SELF-GUIDED PRACTICE WORKBOOK [N55] CST Transformational Learning

WORKBOOK TITLE: Health Care Assistant: General







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# **\*** SELF-GUIDED PRACTICE WORKBOOK

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



# **Using 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 the actual workflow
- An attempt has been made to ensure scenarios are as clinically accurate as possible
- Some clinical scenario details have been simplified for training purposes
- Some screenshots may not be identical to what is seen on your screen and should be used for reference purposes only
- Follow all steps to be able to complete activities
- If you have trouble to follow the steps, immediately raise your hand for assistance to use classroom time efficiently
- Ask for assistance whenever needed



# **PATIENT SCENARIO 1 – Access and Set-up**

#### Learning Objectives

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

- 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
  - Establish a relationship with patients and open patient charts

#### SCENARIO

An 80 year old male presents to the ED with a fever and productive cough. He is admitted with a diagnosis of Pneumonia and prescribed IV antibiotics. You begin your shift and will be receiving the patient into your care. To start, ensure you are logged into the Clinical Information System (CIS) with your provided username and password.

As a Health Care Assistant, you will be completing the following activities:

- Set up a Location Patient List
- Create a Custom Patient List
- Establish a relationship with your patient and then open your patient's chart



# Activity 1.1 – Set Up a Location Patient List

As a Health Care Assistant, upon logging into PowerChart, you will land on **Patient List**. The Patient List is a tool designed to assist you in locating the correct patient and accessing their chart.



At the start of your first shift (or when working in a new location) using the Clinic Information System (CIS), you will only need to create a **Location List** once. This list will capture all of the patients on your unit. Then, whenever you log into the CIS each shift, the list will be available for you to use.

1. Ensure you are viewing the Patient List.

(Click on Patient List from the **Toolbar** at the top of the screen to navigate to the Patient List from anywhere within the patient's chart).

- 2. The screen will be blank. To create a location list, click the **List Maintenance** icon <sup>2</sup>. When you <u>hover</u> over the wrench with your cursor, it will say **List Maintenance**.
- 3. Select **New** at the bottom right corner of the Modify **Patient Lists** window.





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

Select a patient list type: Assignment Assignment (Ancillary) CareTeam Custom Provider Group Query Relationship	elect a patient list type:	
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Scheduled	ssignment (Ancillary) are Team function forvider Group Juery Jeletionship cheduled	
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6. In the **Location Patient List** window, a location tree will be on the right hand side. Expand the list by clicking on the **tiny plus** + sign next to the locations folder.

Location Patient List		×
▲ <b>locations</b> Medical Services     Encounter Types     Care Teams     Relationships     Discharged Criteria     Admission Criteria	Image: Construction of the second General Hospital         Image: Construction of the second General Hospital Hope Centre         Image: Construction of the second General Hospital Hope Centre         Image: Construction of the second General Hospital Hope Centre         Image: Construction of the second General Hospital Hope Centre         Image: Construction of the second General Hope Centre         Image: Construction of the second General Hope Centre         Image:	A H
Enter a name for the list: (Limited to	50 characters)	
	Back Next Finish Can	cel



- 7. Scroll down until you find the location assigned to you today from your handout sheet. Expand the location and select your unit by checking the box next to it.
- 8. Patient Lists need a name to differentiate them. Location lists are automatically named by the Location.
- 9. Click Finish

Location Patient List		×
<ul> <li>✓ *Locations [LGH 2 East]</li> <li>Medical Services</li> <li>Encounter Types</li> <li>Care Teams</li> <li>Relationships</li> <li>Time Criteria</li> <li>Discharged Criteria</li> <li>Admission Criteria</li> </ul>	CGP LGH Laboratory      CGP LGH Lions Gate Hospital      CGP LGH Lions Gate Hospital      CGP LGH 2 East      CGP LGH 3 East      CGP LGH 4 East      CGP LGH 4 East      CGP LGH 4 East      CGP LGH 6 Surgical Close Observation      CGP LGH 6 East      CGP LGH 6 East      CGP LGH 6 East      CGP LGH 7 East      CGP LGH 7 Neuro Critical Care	·
Enter a name for the list: (Limited to LGH 2 East	50 characters) Back Next Finish Car 9	ncel

- 10. In the **Modify Patient Lists** window select your **Location** list.
- 11. Click the **Blue Arrow** icon icon to move the **Location** to the right **Active List**.
- 12. Click the **OK** button at the bottom right corner to return to **Patient Lists**. Your Location list should now appear.





## 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**

Next, you need to create a **Custom List** that will contain only the patients that you are covering.

- 1. To create a **Custom List**, click the **List Maintenance** icon <sup>29</sup> in the **Patient List**.
- 2. Click the **New** button at the bottom right corner of the **Modify Patient Lists** window.
- 3. From the Patient List Type window select Custom.
- 4. Click Next

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- 5. **The Custom Patient List** window opens. **Custom Lists** need a unique name. Type YourName\_Custom (for example JohnDoe\_Custom).
- 6. Click Finish

Custom Patient List	3
Care Teams         □ Cocations         □ Medical Services         □ Encounter Types         □ Admision Criteria         □ Discharged Criteria         □ Use Best Encounter	
Enter a name for the list: (Limited to 50 characters) JohnDoe_Custom List 5 Back Next Finish 6	



- 7. In the **Modify Patient Lists** window select your Custom List.
- 8. Click the **Blue Arrow** icon ion to move your **Custom List** (e.g., JohnDoe\_Custom) to the right **Active List**.
- 9. Click OK

P Modify Patient Lists		×
Available lists: JohnDoe_Custom List	Active lists:	(k) (k)

- 2 At the beginning of each shift or assignment change, you will add your patients to your custom list from your location list.
  - 1. First, find the patient that is assigned to you today from your handout sheet. Your patient is located on your **Location List**. Right- click on the **patient name**.
  - 2. Select Add to a Patient List.
  - 3. Select YourName\_Custom List.





- 4. Select YourName\_Custom tab.
- Now your patient will appear on your Custom List. You may need to click **Refresh** for them to appear.

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	Location	Name MRN	Encounter #	Age	DOB	Admitted	Admitting Physician	Reason for Visit	Primary Care Physician Visitor Status				
	LGH 2E 2EL 03	CST-TTT, RUTH 7000	7367 700000001347	8 71 yea	irs 10-Jan-194	6 14-Nov-2017 10:45 P	ST Plisvca, Rocco, MD	Hemiarthroplasty Should	er Plisvcy, Charise, NP				

\*Please check to ensure this is the patient assigned to you today from your handout sheet.

**Note:** you can remove a patient from your custom list by highlighting the patient and clicking the Remove Patient icon.

#### **Key Learning Points**

You can create a Custom List that will consist of only patients that you are caring for on your shift



# Activity 1.3 – Open Patient Chart from Patient List

In the Patient List tool, you can establish a relationship with your patient and open the patient's chart.

To establish a relationship:

- 1. Double-click on your patient's name
- 2. Select the relationship of Health Care Assistant
- 3. Click OK

Your patient's chart will open to allow you to review patient information.

Patient List				
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### Key Learning Points

Establishing a relationship with your patient allows you to access their electronic chart.



# **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 patient tasks in MPTL
- Open patient chart from MPTL

#### **SCENARIO**

In this scenario, you will use the Multi-Patient Task List (MPTL) to identify your patients and help organize your day.

As a health care assistant, you will complete the following activities:

Set up your Multi-Patient Task List (MPTL) View

Review the Multi-Patient Task List (MPTL) components

Establish a relationship with patient and open the patient's chart from MPTL



## Activity 2.1 – Set Up Your View of the Multi-Patient Task List

The **Multi-Patient Task List (MPTL)** displays your patient list and a list of tasks associated with the patients. Tasks are activities that need to be completed for the patients.

To navigate to the MPTL:

1

2

Click on the Multi-Patient Task List <sup>AMUlti-Patient Task List</sup> on the toolbar

The **MPTL** for Health Care Assistant has a tab for **Scheduled Patient Care** tasks. This tab is a task category and is used to group tasks such as complete the Valuable and Belongings PowerForm (patient form).

PowerChart Organizer for TestUs	er, He	ealthCare/	Assistant					
Task Edit View Patient Ch	nart	Links 1	Task List Options Hel	p				
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Scheduled Patient Care								
Task retrieval completed								
All Patients	^		Name	Medical Record N	Location/Room/Bed	Task Status	Scheduled Date a	Task Description
BROWN-LEARN HENRY			BROWN-LEARN, HENRY	700006026	LGH 2E / 2EL / 04	Pending	Unscheduled	Admission Discharge Outcom
			BROWN-LEARN, HENRY	700006026	LGH 2E / 2EL / 04	Pending	Unscheduled	Valuables and Belongings
CRUZ-LEARN, MARIA	-	•••	CRUZ-LEARN, MARIA	700006409	LGH 2E / 228 / 01	Pending	Unscheduled	Admission Discharge Outcom
CSTADTJAMTHREE ADTON	-	•••	CRUZ-LEARN, MARIA	700006409	LGH 2E / 228 / 01	Pending	Unscheduled	Valuables and Belongings
		•••	CST-TTT, ARTTU	700007370	LGH 2E / 2EL / 06	Pending	Unscheduled	Admission Discharge Outcom
CSTADTJAMTWO, PATIENTS		•	CST-TTT, ARTTU	700007370	LGH 2E / 2EL / 06	Pending	Unscheduled	Valuables and Belongings
CSTAMBTEST, JAMIE	-	•••	CST-TTT, DEANNE	700007378	LGH 2E / 230 / 02	Pending	Unscheduled	Admission Discharge Outcom
			CST-TTT, DEANNE	700007378	LGH 2E / 230 / 02	Pending	Unscheduled	Valuables and Belongings
CSTCD, QUEENSYLVIAZERO			CST-TTT, ISLA	700007366	LGH 2E / 2EL / 02	Pending	Unscheduled	Admission Discharge Outcom
CSTCORMUEEIN BANANAC			CST-TTT, ISLA	700007366	LGH 2E / 2EL / 02	Pending	Unscheduled	Valuables and Belongings

The first time you log in, you will need to set up the **Multi-Patient Task List (MPTL)**. To do this you need to select an appropriate **Patient List** and **Time Frame** to display.

- 1. Right-click on **Assigned Tasks** in the grey information bar (above Scheduled Patient Care tab)
- 2. Select Customize Patient View





#### Within the Task List Properties window:

- 3. In the Patient List tab, ensure Choose a Patient List is checked
- 4. For training purposes select your **Custom List**. (However, in the hospital, you would select Department View and select the location, e.g. LGH 2 East)
- 5. Ensure View Assigned Tasks is checked as this will ensure tasks display on your MPTL
- 6. Click **OK**

In Christian Book Julie's Book List LGH 6 West TEST TEST TEST 604 My Assignment LGH 6 East 405 Chice Custom List 4 Chice Custom List 4 CH6 E Side □ □ □ LGH Planmacy □ □ □ □ □ LGH Planmacy □ □ □ □ LGH Planmacy □ □ □ □ LGH Planmacy □ □ □ □ LGH Planmacy □ □ □ □ □ LGH Planmacy □ □ □ □ □ LGH Planmacy □ □ □ □ □ □ LGH Planmacy □ □ □ □ □ □ LGH Planmacy □ □ □ □ □ □ □ □ □ LGH Planmacy □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	cal Daycare irsal Clinic sthma Clinic r Function Lab Daycare ess Neurology C ess Spinal Clinic patient ech Language P. r Education Prog
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3 After selecting the appropriate Patient List, next you need to set up the **Defined Time Frame** for viewing tasks.

In this practice scenario, you work a 12-Hour shift. To select the appropriate Time Frame for your MPTL:

- 1. Right-click the date range on the far right hand side of the grey information bar
- 2. Select Change Time Frame Criteria. This will open the Task List Properties window

Fask Edit View Patient Chart Links Task-List Options Help									
🗄 🛉 Patient List 🎬 CareCompass 🚨 Multi-Patient Task List 🛛 Tracking Shell 🏢 Schedule 🎎 Staff Assignment 🎬 LearningLIVE 🍦 🗟 CareConnect 😋 PHSA PACS 🛛 🥲									
🗄 📲 Exit 🎬 AdHoc 🎍 PM Conversation 👻 🕂 Add 👻 🕞 Documents 🎟 Medication Administration 🕥 Discern Reporting Portal 🖕									
दे Patient Health Education Materials 🔞 Policies and Guidelines 🔇 UpToDate 🖕									
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LGH 2 East, Assigned Tasks 21-November-2017 16:26 1 Change Time Frame Criteria 2 PST Scheduled Patient Care									
Task retrieval completed									
All Patients									



Within the Task List Properties window:

- 3. Click on Time Frames tab
- 4. Click on Defined Time Frames
- 5. Select Current for Range
- 6. Select time frame of 12 Hour Day Shift
- 7. Click OK

P Task List Properties	x
Time Frames 3 ent List	_
Choose one of the following: O Defined Time Frame     4 Hour Interval     O Generic Time Frame	
Range     12 Hour Day Shift     6       Previous     12 Hour Nught Shift     8       Current     5     8 Hour Day Shift       Next     8 Hour Evening Shift     8	
Show me my: 13:00	
From: 21-Nov-2017 1626 ST	
To: 27-Nov-2017 1627 PST	
OK 7 ancel	

After you have set up the appropriate Patient List and Time Frame for your MPTL, you are ready to review the tasks associated with your patient as shown in the next Activity.

### Key Learning Points

- You can customize the patient list for MPTL.
- You can change the time frame for MPTL to view tasks within a certain time range.

1



### Activity 2.2 – Review Tasks on the Multi-Patient Task List

- On your **MPTL**, review the following components:
  - 1. Task list toolbar hover over the icons to discover their functions.
  - 2. Information bar with the name of the patient list (far left) and the set time frame (far right).
  - 3. Task categories (tabs) to group tasks. HCA position has only one tab named **Scheduled Patient Care**.
  - 4. Navigator window displays a list of your patients.
  - 5. List of patient tasks. Task names are displayed in the Task Description column.



#### Key Learning Points

Task list toolbar, Information bar, Task categories, Navigator, and List of the patient tasks are components of the MPTL.

The location list is maintained by the system. The custom list is maintained by you. When a patient is discharged, they fall off the location list but remain on the MPTL until your shift is over.



## Activity 2.3 – Open Patient Chart from MPTL

In MPTL, you can establish a relationship with your patient, and then open the patient's chart.

To establish a relationship and open patient chart:

- 1. Right- click on your patient's name
- 2. Select **Open Patient Chart**

#### 3. Select Patient Summary

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Multi-Patient Task List								[🗆] Full scree	en 🖷 Print 💸 30 minutes ag
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LGH 2 East, Assigned Tasks					21-Noven	ıber-20	17 16:26 Tue	sday PST - 27-No	vember-2017 16:27 Monday PST
Scheduled Patient Care									
Task retrieval completed									
All Patients	*	Name	*	Medical Record N	Location/Roo	m/Bed	Task Status	Scheduled Date a	Task Description 🔺
		BROWN-LE	ARN, HENRY	700006026	LGH 2E / 2EL	/ 04	Pending	Unscheduled	Admission Discharge Outcom
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		CST-TTT, D	Orders			102	Pending	Unscheduled	Valuables and Belongings
CSTCD, QUEENSYLVIAZE	RO 🛄	CST-TTT, IS	Single	Patient Task List		02	Pending	Unscheduled	Admission Discharge Outcom
CSTCORMUFFIN, BANAN	IAC	CST-TTT, IS	Interac	tive View and IO		102	Pending	Unscheduled	Valuables and Belongings
		CST-TTT, R	interac	and they and to		103	Pending	Unscheduled	Admission Discharge Outcom
CSTDEMOALEXANDER, D	ON III,	CST-TTT, R	Results	Review		103	Pending	Unscheduled	Valuables and Belongings

- 4. In the Assign a Relationship pop-up window, select relationship of Health Care Assistant.
- 5. Click **OK**

P Assign a Relationship
For Patient: BROWN-LEARN, HENRY
Relationships:
Clinical Support
Health Care Assistant 4
5 OK Cancel

**Note**: if you have already established a relationship with the patient for your shift, you will not see this pop up window. The next day, you will need to establish a relationship again.

Your patient's chart will open to allow you to review patient information.



# Key Learning Points

Establishing a relationship with your patient allows you to access their electronic chart.



# PATIENT SCENARIO 3 – Accessing and Navigating the Patient Chart

#### **Learning Objectives**

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

Navigate the patient's chart to learn more about the patient

#### SCENARIO

In this scenario, we will review how to access the patient's chart and navigate the different pages of the chart to learn more about the patient.

As a Health Care Assistant you will be completing the following activities:

Introduction to Banner Bar, Toolbar, and Menu

Introduction to Patient Summary



PATIENT SCENARIO 3 – Accessing and Navigating the Patient Chart

- Activity 3.1 Introduction to Banner Bar, Toolbar, and Menu
- You have opened your patient's chart in the previous step. Now let's review some key parts of the patient chart.



1. The **Toolbar** is located above the patient's chart and it contains buttons that allow you to access various tools within the Clinical Informatics System, such as Adhoc folders where you will find patient documentation forms or the exit button to safely close the patient's chart.





PATIENT SCENARIO 3 – Accessing and Navigating the Patient Chart

- 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 Interactive View and I&O, Orders and more.
- 4. The **Refresh** icon updates the patient chart with the most up to date entries when clicked. It is important to click the **Refresh** icon regularly especially as other clinicians may be accessing and documenting in the patient chart simultaneously.

**Note**: The chart does not automatically refresh. When in doubt, Refresh. Also, you may hover over icons to display more information.

### **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 your current paper chart
- The Refresh icon should be used regularly

1

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PATIENT SCENARIO 3 – Accessing and Navigating the Patient Chart

# Activity 3.2 – Introduction to Patient Summary

Upon accessing the patient's chart you will see the **Patient Summary** section open. The **Patient Summary** will provide an overview or summary of key clinical patient information.

- 1. There are different tabs including **Handoff Tool**, **Summary**, **Assessment**, and **Discharge** that can be used to learn more about the patient. Click on the different tabs to see a quick overview of the patient.
- 2. Each tab has different components. You can navigate through these using the component list on the left side of each tab.

P CSTLEARNING, DEMOBETA - 700008215 Opened by TestUser, HealthCareAssistant									
Task Edit View Patient Chart Links Navigation Help									
🗄 🛓 Patient List 脳 CareCompass 🕮 Multi-Patient Task List Tracking Shell 🛄 Schedule 🤐 Staff Assignment 🐘 LearningLIVE 🚽 🖸 CareConnect 🔃 PHSA PACS 🔃 VCH and PHC PACS 🛍 MUSE 🔃 FormFast WFI 🖕									
🖾 Tear Off 📲 Exit 🎽 AdHoc 🍐 PM Conversation 🔹 🕇 Add 👻 📆 Documents 🎟 Medication Administration 🗃 Discern Reporting Portal 🖕									
😡 Patient Health Education Materials 🐧 Policies and Guidelines 🐧 UpToDate									
CSTLEARNING, DEMOBETA							🔶 List 🔿 🌾 Recei	nt 🖌 🛛 Name	• Q
CSTLEARNING, DEMOBETA	DOB:01-Jan-1937	MRN:700008215	Code Status:		Process:		Location:LGH 6E	; 624; 03	
Allergies: Tape, penicillin	Age:80 years Gender:Male	Enc:7000000015056 PHN:9876469831	Dosina Wt:70 k	a	Disease: Isolation:		Enc Type:Inpatien Attending:Plisyca	t Rocco, MD	
Menu P	Patient Sum	mary					[□] Full screen	Print	₽ 4 minutes ago
Patient Summary	A 100%								
Orders 🕂 Add	Handoff Tool	Summary	53	Assessment	22 Discharge	52	1		
Single Patient Task List		54			50 51511.95				
Interactive View and I&O	Informal Team	munication							<i>p</i>  ≡-
Results Review	Communication	manication							~
Documentation	Active Issues				Add new comment				=
Histories	Allergies (2)								
Allergies	Vital Signs and Measurements	require new pain med	lication tomorrow. F	Please re-order	No comments docum	ented			
Diagnoses and Problems	Documents (8)	e 05/12/17 12·44			All Teams				
	Transfer/Transport/Accompan								
CareConnect	Accoccmonte								
Clinical Research	Lines/Tubes/Drains	17:37     17:37							
Form Browser	Intake and Output	-							
Lines/Tubes/Drains Summary	Labo	<							
MAR Summary	Micro Cultures								
Medication List 🕂 Add	Disgnostics					Classification: Medi	cal and Patient Stated	+ All Visit:	s  ∂ ≡-
Patient Information	Modications								
Reference	Heme Medications				Add new as: This Visit	<b>ب</b> ۹			
	Ordore								
	Oruers								
	Ventilation 2								
	Pathology							All Visit:	s  ∂ ≡-
	Histories								
< III >	Create Note	•	Category	Status	Severity Rea	action Type Source	Comments		•

<sup>2</sup> Click the **Refresh** icon minutes <sup>2</sup><sup>0</sup> minutes <sup>390</sup>.

 $\stackrel{\scriptstyle imes}{\scriptstyle imes}$  . Notice the time since the last refresh is displayed and will reset to 0

### **Key Learning Points**

Patient Summary provides access to key information about the patient.

Click the Refresh icon to get the most updated information on the patient.



## **PATIENT SCENARIO 4 – Orders**

#### Learning Objectives

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

Review the Orders Page

#### **SCENARIO**

As a Health Care Assistant, you will need to be able to review orders on your patient. To do so, you will complete the following activity:

Review Orders Page

PATIENT SCENARIO 4 – Orders



### Activity 4.1 – Review Orders Page

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



- 1. Locate Menu
- 2. Select Orders
- In the next pane, locate the View and click the Med General Medicine Admission Powerplan MED General Medicine Admission (Validated) (Initiated). PowerPlans are like Order Sets.
- 4. Select Patient Care clinical category
- 5. Review the **Weight** Order

Menu 1 P	< 🔉 👻 🛉 Orders
Provider View	🕂 Add   🔐 Document Medication by Hx   Reconciliation 🕶   🚴 Check Interactions
Results Review	
Orders 2 Add	Orders Medication List
Medication List 🛛 🕂 Add	📕 🐗 🚫 🕂 Add to Phase - 🛄 Comments Start: 2018-Ja
Documentation 🕂 Add	View 3 Signature
	MED General Medicine Admission (Validated) (Initiated)
Allergies 🕂 Add	Medical Last updated on: 2018-Jan-26 17:47 PST by: TestUser, Gastro A Admit/Transfer/Discharge
- Diagnoses and Problems	- MED General Medicine Admission (Validated) (Initiated) 3
Histories	□ Suggested Plans (0) △ Patient Care
	Admit/Transfer/Discharge
MAR Summary	Status
MAR	Patient Care 4
Form Browser	Activity
Detient Information	- Diet/Nutrition 🗹 😚 🚱 💆 Pulse Oximetry
Patient Information	Continuous Infusions
Interactive View and I&O	Medications Lines/Tubes/Drains

The Orders are listed under clinical categories, e.g.: Patient Care, Laboratory or Medications.

**Note**: there are icons displayed for some orders. Moving the mouse over order icons allows you to **hover to discover** additional information. For example, the & icon (nurse to review) indicates the order is yet to be reviewed by a nurse.

#### Key Learning Points

The Order Profile page displays all the orders for a patient.



# **PATIENT SCENARIO 5 – Interactive View and I&O**

#### Learning Objectives

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

- Review the Layout of Interactive View and I&O (iView)
- Document and Modify your Documentation in iView

#### **SCENARIO**

When you reviewed the orders, there were patient care orders for your patient:

- Monitor intake and output
- Document weight

In this scenario, your patient requires assistance with bathing. After providing the appropriate care for your patient, you will complete your documentation in **Interactive View and I&O (iView)**. iView is the electronic equivalent of current state paper flow sheets.

As a Health Care Assistant, you will be completing the following activities:

- Document patient's location and activity in the Individual Observation Record band
- Document weight
- Document your patient's the oral intake and urinary output details
  - Document patient's activities of daily living including bathing details



### **Activity 5.1 – Document Location and Activity in iView**

1

Interactive View and I&O (iView) is like your paper flowsheets. The majority of documentation occurs in iView. You can document a variety of findings for your patient.

- 1. Go to the Menu and select Interactive View and I&O
- 2. Locate the **KHealth Care Assistant** Band
- 3. Click once to select the Individual Observation Record section
- 4. Click on the cells and document for Patient Location and Patient Activity. Cells are fields where data is documented.
  - Patient Location = Patient Room
  - Patient Activity = Lying down

To sign your documentation, click the Green Checkmark icon **V**.

Patient Summary	** 🖃 💷 🔐 🖌 🚫 🖏 🖿 🕋 🛤 🗶		
Orders 🕂 Add			
Single Patient Task List	🗙 Health Care Assistant		
Interactive View and I&O	VITAL SIGNS PAIN ASSESSMENT	Find Item	High Low
Results Review	Activities of Daily Living Individual Observation Record	Result	Comments
Documentation 🛛 🕂 Add	Measurements		
Histories	Additional Measurements GASTROINTESTINAL		07-Nov-2017
Allergies	GENITOURINARY		13:36 PST
- Diagnoses and Problems	Urinary Catheter Environmental Safety Management	⊿ Individual Observation Record Patient Location	✓ Patient room
		Patient Activity Arrect	Lying down

**Note**: Documentation will appear in purple until signed. Once signed, the documentation will become black. Documentation must be signed to display for all healthcare team members accessing the patient chart. Once the documentation is signed the text becomes black.

### Key Learning Points

Documentation will appear in purple until signed. Once signed, the documentation will become black.

You do not have to document in every cell. Only document to what is appropriate for your assessment.



## Activity 5.2 – Document and Modify Weight in iView

After weighing your patient, you note the weight is 75 kg.

To document the weight in iView:

- 1. Go to the Menu and select Interactive View and I&O
- 2. Locate the **WHealth Care Assistant** band
- 3. Select Measurements section
- 4. Document weight of 75 kg in the weight measured field:
  - Weight Measured = 75
- 5. Click 🗸 to sign and then refresh screen 💽

Menu P	< 🔹 🛉 Interactive View and I&O	
Patient Summary	™ 🗖 💷 🚧 🔽 🧧 5 🕽 🖿 🖿 🍋 🛪	
Orders 🕂 Add		
Single Patient Task List	Health Care Assistant 2	
Interactive View and I&O	PAIN ASSESSMENT	Find Item   Critical High L
Results Review	Individual Observation Record	Result Comments
Documentation 🛛 🕂 Add	Measurements 3	
Histories	Additional Measurements GASTROINTESTINAL	07-Nov-2017
Allergies	GENITOURINARY	💐 🚮 🚺 13:36 PST
Diagnoses and Problems	Urinary Catheter Environmental Safety Management	Measurements     Height/Length Measured Cm
		Height/Length Estimated cm
		Weight, Admit kg
CareConnect		Source of Admit Weight
Clinical Research		Weight Measured Kg 75 4
Form Browser		Weight Estimated kg
		⊿ Additional Measurements

2 Occasionally errors occur, and they need to be corrected. In this scenario, you realize you transcribed the weight in error, to correct this:

- Right Click on the cell you just charted in
- select Modify from the dropdown list
- Change it to 80 kg (from 75 kg)
- Click ✓ to sign and then refresh screen



#### PATIENT SCENARIO 5 - Interactive View and I&O

	07-N	ov-2017	
A Measurements	14:03 PS	13:36 PST	A del Descult
Height/Length Measured	cm		Add Kesult
Height/Length Estimated	cm		View Result Details
Weight, Admit	kg		Man Campanta
Source of Admit Weight			View Comments
Weight Measured	kg	75	View Flag Comments
Scale Type			View Reference Material.
Weight Estimated	kg		View Order Infe
⊿ Additional Measurements			view Order Into
Mid-Upper Arm Circumference (M	cm		View History
Upper Arm, Left Circumference	cm		N. 17
Upper Arm, Right Circumference	cm		Modify
Lower Arm, Left Circumference	cm		Unchart
Lower Arm, Right Circumference	cm		Change Date/Time
Upper Leg, Left Circumference	cm		
Upper Leg, Right Circumference	cm		Add Comment
Lower Leg, Left Circumference	cm		Duplicate Results
Lower Leg, Right Circumference	cm		Clear
Ankle Left Circumference	cm		cicui

Within the cell will now show your change 80 kg and a blue triangle displays . When you double-click on the blue triangle, a **Result Detail** with pop-up with the modified details displays

**Note**: With a right click on the result in the cell, you can see actions that can be applied to the result:

- View Result Details To view detailed information about the result
- **Unchart** if you charted on the wrong patient, you use this option to unchart the result. Uncharted results are marked as "In Error"
- Add Comment add a free text comment to the result

#### Key Learning Points

Weight can be documented and/or modified in the iView.



### Activity 5.3 – Document Intake and Output in iView

During the day, your patient has intake and output data. In this scenario, your patient's earlier documentation of 600 mL of oral intake and 400 mL of urine output is displayed

To document intake and output:

1

- 1. Go to the Menu and select Interactive View and I&O
- 2. Locate the **Intake And Output** band (you may need to scroll to the bottom of the page)
- 3. Select Oral section
- 4. Double click the cell for Oral Intake under the appropriate date and time, next document:
  - Oral Intake = 500
- 5. Double click on the cell for **Urine Voided** under the appropriate date and time, next document:
  - Urinary Voided = 300
- 6. Click 🚩 to sign and then refresh screen



#### Key Learning Points

You can document Intake and output in the iView Intake and Output band.



# Activity 5.4 – Document Activities of Daily Living in iView

1

You have just supervised your patient taking a bath. You then need to update the documentation for your patient's activities of daily living.

To document bathing details:

- 1. Go to the Menu and select Interactive View and I&O
- 2. Locate the Kealth Care Assistant band
- 3. Select Activities of Daily Living section
- 4. Double click on the blue line next to the **Activities of Daily Living** section to document on several cells. You can move through the cells by pressing the **Tab** key
- 5. Click on Bathing and document:
  - Bathing = Supervision
  - Dressing = Limited Assist
- 6. Click 📕 to sign and then refresh screen.



**Note**: You do not have to document in every cell. Only document what is appropriate for your assessment and follow appropriate documentation policies and guidelines at your site.

5



# Key Learning Points

You do not have to document in every cell. Only document what is appropriate for your assessment.



# **PATIENT SCENARIO 6 – PowerForm**

#### **Learning Objectives**

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

- Document in PowerForms through AdHoc Charting
- View and Modify existing PowerForms

#### **SCENARIO**

In this scenario, we will review another method of documentation. You will be capturing any valuables and belongings documentation in an electronic equivalent of the paper form.

As a Health Care Assistant, you will be completing the following activities:

- Locate the Valuables and Belongings PowerForm
- Document on the Valuables and Belongings PowerForm
- View an existing PowerForm
- Modifying an existing PowerForm
- Unchart an existing PowerForm

1





**PowerForms** are the electronic equivalent of the paper forms currently used to document patient care. In this scenario, you will document your patient's personal belongings on the **Valuables and Belongings** PowerForm.

To access the PowerForm:

- 1. Go to the Toolbar and click **Ad Hoc** <sup>1</sup>/<sub>20</sub> button
- 2. Click the Valuables and Belongings PowerForm
- 3. Click Chart. The PowerForm will open.



#### Key Learning Points

The Valuables and Belongings PowerForm can be accessed by clicking Ad Hoc <sup>10</sup> button.



# Activity 6.2 – Document on the Valuables and Belongings PowerForm

You have opened the **Valuables and Belongings** PowerForm in the previous step. Note if there are previously documented values within the form, those values are denoted by an Icon . These values were documented during the patient's admission.



**Note**: You can add changes to this form and your changes will be added to the previous documentation. Changes may be added multiple times after the PowerForm is signed. Also, there are many fields to select on the form, choose only the ones that best reflect your patient's situation.

In this scenario, you noticed your patient had glasses. You will document this finding on the **Valuables and Belongings** form by following the steps below:

- 1. Scroll down to **Personal Devices**
- 2. Click on the Description cell for Glasses, and document:
  - Glasses Description = Reading glasses with solid black frame
- 3. Click Sign 🗹

P Valuables/Belongings - CSTPRODORD, PATIENT C								
🗸 🖬 🛇   🕱 🗖 🛧 🔸   💷 🖽 🗎	È							
*Performed on: 07-Nov-2017 📮 💌	1451 🊔 PST				By: TestUser, HealthCa			
Valuables/Belong Medication #6			<alpha></alpha>					
Medication #7			<alpha></alpha>					
Medication #8			<alpha></alpha>					
Medication #9			<alpha></alpha>					
Medication #10			<alpha></alpha>	<alpha></alpha>				
Personal Devices		-						
	Description		Number of Items	Location				
Assistive Devices				<alpha></alpha>				
Cane				<alpha></alpha>				
Contact Lenses				<alpha></alpha>				
Dentures, Lower				<alpha></alpha>				
Denture Partial Plate				<alpha></alpha>				
Dentures. Upper	_			<alpha></alpha>				
Glasses	Reading Glass with so	olid black frame		<alpha></alpha>				
Hair Piece, Wig				<alpha></alpha>				
Hearing Aid, Left				<alpha></alpha>				
Hearing Aid, Right				<alpha></alpha>				
Orthodontic Retainer				<alpha></alpha>				
Orthotics				<alpha></alpha>				
Prosthesis				<alpha></alpha>				



### Key Learning Points

- The Valuables and Belongings PowerForm can be accessed by clicking Ad Hoc <sup>11</sup>/<sub>2</sub> button on the toolbar.
- There are many fields to select on the form. Document only in the ones that best reflect your patient's situation.



# **Activity 6.3 – View an Existing PowerForm**

There are several places from which you can review your Valuables and Belongings documentation to ensure you have captured everything correctly. You can review the form via the **Form Browser**.

To access Form Browser and view your previously documented PowerForm:

1. Go to Menu

1

- 2. Select Form Browser
- 3. Double-click the Valuables and Belongings Form
- 4. Review your Documentation
- 5. Close the form when done

P CSTPRODORD, PATIENT C - 70001819 Opened by Test User, Nurse								
Task Edit View Patient Chart Links Options Help								
🗄 🛣 CareCompass 🖕 Patient List 📾 Staff Assignment. 🎬 Discharge Dashboard 😫 Multi-Patient Task List. 🛍 Learninni IVF. 🛍 Mufti-Patient Task List. 🛍 Learninni IVF. 🛍 Mufti-Patient Task List.								
🗄 🎛 Tear Off 🎆 Suspend 🗿 Exit 🔏 Message Sender 🏙 AdHoc 🎟 Medication Administration 🔒 P	Valuables/Belon	gings - CSTPRODORD, PATIENT C			- 5 E			
FESRONE, PRACTICE CSTPRODORD, PATIENT C	( 🖬 🔕 🖄 🖊	🛚 🛧 + 💷 🖾 🗈						
CSTPRODORD, PATIENT C DOB:1935-May-05 MRN:7								
Age:82 years Enc:70	Valuables/Belo	Valuables/Relengi	nac		· · · · · · · · · · · · · · · · · · ·			
Allergies: Latex Pine Nut, amoxiciliin Gender:remaie PHNS		valuables/ Belongi	ngs					
Defined Company of the second se		Does patient have any valuables / belongings with them?	Patient instructed to send all ite exception of personal assistive	ems home with the devices?	Special circumstances including			
	_		Yes: Items sent home with relative or fr	end	patients coming for day surgery.			
Sort by: Form	4	O No	O Yes; Pt unwilling, or unable to send iter	ns home with relative or friend	If patient unwiling or unable to send			
			O No; special circumstance		ensure that patient has signed a "waiver			
NAN DAti Forms					or responsibility for valuables form.			
Provide Review and Icco		Belongings Sent Home With	Belongings Labeled Cor	es patient have any itrabands with them?	Contrabands Removed as per Policy			
2017-Jul-26 10:57 PDT (Auth (Verified)) - Test, Ord		Wife	O Yes	Yes	O Yes			
Madiation - Add - 2017-Jul-27 14:22 PDT (Auth (Verified)) - Test. Ord			O Other. O	No	O Other:			
Diand Back								
Liebolio Bank								
		Contrabands						
Allergies T Add		Description	Number of Items	Sent to				
Diagnoses and Problems		Contraband						
		Does the patient have any	ist any hospital equipment that has	been loaned to	Has the hospital equipment			
Clinical Media T Add		home medications with them? t	the patient		been returned?			
		O No			O Yes			
Form Browser					O Other:			
Growth Chart								
Introduzations		Home Medications						
Lines/ Lubes/ Drains Summary		Medication Nam	ne/Route	Home Medications Sent (	to			
Medication 15th and Add		Medication #1		<alpha></alpha>				
		Medication #2		(Alpha)				
Patient information		Medication #3		(Alpha)				
		Medication #5		<alpha></alpha>				
		Medication #6		(Alpha)				

Note: A PowerForm can have different statuses and can be modified by different users.

- For a **saved** document, **(In Progress)** appears in the **status** next to the title. The form is not complete and cannot be viewed by another user
- For a **completed** document, **(Auth (Verified))** appears in the **status** next to the title. The form has been signed off by the author and is viewable to other users
- For a modified document, (Modified) appears in the status next to the title
- For an uncharted documented, (In Error) appears in the status next to the title



# Key Learning Points

Existing PowerForms can be accessed and viewed through the Form Browser.

A form can have different statuses (e.g. In Progress, Auth Verified, Modified, and In Error).

1



# Activity 6.4 – Modify an Existing PowerForm

It may be necessary to modify PowerForms if information needs to be added or clarified. Let's modify the **Valuables and Belongings** form.

🗄 🎍 Patient List 🎬 CareCompass 🚨 Multi-Patient Task List 🛛 Tracking Shell 🏢 Schedule 🎎 Staff Assignment 📲 Learr								
🗄 🛣 Tear Off 📲 Exit 🎬 AdHoc 🔒 PM Conversation 👻 🕂 Add 👻 🕞 Documents 🎟 Medication Administration 🥃 D								
🔯 Patient Health Education Materials 🔍 Policies and Guidelines 🕄 UpToDate 🝦								
CSTPRODAC, HANHAN								
CSTPRODAC, HANHAN		DOB:30-Sep-1993	MRN:700005678	Code Sta				
		Age:24 years	Enc:7000000010102					
Allergies: shellfish, Latex, bacitri	acın	Gender:Male	PHN:9876748067	Dosing V				
Menu P	$\langle \rangle \rightarrow \langle \rangle$	- 者 Form Browser						
Patient Summary				Wednesda				
Orders 🕂 Add								
Single Patient Task List	Sort by :	Date	•					
Interactive View and I&O	All For	ms						
Results Review	📄 🗁 Frid	day, 13-October-2017 PDT						
Documentation		09:42 PDT Valuables/Belong	ings (Auth (Verified)) - TestUse	r, HealthCar				
Histories	<u>I</u>	14:04 PDT Discharge Plannir	ng Assessment (Auth (Verified))	- TestORD.				
Allergies		14:01 PDT Discharge Plannir	ng Assessment (Auth (Verified))	- TestORD,				
Diagnoses and Problems		12:59 PDT Infectious Disease	Risk Screening (Auth (Verified)	)) - TestUser				
		12:57 PDT Infectious Disease	e Risk Screening (Auth (Verified)	)) - TestUser				
		14-33 PDT Valuables/Belond	nas (Modified) - Multi Contrib	utors				
CareConnect		11:14 PDT Valuables/Belong	ings (in Error) - Multi Contribut	tors				
Clinical Research								
Form Browser	📄 🗁 Fric	day, 29-September-2017 P	DT					
L		12:15 PDT Medication Admi	nistration Follow Up (Auth (Ver	ified)) - Tes				

To modify a PowerForm select it from within Form Browser:

- 1. Right-click on the most recently completed Valuables and Belongings form in Form Browser
- 2. Select Modify

Sort by: Form	
All Forms	7
28-Nov-2017 11:13 PST (Auth (Verified)) - TestUser, HealthCareA     28-Nov-2017 11:12 PST (Auth (Verified)) - TestUser, HealthCareA	ss stant View
	Modify
	Unchart
	History
	Change Date/Time



- 3. Scroll down to **Personal Devices**
- 4. Click on the **Description** cell for **Cane**, and document:
  - a. Cane Description = *Black Cane*

D	escription	Number of Items	Location
Assistive Devices			<alpha></alpha>
Cane Bl	llack Cane		<alpha></alpha>
Contact Lenses			<alpha></alpha>
Dentures, Lower			<alpha></alpha>
Denture Partial Plate			<alpha></alpha>
Dentures, Upper			<alpha></alpha>
Glasses R	eading glasses with solid black frame		<alpha></alpha>
Hair Piece, Wig			<alpha></alpha>
Hearing Aid, Left			<alpha></alpha>
Hearing Aid, Right			<alpha></alpha>
Orthodontic Retainer			<alpha></alpha>
Orthotics			<alpha></alpha>
Prosthesis			<alpha></alpha>
Walker			<alpha></alpha>
Wheelchair			<alpha></alpha>
Other			<alpha></alpha>

5. Click **Sign** to complete the documentation and then refresh the screen.

When you return to this document in the form browser, it will show the document has been modified.



#### Key Learning Points

A document can be modified if needed.

A modified document will show up as (Modified) in the Form Browser.



# Activity 6.5 – Unchart an existing PowerForm

It may be necessary to unchart an existing PowerForm (e.g. an incorrect PowerForm was completed). Let's say the **Values and Belongings** form was documented in error.

To unchart the PowerForm within Form Browser:

- 1. Right-click on Valuables/Belongings
- 2. Select Unchart

1

Sort by : Form -	
All Forms	
	View Modify Unchart History
	Change Date/Time

3. The **Unchart** window opens. Enter a reason for uncharting in the **Comment** box.

Comments = Charted on the wrong patient

P Valuables/Belongings (Unchart) - CSTPRODREG, PRE-INPAT
🗸 🛇   🕱 👩
*Performed on: 28-Nov-2017 TIL25 PST By: TestUser, HealthCareAssistant
Uncharting this form will change the status of all the results associated with this form to 'In Error'
Comment: Charted on the wrong patient



4. Sign the documentation and then refresh your screen.

Uncharting the form will change the status of all the results associated with the form to - In Error. A red-strike through will also show up across the title of the PowerForm.

Sort by :	Form -
All For	ms luables/Belongings
· 18	28 Nov 2017 11:25 PST (In Error) - TestUser, HealthCareAssistant
12	28-Nov-2017 11:13 PST (Modified) - TestUser, HealthCareAssistant
	28-Nov-2017 11:12 PST (Auth (Verified)) - TestUser, HealthCareAssistant

### **Key Learning Points**

A document can be uncharted if needed.

An uncharted document will show up as In Error in the Form Browser.



# **b** End of Workbook

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