SELF-GUIDED PRACTICE WORKBOOK [N51-A] CST Transformational Learning

WORKBOOK TITLE: Allied Health: General





TABLE OF CONTENTS

•	SELE-GUIDED PRACTICE WORKBOOK	3
•	Using the Train Domain	4
•	PATIENT SCENARIO 1 – Patient List	5
	Activity 1.1 – Set Up a Location Patient List	6
•	PATIENT SCENARIO 2 – Multi-Patient Task List	12
	Activity 2.1 – Set up your view of the Multi-Patient Task List	13
	Activity 2.2 – Review MPTL functionality	18
	 Activity 2.3 – Review Patient Tasks 	.20
	 Activity 2.4 – Document a Patient Task as Complete 	
•	PATIENT SCENARIO 3 – Patient Chart Overview	24
	Activity 3.1 – Review Patient Information	25
	Activity 3.2 – Review Documentation	
	Activity 3.3 – Review Results Using Results Review	29
	 Activity 3.4 – Become familiar with the SPTL 	32
	Activity 3.5 – Review Allergies	35
•	PATIENT SCENARIO 4 – Orders	36
	Activity 4.1 – Review Orders Profile	37
	Activity 4.2 – Place an Order	39
	Activity 4.3 – Review Order Statuses and Details	43
	Activity 4.4 – Complete or Cancel/Discontinue an Order	44
	Activity 4.5 – Review Components of a PowerPlan	48
•	PATIENT SCENARIO 5 – Patient Management Conversation	49
	Activity 5.1 – View Person	50
	Activity 5.2 – View Encounter	52
	Activity 5.3 – Update Patient Information	54
•	PATIENT SCENARIO 6 – Handoff Tool	56
	Activity 6.1 – Navigating the Handoff Tool	57
	Activity 6.2 – Documenting Informal Team Communication	59
•	PATIENT SCENARIO 1 – Dynamic Documentation	62
	Activity 1.1 – Dynamic Documentation	63
	Activity 2.2 - Documenting a Therapeutic Note	69
	End Book One	72



SELF-GUIDED PRACTICE WORKBOOK

Duration	4 hours
Before getting started	 Sign the attendance roster (this will ensure you get paid to attend the session) Put your cell phones on silent mode
Session Expectations	This is a self-paced learning session
	A 15 min break time will be provided. You can take this break at any time during the session
	The workbook provides a compilation of different scenarios that are applicable to your work setting
	Work through different learning activities at your own pace
Key Learning Review	At the end of the session, you will be required to complete a Key Learning Review
	This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios



Using the Train Domain

You will be using the Train domain to complete activities in this workbook. It has been designed to match the actual Clinical Information System (CIS) as closely as possible.

Please note:

- Scenarios and their activities demonstrate the CIS functionality, not necessarily the actual workflow
- An attempt has been made to ensure scenarios are as clinically accurate as possible. However, many disciplines are represented by Allied Health. Some scenarios and discipline-specific functionality may not align perfectly with your role
- Some clinical scenario details have been simplified for training purposes
- Some screenshots may not be identical to what is seen on your screen and are meant to demonstrate an approximate view
- Follow all steps to be able to complete activities
- If you have difficulty, get the attention of the instructor (e.g. raise your hand or make eye contact) and they can attend to you
- Ask for assistance whenever needed



PATIENT SCENARIO 1 – Patient List

Learning Objectives

At the end of this Scenario, you will be able to:

- Review how to create a Departmental View list
- Create a Location Patient List
- Create a Custom Patient List
- Find patients on your Location Patient List and move them onto your Custom Patient List

SCENARIO

You arrive at the unit want to see which patients you will be caring for today. You begin by logging in and reviewing patients that are under your care for your shift.

As an Allied Health Clinician you will be completing the following activities:

Set-up a Location Patient List

Create a Custom Patient List

1



Activity 1.1 – Set Up a Location Patient List

Once you have logged into the system you will see the Multi-Patient Task List (MPTL).

Before you can use the MPTL you will need to set-up a Patient List. A Patient List is a view of all the patients that meet a common chosen criterion. For example, some of the possible types of lists include a location list, an assignment list, or a custom list.

At the start of your first shift (or when working in a new location), you will create a Location Patient List that will consist of all patients assigned to your unit.

- 1. Select the **Patient List** from the **Toolbar** at the top of the screen.
- 2. The screen will be blank. To create a location list, click the List Maintenance icon 🥙.
- Within the Modify Patient Lists window, select New in the bottom right corner.



- 4. From the Patient List Type window select Location.
- 5. Click Next

Patient List Type 💽		
Assignment Assignment (Ancillary) Care Lean Custom Control Method Society Provider Group Query Relationship Scheduled		
Back Next Finish Cancel		el
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6. In the **Location Patient List** window, a location tree will be on the right hand side. Expand the list of locations by clicking on the **tiny plus** [+] sign next to **Locations**.

24 at	Location Patient List	• Continue 6 • Continue 6 <th>т.</th> <th></th>	т.	
	Enter a name for the list: (Limite	d to 50 characters)		
		Back Next Finish Can	cel	2

- 7. Scroll down until you find the location assigned to you. (You may need to further expand a facility to select your specific unit. To select check the box next to the unit name.
- 8. All patient lists need a name to help identify them. Location lists are automatically named for the location you select.
- 9. Click Finish

Location Patient List		— ×
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Enter a name for the list: (Limited LGH 2 East	to 50 characters) Back Next Finish 9	Cancel



- 10. In the Modify Patient Lists window select the Location list you've created.
- 11. Click the **blue arrow** icon icon to move the **Location** to the right, under **Active Lists**.
- 12. Click **OK** to return to **Patient Lists**. Your Location list should now appear.

P Modify Patient Lists			
Available lists LGH 2 East 10	Active lists:		() ()
		New OK	Cancel
		12	

🔦 Key Learning Points

- Patient List can be accessed by clicking on the Patient List icon in the Toolbar.
- You can set up a Patient List based on location.



Activity 1.2 – Create a Custom Patient List

- 1 Next, you need to create a **Custom List** that will contain only the patients that you are covering. Patients in custom Lists are added and removed manually.
 - 1. To create a **Custom List**, click the **List Maintenance** icon ²² in the **Patient List**
 - 2. Click New in the bottom right corner of the Modify Patient Lists window
 - 3. From the Patient List Type window, select Custom
 - 4. Select Next

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- 5. **The Custom Patient List** window opens. **Custom Lists** need a unique name. Type in a name for the list = *YourName_Custom* (for example Sara_Custom).
- 6. Click Finish

Custom Patient List Care Teams Locations Medical Services Relationships Admission Criteria Discharged Criteria Use Best Encounter	Care Team #1 Care Team #2 ENT
s	to 50 characters)
Enter a name for the list: (Limited	5
JohnDoe_Custom List	Back Next Finish 6



- 7. In the Modify Patient Lists window select your newly created Custom List
- 8. Click the **blue arrow** icon icon to move your **Custom List** to the right, under **Active Lists**
- 9. Click OK

ſ	Modify Patient Lists	 		X	T
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		New	ок (9	el	9

- At the beginning of a shift and with any assignment changes, you will need to add patients from your location list to your custom list. To do this:
 - 1. First, find your patient on your Location List. Right-click your patient's name.
 - 2. Hover your cursor over Add to a Patient List
 - 3. Select YourName_Custom List



- 4. Navigate to your custom list by clicking on YourName_Custom tab. The tab will be empty.
- 5. Click the **Refresh** icon it to refresh your screen. Now your patient will appear in your **Custom List**. Please ensure the patient you have just added to your custom list is the patient assigned to you today.



2 PowerChart Organizer for TestUser, RespiratoryTherapist			
Task Edit View Patient Chart Links PatientList Help			
😫 Multi-Patient Task List 🖃 Message Centre 🕌 CareCompass 🎬 Clinical Leader Organizer 🐩 Ambulatory Organizer - 🛊 Patient List 🛅 Schedule 🤐 Staff Assignment 📲 LearningLIVE 😓 🗟 QareConnect 🔞 PHSA PACS 🔞 VCH and PHC PAC	.S 🔃 MUSE 🕄 FormFast W	FI 🝦	
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Note: You can remove a patient from your custom list by selecting the patient and clicking the Remove Patient icon $\overset{\text{T}}{}$.

Key Learning Points

- You can create a Custom List that will only consist of the patients that you are caring for
 - Patients are added and removed from Custom Lists manually



PATIENT SCENARIO 2 – Multi-Patient Task List

Learning Objectives

At the end of this Scenario, you will be able to:

- Set up Multi-Patient Task List (MPTL)
- Review and complete patient tasks in MPTL
- Establish a relationship with a patient

SCENARIO

You will use the **Patient List** and **Multi-Patient Task List** (**MPTL**) to identify your patients and help organize your day.

As an Allied Health Clinician, you will complete the following activities:

- Set up your view of the Multi-Patient Task List
- Review MPTL functionality
 - Review patient tasks
 - Document a patient task as complete



Activity 2.1 – Set up your view of the Multi-Patient Task List

As an Allied Health Clinician, the first page you saw upon logging into the Clinical Information System (CIS) was the **Multi-Patient Task List (MPTL).** Navigate there now by clicking on the Multi-Patient Task List button on the toolbar.

The **MPTL** displays specific tasks for multiple patients. Tasks are activities that need to be completed for the patient. Tasks are generated by certain orders or rules in the system and show up in a list format to notify you to complete specific patient care activities. They are meant to supplement your current paper to-do list and highlight activities that are outside of regular care.

Note: Not all orders create tasks. Examples of tasks include orders for consult, important communications and specific therapies or treatments.

The **MPTL** for Allied Health may have more than one tab. Tasks will fall into one of the available task categories (tabs).

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You will use a location based **Patient List** when working on your unit/location. It will be important to reference the steps listed below for when you need to set up a location based **Patient List**.

The first time you log in, you will need to set up the **MPTL**. To do this you need to select the appropriate **Patient List** and **Time Frame** to display. This will need to be done for each tab.

- 1. Right-click directly on the words **Assigned Tasks** in the grey information bar.
- 2. Select Customize Patient View.

P PowerChart Organizer for TestUser, Dietitian	
Task Edit View Patient Chart Links Task List Options Help	
🗄 🖴 Multi-Patient Task List 🖃 Message Centre 🎬 Ambulatory Organizer 🗍 Patient List 🞬 Dynamic Worklist 🚟 Schedule 👫 LearningLIVE 😓 🛱 CareConnect 🖏 PHSA PACS 🖏 VCH and PHC PACS 🖏 MUSE 🖏 FormFast WFI 😓	
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R COOKEMPI, GINGERBREAD	
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Within the Task List Properties window:

- 3. In the Patient List tab, select Choose a Patient List and select Departmental View
- 4. Ensure View Assigned Tasks is checked as this will ensure tasks display on your MPTL.
- 5. Select the **appropriate location** using the location filter (use the + symbol to expand the location tree until you find the desired unit).
- 6. Click OK.

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View Assigned Tasks	Save
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After selecting the appropriate Patient List you need to set up the Defined Time Frame.

To select appropriate Time Frame for your MPTL:

- 7. Right-click directly on the words describing the **date range** in the far right hand side of the grey information bar
- 8. Select Change Time Frame Criteria. This will open the Task List Properties window.





- 9. In the Time Frames tab select Defined Time Frame for your shift.
- 10. Select 12 Hour Day Shift.
- 11. Click **OK**. The **Scheduled Patient Care** tab within the MPTL is now set to the correct patients and their tasks.

P Task List Properties	×
Time Frames Patient List	
Choose one of the following: O Defined Time Frame O O Generic Time Frame	
Range 12 Hour Day Shift 10 Previous 12 Hour Dight Shift 10 © Current 8 Hour Day Shift 8 Hour Shift Next 8 Hour Night Shift 8 Hour Night Shift	
Show me my: 16:00 - PST	
From: 29-Nov-2017 A V 1637 A PST To: 29-Nov-2017 V 1638 PST	
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Note: You will need to repeat these steps for each patient list tab to set up the MPTL.

For the purposes of training, you will practice setting up your view of the Multi-Patient Task List (MPTL) with a different Patient List (**Custom List**) today than the one you will be using outside of this training.

Note: It is recommended for you to use **Departmental View** at Go-Live, however for training purposes, we will use the **Custom List**.

Departmental View: Used when you are looking at an entire department. Discharged patients will stay on this list for a short while allowing you to easily find them if you did not finish your documentation.

Custom List: Used when you have a few patients assigned to you. This is your own personal list and patients will stay on it until you remove them from the list.

Outside of training, the first time you log in, you will need to set up the **MPTL**. To do this you need to select the appropriate **Patient List** and **Time Frame** to display. This will need to be done for each tab.

Follow these steps to set up the appropriate patient list:

- 1. Right-click directly on the words Assigned Tasks in the grey information bar.
- 2. Select Customize Patient View



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CSTDEVEMPICC, PROD TEST									
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CSTLABAUTOMATION, TSRYAN									
CSTLABGOLDENEARS, TOTESTKL LAB									
CSTLABSQ, ANATOMICALPATHOLOGY									
CSTLABSQ, UATCHEM									

Within the Task List Properties window:

3. In the Patient List tab, select Choose a Patient List and select YourName_Custom List

Note: Outside of training, if you want to create a custom list to help you track your current patients, it is recommended you first look at a location based list so that you don't miss any tasks. We are using Customized list in this training for simplicity.

- 4. Ensure View Assigned Tasks is checked as this will ensure tasks display on your MPTL.
- 5. Click OK



P Task List Properties		— ×
Time Frames Patient List		
Choose a Patient List Departmental View JohnDoe_Custom List LOH 0 East	Location Filter	
View Assigned Tasks	Save	
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After selecting the appropriate Patient List you need to set up the **Defined Time Frame**.

To select appropriate Time Frame for your MPTL:

- 6. Right-click directly on the **date range** words in the far right hand side of the grey information bar
- 7. Select Change Time Frame Criteria.

PowerChart Organizer for TestUser, Dietitian											
Task Edit View Patient Chart Links TaskList Options Help											
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All Patients		Name	Location/Room/Bed	Medical Record Number	Task Status	Scheduled Date and Time	Task Description	Order Details			
CSTPRODOSTRAMORAY, DRAKE	88 60 	CSTPRODOSTRAMORAY, DRAKE	LGH 3W / 315 / 02M	700008514	Overdue	19-Dec-2017 08:58 PST	Consult to Dietitian Adult	19-Dec-2017 08:58 PST, Routin	e, Reason for	Consult: NPO	
MEDPROCESS, TESTFOUR		MEDPROCESS, TESTFOUR	LGH 3W / 307 / 01B	700004914	Pending	Continuous	RDN Check TPN	Order entered secondary to P	arenteral Nut	rition Order Adu	
	11										

The Task List Properties window opens.

- 8. In the Time Frames tab select Defined Time Frame for your shift.
- 9. Select 12 Hour Day Shift.
- 10. Click **OK**. The **Scheduled Patient Care** tab within the MPTL is now set to the correct patients and their tasks.



Time Frames	Patient List	
 Choose one of Defined Tin 	the following: ne Frame 8 Hour Interval	🔘 Generic Time Frame
Range Previous Current Next	12 Hour Day Shift 12 Hour Night Shift 8 Hour Day Shift 8 Hour Evening Shift 8 Hour Night Shift	9
Show me my: [12:00 🔻 PST	
From: 13-Dec-2 To: 13-Dec-2	2017 × 1258 2017 × 1259	PST
		OK 10 ancel

Note: You must now repeat these steps for each location tab when setting up the MPTL.

In this Activity, you practiced setting up a **Custom list** in your **MPTL**. Outside of this practice, you will need to set up your **MPTL** using a location based list to appropriately show all the patients on the unit who you are caring for.

You can now proceed to the Key Learning Points section at the end of this Activity. It will be important to reference the steps listed directly below for when you need to set up a location based **Patient List.** You will use a location based **Patient List** when working on your unit/location.

Key Learning Points

- The MPTL is a tool used to display tasks for multiple patients.
- You must select the correct patient list(s) and define the appropriate time frame in order to see assigned tasks for your patients.
- Ensure you set up the correct view for each tab in the MPTL so you can see all of your tasks.
- Click refresh to ensure you can see the most current tasks.

Activity 2.2 – Review MPTL functionality

- 1
- On the **MPTL** you will see the following:
 - 1. Task list toolbar



- 2. Information bar with name of the patient list (far left) and the set time frame (far right)
- 3. Task categories (tabs)
- 4. A window on the left with the patient names
- 5. List of patient tasks

PowerChart Organizer for TestUser, OccupationalTherapist			- # X
Task Edit View Patient Chart Links TaskList Options Help			
🗄 🖴 Multi-Patient Task List 💷 Message Centre 🎬 Ambulatory Organizer 🎍 Patient List 🞬 Dynamic Worklist 🧊 🗄 🕲 Patient Health Education Materials 🔞 Policies and Guidelines 🕲 Up ToDate 🚽 🗟 CareConnect 🕲 PHSA	PACS 🕄 VCH and PI	HC PACS 🕄 MI	JSE [
🗄 🏙 Exit 🎍 PM Conversation 🗸 🚽 Communicate 🗣 🛧 Add 👻 🗑 Documents 📴 iAware 🛗 Scheduling Appointment Book 📾 Discern Reporting Portal 👃			
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Departmental View, Assigned Tasks 2 19-December 2017 06:30 Tuesda			esday PST
OT Treatments OT Evals PT Treatments PT Evals SLP Freatments SLP E 3			
Task retrieval completed	5		
🕼 All Patients 📃 Name Location/Room/Bed Medical Record Number Task Status Scheduled Date and Time Task Description Order Details			
CSTPRODORD, BABYSQUAM STTPL-GHDBM/MSH LGH-3W / 30 / 01C 70007317 Pending Continuous Occupational Therapy Following 20-04-2017 13:59 PDT Strange Continuous Occupational Therapy Following 81-007-2017 14:59 PDT 2017 14:			
SMITH-LGHDEMO, MICHAE			

Key Learning Points

Components of the MPTL include the Task list toolbar, Information bar, Task categories, patient name list, and List of patient tasks.



Activity 2.3 – Review Patient Tasks

1

After setting up the **MPTL** you can see the patients that are under your care. Let's locate a patient and review one of their tasks.

- 1. Under the window with the patient names, locate the correct patient and click on [Patient Name].
- 2. Review tasks associated with the patient and locate your profession's consult task (e.g. **Consult to Dietitian Adult** task.
- 3. Right-click on your profession's consult task (e.g. Consult to Dietitian Adult).
- 4. Select Order Info... to learn more about the order.

Note: If you do not see your profession's task, please navigate to the other available MPTL tabs.

PowerChart Organizer for TestUser, Dietitian							- 6
Task Edit View Patient Chart Links Task List	Options Help						
😫 Multi-Patient Task List 🖃 Message Centre 🌃 Ambul	atory Organizer 🝦 Patient List 🎆	Dynamic Worklist 🧰	chedule 🌃 Le	arningLIVE 🚽 👯 😋 CareConnect 🔞 Pł	HSA PACS 🔃 VCH and PHC PACS (🞝 MUSE 🔍 FormFast WFI 🖕	
🛃 Exit 🔒 PM Conversation 👻 🕞 Communicate 👻 🕂 A	dd 👻 📻 Documents 🝙 Discern F	Reporting Portal					
🖸 Patient Health Education Materials 🔞 Policies and Gu	idelines 😭 UpToDate 💷						
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Scheduled Patient Care All PRN Tasks							
Task retrieval completed				Chart Done			
	Marca		Markarl	Chart Done (Date/Time)	Test Description	0	
All Patients		3 Line / 712 / 02	700005600	Chart Not Done	12.50 DST Consult to Distition /	13:50 PST Routine Rea	son for Consult Troubl
CSTPRODAC, JENNI	CSTPRODURD, PATIENT A	LGH 7E / 7EL / 03	700001815	Quick Chart	Distilie Fellering	2 15:14 PDT	
CSTPRODORD, PATIENT A	CSTPRODOSLAB, DEMO	LGH 7E / 724 / 01	700004418	Chart Details / Modify	Calorie Count	05-Dec-2017 09:06 PST	
CSTPRODOSLAB, DEMO	CSTPRODPET, RAVNEET	LGH 7E / 718 / 01	700006685	Unchart	RDN Check TPN	02-Nov-2017 14:44 PDT Order entered secondary to Parente	eral Nutrition Order Adult
CSTPRODPET, RAVNEET	CSTPRODPET, STTESTAAB	LGH 7W / 709 / 01	700001644	Reschedule This Task	Advance Diet as Tole	rated 2017-Aug-16 12:10 PDT, Full Fluids,	goal of regular diet
CSTPRODPET, STTESTAAB				Print >			
				Order Info 4			
				Order Comment			
				Create Admin Note			

The Order Information window opens.

- 5. Click the **different tabs** to review the order information. The order information will have the Reason for Consult which is mandatory for all consults.
- 6. Click the **Exit** icon ⁴ when you finish reviewing the information.

Note: When the blue exit door is available within a pop up window, use it instead of the Red X close window button. If you select this on the main screen you will exit right out of the application.





Key Learning Points

You can select specific patients for whom you would like to review tasks in the MPTL

Order Information will provide more details about the consult order



Activity 2.4 – Document a Patient Task as Complete

1 After you review your patient tasks and perform them, it is important to complete the appropriate documentation within the CIS. Documenting that a task has been done will allow the task to be cleared and will help prevent your **MPTL** from being cluttered with tasks that have already been completed.

Let's document your consult task for your patient as complete in the MPTL.

- 1. On the **list of patient tasks**, locate the correct patient (**[patient's name]**) and right click on **consult task**.
- 2. Select Chart Done (Date/Time).

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Task Edit View Patient Chart Links TaskList Options Help											
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Multi-Patient Task List								(므) Full scree	n 🖨 Print 👌	• 18 minutes ago	
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Scheduled Patient Care All PRN Tasks											
Task retrieval completed											
🚺 All Patients	Name	Location/Room/Bed	Medical Record Number	Task Status	Scheduled Date and	Task Description	Order Detai	ils			
CSTPRODAC, JENNI	66 CSTPRODAC, JENNI	LGH 7E / 712 / 03	700005690	Pending	19-Dec-2017 13:5	Consult to Dietitian Adu	It 19 Dec-	Chert Dana	: Troubl		
CSTPRODORD, PATIENT A	CSTPRODORD, PATIENT A	LGH /E / /EL / 03	700001815	Pending	Continuous Continuous	Calorie Count	05-Dec-	Chart Done (Date/Time) 2			
CSTPRODOSLAB, DEMO	CSTPRODPET, RAVNEET	LGH 7E / 718 / 01	700006685	Pending	Continuous	RDN Check TPN	02-Nov-	Chart Not Done	der Adult		
CSTPRODPET, RAVNEET	CSTPRODPET, STTESTAAB	LGH 7W / 709 / 01	700001644	Pending	Continuous	Advance Diet as Tolerat	ed 2017-Au	Quick Chart	diet		
CSTPRODPET, STTESTAAB								Chart Details / Modify Unchart			
								Reschedule This Task			
								Print			
								Order Info			
								Order Comment			
								Create Admin Note			
								Reference Manual			
								Task Info			
								Patient Snapshot			
								Select All			
								Deselect All			
								Open Patient Chart			

- You will be asked to establish a relationship with the patient before you can open the patient's chart or proceed with completing a task. Select your profession's relationship (e.g. Dietitian) in the Assign a Relationship window.
- 4. Click **OK**





- 5. Review the **Date/Time** cells in the **Consult to** window (e.g. **Consult to Dietitian** (**Chart Done**) and adjust details as needed.
- 6. Click **OK**

P Consult to Dietitian Adult (Chart Done) - CSTPRODAC, JENNI 📃											
Date/Time:	<u>19-Dec-2017</u> ♠ ▼ 1420 ♠ PST 5										
Performed by:	TestUser, Dietitian										
	OK 6 ncel										

- 7. The task now will now have a **Chart Done** icon **r** next to it. (Only complete one for this exercise)
- 8. Click the **Refresh** icon and the task will fall off the task list.

PowerChart Organizer for TestUser, Dietitian								_ # ×
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🗐 Exit 🔒 PM Conversation 👻 🔩 Communicate	🔹 🕂 Add 👻 🕞 Documents 🝙 Discer	n Reporting Portal 🖕						
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Multi-Patient Task List							(□) Full screen 👼 P	8 🔉 29 minutes age
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Task retrieval completed								
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CSTPRODORD PATIENT A	CETTRODORD, PATIENT A	LCH 7E (721 / 01	700001015	Dending	Continuous	Caloria Count	05-Dec-2017 09:06 PST	
CSTPRODOSLAB, DEMO	CSTPRODPET, RAVNEET	LGH 7E / 718 / 01	700006685	Pending	Continuous	RDN Check TPN	02-Nov-2017 14:44 PDT Order entered secondary to Parenteral Nutrition Order Adult	
CSTPRODPET, RAVNEET	CSTPRODPET, STTESTAAB	LGH 7W / 709 / 01	700001644	Pending	Continuous	Advance Diet as Tolerated	2017-Aug-16 12:10 PDT, Full Fluids, goal of regular diet	
CSTPRODPET, STTESTAAB								

Key Learning Points

It is important to document completed tasks as done to clear them from your MPTL



PATIENT SCENARIO 3 – Patient Chart Overview

Learning Objectives

At the end of this Scenario, you will be able to:

Access patient chart and review information including Patient Summary, Orders, Results Review, Documentation, and more

SCENARIO

After setting up the MPTL you can access your patient's chart.

As you will be completing the following activities:

- Review patient information
- Review Documentation
- Review Results using Results Review
 - Become familiar with the Single Patient Task List (SPTL)
 - Review Allergies



Activity 3.1 – Review Patient Information

1

After reviewing your patient's tasks, you will access the patient's chart directly from the MPTL screen.

- 1. Right click [Patient Name]
- 2. Select **Open Patient Chart**
- 3. Select Patient Summary

PowerChart Organizer for TestUser, Dietitian						
Task Edit View Patient Chart Links Tas	sk List Options Help					
🔐 Multi-Patient Task List 🖃 Message Centre 🎬	Ambulatory Organizer 🛉 Patient List 🎬	Dynamic Worklist 🧰 Schedule 👫 Lea	arningLIVE 🝦 🤅 😋 CareConnect 😋 PHS	A PACS 🔞 VCH and PHC PACS 🧯	🞝 MUSE 🕄 FormFast WFI 🝦	
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🖌 😣 🗉 🖆 🔍 🛄 🦂						
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Scheduled Patient Care All PRN Tasks						
Task retrieval completed						
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CSTPRODAC, JENNI	OU CSTPRODAC, JENNI	Chart Done	Patient Summary 3	14:33 PST Consult to Dietitian A Distition Following	Idult 19 7 14:33 PST, Routine, Reason for Consult: Swallo	
CSTPRODORD, PATIENT A	CSTPRODOSLAB, DEMO	Chart Done (Date/Time)	Mental Health Summary	Calorie Count	05-Dec-2017 09:06 PST	
CSTPRODOSLAB, DEMO	CSTPRODPET, RAVNEET	Chart Not Done	Orders	RDN Check TPN	02-Nov-2017 14:44 PDT Order entered secondary to Parenteral Nutrition Order Adul	t
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CSTPRODPET, STTESTAAB		Unchart	Interactive View and IO			
		Development of the Test	Documentation			
		Rescriedule Inis Task	Histories			
			Allergies			
		Order Into	Diagnoses and Problems			
		Create Admin Note				
		Reference Manual	CareConnect			
		Tack Info	Clinical Research			
		TOSK BITO	Growth Chart			
		Patient Snapshot	MAR Summary			
		Select All	Medication List			
	-	Deselect All	Patient Information			
		Open Patient Chart 2	Reference			

2 The patient's chart is now open to the **Patient Summary** or the **Mental Health Summary** page depending on your profession.

Before we proceed any further, let's go through an overview of the general screen.

- 1. The **Toolbar** is located above the patient's chart and it contains buttons that allow you to access various tools within the Clinical Information System (CIS).
- 2. The **Banner Bar** displays patient demographics and important information that is visible to anyone accessing the patient's chart. Information displayed includes:
 - Name
 - Allergies
 - Age, date of birth, etc.
 - Encounter type and number
 - Code status
 - Weight
 - Process, disease and isolation alerts
 - Location of patient
 - Attending Physician



- 3. The **Menu** on the left allows access to different sections of the patient chart. This is similar to the coloured dividers within a paper-based patient chart. Examples of sections included are **Orders**, **Medication Administration Record Summary** (**MAR Summary**) and more.
- 4. The **Refresh** icon with the patient chart with the most current entries. The chart does not automatically update. As other clinicians may be accessing and documenting in the patient chart simultaneously, it is important to click **Refresh** frequently. Each page refreshes separately so you must refresh each page. When in doubt, click Refresh.

CSTPRODAC, JENNI - 700005690 Opener	d by TestUser, Dietitian							-0	d 🔁 🗙
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😋 Patient Health Education Materials 🔇	Policies and Guidelines 🔞 UpToDate 💡								
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CSTPRODAC, JENNI	DOB:01-May-1995 Age:22 years	MRN:700005690 Enc:700000013089	Code Status:Attempt CPR, Full Code	Process:Diff Disease:	icult Intubation/Airway	L	ocation:LGH 7E; 712; 03 inc Type:Inpatient		2
Allergies: penicillins, Bugs Bunny Cor	mplete, FlowGender:Female	PHN:9876747943	Dosing Wt88 kg	Isolation:			ttending:TestUser, Nurse		
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Orders 🕂 Add									
Single Patient Task List	Informal Team	Informal Team (Communication					2	el≡- Î
Interactive View and I&O	Communication	Informal reality	Simulated						
Results Review	Active Issues	Add new action			Add new comment				
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Histories	Vital Signs and Measurements	No actions documenter	1		No comments documented				
Allergies 🕂 Add	Documents	All Teams			All Teams				
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Clinical Research	Lines/Tubes/Drains								
Form Browser	Intake and Output			1	Add new as: This Visit 👻 🭳				
Growth Chart	Labs				de de Ver				
MAR Summary	Micro Cultures	1 Type 1 diabetes			Classification	Actions This Visit	Chronic		
Medication List 🛛 🕂 Add	Home Medications	Abnormal bead	CT		Medical	This Visit	Chronic		
Patient Information	Diagnostics	Aprila heart dis			Modical	This Visit	Chronic		
Reference	3 Medications	Acute heart dis	ease		Medical	THIS VISIC	chronic		
	Orders	Black head			Medical	This Visit	Chronic		
	Oxygenation and	Head cold			Medical	This Visit	Chronic		

Note: If you Refresh while in the middle of an entry before completing (i.e. if you have not yet clicked on **Sign**, **Complete**, **OK**, or whatever is required for completion), your entry will not be updated and saved. You have to complete your entry before refreshing to save it.



- 3 Now that you have been introduced to some key parts of the general screen, let's look more closely at the **Patient Summary View** or the **Mental Health Summary View**.
 - 1. There are different tabs available to access information: **Handoff Tool, Summary, Assessment**, and **Discharge**. Click on the different tabs to see a quick overview of the patient.
 - Handoff Tool, Summary, Assessment, and Discharge tabs display a summarized view of patient information organized into various components. Information that displays is populated from other parts of the patient chart and includes nursing documentation, RT documentation, lab results, and medication orders.



Key Learning Points

- The Toolbar is used to access various tools within the Clinical Information System
- The Banner Bar displays patient demographics and important information
- The Menu contains sections of the chart similar to a paper-based chart
- The Summary tab in the Patient Summary view provides a summarized view of patient information pulled from other parts of the chart

The Refresh icon should be used regularly to view the most current information



Activity 3.2 – Review Documentation



Documentation can include provider notes, nurse notes, clinician notes, completed forms, assessments, and more.

- 1. Click on **Documentation** in the **Menu List** to open the screen.
- 2. Select the document that you want to review under the **List** box and the document will open in the window to the right.
- 3. Select any document in the List box and review what was documented about the patient.



Key Learning Points

You can review all documents placed on a patient chart. Documents may include notes by nursing or another clinician, a physician consult note, a physician daily rounding note, or even a diagnostic imaging report. Each document has a title, an author, and a date.

1



b Activity 3.3 – Review Results Using Results Review

As explained previously, the **Menu** on the left side of your screen contains different sections of the patient's chart. We will explore some of the Menu sections in the following Activities. Let's begin with **Results Review**.

Throughout your shift, you will need to review your patient's results. One way to do this is to navigate to **Results Review**.

Results are presented using flowsheets. Flowsheets display clinical information recorded for a person such as labs, vital signs, cultures, transfusions and diagnostic imaging and more.

Flowsheets are divided into two major sections.

- 1. The left section is the **Navigator**. By selecting a category within the navigator, you can view related results, which are displayed within the grid to the right.
- 2. The grid to the right is known as **Results Display**.

ecent Results Advance Care P	lanning Lab - Recent Lab - Extended Pathology	Micro Cultures Tran	sfusion Diagnostics	Vitals - Recent Vitals -	Extended			
lowsheet: Lab View 🔻 🗑 Table 💿 Group 💿 List								
• •	Sun	day, 05-June-2016 00:0	0 PDT - Friday, 05-Janua	ary-2018 22:59 PST (Clini	cal Range)			
Navigator	Showing results from (23-Oct-2017 - 25-Oct-2017)	Show more results						
👿 General Chemistry	Lab View	25-Oct-2017 00:00 - 23:59 PDT	24-Oct-2017 00:00 - 23:59 PDT	23-Oct-2017 00:00 - 23:59 PDT				
👿 Therapeutic Drug Monitori	Hematocrit	0.40	0.41	0.43 - 0.45 [2]				
This Misselistan	MCV	92 fL	95 fL	95 fL - 98 fL [2]				
Orine Microbiology	MCH	31 pg	30 pg	32 pg [2]				
Infection Control/Surveilla	RDW-CV	12.0 %	12.0 %	12.0 % [2]				
Church Pland Daint of Co.	Platelet Count	400 x10 9/L	350 x10 9/L	250 x10 9/L - 300 x10 9/L				
Glucose Blood Point of Cal	MPV			9.9 fL				
	Neutrophils	4.90 x10 9/L	4.90 x10 9/L	4.90 x10 9/L - 5.60 x10 9/				
1	Lymphocytes	1.40 x10 9/L	1.40 x10 9/L	1.40 x10 9/L - 1.60 x10 9/				
	Monocytes	0.35 x10 9/L	0.35 x10 9/L	0.40 x10 9/L - 0.63 x10 9/				
	Eosinophils	0.28 x10 9/L	0.28 x10 9/L	0.07 x10 9/L - 0.32 x10 9/				
	Basophils	0.07 x10 9/L	0.07 x10 9/L	0.08 x10 9/L				
	General Chemistry							
	Sodium	142 mmol/L	145 mmol/L	140 mmol/L - 145 mmol/				
	Potassium	3.8 mmol/L	3.9 mmol/L	4.5 mmol/L - 5.0 mmol/L				
	Chloride	100 mmol/L	100 mmol/L	100 mmol/L - 105 mmol/				
	Carbon Dioxide Total	25 mmol/L	26 mmol/L	30 mmol/L - 31 mmol/L				
	Anion Gap	20.8 mmol/L (H)	22.9 mmol/L (H)	13.5 mmol/L - 15 🤈				
	Glucose Random			6.0 mmol/L				

Review the most recent results for your patient:

- 1. Navigate to **Results Review** from the **Menu**.
- 2. Review the Recent Results tab.
- 3. Review each individual tab to see related results.
- 4. Select Lab Recent.



Menu	9	🕻 🔿 🔹 者 Results Rev	ew						[0] Full screen	⊜ Print	20 minute
Respiratory Therapy View	i	10. II.									
Mental Health Summary											
Orders	+ Add	Recent Results 2 hce Care	Planning Lab - Recent 4 Ext	ended Pathology N	licro Cultures Transfusion	Diagnostics Vitals - Recent	t Vitals - Extended	3			
Single Patient Task List								_			
140		Flowsheet: Quick View	▼ Level:	Quick View	 Table 	🔘 Group 🛛 List					
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Interactive View and I&O				Friday, 01-Decemb	er-2017 10:41 PST - Tueso	ay, 05-December-2017 10:41	rst (clinical kange)				•
Results Review	1	Navigator									
Documentation	🕈 Add	Measurements	Show more results								
Medication Request			Quick View	04-Dec-2017 16:31 P	ST 04-Dec-2017 16:30 PST						_
1 Educion			Measurements								
nsiones		SBP/DBP CUTT	Weight, Admit		80 kg						
Allergies	+ Add	Oxygenation	VITAL SIGNS		Measured						
Diagnoses and Problems		Basic Oxygen Information	Temperature Axillary	41.0 DegC (H)	40.0 DegC (H)			-			
		PAIN ASSESSMENT	Peripheral Pulse Rate		100 bpm						
		· · · · · · · · · · · · · · · · · · ·	SBP/DBP Cuff								
CareConnect			Systolic Blood Pressure		70 mmHg (L)						
Clinical Research			Diastolic Blood Pressure		90 mmHg						
			Oxygenation Derpiratory Date	40 brimin (H)	24 br/min (H)						
Form Browser			Sp02	40 bi/min (n)	92%						
Growth Chart			- spor		2.4						
Lines/Tubes/Drains Sum	mary										
MAR Summary											
Medication List	+ Add										
Patient Information											

5. Review your patient's recent lab results

Blood Gases	
pH Capillary	7.29 (L)
pCO2 Capillary	37 mmHg
pO2 Capillary	70 mmHg (L)
HCO3 Capillary	15 mmol/L (L)
Base Excess Capillary	3 mmol/L *
Ventilation Capillary	Nasal Prongs
Oxygen Administered Capillary	0.50
General Chemistry	
Glucose Random	5.5 mmol/L
Lactate	3.7 mmol/L (H)
Bilirubin Direct	2 umol/L
Urine Microbiology	
Urine Culture	
Infection Control/Surveillance	
MRSA Culture	
VRE Culture	

Note: Specific lab results may populate in different colours. Indications of the colours are listed below:

- Blue values indicate results lower than normal range
- Black values indicate normal range
- Orange values indicate higher than normal range
- Red values indicate critical levels

To view additional details about any result, for example, a Normal Low or Normal High value, double-click the **result**.



Key Learning Points

- Flowsheets in Results Review display clinical information recorded for a patient such as labs, cultures, transfusions, medical imaging, and vital signs
- The Navigator allows you to filter certain results in the Results Display
- Lab work is coloured to represent low, normal, high and critical values
- View additional details of a result by double-clicking the value



Activity 3.4 – Become familiar with the SPTL

The **Single Patient Task List (SPTL)** is accessible via the **Menu**. It displays all tasks available for the specific patient whose chart you are viewing. The tools and functionalities of the **SPTL** are similar to the **MPTL**.

Click on the Single Patient Task List in the Menu. You will see:

- 1. Task List toolbar
- 2. Time Frame for the tasks to be displayed
- 3. Task Categories (Tabs)
- 4. List of Tasks

CSTPRODAC, JENNI - 700005690 Oper	ned by TestUser, Dietitian				
Task Edit View Patient Chart	Links Task List Options Help				
🚨 Multi-Patient Task List 🔄 Message	Centre 🌇 Ambulatory Organizer 🛓 Patient	List 👫 Dynamic Worklist 📑	Schedule 🎬 LearningLIVE 💡 🤅 📿 CareConnect 🕻	PHSA PACS 🔍 VCH and PHC PACS 🔍 MUSE 🔍 FormF	Fast WFI 🖕
🛣 Tear Off 📲 Exit 🔒 PM Conversatio	n 🔹 🛶 Communicate 🔹 🕇 Add 👻 🛅 Doc	uments 🗃 Discern Reporting	Portal 🖕		
Realth Education Materials	🞝 Policies and Guidelines 🔞 UpToDate 💡				
CSTPRODAC, JENNI 🛛					🔶 List 🔿 🖀 Recent + 🛛 Name 🛛 - 🔍
CSTPRODAC, JENNI	DOB:01-May-1995 Age:22 years	MRN:700005690 Enc:7000000013089		Process:Difficult Intubation/Airway Disease:	Location:LGH 7E; 712; 03 Enc Type:Inpatient
Allergies: penicillins, Bugs Bunny C	omplete, FlowGender:Female	PHN:9876747943	Dosing Wt:88 kg	Isolation:	Attending:TestUser, Nurse
Menu ?	< 🔹 🔹 🏠 Single Patient Task	List			🗇 Full screen 🛛 👼 Print 🛛 🕈 0 minutes ago
Patient Summary					
Mental Health Summary			10 December 2017 05 20 Tuesday PC	T 10 December 2017 10:45 Tuesday DCT	2
Orders 🕂 Add		2	19 December 2017 00.30 Tuesday F3	1 - 13-December - 2017 15/43 Tuesday (3)	2
Single Patient Task List	Scheduled Patient Care All PRN Tasks	2			
Interactive View and I&O	Task retrieval completed				
Results Review	Task Status Scheduled Bate and	Time Task Description	Order Details		
Documentation	60° Pending 19-Dec-2017 14:33	PST Consult to Dietitian A	dult 19-Dec-2017 14:33 PST, Routine, Reason for Consu	ult: Swallowing difficulty 4	
Histories					
Allergies 🕂 Add					
Diagnoses and Problems					
CareConnect					
Clinical Research					
Form Browser					
Growth Chart					
MAR Summary					
Medication List 🛛 🕂 Add					
Patient Information					
Reference					

2



As with the MPTL, the **Time Frame** can be changed to the appropriate date.

- 1. Right-click directly on the time frame words on the grey information bar.
- 2. Select Change Time Frame Criteria.

CSTPRODAC, JENNI	- 700005690 Ope	ned by TestUser, Dietitian				
Task Edit View P	atient Chart	Links Task List Options Help				
🕴 🔐 Multi-Patient Task I	List 📑 Message	Centre 🌇 Ambulatory Organizer 🛔 Patier	nt List 🌇 Dynamic Worklist 👖	🖥 Schedule 🛛 👫 LearningLIVE 💡 🤅 😋 CareConnect 🧯	🞝 PHSA PACS 🔞 VCH and PHC PACS 🔞 MUSE 🔞 Form	Fast WFI 🖉
😨 Tear Off 📲 Exit 🔒	PM Conversatio	on + 🔄 Communicate + 🕂 Add + 🗐 Do	cuments 🗃 Discern Reporting	Portal		
Patient Health Educ	ation Materials	Relicies and Guidelines 🕄 UpToDate				
CSTPRODAC, JEN	NI 🗵					← List → @ Recent + Name - Q
CSTPRODAC, JEN	INI	DOB:01-May-1995 Age:22 years	MRN:700005690 Enc:7000000013089	Code Status:Attempt CPR, Full Code	Process:Difficult Intubation/Airway Disease:	Location:LGH 7E; 712; 03 Enc Type:Inpatient
Allergies: penicillins,	Bugs Bunny C	omplete, FlowGender:Female	PHN:9876747943	Dosing Wt:88 kg	Isolation:	Attending:TestUser, Nurse
Menu	ġ.	< 🕘 🕘 者 Single Patient Tasi	k List			[0] Full screen 🛛 👘 Print 🛛 🗞 3 minutes ago
Patient Summary		✓ ⊗ 煎 首 鸣, 即				
Mental Health Summary	у					
Orders	+ Add			19-December-2017 06:30 Tuesday PS	1 - 19-December-2017 19:45 Tuesday PST	2 Change Time Frame Criteria
Single Patient Task Lis	t	Scheduled Patient Care All PRN Tasks				2
Interactive View and 18d	0	Task retrieval completed				
Results Review		Task Status Scheduled Date an	d Time Task Description	Order Details		
Documentation		60 Pending 19-Dec-2017 14:	33 PST Consult to Dietitian A	Adult 19-Dec-2017 14:33 PST, Routine, Reason for Cons	ult: Swallowing difficulty	
Histories						
Allergies	+ Add					
Diagnoses and Problem	5					
CareConnect						
Clinical Research						
Form Browser						
Growth Chart						
MAR Summary						
Medication List	+ Add					
Patient Information						
Reference						

The Task List Properties window opens.

- 3. Under the Time Frames tab, select Defined Time Frame for your shift.
- 4. Under Range, ensure Current is selected. Click 12 Hour Day Shift.
- 5. Click **OK**. The Task Categories (Tabs) within the **SPTL** is now correctly set for your day shift.

P Task List Proper	ties			×
Time Frames				
 Choose one of Defined Time 	the following: e Frame 3 our Interval	🔘 Generic Time	e Frame	
Range Previous Current Next	12 Hour Day Shift 12 Hour Night Shift 8 Hour Day Shift 8 Hour Evening Shift 8 Hour Night Shift	4		
Show me my:	15:00 - PST			
From: 19-Dec-2	017 💌 🔻 1539	PST		
To: 19-Dec-2	017 💌 🔻 1540	PST		
			ОК	5 ncel



Note: Similar to the steps outlined in the MPTL, patient tasks can be documented as complete through the SPTL. When using the SPTL however, you can only complete tasks for the patient whose chart you have open.

Key Learning Points

- The SPTL has similar tools and functionalities as the MPTL
- The SPTL displays tasks for the patient's chart that you have open



🔹 Activity 3.5 – Review Allergies

1

You can review allergies for a patient through the Allergies section under the Menu.

- 1. Click on **Allergies** in the **Menu**.
- 2. View the list of the patient's allergies. They will be listed from most severe to less severe. In this case, Penicillin causes a more severe reaction than Tape.
- 3. View the **Allergies** information in the banner bar.

CSTPRODAC, JENNI - 700005690 Open	ed by TestUser, Dietitian						- @ X
Task Edit View Patient Chart L	Links Allergy Help						
🚦 🚨 Multi-Patient Task List 🖃 Message C	Centre 🎬 Ambulatory Organizer 🛓 Patient	List 🌃 Dynamic Worklist 🧰	Schedule 🎬 LearningLIVE 📮 🗄 🕄 CareConnect	💐 PHSA PACS 🔞 VCH and PHC PACS	🛱 MUSE 🙀 FormFast WFI		
🗄 🔀 Tear Off 📲 Exit 🔒 PM Conversation	n + 🔄 Communicate + 🕂 Add + 🛅 Doci	ıments 🗃 Discern Reporting	Portal 🖕				
🛿 😋 Patient Health Education Materials 🔮	🕽 Policies and Guidelines 🔍 UpToDate 📮						
CSTPRODAC, JENNI 🛛						🗲 List 🔿 🛍 Recent 🔹	Name • Q
CSTPRODAC, JENNI	DOB:01-May-1995	MRN:700005690	Code Status:Attempt CPR, Full Code	Process:Difficult Intubation	n/Airway	Location:LGH 7E; 712; 03	
Allergies: popicilling, Burgs Bungy Co	Ane:22 years	Enc:7000000013089	Docing WITRE kg	Disease: Isolation:		Enc Type:Inpatient Attending:TestLiser, Nurse	
menu T	Julies and Alexandre		Dosing Wildo Kg	ISOlation.		D Full screen	Print 🔊 0 minutes ago
Patient Summary	H Analysis					end an activity (B)	
Mental Health Summary	Mark All as Reviewed						
Orders 🕂 Add	+ Add Modify O No Known A	llergies 🛛 🖓 No Known M	edication Allergies 🛛 🔗 Reverse Allergy Check	Display Active 👻			
Single Patient Task List							
Interactive View and I&O	D. Substance	Type Category	Severity Peartion O	mmente Source Peartion Statur	Reviewed Ect Ope	at Undated By	
Results Review	Bugs Bunny Complete	Allergy Food		Active	06-Nov-2017 1	29-Aug-2 2	
Documentation	✓ penicillins	Allergy Drug	Moderate	Patient Active	06-Nov-2017 1 2007	06-Oct-20	
Histories	Таре	Allergy Other		Active	14-Dec-2017 1	14-Dec-20	
Allergies 1							
Diagnoses and Problems							
CareConnect							
Clinical Research							
Form Browser							
Growth Chart							
MAR Summary							
Medication List 🛛 🕂 Add							
Patient Information							
Reference							

Note: Allergies are sorted by severity (most to least). If the allergies listed are longer than the space available, the text will be truncated. Hovering over the truncated text will display the complete allergies list.

Key Learning Points

- The Allergy section of the chart displays detailed information about a patient's allergies.
- The Banner Bar displays allergy information on the left side.



PATIENT SCENARIO 4 – Orders

Learning Objectives

At the end of this Scenario, you will be able to:

- Review the Orders Profile and place Orders
- Complete an Order
- Review the components of a PowerPlan

SCENARIO

As an Allied Health Clinician, you will need to be able to review orders on your patient. You will also need to place orders on your patient in certain situations.

As an Allied Health Clinician, you will complete the following activities:

- Review the Orders Profile
- Place a No Co-signature Required order
- Review order statuses and details

Place a verbal order

- Complete an order
- Review components of a PowerPlan


Activity 4.1 – Review Orders Profile



Throughout your shift, you will review your patient's orders. The **Orders Profile** is where you will access a full list of the patient's orders.

To navigate to the Orders Profile and review the orders:

- 1. Select Orders from the Menu
- 2. On the left side of the screen is the navigator (**View**) which includes several categories including:
 - Plans
 - Categories of Orders
 - Medication History
 - Reconciliation History
- 3. On the right side is the Orders Profile where you can:
 - Review the list of All Active Orders

Moving the mouse over order icons allows you to **hover to discover** additional information. Some examples of icons are:

- 66 Order for nurse to review
- Additional reference text available
- Order is part of a PowerPlan (preprinted order)
- Order requires Pharmacy verification
- 4. Notice the display filter default setting is set to display **All Active Orders**. This can be modified to display other order statuses by clicking on the blue hyperlink.



2 CSTPRODAC, JENN - 700005690 Opened by TestUser, Dietitian												
Task Edit View Patient Chart Links Options Current Add Help												
😫 Multi-Patient Task List 🖃 Message Centre 👫 Ambulatory Organizer 🖕 Patient List 👫 Dynamic Worklist 🧮 Schedule 👫 LearningLIVE 😓 🕲 CareConnect 🔞 PHSA PACS 🔞 VCH and PHC PACS 🕲 MUSE 🔞 FormFast WFI 🚽												
🛣 Tear Off 📲 Eait 💄 PM Conversation 🔹 🔓 Communicate 🔹 🕂 Add + 📆 Documents 🔬 Discen Reporting Portal :												
👯 😋 Patient Health Education Materials 🔮	Policies and Guidelines 🍓 UpToDate 🝦											
CSTPRODAC, JENNI			← List → / 🛍 Recent - Name - 🤉									
CSTPRODAC, JENNI	ide Process:Difficult Intubation/Airway Disease:	Location:LGH 7E; 712; 03 Enc Type:Inpatient										
Allergies: penicillins, Bugs Bunny Co	omplete, FlowGender:Female PHN:9876747943 Dosing Wt:88 kg	Isolation:	Attending:TestUser, Nurse									
Menu 7	< > - A Orders		🗇 Full screen 🛛 📾 Print 🕹 1 hours 32 minutes ago									
Patient Summary	+ Add 🗌 🖑 Document Medication by Hy 🛛 Reconciliation 🕇 🔕 Check Interactions		Reconciliation Status									
Mental Health Summary			Meds History Admission Discharge									
Orders + 1	Orders Medication List Document In Plan											
Single Patient Task List		Notice of the other Defendance of the Defendance of the Defendance	Charables Order									
Interactive View and I&O	View	Displayed: All Active Urders (All Inactive Urders) All Active Urders	show more Unders									
Results Review	Plans	🔊 🕅 Order Name	Status Dose Details									
Documentation	Document In Plan	⊿ Consults/Referrals										
bocumentation	Medical	IP Consult to Dietitian Adult	Processing 19-Dec									
Histories	EICU General Admission Medical / Surgical (Validated) (Planned)	O IP Consult to Dietitian Adult	Ordered 19-Dec									
Allergies 🕂 Add	- Venous Thromboembolism (VTE) Prophylaxis (Module) (Validated) (Planned)	IP Consult to Recreation Therapy	Ordered 19-Dec									
Diagnoses and Problems	ICU Insulin Infusion - Critical Care (Module) (Validated) (Planned)	🗹 😚 🛛 IP Consult to Ethicist	Ordered 19-Dec									
	ICU Electrolyte Replacement (Module) (Validated) (Planned)	🗹 😚 🛛 IP Consult to Music Therapy	Ordered 19-Dec									
	MED General Medicine Admission (Validated) (Initiated)	✓ 66 ^o IP Consult to Occupational Therapy (IP Consult to OT)	Ordered 19-Dec									
CareConnect	-Suggested Plans (0)	🗹 🚧 IP Consult to Physical Therapy (IP Consult to PT)	Ordered 19-Dec									
Clinical Research	Orders	66' IP Consult to Speech Language Pathology (IP Consult to SLP)	Ordered 19-Dec									
	Admit/Transfer/Discharge	60 IP Consult to Spiritual Health Services	Ordered 19-Dec									
Form browser	Z Status	IP Consult to Social Work	Ordered 04-Dec									
Growth Chart	- Care Care	4. Communication Orders	older e									
MAR Summary	C Diet/Nutrition	Refer to Bowel Protocol	Ordered 30-Nov									
Medication List 🛛 🕂 Add	Continuous Infusions	M D Defects Convert Survey Data	F 2									
Patient Information	Medications 2	Refer to deneral Surgery Pathway	ordered St 3									
Reference	Related Results	T Details										
	Formulary Details											
	Variance Viewer	Orders For Cosignature Orders For Nurse Review	Orders For Signature									

Key Learning Points

- The Orders Page consists of the orders view (Navigator) and the order profile
- The Orders View displays the lists of PowerPlans (preprinted orders) and clinical categories of orders

The Orders Profile page displays All Active Orders for a patient

1



Activity 4.2 – Place an Order

You can place orders according to your profession.

Once you have responded to a consult order and have seen the patient, you can place an order indicating you are following that patient. This is called a **Following Order**, e.g. Dietician Following.

Let's place a **Following** order for your patient.

1. Click Add ^{+ Add} within the Orders page.

CSTPRODAC, JENNI - 700005690 Opened	by TestUser, Dietitian									
Task Edit View Patient Chart Links Options Current Add Help										
🔒 Multi-Patient Task List 🖃 Message Cen	tre 📲 Ambulatory Organizer 🛓 Patient List 🎬 Dynamic	Worklist 🛄 Schedule 🌇 LearningLIVE 🚽 🕄 😋 CareConr	ect 🕄 PHSA PACS 🕄 VCH and PHC PACS 🔍 MU	ISE 🔍 FormFast WFI 🝦						
🗄 🖭 Tear Off 📲 Exit 🔒 PM Conversation 🗸	🛀 Communicate 🔹 🕂 Add 👻 🗐 Documents 🗃 Discer	n Reporting Portal 🝦								
🗄 🕄 Patient Health Education Materials 🔍 P	olicies and Guidelines 🔍 UpToDate 🝦									
CSTPRODAC, JENNI 🗵				← List → @ Recent + Name - Q						
CSTPRODAC, JENNI	DOB:01-May-1995 MRN:700005690 Age:22 years Enc:70000000130	Code Status:Attempt CPR, Full Code 39	Process:Difficult Intubation/Airway Disease:	Location:LGH 7E; 712; 03 Enc Type:Inpatient						
Allergies: penicillins, Bugs Bunny Com	plete, F Gender:Female PHN:9876747943	Dosing Wt:88 kg	Isolation:	Attending:TestUser, Nurse						
Menu	🕂 < - 者 Orders			🗇 Full screen 🛛 📾 Print 🛛 🗞 3 minutes ago						
Patient Summary	Add 2 1 ent Medication by Hx Reconci	liation - 👌 Check Interactions		Reconciliation Status						
Mental Health Summary		10		Meds History Admission Discharge						
Orders 🕂 Add	Orders Medication List Document In Plan									
Single Patient Task List		K Disclaused, All Antice Orders LAU exertise Orders LAU Anti	un Ordere	Chew Mere Orders						
Interactive View and I&O	View	Displayed. All Active orders (All mactive orders (All Acti	Dispayed. Al Active orders (All macrive orders (All Active orders							
Results Review	Griders	Solution of the second	Status	Dose Details						
Documentation	Admit/Transfer/Discharge	△ Admit/Transfer/Discharge								
Histories	2 Status	Admit to Inpatient	Ordered	28-Nov-2017 09:50 PST_Admit to (
	2 Patient Care	⊿ Status								
Allergies 🔮 Add	E Dist/Netrition	🗹 🛃 🕢 Code Status	Ordered	18-Dec-2017 16:43 PST, Attempt CI						
Diagnoses and Problems	Continuous Infusions	⊿ Patient Care								
	Medications	- Foot Care	Proposal	28-Nov-2017 09:09 PST						
CareConnect	Blood Products	Monitor Intake and Output	Ordered	18-Dec-2017 10:43 PST, onless are						
Clinical Paramete	C Laboratory	🖌 🕼 Central Venous Catheter Care	Ordered	07-Dec-2017 07:59 PST						
	Diagnostic Tests			Order placed due to patient having						
Form Browser	Procedures	Tracheostomy Capping Trial	Ordered	01-Dec-2017 11:14 PST						
Growth Chart	Respiratory	Nurse to Discontinue Order Set	Ordered	28-Nov-2017 16:25 PS1 *						
MAR Summary	Allied Health			•						
Madication List	Related Results	▲ Details								
	Formulary Details									
Patient Information	Variance Viewer	Orders For Cosignature Orders For Nurse Review		Orders For Signature						
Reference	*									

The Add Order window will open.

- 2. Type in **Search** [Your Allied Profession] Following, and then press Enter key.
- 3. Select your profession's following order (e.g. **Dietitian Following**) from the search results.

Note: You will see all following orders so be careful to select the correct one for your profession.

4. Click **Done** to close the Add Order window.



P CSTPRODAC, JENNI - Add Order			
CSTPRODAC, JENNI DOB:0	1-May-1 MRN:700005690 Code Status:At	tempt CPR, Full CProcess:Difficult Intu Disease:	ubation/Airw Location:LGH 7E; 712; 03
Allergies: penicillins, Bugs B Gende	r:Female PHN:98767479 Dosing Wt:88 k	g Isolation:	Attending:TestUser, Nurse
Search Following 2	dvanced Options 👻 Type: 👘 Inpatient	•	
📭 🖆 🚖 🖲 🖾 Folder:	Search within:	-	
Dietitian Following Ethicist Following OT Following Physiotherapy Following Psychology Following PT Following SLP Following Aboriginal Health Following Asthma Educator Following Diabetic Educator Following Music Therapy Following Occupational Therapy Following Physical Therapy Following Recreation Therapy Following	Respiratory Therapy Following Social Work Following Discharge Care Coordinator Following IV Therapy Team Following Psychiatric ED Nurse Following Respiratory Nurse Clinician Following Speech Language Pathology Following Spiritual Health Services Following Wound Care Clinician Following Mental Health ED Nurse Following Transition Services Team (TST) Following Aboriginal Spiritual and Cultural Suppo Cardiac Home Follow Up Nurse Followi		
		CST	rprodac, JENNI - 70000 <mark>4</mark> Done

Note: This order will not prompt you to add in an ordering physician name, unlike other types of orders.

- 5. Review the order detail fields. Write your **Reason for Follow-Up** in the box. It is a free text box.
- 6. Click the Sign button.

CSTPRODAC, JENNI - 700005690 Opened B	by TestUser, Dietitian			- # *						
Task Edit View Patient Chart Links Options Current Add Help										
🔐 Multi-Patient Task List 🖃 Message Cent	tre 🌃 Ambulatory Organizer 🍦 Patient List 🎬 Dyna	amic Worklist 🎬 Schedule 🎬 LearningLIVE 📮 🗄 💐 CareConnect 💐 PHS	A PACS 🔞 VCH and PHC PACS 🐧 MUSE 🐧 FormFast WFI	,						
🛣 Tear Off 📲 Exit 🔒 PM Conversation 👻	🔄 Communicate 🔹 🕂 Add 👻 🛅 Documents 🗃 D	Discern Reporting Portal		-						
🕄 Patient Health Education Materials 🔇 P	olicies and Guidelines 🔇 UpToDate 🝦									
CSTPRODAC, JENNI 🛛				🗲 List 🔿 🌇 Recent 🗸 Name 🛛 🗸 🔍						
CSTPRODAC, JENNI	DOB:01-May-1995 MRN:70 Age:22 years Enc:7000	0005690 Code Status:Attempt CPR, Full Code 0000013089	Process:Difficult Intubation/Airway Disease:	Location:LGH 7E; 712; 03 Enc Type:Inpatient						
Allergies: penicillins, Bugs Bunny Comp	plete, FlowGender:Female PHN:987	76747943 Dosing Wt:88 kg	Isolation:	Attending:TestUser, Nurse						
Menu 🧧 🤇	🗧 🕆 🛉 🕈 Orders			🗇 Full screen 🛛 👼 Print 🛛 🎅 1 hours 50 minutes ago						
Patient Summary Mental Health Summary	Add T Document Medication by Hx Reconciliat	tion * 🚴 Check Interactions		Reconciliation Status Meds History Admission Discharge						
Orders + Add	Medication Esc Document in Plan									
Single Patient Task List		Orders for Signature	m							
Interactive View and I&O	Orders for Signature		Details							
Results Review	Plans	△ Allied Health	731							
Documentation	Document In Plan	🗌 👘 Dietitian Following Order 19-Dec-2017 16	:00 19-Dec-2017 16:00 PST, Reason for follow-up: TPN							
Histories	Medical Order and Admission Medical / Surgical (Valia)			5						
Allergies 🕂 Add	Venous Thromboembolism (VTE) Prophylaxi =	Details for Dietitian ⊢ollowing								
Diagnoses and Problems	ICU Insulin Infusion - Critical Care (Module)	Details III Order Comments								
	ICU Electrolyte Replacement (Module) (Valid MED General Medicine Admission (Validated									
CareConnect	Suggested Plans (0)									
Clinical Research	Orders	*Requested Start Date/Time: 19-Dec-2017	PST Reason for Follow-Up: TPN							
Form Browser	Status									
Growth Chart	Patient Care									
MAR Summary	Activity Diet/Nutrition									
Medication List 🕂 Add	Continuous Infusions									
Patient Information	Medications +	•								
Reference	Related Results									
	Formulary Details									
	Variance Viewer	0 Missing Required Details 0 rders For Cosignature 0 rders For Nurse Re	view	6 Sign						



The Following order will display in the status column of the order profile as Processing.

P CSTPRODAC, JENNI - 700005690 Open	ned by TestUser, Dietitian					
Task Edit View Patient Chart	Links Options Current Add Help					
🔐 Multi-Patient Task List 🖃 Message (Centre 🌇 Ambulatory Organizer 🍦 Patient List 🌇 Dy	namic Worklist 🧾 Sch	nedule 👫 LearningLIVE 🔡 🕄 CareConnect 🔍 PHSA PAG	CS 🔃 VCH and PHC PACS 🔍 MUSE 🤅	FormFast WFI	
Tear Off 📲 Exit 🔒 PM Conversatio	n • 🚽 Communicate • 🕂 Add • 📻 Documents 🝙	Discern Reporting Port	lal _			
Patient Health Education Materials	Policies and Guidelines 🕜 UpToDate					
					tatiet and ®a	Recent - Name - Q
CSTPRODAC, JENNI	DOB:01-May-1995 MRN:7 Age:22 years Enc:70	00005690	Code Status:Attempt CPR, Full Code	Process:Difficult Intubation/Airway Disease:	Location:LGH 7E; 7: Enc Type:Inpatient	12; 03
Allergies: penicillins, Bugs Bunny Co	omplete, FlowGender:Female PHN:98	76747943	Dosing Wt:88 kg	Isolation:	Attending:TestUser, I	Nurse
Menu 9	< > • 🔒 Orders				(□) Full sc	reen 👘 Print 📀 0 minutes ago
Patient Summary	+ Add Reconcilia	tion •	ractions		Reconciliatio	on Status
Mental Health Summary					Meds His	story 🚯 Admission 🚯 Discharge
Orders + Add	Orders Medication List Document In Plan					
Single Patient Task List	-	4		/		20 N 500
Interactive View and I&O	View	Displayed: All Activi	e Orders All Inactive Orders All Active Orders			Show More Orders
Parulte Paulau	Orders for Signature	4 6	Order Name	Status	Dose Details	*
	Document In Plan	△ Allied Health				
Documentation	Medical	✓ 2 60	* Dietitian Following	Processing	19-Dec-2017 16:00 PST, Reason	for follow-up: TPN
Histories	CIL General Admission Medical / Surnical O/ali		Respiratory Therapy Following	Ordered	09-Nov-2017 13:14 PST, Reason	for follow-up: test
Alleroies 📥 Add	Venous Thromhoemholism (VTE) Pronhulavi		Respiratory Therapy Following	Ordered	08-Nov-2017 16:39 PST, Reason	for follow-up: test
Allegies T Aud	Citilesulin Infusion Critical Care (Madula)		Respiratory Therapy Following	Ordered	08-Nov-2017 16:16 PST, Reason	for follow-up: test
Diagnoses and Problems	ICII Electrolyte Replacement (Module) (Valid	△ Consults/Ref	errals			
	MED Casard Madialas Administra Olalidated	≤ 66	IP Consult to Dietitian Adult	Ordered	19-Dec-2017 14:33 PST, Routine	e, Reason for Consult: Swallo
-	Supported Dises (0)		IP Consult to Recreation Therapy	Ordered	19-Dec-2017 13:50 PST, Routine	e, Reason for Consult: Wrist sp
CareConnect	Suggested Plans (0)	66	IP Consult to Social Work	Ordered	19-Dec-2017 13:50 PST, End of	Life, Code Blue, Death
Clinical Research	- Orders	60	IP Consult to Ethicist	Ordered	19-Dec-2017 13:49 PST, Routine	e, Reason for Consult: Conflict
Come Presson	Admit/Transfer/Discharge	00	IP Consult to Music Therapy	Ordered	19-Dec-2017 13:49 PST, Routine	e, Reason for Consult: Grief co
Form browser	Tatus	60	IP Consult to Occupational Therapy (IP Consult to OT)	Ordered	19-Dec-2017 13:49 PS1, Routine	E, Keason for Consult Fall
Growth Chart	Patient Care	00	IP Consult to Physical Therapy (IP Consult to PT)	Ordered D) Ordered	19-Dec-2017 13:49 PST, Routine	E, Reason for Consult: wrist sp
MAR Summary	C Activity	40	IP Consult to speech Language Pathology (IP Consult to SL	Ordered	10 Dec 2017 13:49 PS1, Routine	Disconnection of Conflict
	Diet/Nutrition		IP Consult to Spinitual Health Services	Ordered	04. Dec-2017 15:49 PST, 3pintua	in Disconnection of Connect
Medication List 🕈 Add	Continuous infusions			CTUCICU .	Order entered secondary to do	cumenting domestic concerns.
Patient Information		A Communicati	on Orders			-
Palacasa	ж ш н					
Reference	Related Results	Tetail:				
	Formulary Details					
	Variance Viewer	Urders For Cosigna	Kure Urders For Nurse Heview			Urders For Signature

7. Click the **Refresh** icon **Sec.** and the status will change from Processing to Ordered.

g CSTPRODAC, JENRE - 700005590 Opened by TestUse; Dieblian											
Task Edit View Patient Chart Links Options Current Add Help											
📾 Multi-Patient Task List 🔄 Message Centre 🙀 Ambulatory Organizer 🖉 Patient List 🙀 Dynamic Worklist 📓 Schedule 🙀 LearningLIVE 💭 🤹 CareConnect 🔞 PHSA PACS 🕲 VCH and PHC PACS 🕲 MUSE 🕲 FormFast WFI											
🗄 📰 Tear Off 📲 Exit 🔒 PM Conversa	tion 🔹 🕞 Communicate 🔹 💠 Add 🔹 💽 Documents 🔗 Di	cern Reporting Port	tal 🛫								
🖸 😋 Patient Health Education Materials	🕄 📿 Policies and Guidelines 📿 UpToDate 💡										
CSTPRODAC, JENNI						🔶 List 🔿 🛍 Recent	- Name - Q				
CSTPRODAC, JENNI	DOB:01-May-1995 MRN:700 Age:22 years Enc:7000	05690 00013089	Code Status:Attempt CPR, Full Code	Process:Difficult Intubation/Airway Disease:		Location:LGH 7E; 712; 03 Enc Type:Inpatient					
Allergies: penicillins, Bugs Bunny	Complete, FlowGender:Female PHN:9876	747943	Dosing Wt88 kg	Isolation:		Attending:TestUser, Nurse					
Menu P	< > • 🕈 Orders					[D] Full screen	7 👌 0 minutes ago				
Patient Summary	+ Add Reconciliation by Hx Reconciliation	n • Check Inte	ractions			Reconciliation Status					
Mental Health Summary	• ····· · · · · · · · · · · · · · · · ·					Meds History	Admission 😲 Discharge				
Orders 🕂 Add	Orders Medication List Document In Plan										
Single Patient Task List	H			/							
Interactive View and I&O	View	Displayed All Activ	e Urders All Inactive Urders All Active Urders								
Results Review	Orders for Signature	9 8	Order Name	Status	Dose	Details	*				
	Plans Document In Plan	⊿ Allied Health		-							
Documentation	Medical	S 2 60	* Dietitian Following	Ordered		19-Dec-2017 16:00 PST, Reason for follo	w-up: TPN				
Histories	CICII General Admirrion Medical / Surpical (Vali		Respiratory Therapy Following	Ordered		09-Nov-2017 13:14 PST, Reason for follo	w-up: test				
Allaraian 📥 Add	Venous Thromboemholism (VTE) Pronhulasi		Respiratory Therapy Following	Ordered		08-Nov-2017 16:39 PST, Reason for follo	w-up: test				
Panergies	ICI I Inculin Infurion - Critical Care (Module)		Respiratory Therapy Following	Ordered		08-Nov-2017 16:16 PST, Reason for follo	w-up: test				
Diagnoses and Problems	ICU Electrolite Replacement (Madule) 0(alid	⊿ Consults/Refe	errals								
	MED General Medicine Administra (Moldule) (Valid	60	IP Consult to Dietitian Adult	Ordered		19-Dec-2017 14:33 PST, Routine, Reason	for Consult: Swallo				
	Considered Officer (0)	60	IP Consult to Recreation Therapy	Ordered		19-Dec-2017 13:50 PST, Routine, Reason	for Consult: Wrist sp				
CareConnect	Suggested Plans (U)	60	IP Consult to Social Work	Ordered		19-Dec-2017 13:50 PST, End of Life, Cod	e Blue, Death				
Clinical Research		60	IP Consult to Ethicist	Ordered		19-Dec-2017 13:49 PST, Routine, Reason	for Consult: Conflict				
Prove Barrison	-C Admit/Transfer/Discharge	60	IP Consult to Music Therapy	Ordered		19-Dec-2017 13:49 PST, Routine, Reason	for Consult: Grief co				
Form Browser	- Ca Status	66	IP Consult to Occupational Therapy (IP Consult to OT)	Ordered		19-Dec-2017 13:49 PST, Routine, Reason	for Consult: Fall				
Growth Chart	Patient Care	00	IP Consult to Physical Therapy (IP Consult to PT)	Ordered		19-Dec-2017 13:49 PST, Routine, Reason	for Consult: Wrist sp				
MAP Summary	Activity	00	IP Consult to Speech Language Pathology (IP Consult to SL	P) Ordered		19-Dec-2017 13:49 PST, Koutine, Keason	for Consult Swallo				
	Diet/Nutrition	- 00	IP Consult to Spiritual Health Services	Ordered		19-Dec-2017 15:49 PS1, Spintual Discon	nection or Connict				
Medication List 🕈 Add	Continuous Infusions	100	IP Consult to Social Work	Ordered		Order entered secondary to documentia	a domestic concerns				
Patient Information	- Medications -	4 Communicati	on Orders				*				
	*	SentimandUllU									
Keterence	Related Results	Totails									
	Formulary Details										
	Variance Viewer	Orders For Cosigna	Urders For Nurse Review				Orders For Signature				



- A task associated with your newly placed patient Following order can now be found on the **Single Patient Task List (SPTL)** and **Multi Patient Task List (MPTL)**.
 - 1. Click on Single Patient Task List in the Menu
 - 2. The **Following** task displays under one of the **SPTL** tabs (e.g. **Scheduled Patient Care** tab for Dietitians).

Note: Refresh and review all tabs in your SPTL to see all tasks

P CSTPRODAC, JENNI - 700005690 Opened by	ry TestUser, Dietitian	
Task Edit View Patient Chart Links	s Task List Options Help	
🔐 Multi-Patient Task List 🖃 Message Centre	re 🎬 Ambulatory Organizer 🎍 Patient List 🎬 Dynamic Worklist 🎬 Schedule 🎬 LearningLIVE 🍦 🕄 🔃 CareConnect 🕄 PHSA PACS 🕄 VCH and PHC PACS 🖏 WUSE	🕄 FormFast WFI 🝦
😨 Tear Off 📲 Exit 🔒 PM Conversation 👻	🛁 Communicate 🔻 🛉 Add 👻 💽 Documents 📾 Discern Reporting Portal 🖕	
🕄 Patient Health Education Materials 🕄 Pol	Slicies and Guidelines 🔃 UpToDate 🖕	
CSTPRODAC, JENNI 🛛		🗲 List 🔿 🌇 Recent 🗸 Name 🔍 🤉 🔍
CSTPRODAC, JENNI	DOB/01-May-1995 MRN/700005690 Code Status-Attempt CPR, Full Code Process:Difficult Intubation/Airway Age-22 years Enc:7000000013089 Disease:	Location:LGH 7E; 712; 03 Enc Type:Inpatient
Allergies: penicillins, Bugs Bunny Comp	lete, F Gender:Female PHN:9876747943 Dosing Wt:88 kg Isolation:	Attending:TestUser, Nurse
Menu P	< 🗧 - 🛔 Single Patient Task List	🖽 Full screen 🛛 📾 Print 🛛 🕹 0 minutes ago
Patient Summary		
Mental Health Summary		
Orders 🕂 Add	20-December-2017 06:30 Wednesday PST - 20-December-2017 19:45 Wednesday PST	
Single Patient Task List	Scheduled Patient Care All PRN Tasks 2	
Interactive View and I&O	Task retrieval completed	
Results Review	Task Status Scheduled Date and Time Task Description Order Details	
Documentation	😚 🕺 Overdue 19-Dec-2017 14:33 PST Consult to Dietitian Adult 19-Dec-2017 14:33 PST, Routine, Reason for Consult: Swallowing difficulty	
Histories	607 Pending 20-Dec-2017 09:25 PST Consult to Dietitian Adult 20-Dec-2017 09:25 PSI, Routine, Reason for Consult: IPN Dietitian Educational 19-Dec-2017 16:00 PSI Reason for Consult: IPN Dietitian Educational II-9-Dec-2017 16:00 PSI Reason for Consult: IPN	
Allergies 🕂 Add	Vertiling Continuous Dictation Onlying	
Diagnoses and Problems		
CareConnect		
Clinical Research		
Form Browser		
Growth Chart		
MAR Summary		
Medication List 🕂 Add		
Patient Information	1	



1



Activity 4.3 – Review Order Statuses and Details

To see examples of different order statuses, review the image below:

- Processing- order has been placed but the page needs to be refreshed to view updated status
- Ordered- active order that can be acted upon

	8 B		8	Order Name 🔺	Status	Dose	Details	*
	e		0	Insert Peripheral IV	Processing		20-Nov-2017 11:46 PST	
	0		0	Insert Urinary Cath	Ordered		20-Nov-2017 11:31 PST, Indwelling	
	•		10	Morse Fall Risk Assessment	Ordered		17-Nov-2017 14:05 PST, Stop: 17-Nov-2017 14:05 PST Order entered secondary to inpatient admission.	11
	•		0	Vital Signs	Ordered		20-Nov-2017 11:25 PST, q4h while awake	
•	- 🔁		8 0	Vital Signs	Ordered		17-Nov-2017 16:24 PST	
Δ	Medica	ation	15			1		
	0)a 🗈	furosemide	Ordered		20 mg, IV, as directed, order duration: 5 day, drug form: inj, start: 17-Nov Administer pre red blood cell transfusion	-
4							,	

To see examples of order details review the image below:

- Notice in the Details column of the Orders Profile
- Hover your cursor over certain order details to see the complete order information
- Note the start date and that orders are organized by clinical category

	8	Orde	er Name	Status	-	Dose	Details		
4	Patient Care								
	Г	🗹 Vita	Signs	Ordered			28-Nov-2017 10:42 PST, q4h		
4	Bl	ood Products							
		🗹 🗈 Red	3lood Cell Transfusion				Routine, Administer: 1 unit, IV, once, Administer each over: 120 - 180 Minutes, Irradiated, Ple Informed consent must be present on patient record		
	Red Blood Cell Transfusion Details:								
							Routine, Administer: 1 unit, IV, once, Administer each over: 120 - 180 Minutes, Irradiated, Please callwhen ready for pick up, 28-Nov-2017 11:04 PST		
	Order Comment: Informed consent must be present on patient record								

When new orders are placed in the chart, a nurse must acknowledge reviewing these new orders. If

you see a **Nurse Review** icon *b* to the left of the order, this means the order still needs to be reviewed by a nurse. Review, in this case, means a nurse will be able to see that an order to your profession has been picked up and is being followed`. (this helps to avoid multiple referrals for the same patient). In most cases, once an order has been marked reviewed by a nurse, the icon will no longer display.

Key Learning Points

- Remember to review and verify the status of orders
- Hover over items in the chart to view additional order information.



Activity 4.4 – Complete or Cancel/Discontinue an Order



When a one-time order has been carried out, the order needs to be removed from the patient's Orders Profile. This is done by completing the order.

Let's complete an order.

- 1. Review the Orders Profile
- 2. Right-click the Consult order for your profession
- 3. Select Complete

P CSTPRODAC, JENNI - 700005690 Opened by	TestUser, Dietitian								
Task Edit View Patient Chart Links Options Current Add Help									
🗄 🔐 Multi-Patient Task List 🖃 Message Centre	🎬 Ambulatory Organizer 🛓 Patient List 🎬 Dynamic Worklist 🛙	🖩 Schedule 🎬 LearningLIVE 🝦 🤅 😋 CareConnect 😋 PHSA PA	ACS 💐 VCH and PHC PACS 🐧 MUSE 🐧 FormFa	st WFI 🖕					
🗄 📰 Tear Off 📲 Exit 🔒 PM Conversation 👻 🖕	Communicate 🔹 🕂 Add 🔹 🖲 Documents 🗃 Discern Reportin	g Portal 🛫							
😧 🕄 Patient Health Education Materials 🔇 Polic	cies and Guidelines 🔍 UpToDate 💡								
CSTPRODAC, JENNI				🔶 List 🔿 🛍 Recent - Name	- Q				
CSTPRODAC, JENNI	DOB:01-May-1995 MRN:700005690 Age:22 years Enc:700000013089	Code Status:Attempt CPR, Full Code	Process:Difficult Intubation/Airway Disease:	Location:LGH 7E; 712; 03 Enc Type:Inpatient					
Allergies: penicillins, Bugs Bunny Comple	ete, FlowGender:Female PHN:9876747943	Dosing Wt:88 kg	Isolation:	Attending:TestUser, Nurse					
Menu 🖓	< 🔸 - 🔒 Orders			🗇 Full screen 🛛 👼 Print 🛛 🗞 0 m	minutes ago				
Patient Summary	+ Add Reconciliation + Hx Reconciliation +	Check Interactions		Reconciliation Status					
Mental Health Summary		- eneer interactions		9 Meds History 9 Admission 9	Discharge				
Orders 🕂 Add	Orders Medication List Document In Plan								
Single Patient Task List	K	Distant Black Onto 1881 and Delay 1888 and							
Interactive View and I&O	View	Displayed: All Active Orders (All Inactive Orders (All Active Orders		Renew Renew					
Results Review	Activity	🔊 🕅 Order Name	Status	Modify	*				
Documentation	Diet/Nutrition	Respiratory Therapy Following	Ordered	Copy	up: tes				
	Continuous Infusions	Respiratory Therapy Following	Ordered	Cancel and Reorder	up: tes				
Histories	Medications	Consults/Referrals	Orde 2	Suspend	Cons				
Allergies 🕂 Add	Blood Products	CA IP Consult to Dictition Adult	0.44		r Cons				
Diagnoses and Problems	Laboratory	60 IP Consult to Recreation Therapy	Ordered	2 P	r Cons				
	Diagnostic Tests	66 IP Consult to Social Work	Ordered	Complete	lue, Di				
Conferent	Respiratory	60 IP Consult to Ethicist	Ordered	Concel/Discontinue	r Cons				
CareConnect	Allied Health	P Consult to Music Inerapy	Urdered cult to OT) Ordered	Void	r Cons				
Clinical Research	Consults/Referrals	6 m IP Consult to Physical Therapy (IP Consult to	o PT) Ordered	Reschedule Task Times	r Cons				
Form Browser	Communication Orders	66° IP Consult to Speech Language Pathology (IP Consult to SLP) Ordered	Add/Modify Compliance	r Cons				
Growth Chart	Supplies	60 IP Consult to Spiritual Health Services	Ordered	riad, includy complete	tion o —				
MAR Summan/	Non Categorized	IP Consult to Social Work	Ordered	Order Information	tomer =				
	Medication History	Communication Orders	_	Comments	Jomes				
Medication List Add	Reconciliation History			1 Results	*				
Patient Information	4 III +	< III		Reference Information	F				
Reference	Related Results	Details		Print >					
	Formulary Details			Advanced Ellerer					
	Variance Viewer	Orders For Cosignature Orders For Nurse Review		Advanced Filters	ignature				
				Customize View					

Notice that the order is now crossed out.

4. Click Orders for Signature

🤰 CSTPRODAC, JENN - 700005560 Opened by TextUser, Dietkian										
Task Edit View Patient Chart Links Options Current Add Help										
🔐 Multi-Patient Task List 🖃 Message Centre	🌇 Ambulatory Organizer 🛔 Patient Li	ist 🌃 Dynamic Worklist 🏢	Schedule 🌃 Lea	rningLIVE 🝦 👯 CareConnect 🔞 PHSA PACS	🕄 VCH and PHC PACS 🕄 MUSE 🕄 Fo	rmFast WFI 💡				
🗄 🏧 Tear Off 📲 Exit 🔒 PM Conversation 👻 🕞	Communicate 🔹 🕇 Add 👻 🖲 Docum	nents 🧃 Discern Reporting	Portal 🝦							
👯 😋 Patient Health Education Materials 🛯 Q Polici	es and Guidelines 🜊 UpToDate 🝦									
CSTPRODAC, JENNI ▼ ← Q										
CSTPRODAC, JENNI	DOB:01-May-1995 Age:22 years	MRN:700005690 Enc:7000000013089	Code Status:	Attempt CPR, Full Code Pri Dis	ocess:Difficult Intubation/Airway sease:	Loc	ation:LGH 7E; 712; 03			
Allergies: penicillins, Bugs Bunny Complet	e, FlowGender:Female	PHN:9876747943	Dosing Wt:88	3 kg Iso	plation:	Atte	ending:TestUser, Nurse			
Menu P	< > - ♠ Orders						🗇 Full screen 🛛 📾 Print 🕹 3 minutes ago			
Patient Summary	+ Add P Document Medication	w Hx Reconciliation * 👌	Check Interaction	05			Reconciliation Status			
Mental Health Summary							Heds History B Admission Discharge			
Orders 🕂 Add	Orders Medication List Documen	t In Plan								
Single Patient Task List		М	Distance of Auto-	- Orders LATI acceling Orders LATA stice Orders						
Interactive View and I&O	View		Displayed Al Adam	e orders (Air macrive orders (Air Acrive orders						
Results Review	Patient Care	^	D 7	Order Name	Status	Dose	Details			
December 11	Diet/Nutrition			Respiratory Therapy Following	Ordered		08-Nov-2017 16:39 PST, Reason for follow-up: te:			
Documentation	Continuous Infusions			Respiratory Therapy Following	Ordered		08-Nov-2017 16:16 PST, Reason for follow-up: te:			
Histories	Medications		△ Consults/Ref	errals						
Allergies 🕂 Add	Blood Products		000 ·	IP Consult to Dietitian Adult	Complete		10 Dec 2017 14/22 DET, Reutine, Researcher Cons			
Diagnoses and Problems	Laboratory		- 00 - 00	IP Consult to Direction Therapy	Ordered		19-Dec-2017 14:55 P31, Routine, Reason for Cons 19-Dec-2017 13:50 PST, Routine, Reason for Cons			
	Diagnostic Tests		✓ 66°	IP Consult to Social Work	Ordered		19-Dec-2017 13:50 PST, End of Life, Code Blue, D			
	Procedures		60	IP Consult to Ethicist	Ordered		19-Dec-2017 13:49 PST. Routine. Reason for Cons			
CareConnect	2 Respiratory		66	IP Consult to Music Therapy	Ordered		19-Dec-2017 13:49 PST, Routine, Reason for Cons			
Clinical Perearch	Allied Health		🗹 66°	IP Consult to Occupational Therapy (IP Consult	t to OT) Ordered		19-Dec-2017 13:49 PST, Routine, Reason for Cons			
	Consults/Referrals		66	IP Consult to Physical Therapy (IP Consult to P1	T) Ordered		19-Dec-2017 13:49 PST, Routine, Reason for Cons			
Form Browser	Communication Orders	E	66	IP Consult to Speech Language Pathology (IP C	Consult to SLP) Ordered		19-Dec-2017 13:49 PST, Routine, Reason for Cons			
Growth Chart	Supplies		≤ 66	IP Consult to Spiritual Health Services	Ordered		19-Dec-2017 13:49 PST, Spiritual Disconnection o			
MAR Summary	Mon Categorized			IP Consult to Social Work	Ordered		04-Dec-2017 16:27 PST Order entered secondary to documenting domes			
Medication List 🕂 Add	Medication History Snapshot		Communicati	on Orders						
Patient Information	Reconciliation History	*	< [m						
Reference		•		A						
	Related Resul	ts	Details for IP	Consult to Dietitian Adult						
	Formulary Det Variance View	er	Orders For Cosigna	ature Orders For Nurse Review			4 Orders For Signature			



The Orders for Signature window displays.

5. Review the order for signature details and click Sign.

CSTRRODAC JENNI - 700005690 Opened by	Testl ker Dietitian			
Task Edit View Patient Chart Links	Ontions Current Add Help			
Multi-Patient Task List -1 Message Centre	Cambulatory Organizer & Patient List Conamic Workl	ist 🕮 Schedule 📧 Learning! IVE 🔡 🚱 CareConnect 🖉	PHSA PACS 🕥 VCH and PHC PACS 🕜 MUSE 🕅 Form	Fast WFI
Tear Off + Evit & PM Conversion -	Communicate = + Add = Pocumente Pircern Ren	arting Rotal		
Constraint on Speak a reaction Materials (Constraint)	Communicate - + Aud - Erocaments Eroscen repr	and growing g		
Coracent reality concaron materials Coron	cies and duidennes Q oprobate 💡			
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CSTPRODAC, JENNI	Age:22 years Enc:70000001308	9	Disease:	Enc Type:Inpatient
Allergies: penicillins, Bugs Bunny Comple	etc, FlowGender:Female PHN:9876747943	Dosing Wt:88 kg	Isolation:	Attending:TestUser, Nurse
Menu P	< > - ♠ Orders			🗇 Full screen 🖷 Print 🚓 15 minutes age
Patient Summary	+ Add Reconciliation by Hy Reconciliation	* A Check Interactions		Reconciliation Status
Mental Health Summary		0 - energinerations		Meds History () Admission () Discharge
Orders 🕂 Add	Orders Medication List Document In Plan			
Single Patient Task List		Orders for Signature		
Interactive View and I&O	View	📄 🔊 😨 📅 🕅 Order Name Status	Start Details	
Results Review	Orders for Signature	△ LGH 7E; 712; 03 Enc:700000013089 Admit: 0	06-Nov-2017 09:25 PST	
Documentation	Document In Plan	🗌 🤀 66' IP-Consult to Dietitian Comple	ete 20-Dec-2017-09:25	
Histories	Medical			
Allergies 🕂 Add	 ICU General Admission Medical / Surgical (Validated Venous Thromboembolism (VTE) Prophylaxis (Mo 	/ r =		
Diagnoses and Problems	ICU Insulin Infusion - Critical Care (Module) (Valida	1		
biognoses and Problems	ICU Electrolyte Replacement (Module) (Validated)	() () () () () () () () () ()		
CareConnect	- Suggested Plans (0)			
Clinical Research	Orders			
Form Browner	Admit/Transfer/Discharge			
Growth Chart	Patient Care			
MAR Summan	C Activity			
Mode Summary	Diet/Nutrition			
Medication List Add	Medications	-		
Patient Information	< H			
Reference	Related Results	Details		
	Variance Viewer	0 Missing Required Details Orders For Cosignature	Orders For Nurse Review	5 Sign
			[

You will return to the Orders Profile where the order will show as processing.

6. Click the **Refresh** icon and the order will no longer be visible in the **Orders Profile**.

2 Now let's **Cancel/Discontinue** an order.

Certain orders such as **Following** orders are not a one-time order and cannot be completed. These tasks will remain on your SPTL or MPTL until the order is cancelled or discontinued.

- 1. Within the **Orders Profile**, locate the **Following** order for your profession and right click on the order
- 2. Select Cancel/ Discontinue



Tak Edi View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Current Add Help Tak Liti View Patient Chut Lius Options Tak Liti View Patient Chut Lius	CSTPRODAC, JENNI - 700005690 Opened by T	estUser. Dietitian				- @ *
Adult-Planta Task Litt () Measage Center () Arbitatory Granicer + Add + Documents () Discent Reporting Patial CareeConnect: () PHSA PACS () VCH and PHC PACS () MUSE () Formfast WH, () Benew CareeConnect: () Fail Code Communicate + + Add + () Documents () Discent Reporting Patial Core of a Recorder Supplies CSTPRODAC, JENNI DOCIDI-Harper Status DOCIDI-Harper Status Discasse: Encoder Supplies CSTPRODAC, JENNI DOCIDI-Harper Status Discasse: Encoder Supplies Arbitatory CareeConcet: () Fail Code Processcolfficult Intubation/Airway Locatis Corecl of Recorder Supplies CareeConcet: () Fail Code Processcolfficult Intubation/Airway Locatis Corecl of Recorder Supplies Concent In Real Processcolfficult Intubation/Airway Locatis Corecl of Recorder Supplies Concent In Real Processcolfficult Intubation/Airway Locatis Corecl of Recorder Supplies Concent In Real Palero Summary Match Collocation V/ Ref (Recorder Interaction V/ Recorder Interaction V/ Ref (Recorder Interaction V/ Ref (Ref Name Status Doce = 20071426 PS1, Adv Adv/ Model (Vision Medical / Supplie) (Vision	Task Edit View Patient Chart Links	Ontions Current Add Help				
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Patient Health Education Materials: Policies and Guideline: Up ToDate Copy Code StatusAttempt CPR, Full Code ProcessDifficult Intubation/Jarway EccTip Code StatusAttempt CPR, Full Code ProcessDifficult Intubation/Jarway EccTip Altergies ProcessDifficult Intubation/Jarway EccTip Add Document Medication by tel Reconcilation ProcessDifficult Intubation/Jarway EccTip Patient Summary ProcessDifficult Intubation/Jarway EccTip ProcessDifficult Intubation/Jarway ProcessDifficult Intubation/Jarway EccTip ProcessDifficult Intubation/Jarway EccTip ProcessDifficult Intubation/Jarway EccTip ProcessDifficult Intubation/Jarway EccTip ProcessDif	Tear Off 📲 Exit 🔒 PM Conversation 👻 📑	Communicate - + Add - 🕞 Documents 📾 Discern Reportin	g Portal			Modify
CSTPRODAC, JENNI DORDIA-May-1995 MR84700005690 Code StatusAttempt CPR, Full Code Process.Difficult Intubation/Alrway Location Register pentionalities, PlowCenderFemale Process.Difficult Intubation/Alrway Location Register pention Register pention Register pention Register Plant Summary Add Document Medication My Hz Reconciliation Check Interactions Process.Difficult Intubation/Alrway Reconciliation Check Interactions Proceeding	Patient Health Education Materials 🕥 Polici	ies and Guidelines 🕄 UpToDate				Сору
CSTPRODAC, JENNI D0801-May-1995 MR9/200005699 Code Status/Attempt CPR, full Code Process/Difficult Intubation/Ainway Locati Supped Allergies: penicillins, Bugs Bunny Complete, Flowconder/Emaile Privise/Fr4743 Dosing Wt88 kg Dosing Wt88 kg Concel/Discontinue 2 Menu 4 Concel/Discontinue 2 Concel/Discontinue 2 Venue 4 Concel/Discontinue 2 Void Void Menu 4 Concel/Discontinue 2 Void Void Void Menu 4 Concel/Discontinue 2 Void Void <t< td=""><td></td><td></td><td></td><td></td><td>4</td><td>Cancel and Reorder</td></t<>					4	Cancel and Reorder
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3. Select No Longer Medically Indicated in the Discontinue Reason drop-down

4. Click Orders for Signature



5. Click Sign





You will return to the Orders Profile where the order will show as processing.

6. Click the **Refresh** icon and the order will no longer be visible in the Orders Profile.

Key Learning Points

- Right-click to mark an order as completed or cancel/discontinued.
- Once an order is cancelled or discontinued the order will be removed from the patient's Orders Profile



Activity 4.5 – Review Components of a PowerPlan

1

A **PowerPlan** in the CIS is the equivalent of preprinted paper orders. **PowerPlans** help to coordinate patient care by defining sets of orders that are often used together. At times it may be useful to review a **PowerPlan** to distinguish its associated orders from orders placed in an individual manner.

Let's review a PowerPlan. From the Orders Profile:

- 1. Locate the Plans category to the left side of the screen under the View menu
- 2. Select the Bowel Protocol PowerPlan
- 3. Review orders within the PowerPlan (Sennosides 12mg, PO, qHS, PRN)

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Key Learning Points

- The View Menu displays the lists of PowerPlans and clinical categories of orders
- At times it may be useful to review a PowerPlan to distinguish its associated orders from orders placed in an individual manner



PATIENT SCENARIO 5 – Patient Management Conversation

Learning Objectives

At the end of this Scenario, you will be able to:

Review and update patient details in Patient Management Conversation (PM Conversation)

SCENARIO

You just finished reviewing the patient's chart. You were given a phone number that needs to be compared to the current number on file and then updated.

As an Allied Health Professional you will be completing the following activities:

- View Person
- View Encounter
 - Update Patient Information

Activity 5.1 – View Person

1

You can view patient information through **Patient Management Conversation** (**PM Conversation**). Let's review the patient's alerts.

1. Click the drop-down arrow within **PM Conversation** ^{A PM Conversation} in the **Toolbar**.

CLINICAL+SYSTEMS

TRANSFORMATIONAL

LEARNING

2. Select View Person from the drop-down.

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The Organization window opens. To select the facility:

- 3. In the **Facility Name** field, type = *LGH Lions Gate* and press **Enter** on your keyboard.
- 4. Select LGH Lions Gate Hospital.
- 5. Click the **OK** button.

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The View Person window displays and lands on the Patient Information tab.



1. Review the Address Information, Preferred Phone and Home Phone Number fields.

Note: There are other tabs including:

- ALERTS
- Insurance
- Additional Contacts
- 2. Click the **Complete** button.

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Key Learning Points

- View Person is located within the PM Conversation tool
- View Person displays patient information such as address and phone number

Activity 5.2 – View Encounter

1

You can view patient encounter information through **Patient Management Conversation** (**PM Conversation**). Let's review the patient's registration and admission date and time.

- 1. Click the drop-down arrow within **PM Conversation** in the **Toolbar**.
- 2. Select View Encounter from the drop-down.

The View Encounter window displays and lands on the Patient Information tab.

- 3. Click the Encounter Information tab.
- 4. Review the **Registration Date, Registration Time, Patient Admit Date, Patient Admit time** fields.

Note: There are other tabs including:

- ALERTS
- Patient Information
- Insurance
- Additional Contacts
- Waitlist Info
- Referral Info
- 5. Click the **Complete** button.

SCOTT-LGHDEMO, L	LEO - 700005170 Opened	d by TestUser, Dietitian								c	
Task Edit View P	Patient Chart Links	Navigation Help									
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Interactive View and I&C		Communication			20-Jan-1960		57Y	Male	•		5 - 5
Results Review		Active Issues	BC PHN:	Validated with Patient/Family?							
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Form Browser		Intake and Output	Eurent Encounter Informatio	2n					_ _		
Growth Chart		Labs	Encounter Type:	Previous Encounter Type:	Medical Service:	Reason for Visit	Admit Calegory	Admit Source:			
MAR Summary		Imaging (0)	Imposent	inpotent	Linical Care	shorthess of breath	Orgeni/E mergeni	 Emergency 	·		
Medication List		Medications	Anival by Anbulance: No Ambulance	Source of ID: BC Case Card INo Physics	Transferred From:	Transferred From Admit Date	Transferred From Admit Time	E: Disaster Flag:			
Patient Information		Home Medications (2)	- Care Providers								
Reference		Orders (30)	Admitting Provider:	Attending Provider	Primary Care Provider	PCP Veilled?:	Referring Provider:	Conculting Provider 01:			
		Oxygenation and Ventilation	TestCST, GeneraMedic	TestPET. GeneralHedic 🔍	MacDonald, William Kirr 🔍	Yes		N	۹	All Visits	e =-
		Pathology (1)	 Additional Information — 								
		Histories	Visitor Statue:								
		Thomas and the	Assessed Parts						•	Commenta	
		Create Note							Concision		
		Interdisciplinary Care Plan	Beach				001000 75	OT DIFTITIAN DOUG TOUT	14.55		
		Interdisciplinary Rounding Su	GIDVIS		Environment	ACTIVE	Al	ergy	14:00		
		mmary Note	Milk Products		Food	Active	Al	ergy			
		Nursing Shift Summary					Reconciliation Status: (Completed by TestUser, (GeneralMedicin	e-Physician, MD on JUL 18, 2017 at	t 12:20
		A A CALOR AND CONTRACT									
									PRODEC	TEST DIFTITIAN Monday 16-October-2	2017 14:55 PO*



Key Learning Points

View Encounter is located within the PM Conversation tool

View Encounter allows you to access patient information more quickly than View Person by bypassing the Facility Search



Activity 5.3 – Update Patient Information

1

You can update patient information through **Patient Management Conversation** (**PM Conversation**). Let's update the patient's phone number.

- 1. Click the drop-down arrow within **PM Conversation** ^{A PM Conversation} in the **Toolbar**.
- 2. Select Update Patient Information.



The Update Patient Information window opens and lands on the Patient Information tab.

- 3. Click the Preferred Phone drop-down.
- 4. Select Mobile Phone Number. The Mobile Phone Number field automatically highlights.
- 5. Enter the patient's Mobile Phone Number = 604-123-4567
- 6. Click the **Complete** button when finished.

🐨 Update Patient Information	n							
Medical Record Number: 760000668	Encounter Number: 760000000668	Last Name: VALIDATE	First Name: IP-ALLIED	Middle Name:	Preferred Name:	Previous Last Name: Validate	Date of Birth 13-Jan-1977	A V
Age: 41Y	Gender: Male	BC PHN: 0760000668						
ALERTS Patient Information	n Encounter Information Insura	nce Insurance Summary Addit	ional Contacts					
Address and Contact Infor Address Information: Permanent Address: 669 West Broadway Vancouver, British Columbi Canada	e V6R 2L3	Address: fress	Mailing Address (If dif Add Address	ferent from Permanent Address):]	'emporany/Secondary Address: Add Address			
Preferred Phone: Mobie Phone Number Home Number Home Number No Phone Work Phone Number Work Phone Number	3 Phone Number: 333335 4 or	Mobile Phone Number 5 (604)123-4567 Language:	Work Phone Number:	Work Extension:	Alternate Phone Number:	Email Address:		
O by you identify as an Abor If yes, do you identify as Fi Indigenous Identify: No Response	rgnavinaigenous person? inst Nations, Metis or Inuit? (You ca	n choose more than one)						
ADDRESSING GUIDELIN Clent's address: Record II Address for Child in Foster	ES:	rmanent Address section. If the c idress as the Home Address. —	lient is visiting or temporarily reloc	ated within the province, also rec	ord the temporary address, if avai	llable, in the Temporary Address se	ection. —	
						6	Complete	Cancel
Ready						TRAIN1 TEST.DIE	TITIAN 06-Feb-2018	14:49



Key Learning Points

- PM Conversation allows you to update patient information
 - When selecting a Preferred Phone Number the field you need to populate automatically highlights



PATIENT SCENARIO 6 – Handoff Tool

Learning Objectives

At the end of this Scenario, you will be able to:

Navigate and utilize the Handoff Tool

SCENARIO

In this scenario, you will practice using the Handoff Tool in the CIS to communicate patient information with other healthcare professionals.

As an Allied Professional, you will be completing the following activities:

Navigate Handoff Tool

Document Informal Team Communication



Activity 6.1 – Navigating the Handoff Tool

- The **Handoff Tool** can be used to review a summary of specific patient information.
 - 1. Navigate to the Patient Summary/ Mental Health Summary page in the patient's chart
 - 2. Select the **Handoff Tool** tab

Menu 9	< 🖂 👻 者 🛛 Mental Health Si	ummary	🗇 Full screen 📾 Print 🛷 2 minutes ago
Mental Health Summary	A 100%	- • • • 4	
Orders 🕂 Add	Mental Health Summary	XX Handoff Tool XX 2 tharge	
Single Patient Task List			
Results Review	Informal Team 🔒	Informal Team Communication	a =-
Documentation 🛛 🕂 Add	Communication		
Histories	Active Issues	Add new action	Add new comment
Allergies	Allergies (0)		
Diagnoses and Problems	Vital Signs and Measurements $_{\equiv}$	No actions documented	No comments documented
	Documents	All Teams	All Teams
CareConnect	Transfer/Transport/Accompan		
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Form Browser	Assessments	Active Issues	Classification: Medical and Patient Stated 👻 🛛 All Visits 🛛 🤁 📄
Growth Chart	Lines/Tubes/Drains		
MAR Summary	Intake and Output		Add new as: This Visit 👻 🭳
Medication List 🛛 🕂 Add	Labs	No seculto faund	
Patient Information	Micro Cultures	No results round	
Reference	Diagnostics		
	Medications	Allergies (0) 🕂	All Visits 🛛 🥹 📃 -
	Home Medications	• (*/ -	

Let's review the information you can find on the Handoff Tool tab:

- 1. You can use the scroll bar on the right to view all of the components of the tool such as Active Issues, Intake and Output, Diagnostics, Medications, Orders etc.
- 2. Or you can click on each component on the left and it will bring you directly to that information.
- 3. You can also find quick links to commonly used documentation under the **Create Note** section on the left

Tr Mental Health S	Summary	U, Full screen 📳 Print 💐 18 minutes ago
🗚 🐘 🖣 🐘 🔍 🔍 100%	-10 0 4	
Mental Health Summary	12 Handoff Tool 12 Discharge 23 +	
Informal Team Communication	Informal Team Communication	∂ ≡-
Active Issues Allergies (0)	Add new action	Add new comment
Vital Signs and Measurements Documents (21)	No actions documented	No comments documented
Transfer/Transport/Accompan iment (0)	All Teams	All Fearts
Assessments (0) Lines/Tubes/Drains	Active Issues	Classification: Hedical and Patient Stated $*$ All Visits \mathfrak{L} =-
Intake and Output		Add new as: This Visit 👻 🍳
Labs Micro Cultures (0)	No results found	
Diagnostics (0)		
Medications	Allergies (0) 💠	All visits $ oldsymbol{Q} $ =-
Orders (5)	O Allergies not recorded.	
(0)		
Pathology (0) Histories 2	No results found	Reconciliation Status: Incomplete Reconciliation
Create Note	Vital Signs and Measurements 🔶	Selected visit: Lates ** Selected visit: Last 12 hours: $arproduction$
Interdisciplinary Care Plan Interdisciplinary Rounding Su	No results found	
mmary Note Nursing Shift Summary	Documents (21)	Selected viel: Task 50 Notes _ Selected viel: Task 12 hours Move vi 🔊 =-
Select Other Note 3		III Mv notes only III Group by encounter I Display: Facility defined view - 1



Key Learnings Points

Use the Handoff Tool to review patient information with the oncoming nurse

You can add information or create common note types directly from the Handoff Tool

1



Activity 6.2 – Documenting Informal Team Communication

Within the **Handoff Tool** there is an **Informal Team Communication** component that can be used for documenting informal communication between all interdisciplinary care team members. The **Informal Team Communication** Tool can be used to add actions or comments to handover to your colleagues much like you would in a Kardex.

- Use the Add new action section to create a list of to-do action items
- Use the **Add new comment** section to leave a free text comment for the oncoming respiratory therapist or other team members

Note: The **Informal Team Communication** is NOT part of the patient's legal chart. This is not to be used for legal documentation purposes.

Within the Patient Summary page:

- 1. Select the Handoff Tool tab
- 2. Navigate to the Informal Team Communication component
- 3. Type the following = Wife is tearful, may require support
- 4. Click Save

Menu	ą	< 🔹 🔹 👫 🛛 Patient Summa	ry	
Patient Summary		A 100%	- G • A	
Orders Single Patient Task List	+ ^{Adc} 1	Handoff Tool	X Summary X Assessment X Discharge	× +
MAR		Informal Team Communication	Informal Team Communication	
Interactive View and I&O		2 /e Issues		
Results Review		gies (2)	wife is tearful, may require support	dd new comment
Documentation	🕈 Add	Vital Signs and Measurements	2	
Medication Request		Documents (1)	219 characters left No	o comments docu
Histories		Transfer/Transport/Accompanim	Available t 4 Save Cancel	Teams
Allergies	🕈 Add	ent (0)	Entral tube removed as nationt nassed swallowing assessment	
Diagnoses and Problems		Assessments (0)	TestUser, Nurse 21/11/17 09:00	
		Lines/Tubes/Drains		

You may complete or delete these informal team communications when they no longer apply.

To complete a task in Informal Team Communication:

5. Click the **checkbox** to the left of the note. The task will appear as completed and is still viewable.

To delete a task in Informal Team Communication:

6. Click the **small circle** with the x to the right of the note



Informal Team Communication	
Add new action	
No active actions documented	
Patient's family will come to visit this evening	
5 TestMH, Nurse-MH 15/12/17 11:27	6
All Teams	Hide Completed (1)

Note: It is important to remove/delete these informal team communications when they no longer apply.

Key Learning Points

Informal Team Communication component provides a way to create a list of to-do action items or leave a message for another clinician.

An Informal Team Communication message is NOT part of the patient's legal chart.

SELF-GUIDED PRACTICE WORKBOOK CST Transformational Learning

CURRICULUM TRACK: ALLIED HEALTH: ADD-ON for MH

Complete the following activities if you are one of the following, working in the field of **Mental Health**:

Occupational Therapist

Social Worker

Counsellor



PATIENT SCENARIO 1 – Dynamic Documentation

Learning Objectives

At the end of this Scenario, you will be able to:

Create a Dynamic Document

Modify a Dynamic Document

SCENARIO

In this scenario, you will be creating a progress note for your patient.

As an Allied Health Professional, you will be completing the following activities:

Dynamic Documentation

Documenting a Therapeutic Note



Activity 1.1 – Dynamic Documentation

Dynamic Documentation is similar to written progress notes. In a dynamic document, you have the ability to enter free text to document narrative information such as one-to-one sessions or family meetings.

After reviewing the patient's information we want to complete and document the assessment in the patient's chart.

1. With the patient's chart open, click **Documentation** in the **Menu**.

The **Documentation** screen opens.

- 2. Click the Add button.
- 3. Click the Note Type List Filter drop-down menu and select Position.
- 4. Click the **Type** drop-down and select the appropriate note for your position: **Occupational Therapy Note**.

Note: please choose Social Work Note or Counselor Note if that applies to you

- 5. From the Notes Template box select Name: Free Text Note.
- 6. Click the **OK** button.

Note: There are other templates that are available for you to choose from in the Note Templates box

CSTPRODREG, GLORIA	DOB:09-Nov-1987	MRN:700002382		Process:	Location:LGH 4E	
Allergies: Allergies Not Recorded	Age:30 years Gender:Female	PHN:9878173547	Dosing Wt:	Isolation:	Attending:	
Menu 🧧 🕻	> • 🔒 Documentation				(D) Full screen 👘 Print	2 minutes ago
Mental Health Summary	Add at a lar					
Orders + Add	w Note					4 6
Single Patient Task List	Lot					
Results Review	lote Type List Filter:		All (63) Favorites (0)		Q Search	
Documentation + Add	Position	✓ 3				
Histories	Type:	Not	e Templates			
Allergies 🕂 Add	Occupational Therapy Note		Name -	Description		
Diagnoses and Problems	Occupational Therapy Note	4	Discharge Summary	Discharge Summary		Î
	itle:		ED Handoff Note	ED Handoff Note		
Clinical Research	ree Text Note		ED Note	ED Note		8
Form Browser	Date:	1 1	ED Note – WorksafeBC	ED Note – WorksafeBC		
Growth Chart	1-Dec-2017 🛅 1529	PST	ED Note Simple	ED Note Simple Template		
MAR Summary	Author		ED Supervision/Handoff Note	ED Supervision/Handoff Note		
Medication List 🕂 Add	estMH, OccupationalTherapist-MH		Family Conference Note	Family Conference Note Template		
Patient Information						
Reference			Free Text Note	Free Text Note Template 5		
			General Surgery Progress/SOAP Note	General Surgery Progress/SOAP Note Template		
		1	ICU Admission/Consultation Note	ICU Admission/Consultation Note Template		
						÷
					6 ок	Cancel



2

- 1. Type = Family visited, patient tearful. Support provided.
- 2. Click Sign/Submit

Menu		€ ≥ •	D'Fall screen	11 minutes as
Mental Health Summary			and a second	a continuer of
Orders	+ Add			
Single Patient Task List		Pree lext Note X Lat		
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Documentation	+ Add			
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		Note Details: Nursing Narrative Note, TestUser, Nurse-MH; 28-Nov-2017 13:47 PST, Free Text Note Sign/Submit	S 2 Save & Clo	ose Cancel

3 The **Sign/ Submit Note** window opens.

- 1. Review the Type and Note Type List Filter.
- 2. In the **Title** text box type = OT update and change the date and time as desired

Note: please type in Social Work Update or Counselor Update if that applies to you

3. Click the **Sign** button

P	Sign/Submit Note				- • ×
	*Type: Occupational Therapy Note	Note Type List Filter: Position	√ 1		
	*Author: TestMH, OccupationalTherapist-MH	Title: OT update	2 *Date: 11-Dec-2017	1529 PST	
	Forward Options Create provider letter Favorites Recent Relationships Q Provide	r Name			
	Contacts	Recipients	Comment	Sign	Review/CC
				3 Sign	Cancel



The note that you just entered and signed can now be found in the **List** tab of **Documentation**.

CSTPRODREG, GLOP	RIA		DOB:09-Nov-1987	MRN:700002382	Code Status:	Process:	
Allergies: Allergies Not	Recorded		Gender:Female	PHN:9878173547	Dosing Wt:	Isolation:	
Menu	4	< > - f	Documentation				
Mental Health Summary		🕂 Add 💷 Sub	mit 🔳 🌒 Forward	Provider Letter	r 🖿 🗶 🖤 📰 🖬 In Error 📳 Pre	view	
Orders •	🕈 Add	list	n				
Single Patient Task List							
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Documentation	Add	Seprice Date/Tir	me 🗸 Subject	Type	Escility Author Contributor(s)	Statur	Diagnoris
Histories		11-Dec-2017 15	29:00 P OT update	Occupational Therapy Note	TestMH, OccupationalTherapist	t-MH; Pending Refresh Auth (Verified)	Diagnosis
Allergies	Add						
Diagnoses and Problems							
CareConnect							
Clinical Research							
Form Browser							
Growth Chart							
MAR Summary							
Medication List	Add						
Patient Information							
Reference							

You want to modify the note that you just signed.

- 1. Select **Documentation** in the **Menu** if you are currently on the page.
- 2. Under the **List** tab, select the note you want to modify. In our example, we will select the Occupational Therapy Note.

Note: please select Social Work Note or Counselor Note if that applies to you.

3. Click the **Modify** button.

5

MHTEST, SHERRY	×								🗲 List 🗕	🕨 🍘 Recent 👻 Na	ime	- Q
MHTEST, SHERRY			DOB:05-Sep Age:36 years	-1981 N s E	/IRN:700006535 inc:7000000010128	Code Status:Attempt CPR, Full Code	Process:Fa Disease:	ills Risk	Location:L Enc Type:In	6H MIU; M004; 01 patient		
Allergies: Citrus, Banana,	Kaochlor	S-F, prochl	. Gender:Fem	ale P	HN:9876706267	Dosing Wt:	Isolation:		Attending:T	estPET, Psychiatrist-	Physician, MD	
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Documentation	- 1	Service Date	Time 🗸	Subject		Type	Facility	Author Contributor(s)				*
Histories		2 Dec.201	7 00:05:00 051	OT Undate		Occupational Therapy Note	LGH HOpe Centre	TectMH OccupationalTherapid	^ F	nal Report		
Allergies 🕂	Add	Dec-201	7 08:10:42 PST	Therapeutic Inte	ervention/Group Progress I	Acte Therapeutic/Intervention Note	LGH HOpe Centre	TestUser, Nurse-MH				
Diseases and Decklasse	roblems 11	11-Dec-201	7 10:42:00 PST	Psychiatry Prog	ress Note	Psychiatry Progress Note	LGH HOpe Centre	TestPET, Resident, MD: TestPET	Family visited, p	atient tearful. Su	upport	
Diagnoses and Problems		11-Dec-201	7 10:31:00 PST	Psychiatry Asse	ssment Note	Admission Note Provider	LGH HOpe Centre	TestPET, Resident, MD; TestPET	provided.			=
		11-Dec-201	7 10:21:00 PST	Psychiatry Asse	ssment Note	Admission Note Provider	LGH HOpe Centre	TestPET, Resident, MD				
		11-Dec-201	7 10:15:00 PST	Psychiatry Asse	ssment Note	Admission Note Provider	LGH Lions Gate	TestPET, Resident, MD	Signature Line			
Clinical Research		11-Dec-201	7 10:05:00 PST	Psychiatry Asse	ssment Note	Admission Note Provider	LGH Lions Gate	TestPET, Resident, MD	Electronically Sign	ed on 19-Dec-2017	09-12	
C D		06-Dec-201	7 14:23:00 PST	Vital Signs and I	Measurements	Ambulatory Vitals Height Weight - T	ext LGH Lions Gate	TestSX, Anesthesiologist-Physic	Licensinearly orgin		00112	
Point browser		30-Nov-201	7 11:01:51 P	Therapeutic Inte	ervention/Group Progress I	lote Therapeutic/Intervention Note	LGH HOpe Centre	TestMH, Nurse-MH	TestMH, Occupatio	onalTherapist-MH		-
Growth Chart		20-Nov-201	7 14:50:00 P	Admission H &	P	Mental Health Counsellor Note	LGH HOpe Centre	TestMH, CounsellorStudent-MH	1	1.1		
MAR Summary		20-Nov-201	7 14:49:00 P	APSO Note		Psychology Assessment	LGH HOpe Centre	TestMH, PsychologyStudent-M				
Medication List	Add	15-Nov-201	.7 17:08:00 P	Test Note from	RT Student	Respiratory Therapy Note	LGH HOpe Centre	TestUser, RespiratoryTherapyStu	Result	cupational Thorapy	Noto	
		15-Nov-201	7 16:16:00 P	Free Text Note		Psychiatry Clinic Note	LGH HOpe Centre	TestMH, CounsellorStudent-MH	type:	upational merapy	Note	
Patient Information		15-Nov-201	7 15:14:00 P	Free Text Note		Nursing Narrative Note	LGH HOpe Centre	TestMH, Nurse-MH	Result Tu	asday, 19-Decembe	3r-2017	
Reference		14-Nov-201	7 11:11:00 P	Free Text Note		Occupational and Physical Therapy N	ote LGH HOpe Centre	TestMH, OccupationalTherapist	Result .	00 - 51		-
		•						Þ	< [F
		<< Previous	Next >>									



6 The **OT Update** note opens in a new tab.

Note: This will be Social Work Update or Counselor Update, depending on the title you chose.

- 1. Edit/ update/ modify the note. Type = Patient was able to participate in group Arts and Crafts today
- 2. Click the Sign button.

You will return to the **List** tab.

3. Click the **Refresh** sutton near the top right corner of the window.

 The second second	[□] Full screen 🛛 🦷	3	€ 4 minutes age
💠 Add 🔟 🔲 🛛 🔀			
List OT Update X			4 Þ
Tahoma • 11 • ● ● ● Ⅰ ↓ ● <			
* Final Report *			
Family visited, patient tearful. Support provided.			
*Insert Addendum Here: Patient was able to participate in group Arts and Crafts today			
Note Details: Occupational Therapy Note, TestMH, OccupationalTherapist-MH, 19-Dec-2017 09:06 PST, Auth (Verified).	Save Save (& Close	Cancel

7

The note has now been updated and is reflected with the red Document Contains Addenda.

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Jay: Al 🔹 🚽										
ervice Date/Time 💎	Subject	Туре	Facility	Author; Contributor(s)	* Final Report *					
9-Dec-2017 09:06:00 PST	OT Update	Occupational Therapy Note	LGH HOpe Centre	TestMH, OccupationalTherapist	Document Contains Addenda					
3-Dec-2017 08:10:42 PST	Therapeutic Intervention/Group Progress Note	Therapeutic/Intervention Note	LGH HOpe Centre	TestUser, Nurse-MH	Document contains Addenda					
1-Dec-2017 10:42:00 PST	Psychiatry Progress Note	Psychiatry Progress Note	LGH HOpe Centre	TestPET, Resident, MD; TestPET						
1-Dec-2017 10:31:00 PST	Psychiatry Assessment Note	Admission Note Provider	LGH HOpe Centre	TestPET, Resident, MD; TestPET	Family visited, patient tearrul. Support provided.					
1-Dec-2017 10:21:00 PST	Psychiatry Assessment Note	Admission Note Provider	LGH HOpe Centre	TestPET, Resident, MD						
1-Dec-2017 10:15:00 PST	Psychiatry Assessment Note	Admission Note Provider	LGH Lions Gate	TestPET, Resident, MD	Signature Line					
1-Dec-2017 10:05:00 PST	Psychiatry Assessment Note	Admission Note Provider	LGH Lions Gate	TestPET, Resident, MD						
6-Dec-2017 14:23:00 PST	Vital Signs and Measurements	Ambulatory Vitals Height Weight - Text	LGH Lions Gate	TestSX, Anesthesiologist-Physic	Electronically Signed on 19-Dec-2017 09:12					
0-Nov-2017 11:01:51 P	Therapeutic Intervention/Group Progress Note	Therapeutic/Intervention Note	LGH HOpe Centre	TestMH, Nurse-MH	Testilli Assessment and These state All					
0-Nov-2017 14:50:00 P	Admission H & P	Mental Health Counsellor Note	LGH HOpe Centre	TestMH, CounsellorStudent-MH	restMH, Occupational inerapist-MH					
0-Nov-2017 14:49:00 P	APSO Note	Psychology Assessment	LGH HOpe Centre	TestMH, PsychologyStudent-M						
5-Nov-2017 17:08:00 P	Test Note from RT Student	Respiratory Therapy Note	LGH HOpe Centre	TestUser, RespiratoryTherapySte	Addendum by TestMH, OccupationalTherapist-MH on 19					
5-Nov-2017 16:16:00 P	Free Text Note	Psychiatry Clinic Note	LGH HOpe Centre	TestMH, CounsellorStudent-MH	December-2017 09:21 PST (Verified)					
5-Nov-2017 15:14:00 P	Free Text Note	Nursing Narrative Note	LGH HOpe Centre	TestMH, Nurse-MH	Patient was able to participate in group Arts and					
14-Nov-2017 11:11:00 P	Free Text Note	Occupational and Physical Therapy Note	LGH HOpe Centre	TestMH, OccupationalTherapist	Crafts today					
L4-Nov-2017 10:34:00 P	Absence Note	Social Work Note	LGH HOpe Centre	TestMH, SocialWorkStudent-MI						
L4-Nov-2017 10:28:00 P	Consult Note	Social Work Note	LGH HOpe Centre	TestMH, SocialWorker-MH; Tes						
09-Nov-2017 10:22:00 P	Test 1	Mental Health Care Worker Note	LGH HOpe Centre	TestMH, HealthCareWorker-MH	Signature Line					
1					•					



It may be necessary to unchart a document if information was entered on the wrong patient.

Let's unchart the note that you previously documented.

Under the List tab on the Documentation page:

1. Click on Occupational Therapy Note

Note: please select Social Work Note or Counselor Note if that applies to you.

2. Click In Error

8



3. Enter a reason for uncharting in the comment box of the new window = Wrong patient

4. Click OK

P Result Uncharting - CSTLEARNING, DE	MOTHETA - 700008216	×
In Error Comment - Optional		
Comments:		
Wrong patient		
3		
	OK 4 Car	ncel

The document will still appear in the Document tab but will now be under the status of IN ERROR.



Key Learning Points

- Dynamic Documents notes can be found in the Documentation section of the Menu
 - Remember to click the Sign button when you finish entering a new Free Text Note



Activity 2.2 - Documenting a Therapeutic Note

1 You can create a group note for multiple patients at once using the Therapeutic Note component in Powerchart. You can modify notes to reflect group content in addition to the progress of each patient.

- 1. Click Therapeutic Note ^{III Therapeutic Note} from the Organizer Toolbar
- 2. Select YourName_Custom from Patient List Drop-down
- 3. Click **Edit** and a Therapeutic Notes pop-up window will appear

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2 1. Enter into Therapy Name text box = *Practice Group*

Note: Start and End Times are both pre-populated to the current time. You will need to modify the time to ensure it aligns with the time the group was run. Other fields will be pre-populated. You may modify these as necessary.

- 2. Modify the Start Time to 11:00. Modify the End Time to 12:00.
- 3. Click Ok

Therapeutic Notes	S
* Therapy Name Practice Group	Location
Mode 🗸	Modifier
Category	Topic
* Date 12/15/2017	* Start Time * End Time 11:00 2
* Verified By P TestMH, Nurse-MH	Co-Facilitated By:
* Facilitated By	
	3 Ok Cance



- 1. Enter group note description into free text box = *Today we covered* ...
 - 2. Select your patient from the list by clicking arrow next to the patient's name to document individual patient progress
 - 3. Explore the various elements that you can modify to reflect your patient's participation in the group and enter some values as you wish
 - 4. Click Sign

3

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🗄 📲 Exit 🦉 AdHoc 🔒 PM Conversation 👻 🛧 Add 🛩 🛚	🗄 Documents 🗃 Discern Reporting Portal 🖕		
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Note: Each patient will now have a Therapeutic Note in their documentation section.





End Book One

You are ready for your Key Learning Review. Please contact your instructor for your Key Learning Review.