# SELF-GUIDED PRACTICE WORKBOOK [N54] CST Transformational Learning

# WORKBOOK TITLE: Nursing: Supervisor

Complete the following activities if you are one of the following:

- Patient Care Coordinator
- Charge Nurse
- Inpatient Nurse who takes on charge duties





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

Duration	8 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>Each scenario will allow you to work through different learning activities at your own pace to ensure you are able to practice and consolidate the skills and competencies required throughout the session.</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>Upon completion of the Key Learning Review, both you and your instructor will provide feedback and sign the review.</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 – Navigating Clinical Leader Organizer (CLO)**

#### **Learning Objectives**

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

Review the Clinical Leader Organizer

### **SCENARIO**

As an inpatient charge nurse, you will be completing the following activity in order to review your patients for the day:

Review the Clinical Leader Organizer (CLO)

1





### Activity 1.1 – Review Clinical Leader Organizer (CLO)

**Clinical Leader Organizer (CLO)** is an interactive organizer that supports communication and coordination across the continuum of care. It provides a high-level overview of patient data such as location, visit summary, risks and more. It is a very useful tool for understanding patient care goals and assists charge nurses in assigning appropriate patients to nurses.

With **CLO**, charge nurses, nursing managers and other users can view the following data for each patient: patient name; location; active discharge orders; high risks; isolation precautions; restraint information; elopement risk; pending transfer; diet order; falls risk; suicide precaution; skin integrity; ventilator; airway information; telemetry order; central line insitu; catheter insitu; visitor information; care team; non-invasive ventilation; and oxygen therapy.

**Note:** Patient Care Coordinators and nurses who are always in charge will land on the CLO page when logging into the system. Inpatient nurses who are only occasionally in charge will land on CareCompass but can navigate to CLO when necessary.

Let's review Clinical Leader Organizer:

- 1. Select Clinical Leader Organizer from the toolbar
- 2. Confirm that the displayed Patient List is the Location List you created in Activity 1.1
- 3. Click Establish Relationship

PowerChart Organizer for TestUser, Nurse										
Task Edit View Patient Chart Links Navigation Help										
🗄 🎬 CareCo 🥇 🎬 Clinical Leader Organizer 🖕 Patient List 🚨 Multi-Patien	t Task List 📲 Dis	charge Dashboard  🎎 S	taff Assignment	t 🌃 Learr	ningLIVE	Ŧ				
🗄 😋 PACS 💽 FormFast WFI 🛫 🗄 🛣 Exit 🎬 AdHoc 🎟 Medication Administrat	ion  🔒 PM Conve	ersation 👻 🗎 Medical F	Record Request	🕂 Add 🗸	🖻 Docu	iments 🖡	Schedu	ling Appo	ntment Bo	ook 🗃 Discern Reporting Portal 🤤
🗄 😋 Patient Health Education Materials 😋 Policies and Guidelines 😋 UpToDate	a 🖕									
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Clinical Leader Organizer										
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Clinical Leader Organizer 🛛 🕄 🕂										
Patient List: LGH 3 West V Aaintenance Establish Relationships	3									
Patient Location	Dis Hi	Care Team	Air	Fall	Sui	Iso	Tel	Central	Ox	
*CSTPRODREG, PRO 27 yrs M	No Relationsh	ip Exists								
CSTPRODREGAAA, B 11 m F LGH 3W	No Relationsh	ip Exists								
*MEDPROCESS, TES 44 yrs F LGH 3W 305 - 01A	No Relationsh	ip Exists								





2 Establish relationships with all of the unit's patients as a **Nurse**.

- 1. Select Nurse from the Relationship drop-down
- 2. Click top checkbox to select all patients
- 3. Click Establish

	Dis	Establi	sh Relationships				53
	No Re	Relatio	nship Nurse	⊠ 1			
	No Re		2	Sex	DOB	MRN	-
5 - 01A	No Re		CSTMATTEST, BABY	м	Nov 9, 2017	700008024	-
7 - 01M	No Re	V	CSTLABVIRTUAL, VI	F	Mar 20, 1962	700001989	
7 - 01A	No Re		FORD-LEARN, HARRY	м	Oct 13, 2010	700008093	
7 - 01B	No Re		CSTPRODMAT, MAR	F	Jul 16, 1986	700008120	
L - 01A	No Re		CSTPRODREGHIM, B	м	Nov 16, 2017	700008170	
L - 01M	No Re	<b>V</b>	CSTSMITH, CSTDAN	м	Nov 14, 1945	700008053	
7 - 01M	No Re		CSTPRODMAT, BAB	F	Nov 19, 2017	700008260	
5 - 01M	No Re		Controbinity DRD		100 13, 2017	70000200	*

- 3 CLO contains several different columns displaying patient data. The first time you access CLO, all columns in the configuration are displayed in the dashboard. You can customize your columns to view relevant patient data. Hovering over the column titles enables you to see the full name of the column.
  - 1. Hover over a column heading to see the full title of the column
  - 2. Click the Menu icon =-
  - 3. Click the green checkmark beside a viewable topic(s) of your choice to de-select it from the viewable columns
  - 4. Click Apply

Note: Columns can also be reordered by dragging the column name into the order you prefer.

Clinical Leader Organizer																	Į	🗅 Full screen 🛛 👼 Print	æ3	minute	ago
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Clinical Leader Organizer		× +																			
																				-	1
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Patient			Location	1	Dis	ні	Care Team	Air	Fall	Sui	Iso	Tel	Central	Ox	Ski	Ve	Visit	Viewable			
*CSTPRODPET, RAV	34 yrs	F	LGH 7E	718 - 01		•			75				U				Length of Stay: 2 months	Patient	48	<u> </u>	
						-			75				*					Discharge	1	-	
*CSTPRODREG, HLS	27 yrs	F							60								Length of Stay:	High Risk	1	0	
CSTPRODCOW, SNT	104 yrs	м	LGH 7E				-										Length of Stay:	Care Team		0	
COTOCUUADVEV, CT	26		1.011.75														Length of Chau	Airway	0	0	
CSTSCHRARVET, ST	20 yrs	m	LON /E														Lengur or Stay	Fall		•	
*TESTSQBBVPP, SA	37 yrs	м	LGH 7E						70								Length of Stay: 6 months 2 weeks	Suicide	0	0	3
*TESTSOBBVDD, SA	89 yrs	м	LGH 7E						66		8						Length of Stay: 6 months 2 weeks	Isolation	1	-	
12010200111/012	,								55		w							Central Line	0	<u> </u>	
*TESTSQBBVPP, SA	66 yrs	м	LGH 7E														Length of Stay: 6 months 2 weeks	Oxygen Theram	· 0	-	
*TESTSQBBVPP, SA	45 yrs	м	LGH 7E														Length of Stay: 6 months 2 weeks	Skin Integrity		0	
																		Ventilator	1	0	
TESTCSTSQ, SIX LAU	17 yrs	F	LGH /E	-													Length of Stay: 6 months 2 weeks	Visit		0	
CSTLABADDON, DEM	33 yrs	F	LGH 7E	722 - 03			-		25								Length of Stay: 5 months 1 week	Catheter	0	0	
CSTORODOSLAB, DE	53	м	LGH 7E	724 - 01													Length of Stay: 5 months	Restraints	0	0	
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*WINRECS, INPATIE	67 yrs	F	LGH 7E	708 - 01													Length of Stay: 5 months	NOL IN VIEW			
*CSTLABAUTOMATL.	41 yrs	м	LGH 7E														Length of Stay: 5 months	4 Apply	Cance		

4



Clicking on icons within the CLO provides additional information. The system displays a pop-up box when an icon is clicked.

- The topic(s) that you de-selected previously are no longer viewable columns in your CLO view
- 2. Click on an icon within the CLO to see additional information

Clinical Leader Organizer																	(D) F	ull screen	🖷 Pri	nt 🛷 8	minute	ago
A	% <del>•</del>		4																			
Clinical Leader Organizer	2	* +																				•
Patient List: LGH 7 East	List Ma	intenan	ce Establ	ish Relationship	IS																=	
Patient			Location	1	Dis	н	Care Team	Air	Fall	Iso	Tel	Central	Ox	Ski	Ve	Visit	Ca	Re	Elo	Pe	Diet	1
*CSTPRODPET, RAV	34 yrs	F	LGH 7E	718 - 01	F	A			75			¥				Length of Stay: 2 months					۳L	ĥ
*CSTPRODREG, HLS	27 yrs	F							1.0							Length of Stay:						
CSTPRODCOW, SNT	104 yrs	м	LGH 7E					P	atient Isola	ition		_				Length of Stay:						
CSTSCHHARVEY, ST	26 yrs	м	LGH 7E					3	1-Oct-201	08:52 PE	T, Conta	ct Plus				Length of Stay:						
*TESTSQBBVPP, SA	37 yrs	м	LGH 7E					Ľ	ruereu at:	10/31/20	1/ 8:52 /	44				Length of Stay: 6 months 2 weeks						
*TESTSQBBVPP, SA	89 yrs	м	LGH 7E						55	8	2					Length of Stay: 6 months 2 weeks						=
*TESTSQBBVPP, SA	66 yrs	м	LGH 7E								-					Length of Stay: 6 months 2 weeks						11
*TESTSQBBVPP, SA	45 yrs	м	LGH 7E													Length of Stay: 6 months 2 weeks						
TESTCSTSQ, SIX LAU	17 yrs	F	LGH 7E													Length of Stay: 6 months 2 weeks						11
CSTLABADDON, DEM	33 yrs	F	LGH 7E	722 - 03					25							Length of Stay: 5 months 1 week						
CSTPRODOSLAB, DE	53 yrs	м	LGH 7E	724 - 01			-									Length of Stay: 5 months					τi	Ц
*WINRECS, INPATIE	67 yrs	F	LGH 7E	708 - 01			-									Length of Stay: 5 months						

Note: Customization of the CLO is only visible to the user customizing their views.

### Key Learning Points

- Clinical Leader Organizer (CLO) is an interactive organizer that supports communication and coordination across the continuum of care
- CLO provides a high-level overview of patient data
- CLO can be customized to display patient information pertinent to your workflow



### **PATIENT SCENARIO 2 – Reports**

#### Learning Objectives

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

Run a report in the CIS

### **SCENARIO**

As an inpatient charge nurse or nurse manager, you will be completing the following activities:

Run a report for your unit/organization in the CIS





### Activity 2.1 – Running Reports for your Unit/Organization

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The reporting functionality in the Clinical Information System (CIS) allows users to run reports at a unit and/or organizational level. Reports are important for performing audits and in informing safe patient care. Some of the reports that can be generated include the following: number of falls; catheterized patients; and isolated patients.

**Note:** Only Patient Care Coordinators, Educators, managers, or nurses who are frequently in charge will have the ability to run reports in the system.

Assuming you are a charge nurse, generate a report for **Patient Census by Location**.

1. Navigate to **Discern Reporting** by selecting the Discern Reporting Portal button in the Toolbar to open the Reporting Portal window

Task Edit View Patient Chart Links Options Documentation Orders Help

2. Locate **Patient Census by Location** by typing it into the search box

e unberung i erter				
Reporting Portal				
⊖ Cerner				Welcome: TestORD, Nurse   Settings   Help
Reporting Portal			2 QBearch for Report Title	
Filters	All Reports (37) My Favorites (0)			1 2 > Last >> 🖸
	Report Name		<b>♦</b> Source	🗢 Favorite 🗢 🦰
Source	Arterial Line	Nursing Supervisor	Public	\$
<ul> <li>Categories</li> </ul>	Bed Status	Nursing Supervisor	Public	$\stackrel{\sim}{\sim}$
Perent Penorts	Braden Assessment - Current Inpatients	Nursing Supervisor	Public	*
Moderate Sedation	Braden Q Assessment - Current Inpatients	Nursing Supervisor	Public	÷
Braden Assessment - Current Inpatients Diet Orders - Current Patients	Central Line Days - Current Inpatients	Nursing Supervisor	Public	*
Braden Q Assessment - Current Inpatients	Central Line Days - Discharged Inpatients	Nursing Supervisor	Public	*
Patient Census by Location	Charting After Discharge	Nursing Supervisor	Public	~~

Note: This report can also be located by navigating through the pages

- 3. Click the name of the report to expand the field
- 4. Click Run Report

Reporting Portal			Q patient censu	sus by location X
Filters	All Reports (1) My Favorites (0)			1 0
	Report Name	<ul> <li>Categories</li> </ul>		
► Source 3	Patient Census by Location	Nursing Supervisor	Public	\$
Categories	Description: Passed Testing: NO (replace with YES after completed)	Suggested Report User:	Reporting Application: CCL	4 Run Report
Recent Reports	rested by: rested Date:	Suggested Report Frequency:	Alternate Name: BC_ALL_PM_CENSUS_LOCN_LYT:DBA	Run Report in Background
Moderate Sedation		Support Reference Number:		View Previous Kult
Braden Assessment - Current Inpatients		0075c058-e494-478f-9467-3622315ffa02		
Diet Orders - Current Patients				
Braden Q Assessment - Current Inpatients				
Patient Census by Location				

2





The **Discern Prompt** window opens. This window is where you indicate the information you would like in the report.

Select the following information:

- 1. **Encounter Type** = *Inpatient*
- 2. Site = Lions Gate Hospital
- 3. Facility = LGH Lions Gate Hospital
- 4. **Unit/Clinic(s)** = All Nurse Units
- 5. Click Execute

Discern Prompt: BC_ALL_PM_CI	ENSUS_LOCN_LYT:DBA	×
*Output to File/Printer/MINE	MINE 👻	
*Output Type	© Exportable(CSV) <ul> <li>Printable(PDF)</li> </ul>	
*Encounter Type(s)		1
Health Organization	Vancouver Coastal Health Authority 🔹	_
*Site	Lions Gate Hospital 💌	2
*Facility	All Facilities     EGH Evergreen House     LGH HOpe Centre     IGH Lions Gate Hospital     LGH North Shore Hospice	3
Unit/Clinic(s)	V All Nurse Units <ul> <li>LGH 2 East</li> <li>LGH 2E Cardiac Care</li> <li>LGH 3 East</li> <li>LGH 3 West</li> <li>LGH 4 East</li> <li>T</li> </ul> <li>Vest</li>	4
Include VIP Patients? Page break on Unit?	Yes ▼ No ▼	
Beturn to prompts on close of output	Execute Cancel	•

The Patient Census by Location report will now display.



#### Review the Report

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- 1. Navigate the Report by clicking the Next Page 🕒 icon
- 2. To print the report, click on the Print  $\stackrel{\checkmark}{=}$  icon.

Note: For this activity, we will only view and not print the actual report.

🗃 Re	eporting Port	al									
Repo	rting Portal	Diet Or	rders - Current Patients	Braden Q Asse	ssment - Cu	rrent Inpatients	Patient Census by L	ocation	×		
	🍯 🖪,   A		3	🔌 🔍 100%	- 📲						
	2		1								
					F	atient Census	By Location				
					Facility:	LGH Lions	sGate				
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	Submitted	Dn: 30-NOV	/-2017 15:13		Privacy	Patients: INCLUDE	D				
	Room/ Bed	MRN	Patient	Age	Gender	Service	Admit Date/Time	LOS	Attending Provider	LOA Encounter Type	Visitor Status
	Unit/Cil nic:	LGH 2E									
	204-01	70000034	CSTPRODMED, JAMIE	25 Years	Female	General Internal Medicine	10-NOV-2017 10:52	20 days	Pillev cf, Dillon, MD	Inpatient	
	204-02	700006576	CSTPRODMI, SITSYNGO	41 Years	Female	General Internal Medicine	27-NOV-2017 13:13	3 days	Pliev cc, Trevor, MD	Inpatient	

Key Learning Points

The reporting functionality in the CIS allows users to run reports

Specific information can be selected to be included in the report



# End of Workbook

When you are ready for your Key Learning Review, please contact your instructor.