewed by a medical provider.

**WARNING: THIS IS AN UNSIGNED STUDENT NOTE**  
**This note has not been reviewed by a licensed medical provider**

- C. Residents or attending physicians/providers may utilize the student note by selecting the incomplete note in the notes activity and hitting Edit. Pending, Sharing or Signing this edited note will make the supervising resident or attending/provider the new author of the note.
- D. Resident and attending may edit the note, but must add the student attestation SmartPhrase (.MEDSTUATT or .STUATT) before signing the note.

- E. Student signature must be maintained within the note
- F. The note will reside under the supervising resident or attending name
- G. Incomplete notes not utilized by the resident or attending should be deleted by either the student, resident or attending within 72 hours.

#### REFERENCES

- E. CMS Guidelines for Teaching Physicians, Interns and Residents

#### REVIEW/REVISION HISTORY

<b>Date of Revision</b>	<b>Revision #</b>	<b>Revision / Review</b>	<b>Revision Description</b>	<b>Collaborated With (i.e. Standardization Committee, VP's, Quality, Risk)</b>
04/10/2009	0	New		Graduate Medical Education Committee (GMEC)
02/15/2012	1	Revision	Updated format	GMEC
01/16/2013		Review	N/A	GMEC
11/20/2013	2	Revision	Policy updates	GMEC
06/18/2014		Review	N/A	GMEC
07/18/2015		Review	N/A	GMEC
03/21/2018	3	Revision	Updated to reflect CMS change	GMEC/Compliance
04/18/2018	4	Revision	Attestation change	GMEC/Compliance/HIM
06/20/2018	5	Revision	Added workflows	GMEC/Informatics
07/18/2018		Review	Reviewed with prior revisions	GMEC