**Health COACH Notes**

**Policy & Procedure**

After triage is complete and the patient’s chart has been fully updated, the health COACH is responsible for starting the clinic visit note. The COACH will record the following information in the note:

* Date of service
* Patient name, DOB, age
* Chief complaint
* Subjective- HPI, ROS
* Objective- vital signs, exam performed by provider
* Assessment
* Plan

The health COACH will scribe the office visit note as outlined:

1. Open the Centriq clinic module by clicking the Clinic tab
2. Click on Work Center app
3. Click on the patient’s name
4. Hover over the favorites list and click Notes
5. Choose COACH note from the Templates list
6. Date of service, patient name, DOB, age, chief complaint, and vital signs will auto populate from the patient’s chart and recent triage
7. Complete the chief complaint by explaining the patient’s present illness and reason for visit using the patient’s words
   1. The first sentence of the HPI in the COACH note template reads “Patient presents for chronic care management and lab review.” If the patient is in the clinic did not have lab drawn for review then remove “and lab review” from the end of the sentence so that it reads “Patient presents for chronic care management.”
8. Complete the ROS by asking if the patient is experiencing any fever, chills, shortness of breath, or chest pain
   1. If patient answers “no” to all the above review of systems, then leave template as is
   2. If patient answers “yes” to any of the above review of systems, then change “Denies” to “POSITIVE for”
   3. Differentiate shortness of breath with rest and/or activity
   4. Differentiate chest pain with rest and/or activity
9. Click Draft to save as a draft
10. You may complete the HPI and document the findings of the medical exam as stated by the clinician.
11. Wait for provider to examine the patient before finishing the rest of the note- objective, assessment, and plan. Add problem and update condition status as directed by clinician. Add labs and clinician comments as directed by clinician.
12. Include the following statement at the end of the note:
    1. Patient seen and examined by [provider]
    2. Note scribed by [name, Health COACH]
13. Add updated medication list to very bottom of the note by clicking Home Meds: Chart on the left side panel
14. Click Draft to save as a draft
    1. Provider will ultimately review, edit, and save the note