Managing Carry Forward Data

Carry Forward

Carry forward is the process by which data are copied from previous eScribe reports into a new report entry form. This is used most frequently for Office Notes but can be implemented for any type of report.

Each account identifies which fields (in which reports) it wants carried forward into a new report. These can be fields that show little change over time (e.g., height) or a value copied into a new note to be reviewed at each visit (e.g., ICD-9 codes in the Problem List; smoking status). Data recorded new at each visit (e.g., blood pressure) are not typically carried forward.

Automatic Carry Forward

eScribe posts a notification of all carried forward data when a new report is created. Figure 1 shows the notification link at the top of a new office note.
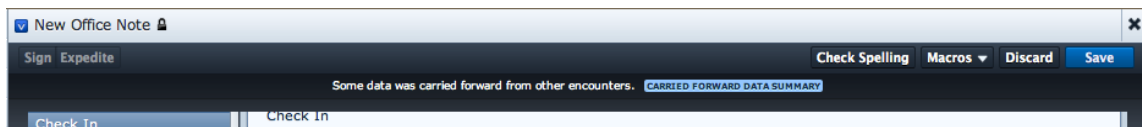

Figure 1: Carried Forward Link

Click on CARRIED FORWARD DATA SUMMARY to open the Carried Forward Data Summary, a list of data that were successfully copied into the new report. Figure 2 shows an example of a Carried Forward Data Summary.

Figure 2: Carried Forward Data Summary

The Carried Forward Data Summary identifies the:
• name of the field from which data was carried forward
• type of report (usually Office Note) and the date of the report from which the data was carried forward
• actual carried forward data

In Figure 2, three risk factors (Diabetes mellitus, Hypertension, and Obesity) were carried forward from the RISK_FIELD of the 09/08/2011 Office Note. Three ICD-9 codes were carried forward from the ICD9_Code field (this is the ICD-9/SNOMED field in the Assessment section of the Office Note). Three ICD-9 codes were carried forward from the ICD9_CODE_PROBLEM field (this is the Problem field in the Problem List section of the Office Note).

Figure 2 demonstrates a carry forward scenario that does not require any user action. It simply reports what data were successfully copied into the new Office Note.

Always review the Carried Forward Data Summary. You can always modify a value directly in the report after it is copied to the new report.

Carry Forward Requiring User Intervention

When there are mismatches between report fields or choice list versions, eScribe is unable to copy data automatically from a previous report to a new report. In these cases, the user creating the new report receives an Alert when the new report opens. Data entry on the Office Note is prevented until all issues are acknowledged and/or resolved. There are two types of alerts:

• CARRY FORWARD PROHIBITED ALERT: Data from a previous report could not be carried forward because the specific field or value in a field in the earlier report is not available in the new report. The user must then consult with the physician to identify if the data can be ignored, if another choice can be selected in the field, or if the data must be entered manually in some other appropriate field in the new report. For example, a previous Office Note had a field that had two choices: Normal or Abnormal. But in the new Office Note, the choice list in that field has different choices: Unremarkable, Remarkable, Borderline. Neither value from the previous office note can be copied into the new Office Note. The user must manually select a value during data entry.
• CARRY FORWARD REQUIRING USER ACTION ALERT: Data from a previous report cannot be carried forward automatically because there is an inconsistency between versions that requires user analysis and adjudication.

In this case, eScribe will present a value for the user to approve or deny. For example, a field in an earlier report had two choices: Good and Bad. The same field in the new report has two choices: Good and Excellent. If the value in the earlier report was "Good," the user will be asked to approve or deny "Good" as the carry forward value.

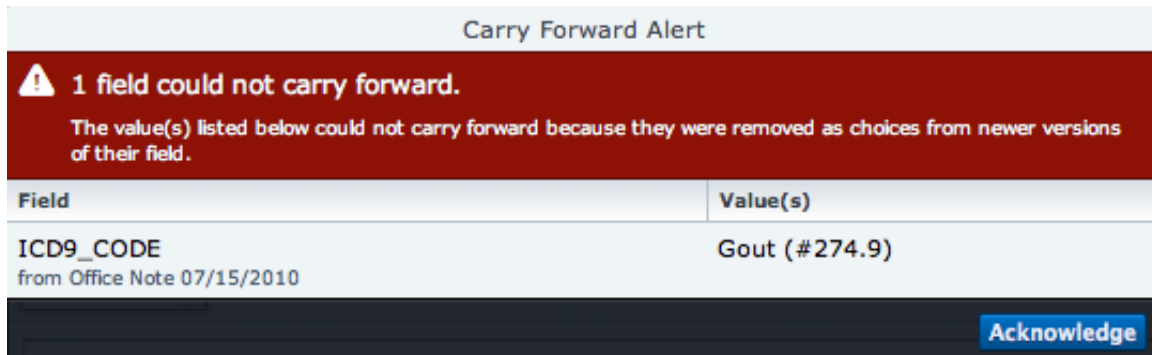## Process A Carry Forward Prohibited Alert

Figure 3: Carry Forward Alert – Carry Forward Prohibited

Figure 3 illustrates a code that is prohibited from carrying forward because the value is no longer included in the choice list for this field. Gout (#274.9) is not a valid value in the ICD9_Code field (in the Assessment section) in the new office note. This value cannot be carried forward.

The only available action is to click the Acknowledge button to close the alert. If you want to add an ICD-9 code for Gout, navigate to the Assessment section of the new Office Note and manually add the correct code.

Prohibited Carry Forward Alerts appear before alerts requiring user action.

Process A Carry Forward Requiring User Action Alert

Figure 4: Carry Forward Alert – Action Required

Figure 4 illustrates a Carry Forward Alert for 4 separate fields. These values could not be carried forward automatically because there is a new version of the choice list for each field. The user must approve or deny the carry forward value for each field.

Review each value in the alert and click the checkmark to approve the presented value (it turns green) or click the X (it turns red) to deny the presented value. Repeat this for each field/value in the list. (Note: Click again to de-select.)

When all fields in the list are reviewed and adjudicated, click the Continue button. (Note: The Continued button is disabled until all fields have a checkmark or an X selected). Fields that were approved remain in the Carry Forward Data Summary (which opens automatically for final review; see Figure 2); those that were denied are deleted.