

University of Toledo Ambulatory Services Guideline

Title: Advance Medical Directives

Purpose: This guideline outlines the procedures and documentation for Advance Directives

Related Policies: 3364-100-10-12 Advance Medical Directives
3364-100-60-02 Patient Rights and Responsibilities

Accountability: It is the responsibility of the staff member who performs the Check In process when a NEW patient arrives for their appointment. A clinic staff member who is presented with documentation regarding Advance Directives outside of a clinic visit is also responsible to follow the guideline. All staff need to be able to locate the most up to date Advance Directive for the patient.

1. NEW Patient arrives for appointment. During the Check In process registration staff will ask new adult patients or their guardians “Do you have a living will or advanced directives?”
 - Document the correct response when prompted
 - Yes-copy requested
 - No-Info provided
 - No-no info wanted
 - Unable to obtain
 - Yes-on file at UTMC
 - Enter Date Verified of Advance Directive when prompted to assure ongoing follow up.
 - If the patient states that he/she has an Advance Directive but did not bring it:
 1. Check In Registration staff will ask the patient/family to bring a copy with them at their next visit.
 2. If a patient requests information on Advance Directives, the Check In staff will provide information to patient/family available in Athena>Chart>Facesheet>Print forms> print Advance Directives
2. When the patient brings a copy of an Advance Directive, a copy is to be scanned and placed in the patient’s Athena chart and a copy sent to HIM to be filed in Horizon Patient Folder Advance Directives.
 - Label the copy with Patient Name and Medical Record number. Scan into Athena-Admin Documents>Admin Document-Advanced Directives
 - Export Advance Directives from Athena to HIM:
 - Facesheet>Chart Export button (located on top right side of screen)
 - Click on + next to Admin Document
 - Click on Admin-Advanced Directives
 - Once highlighted, move to right hand box by middle arrow and hit Create
 - Next screen: Method>Athena Fax Send to: Medical Records Fax: (419)383-6224
 - Attention: Senior Team Leader click Submit radio button is chosen> hit Save

3. To view the patients most current Advance Directive you will need to go to the Clinical Portal. Go to Clinical Portal>Select Patient>Medical Record Tab>Advance Directives on left side of screen.

Approved 7/15 by: Susan Van Camp RN, CRRN Ambulatory Performance Improvement & Staff Development Dir.
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Reviewed: