

**MILLE LACS BAND OF OJIBWE  
HEALTH AND HUMAN SERVICES POLICY & PROCEDURE**

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**Department:** Administration Services-Health  
Information Management

**Policy Number:** HHS-ADM-HIM 3421

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**Policy Title:** RPMS Electronic Health Record (EHR) Template Use & Design

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**Attachments:**

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**Revision History:** 12/12


**Revised by/Date:** EHR Committee 11/2019

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**Approved by:**   
Jan Manary, Executive Director of HHS

**Date:** 12-2-2019

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**Approved by:**   
Nicole Anderson, Commissioner of HHS

**Date:** 12-3-2019

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**POLICY STATEMENT:** Mille Lacs Band Health and Human Services, recognize the importance of establishing a process for how templates and template dialogues will be reviewed and approved for use in the EHR. Template designs should be limited and structured either around specialty clinics, and clinic type, not centered on individual provider wishes. Templates need to be able to be structured, categorized, and defined so when reports are needed the information sought can be printed around a designated template design, in order to have the most accurate data possible.

Existing templates which have already been tested for quality and quantity of documentation are available on the IHS EHR website at [www.ihs.gov](http://www.ihs.gov).

**PURPOSE:** The purpose of this policy is to establish consistency with use and design of templates used within the Electronic Health Record (EHR).

**PROCEDURE:** All templates are to be reviewed by the appropriate committee for review and approval prior to the template being entered into the EHR. Consideration of the following should be given when creating new templates.

1. The templates that are submitted to the committee for review should have been tested by the requesting EHR users in the “my template” area. Demo patients should be used during the testing phase. Testing is the responsibility of the Clinical Application Coordinator (CAC) or the designated requestor.
2. Each template reviewer will apply the template approval criteria, answer the template approval questions and submit these to the HIM Review Committee.
3. Once the template is approved, it will be placed in the “shared” directory.
4. Minor template revisions do not need to be approved by the HIM Review Committee. This includes changes to check boxes and structural items. Content changes, however, need to be reviewed and approved by the HIM Review Committee.
  - a. Major revisions: affect form or function of the template; requires committee approval
  - b. Minor revisions: spelling, grammar, spacing issues; does not require committee approval

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**Template Approval Criteria:**

- Template Name
- Submitted by
- Written justification for this template/form is attached?
- Billing/Coding: Does this comply with the coding requirements?
- Uniformity of Content: Does this note follow the (Subjective, Objective, Assessment, Plan) SOAP format?
- Redundancy: Is there another template that addresses the same content? If so, why are you adding a separate template?
- General Comments:

<b>Internal and/or External References</b>	
<b>Compliance - Posting Date</b>	12/3/2019
<b>Replaces – Policy Number</b>	HHS-4121-HIM
<b>Next Review - Due Date</b>	12/3/2022