



# Defense Health Agency

## PROCEDURAL INSTRUCTION

NUMBER 6025.06  
May 16, 2018

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Healthcare Operations

SUBJECT: Standardized Templates for Primary Care Clinical Encounter Documentation

References: See Enclosure 1.

1. **PURPOSE.** This Defense Health Agency-Procedural Instruction (DHA-PI), based on the authority of References (a) and (b), and in accordance with the guidance of References (c) through (d), establishes the Defense Health Agency's (DHA) procedures for all DoD Medical Treatment Facilities (MTFs) providing healthcare services in the direct care system. In support of direct care system MTFs delivering a standard scope of primary care to all beneficiaries, clinicians will use standardized electronic entry forms for electronic health record systems. This is in compliance with Reference (d). Standardized templates supporting clinical practice guidelines, care pathways, and standardized workflow will be used for documenting all outpatient face-to-face encounters in primary care. Tri-Service Workflow (TSWF) adult and pediatric CORE forms will be used in Armed Forces Health Longitudinal Technology Application (AHLTA), and the equivalent forms within Military Health System (MHS) GENESIS.

2. **APPLICABILITY.** This DHA-PI applies to:

a. OSD (excluding the Coast Guard), the Military Departments, the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the DoD, the Defense Agencies, the DoD Field Activities, and all other organizational entities within the DoD (referred to collectively in this DHA-PI as the "DoD Components").

b. DoD MTFs, DoD clinical teams, and practitioners who are involved in the delivery of primary care services to eligible beneficiaries.

3. **POLICY IMPLEMENTATION.** It is DHA's instruction, pursuant to References (a) through (d), that AHLTA TSWF forms and the MHS GENESIS equivalent will be used to screen patients and document all MTF primary care face-to-face encounters including, but not

limited to, the use of CORE forms, clinical practice guidelines, and care pathways.

4. RESPONSIBILITIES. See Enclosure 2.

5. PROCEDURES. See Enclosure 3.

6. RELEASABILITY. **Cleared for public release.** This DHA-PI is available on the Internet from the Health.mil site at: [www.health.mil/DHAPublications](http://www.health.mil/DHAPublications).

7. EFFECTIVE DATE. This DHA-PI:

a. Is effective upon signature.

b. Will expire 10 years from the date of signature if it has not been reissued or cancelled before this date in accordance with DHA-PI 5025.01 (Reference (c)).



R. C. BONO  
VADM, MC, USN  
Director

Enclosures

1. References
2. Responsibilities
3. Procedures

Glossary

ENCLOSURE 1

REFERENCES

- (a) DoD Directive 5136.01, “Assistant Secretary of Defense for Health Affairs (ASD(HA)),” September 30, 2013, as amended
- (b) DoD Directive 5136.13, “Defense Health Agency (DHA),” September 30, 2013
- (c) DHA-Procedural Instruction 5025.01, “Publication System,” August 21, 2015
- (d) Health Affairs Policy Memorandum 09-015, “Implementation of the ‘Patient-Centered Medical Home’ Model of Primary Care in MTFs,” September 18, 2009

ENCLOSURE 2

RESPONSIBILITIES

1. DIRECTOR, DHA. The Director, DHA, will:
  - a. Assess the utilization of AHLTA TSWF forms and the MHS GENESIS equivalent.
  - b. Monitor compliance data on MTF primary care AHLTA TSWF forms and MHS GENESIS equivalent use in MTF primary care encounters.
  
2. DEPUTY ASSISTANT DIRECTOR, DHA HEALTHCARE OPERATIONS (HCO). The Deputy Assistant Director, DHA HCO, will:
  - a. Oversee the development of data collection, tracking, and analysis of AHLTA TSWF and MHS GENESIS equivalent by the DHA's HCO.
  - b. Ensure the availability of standardization products and content for AHLTA TSWF and MHS GENESIS equivalent.
  - c. Assess the utilization of AHLTA TSWF and the MHS GENESIS equivalent.
  - d. Establish and maintain a feedback mechanism on modifications to AHLTA TSWF forms and the MHS GENESIS equivalent for MTF primary care staff.
  - e. Identify and appoint a subject matter expert to participate as the Chair, TSWF Working Group (WG).
  
3. THE SECRETARIES OF THE MILITARY DEPARTMENTS. The Secretaries of the Military Departments will ensure that the Surgeons General of the Military Departments will identify and appoint a Service subject matter expert to participate on the DHA TSWF WG.

ENCLOSURE 3

PROCEDURES

1. OVERVIEW. AHLTA TSWF forms are standardized workflow and documentation platforms used in the direct care system's outpatient electronic health records. TSWF forms support an efficient team-based workflow, standard screening, and clinical processes in the Patient-Centered Medical Home (PCMH). The PCMH is the direct care system's model of primary care service delivery. Primary care includes family medicine; internal medicine; pediatrics; adolescent medicine; general primary care; trainee health and student clinics; operational medicine; executive medicine; aviation/flight medicine; women's health clinics and ancillary providers integrated into the primary care team (e.g., clinical pharmacists and behavioral health). The PCMH is an evidence-based model of care built on national principles including: a "whole person" view of the patient; a focus on prevention, quality and safety; coordinated and integrated care; enhanced access; and payment reform. The TSWF enables standardized integration of evidence-based clinical decision support tools, accreditation standards, and clinical preventive service recommendations into PCMH encounters. The benefits of this standardization include better healthcare quality and safety for the patient through consistent and comprehensive documentation, enhanced clarity and safety of communication, and improved monitoring and analysis of clinical data. Approval of AHLTA TSWF and MHS GENESIS equivalent content standards falls under the Tri-Service PCMH Advisory Board which is organized under the Patient Centered Care Operations Board.

2. TIMELINE. The use of TSWF forms to screen and document face-to-face primary care encounters or virtual encounters scheduled in lieu of face-to-face encounters with providers in AHLTA, or the MHS GENESIS equivalent, is effective immediately.

3. DHA TSWF WG

a. The DHA TSWF WG will:

(1) Be comprised of four voting members; one each from DHA, Army, Navy, and the Air Force. Other Ad hoc members may attend the DHA TSWF WG as required.

(2) Collect utilization data centrally for the AHLTA TSWF and the MHS GENESIS equivalent, and report compliance quarterly to the Tri-Service PCMH Advisory Board.

b. The DHA TSWF WG will provide recommendations for AHLTA TSWF and the MHS GENESIS equivalent content approval to the Tri-Service PCMH Advisory Board.

c. Final approval of content and workflow standardization products for AHLTA TSWF and MHS GENESIS equivalent, and publications pertaining to the execution of all aspects of primary care in AHLTA and MHS GENESIS, fall under the PCMH Advisory Board or its successor organization.

d. The DHA TSWF WG will present requirements necessitating funding to the Clinical Portfolio Management Board, or its successor organization, for approval.

#### 4. ACTIVITIES

a. The DHA TSWF WG will:

(1) Prioritize TSWF standardization products for AHLTA and MHS GENESIS development and implementation.

(2) Develop and field clinical workflow solutions, support standardized workflows, and integrate evidence-based medicine into all MHS primary care delivery and documentation processes.

(3) Collect and analyze TSWF form compliance and outcome data and provide to Tri-Service PCMH Advisory Board Service leads for dissemination to MTFs.

(4) Coordinate training for MTF primary care clinics as requested by Tri-Service PCMH Advisory Board Service leads.

b. The Services will use compliance data provided by the DHA TSWF WG to monitor and address compliance with the use of AHLTA TSWF and the MHS GENESIS equivalent forms to document screening of face-to-face primary care encounters.

c. The Director, DHA, with support of the Services, will ensure availability of standard form content for AHLTA TSWF and MHS GENESIS equivalent.

d. The PCMH Advisory Board is responsible for specific TSWF form content; use of parameters; screening and administrative standards; compliance requirements; and all measures thereof. This responsibility is applicable to both AHLTA and MHS GENESIS.

e. All DHA Interim Procedures Memoranda, DHA-PIs, Procedures Manuals, and DoD Issuances establishing primary care screening and documentation standards will be monitored and enforced by the PCMH Advisory Board.

## GLOSSARY

### PART I. ABBREVIATIONS AND ACRONYMS

AHLTA	Armed Forces Health Longitudinal Technology Application
DHA	Defense Health Agency
DHA-PI	Defense Health Agency-Procedural Instruction
HCO	Healthcare Operations
MHS	Military Health System
MTF	Medical Treatment Facility
PCMH	Patient-Centered Medical Home
TSWF	Tri-Service Workflow
WG	Working Group

### PART II. DEFINITIONS

care pathways. A documented sequence of clinical interventions, placed in an appropriate timeframe, written and agreed to by a multidisciplinary team. They help a patient with a specific condition or diagnosis move progressively through a clinical experience to a desired outcome. Care pathways incorporate patient outcomes measurement at every patient touch point in the pathway, with a consistent feedback loop to providers. Care pathways measure and incorporate warranted deviations from the pathway at each patient touch point, based on data collected and analyzed.

clinical practice guidelines. Systematically developed statements to assist practitioners with appropriate health care for specific, generalized circumstances. They include recommendations, intended to optimize patient care, that are informed by a systematic review of evidence and an assessment of the benefits and harms of alternative care options.

clinical teams and practitioners. All members of the team involved in patient care delivery in the clinic, including but not limited to primary care managers, nurses, medical assistants and their active duty military equivalent(s), pharmacists, physical therapists, and internal behavioral health consultants.

direct care. Services that are delivered at MTFs to include those on and off of military installations.

MTF. A facility established for the purpose of furnishing medical and/or dental care to eligible

individuals.

outpatient face-to-face encounters. Includes a patient seen in the MTF clinic by their primary care manager and telehealth appointments.

primary care. Services delivered in MTFs where patients are typically enrolled to a primary care manager (e.g., physician assistant, nurse practitioner, family medicine physician, internal medicine physician, and pediatric physician) who is designated as the patient's primary medical provider.