SELF-GUIDED PRACTICE WORKBOOK [N62]
CST Transformational Learning

WORKBOOK TITLE:

UNIT CLERK: RESIDENTIAL CARE

CLINICAL + SYSTEMS TRANSFORMATION
Our path to smarter, seamless care

TRANSFORMATIONAL LEARNING

Last update: March 8, 2018 (v2)

TABLE OF CONTENTS

SELF-GUIDED PRACTICE WORKBOOK

Duration	1 hour
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 the 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 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 – Residential Care Patient Admission

Learning Objectives

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

- Build a Patient List
- Access the patient chart
- Navigate the patient's chart to learn more about the patient

SCENARIO

You are notified of a 65 year old male being admitted to Residential Care following an inpatient stay at the hospital for COPD exacerbation. The patient arrives and you have notified central registration of the patient's arrival in order for registration to update/add encounter information into the Clinical Information System.

As a Unit Clerk working in Residential Care, you will complete the following activities in the Clinical Information System (CIS):

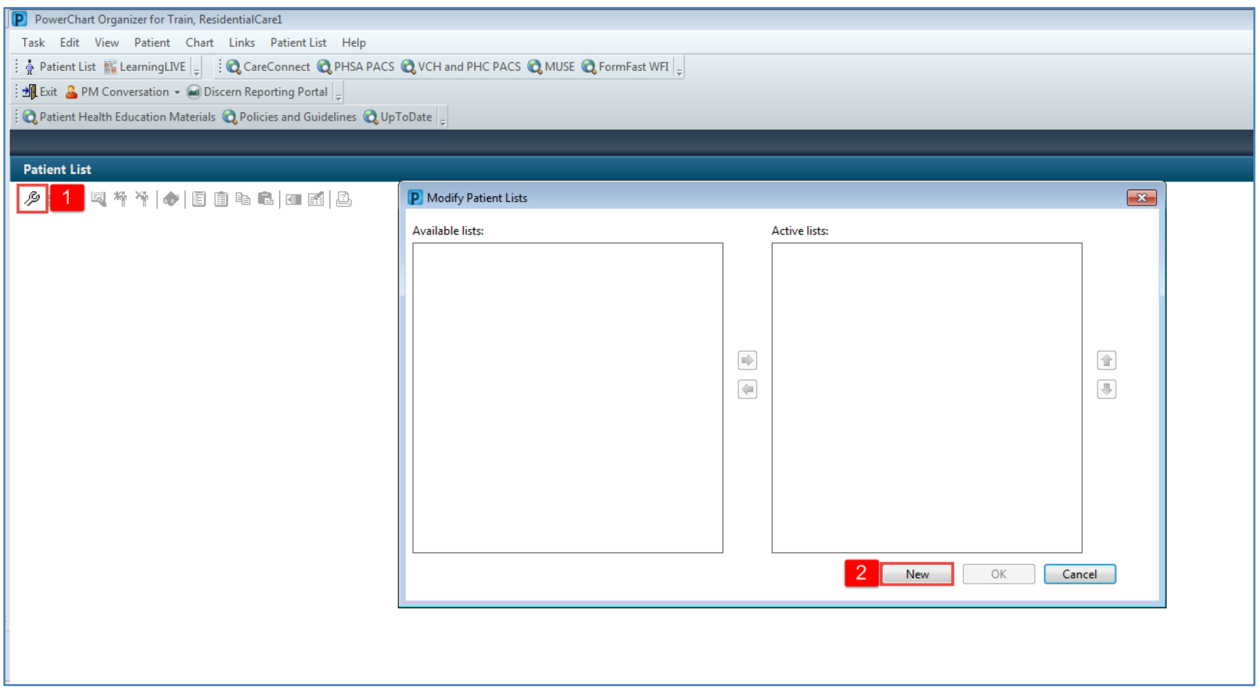
- Create a Patient List
- Review Patient Information

Activity 1.1 – Set Up a Location Patient List

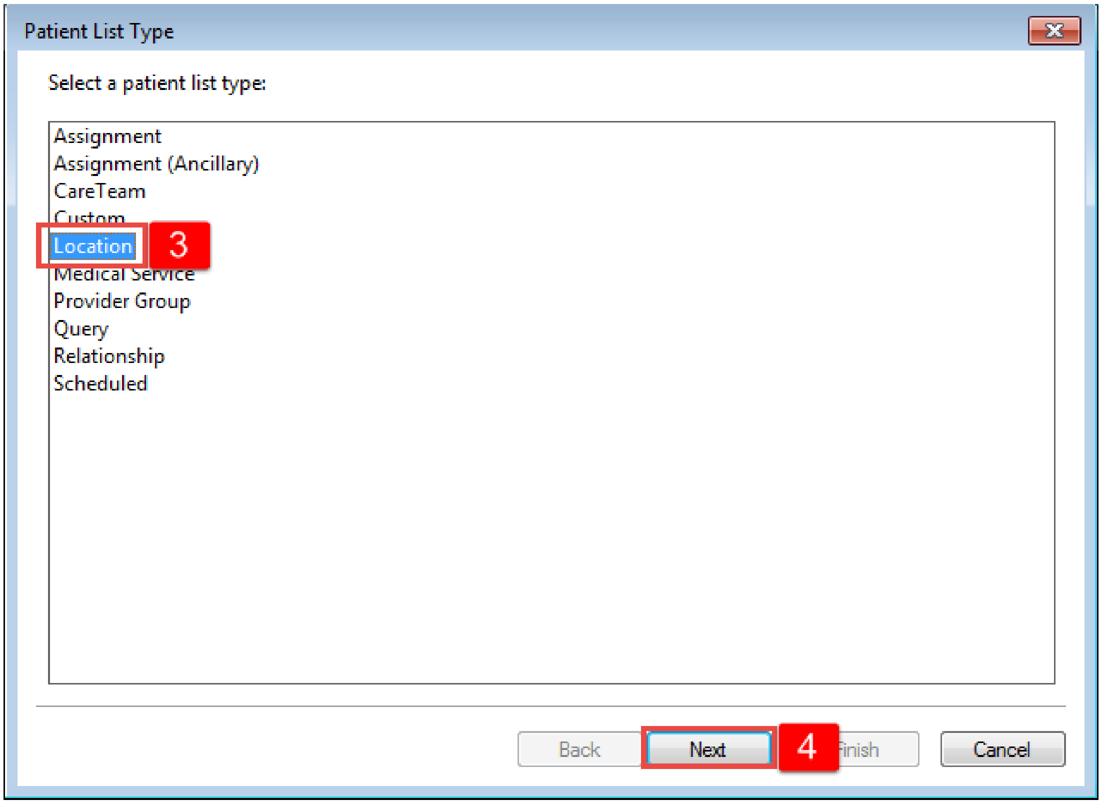
1 Upon logging in, you will land on Patient List. Patient List provides a quick overview of select patient information.

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

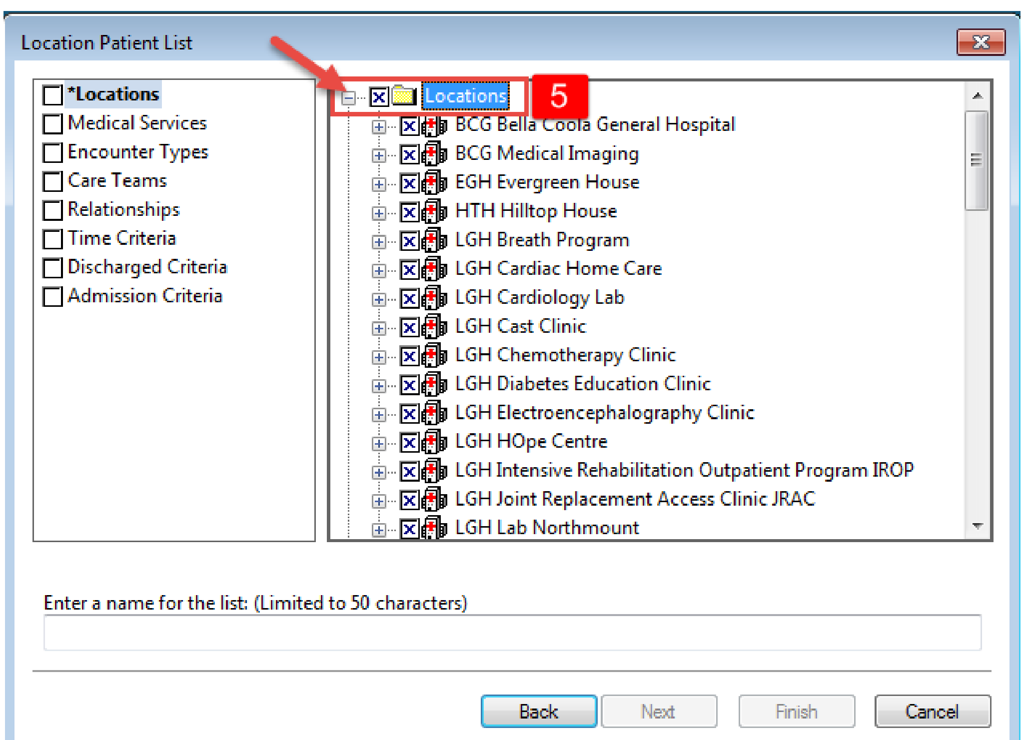
1. The screen will be blank. To create a location list, click the **List Maintenance** icon . When you hover over the wrench it will say **List Maintenance**.
2. Click the **New** button in the bottom right corner of the **Modify Patient Lists** window.



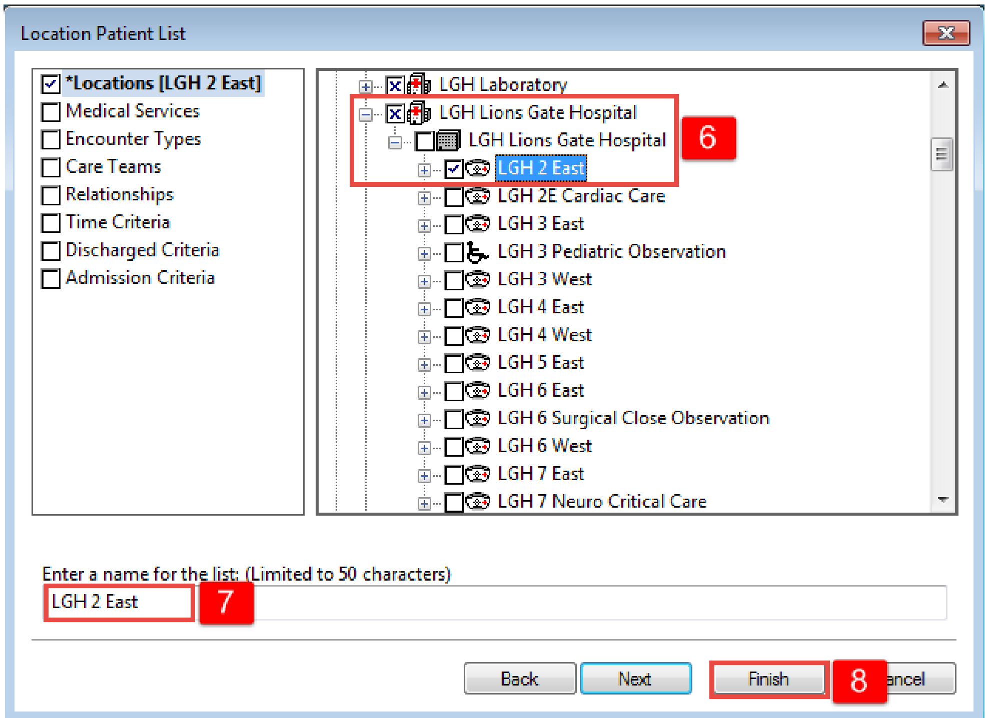
3. From the Patient List Type window select **Location.**
4. Click the **Next** button in the bottom right corner.



5. 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 facility.



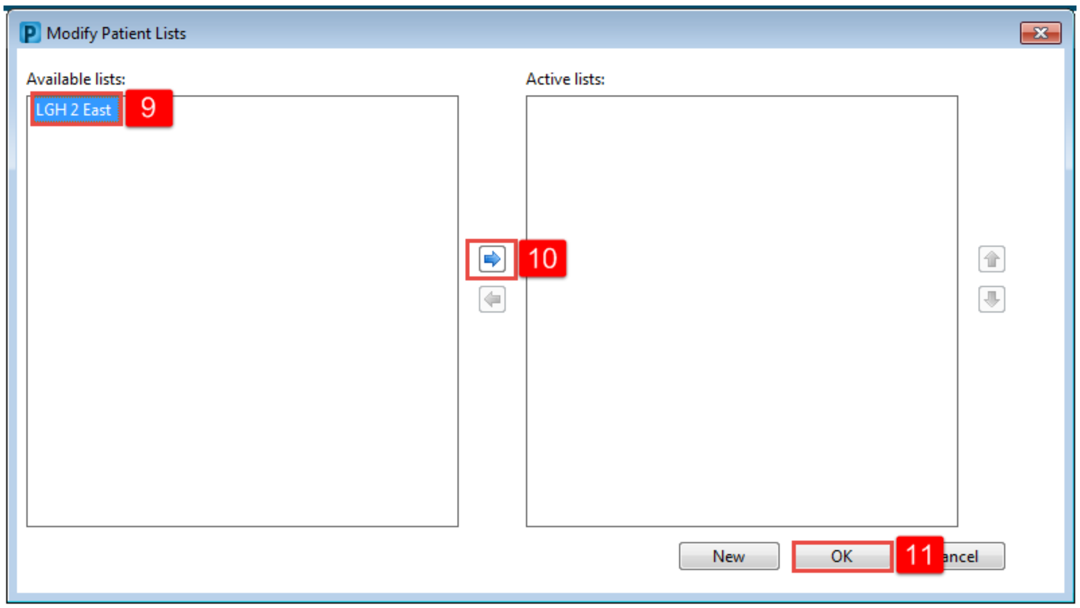
6. Scroll down until you find the location assigned to you. Expand the location and select your unit by checking the box next to it.
7. Patient Lists need a name to differentiate them. Location lists are automatically named by the Location.
8. Click the **Finish** button in the bottom right corner.



9. In the **Modify Patient Lists** window select your **Location** list.

10. Click the **Blue Arrow** icon  to move the **Location** to the right **Active List**.

11. Click the **OK** button in the bottom right corner to return to **Patient Lists**. Your Location list should now appear.



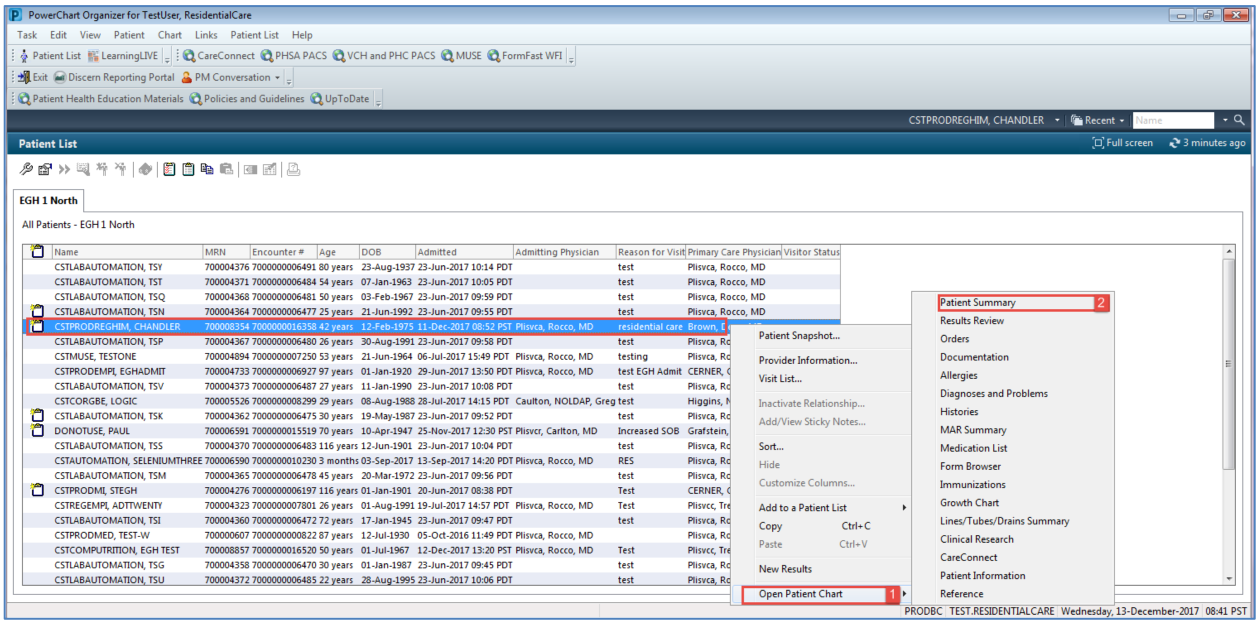
Key Learning Points

- 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.

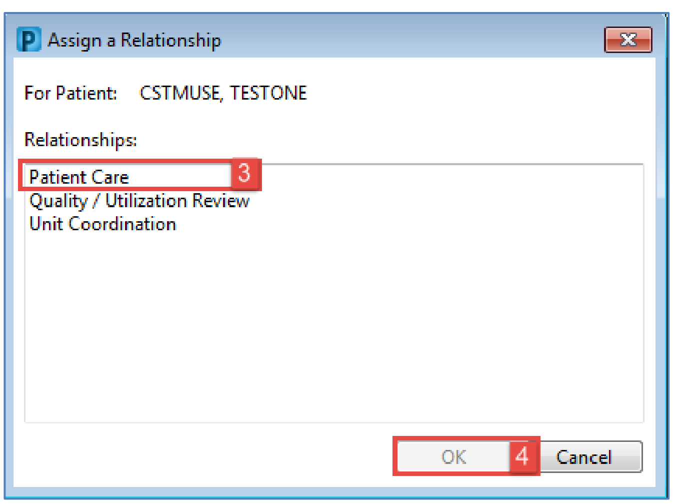
Activity 1.2 – Introduction to Banner Bar, Toolbar, and Menu

1 From Patient List, locate your assigned patient.

1. Locate your patient, right click on the patient's name and select **Open Patient Chart**
2. Click on **Patient Summary**



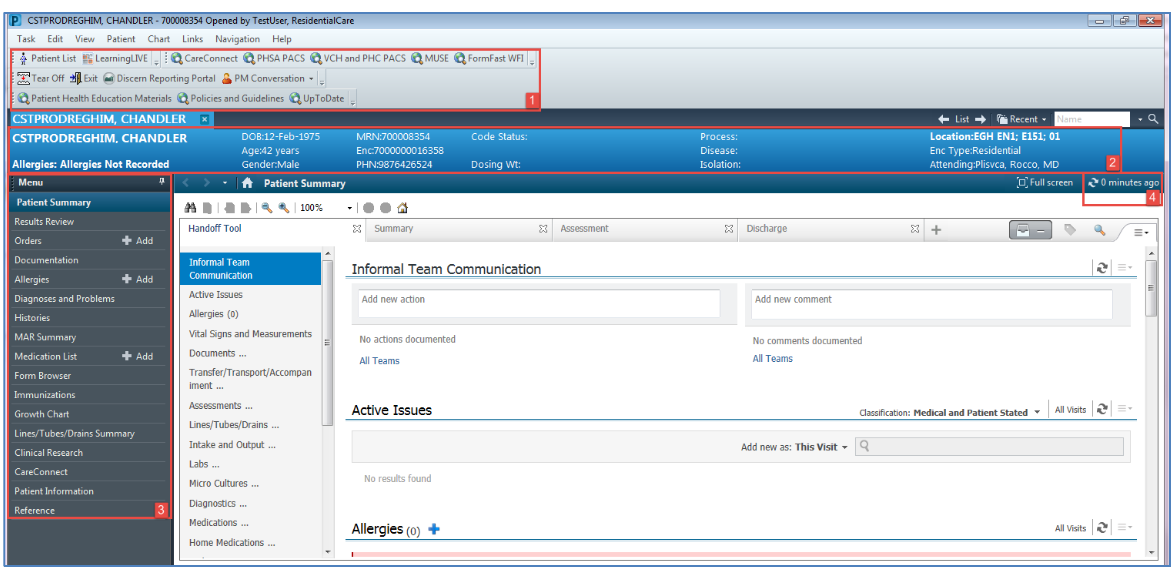
3. You will be asked to establish a relationship with the patient before you can open the patient's chart. Select **Patient Care** in the **Assign a Relationship** window
4. Click **OK**



PATIENT SCENARIO 1 – Residential Care Patient Admission Activity 1.2 – Introduction to Banner Bar, Toolbar, and Menu	CLINICAL + SYSTEMS TRANSFORMATION Our path to smarter, seamless care · TRANSFORMATIONAL LEARNING

2 The patient's chart is now open. Let's review the key parts of this 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.
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, MAR Summary 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 frequently especially as other clinicians may be accessing and documenting in the patient chart simultaneously.



Note: The chart does not automatically refresh! When in doubt, click the **Refresh** icon .

PATIENT SCENARIO 1 – Residential Care Patient Admission Activity 1.2 – Introduction to Banner Bar, Toolbar, and Menu	

Key Learning Points

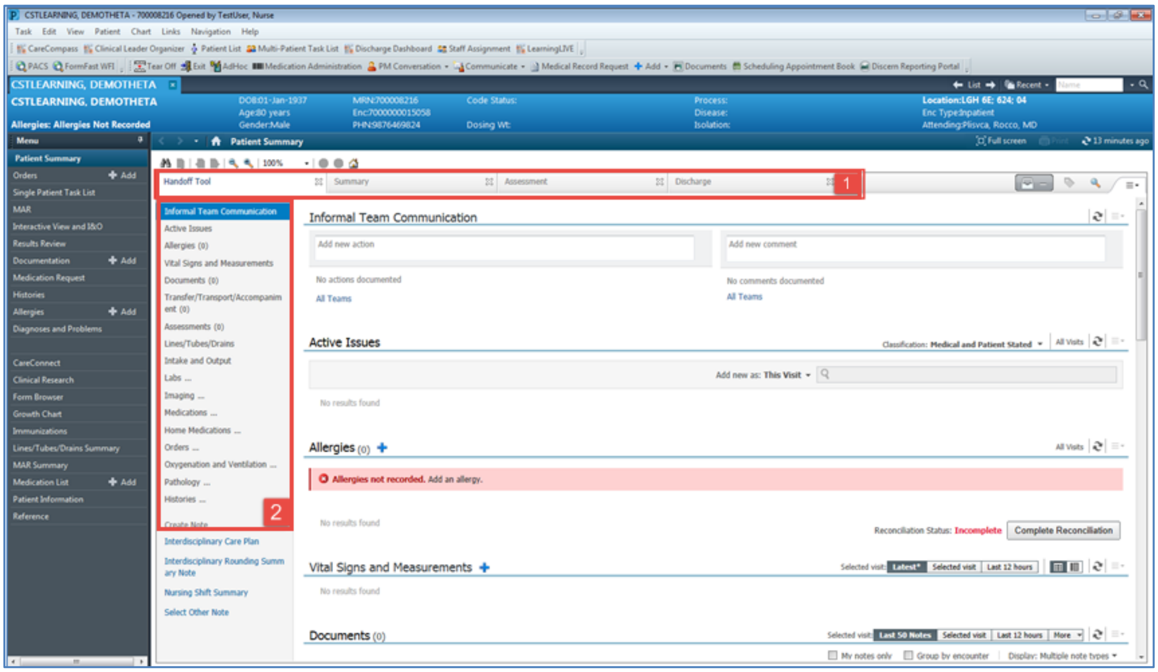
- The Toolbar is used to access various tools within the Clinical Information System
- The Banner Bar displays patient demographics and important information
- The Menu contains sections of the chart similar to your current paper chart
- The Refresh icon should be used regularly

PATIENT SCENARIO 1 – Residential Care Patient Admission Activity 1.3 – Introduction to Patient Summary	CLINICAL + SYSTEMS TRANSFORMATION Our path to smarter, seamless care · TRANSFORMATIONAL LEARNING

Activity 1.3 – Introduction to Patient Summary

1 Upon accessing the patient's chart you will see the **Patient Summary** section open. The **Patient Summary** will provide views 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.



2 Click the **Refresh** icon . Notice the time since the last refresh is displayed and will reset to 0 minutes 
.

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 2 – Orders

Learning Objectives

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

- Transcribe new orders
- Review orders
- Cancel/Discontinue an order

SCENARIO

The physician has assessed the new patient and you need to enter orders into the Clinical Information System (CIS), as well as other Order Management associated activities. You will also review results within the CIS.

Note: Not all orders will need to be entered into the CIS. Only orders pertaining to lab, diet and cardiology will be entered by unit clerks or nursing staff to ensure other departments have the information they need for continuity of patient care. Medication orders will be entered by pharmacy department.

Nursing will review both the paper record and CIS to ensure that the orders are captured accurately.

As a unit clerk, you will be completing the following activities:

- Transcribe new orders
- Review orders
- Cancel/Discontinue an order

Activity 2.1 –Orders Profile page

1 Throughout your shift, you will review your patient's orders. The Orders Profile Page is where you will access a list of the patient's orders that have been entered into the Clinical Information System.

To navigate to the **Order** page and review the orders:

1. Select **Orders** from the **Menu**
2. On the left side of the Orders Page is the Navigator (**View**) which includes several categories including:
   - Plans
   - Categories of Orders
   - Medication History
   - Reconciliation History
3. On the right side is the **Order 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.

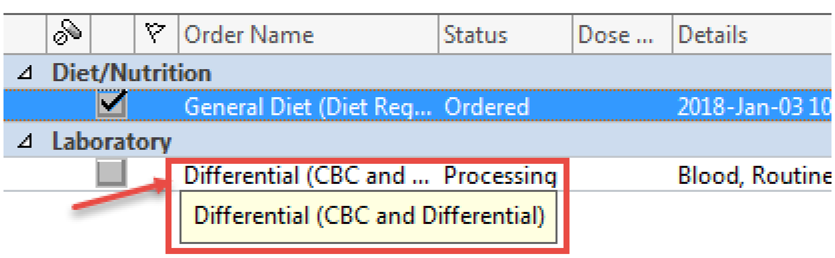
Some examples of icons are:

Order for nurse to review

Additional reference text available

Order waiting for Pharmacy verification

Note: Hover your cursor over specific orders to discover additional information



PATIENT SCENARIO 2 – Orders Activity 2.1 –Orders Profile page	

Key Learning Points

- The Order Page consists of the orders view (Navigator) and the order profile.
- The Orders View displays the lists of PowerPlans and clinical categories of orders.
- The Order Profile page displays All Active Orders for a patient.
- Hover to Discover additional order information.

Activity 2.2 – Transcribe (Add) an Order

1

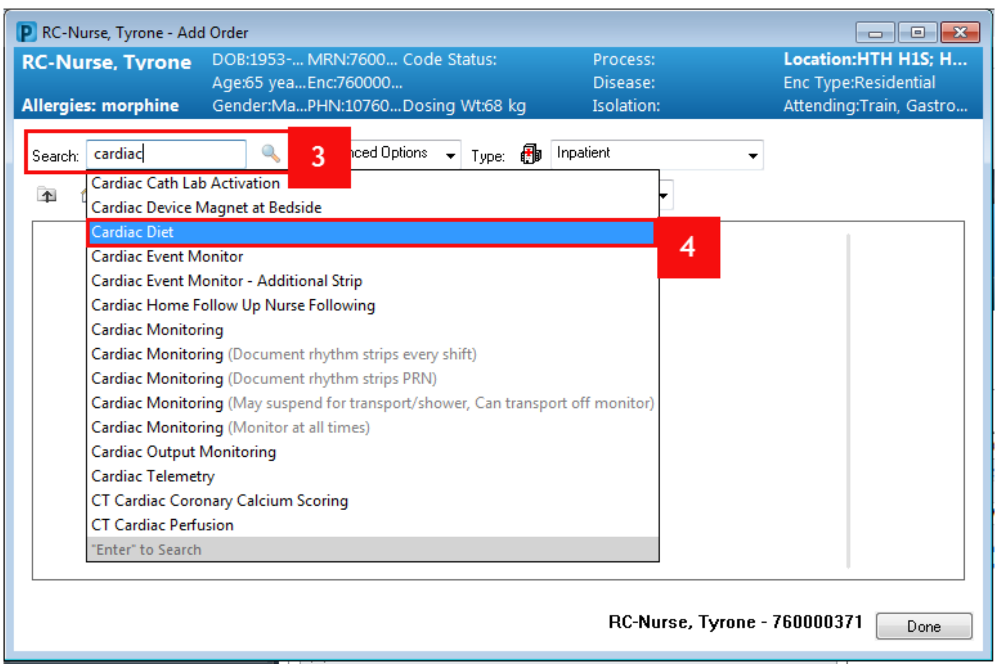
Residential care orders will remain on paper. Transcription is needed for the following orders into the CIS: Diet, Lab, Cardiology and Medication.

Diet, lab and cardiology orders will need to be entered by unit clerks and nursing staff. You will continue to fax the medication orders to pharmacy and they will be entered by the pharmacy department.

In this activity, you are going to transcribe a Diet order into the CIS.

To place an order:

1. Select **Orders** from the **Menu**
2. Click the + Add button
3. The **Add Order** pop-up window will appear
4. Type **Cardiac Diet** in the search field and press **Enter** to search
5. Select **Cardiac Diet** from the list



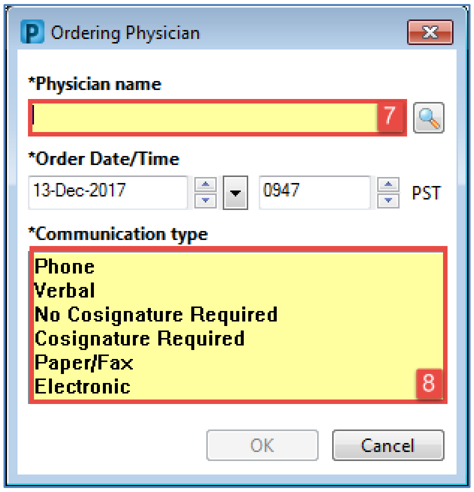
Note: You can add multiple orders from Add Order window and sign for all orders added at the same time

6. The ordering Physician pop-up window will appear
7. Fill out required fields highlighted yellow with below and click **OK**
   - **Physician name** = type name (Last name, First name)

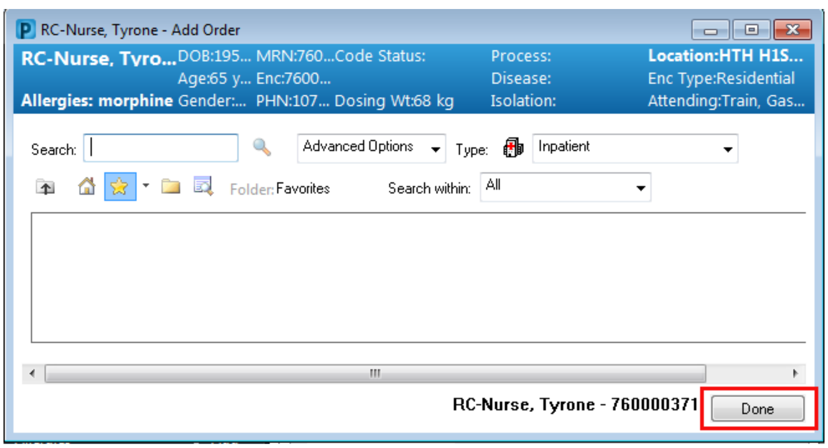
PATIENT SCENARIO 2 – Orders Activity 2.2 – Transcribe (Add) an Order	

- **Communication type** = Paper/Fax

8. Click **OK**



9. Click **Done** on the Add Order window to close that window

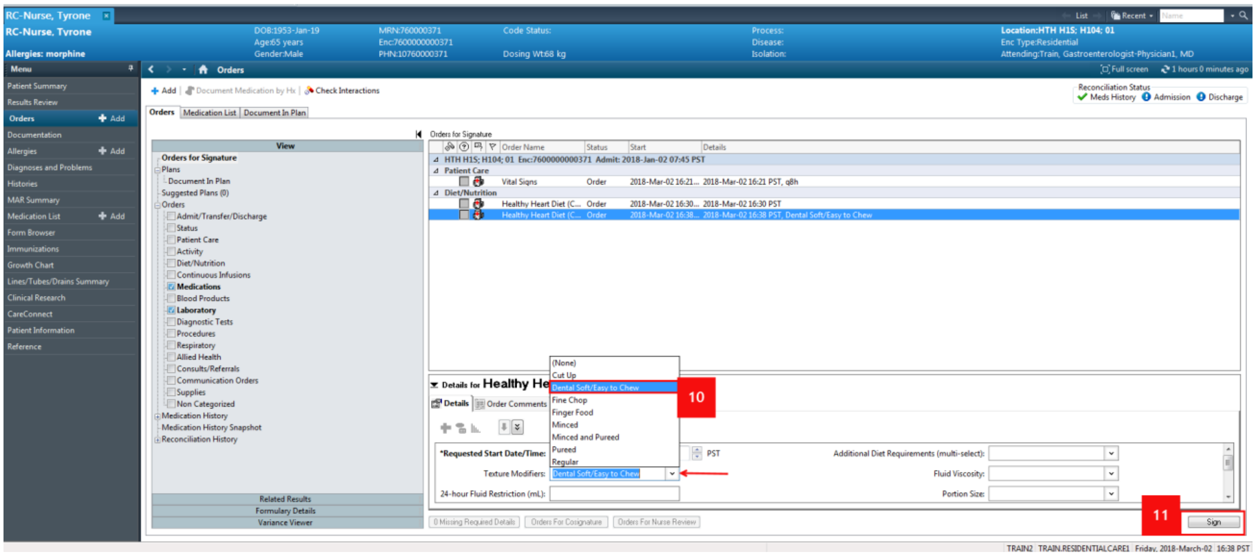


Order Details window opens.

10. Select **Dental Soft/Easy to Chew** within Texture Modifier
11. Click **Sign**.

PATIENT SCENARIO 2 – Orders

Activity 2.2 – Transcribe (Add) an Order



Note: The order will now be displayed on the order profile with a status of **Processing.** Click the **Refresh** icon  and the status will now change to **Ordered.**

Key Learning Points

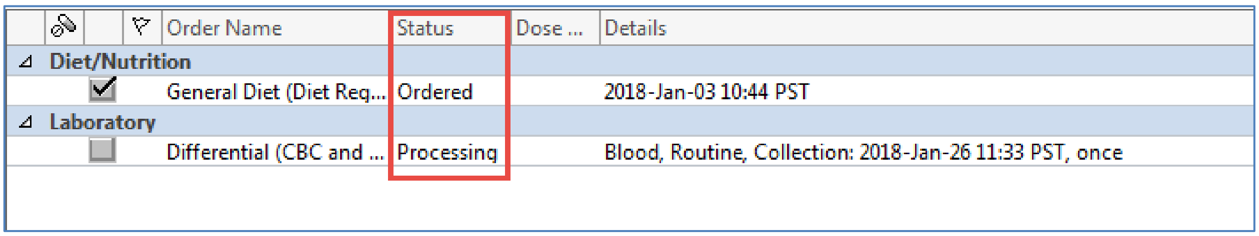
- Orders related to Diet, Lab, and Cardiology will need to be transcribed into CIS by unit clerks and nursing staff.
- Required fields are always highlighted yellow or marked with *.

Activity 2.3 – Review Order Statuses and Details

1 In the following activity, you will only be reviewing the screenshots that are attached.

Orders are classified by status including:

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



Order Name	Status	Dose ...	Details
Diet/Nutrition			
General Diet (Diet Req...	Ordered		2018-Jan-03 10:44 PST
Laboratory			
Differential (CBC and ...	Processing		Blood, Routine, Collection: 2018-Jan-26 11:33 PST, once

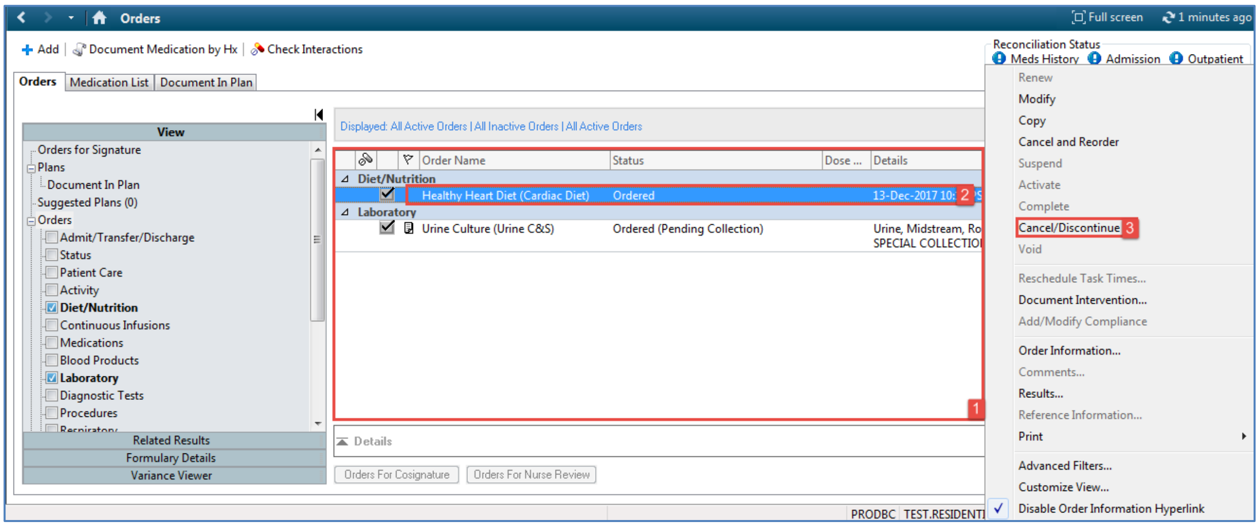
Key Learning Points

- Unit Clerks should always verify the status of orders.

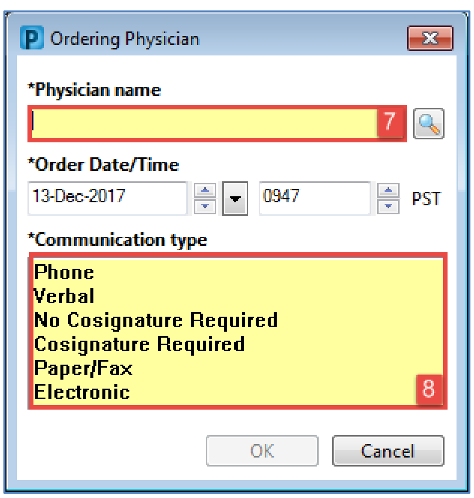
Activity 2.4 – Cancel/Discontinue an Order

1 To Cancel/Discontinue an order:

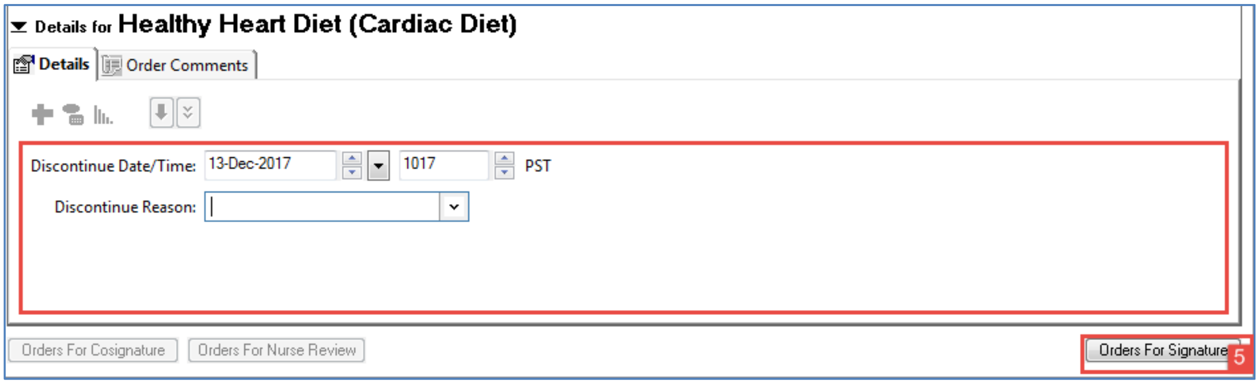
1. Review order profile
2. Right-click order **Cardiac Diet**
3. Select Cancel/Discontinue



4. Ordering Physician pop-up window will appear. Fill out required fields highlighted yellow below and then click **OK**
   - Physician name = type name of Attending Physician (Last name,First name)
   - Communication type = Paper/Fax

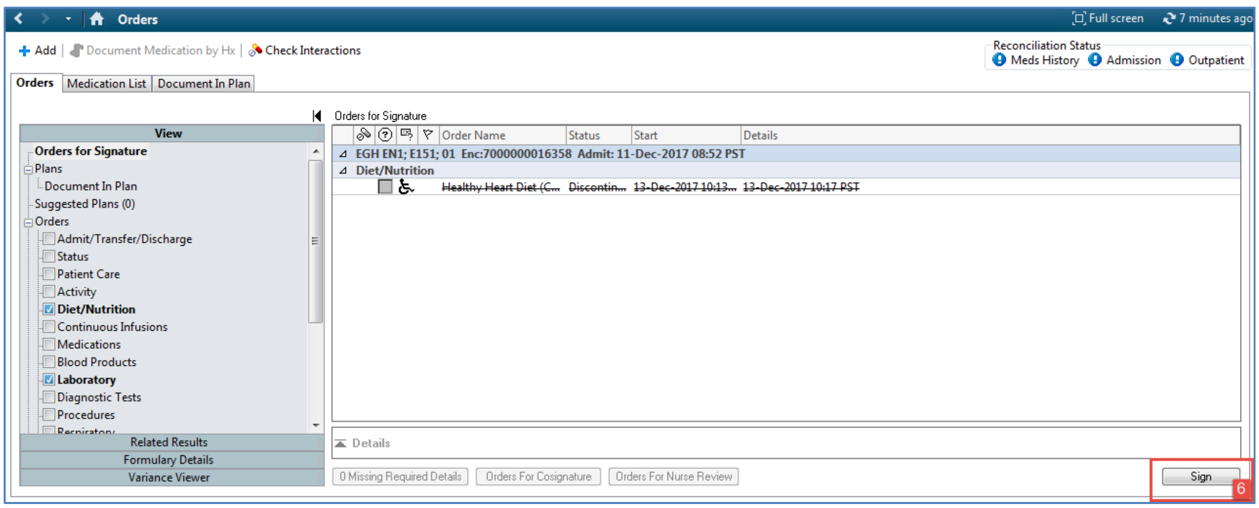


5. Review order details and add in additional information as needed. Click **Orders For Signature**



Order for Signature window opens; the Cardiac Diet order displays with a strike-through.

6. Click **Sign**.



The order will now be displayed on the order profile with a status of **Discontinued.** Click the **Refresh** icon and the order will no longer be visible on the order profile.

Note: For lab and cardiology orders that have been processed and resulted, the status of **Completed** will appear and the orders will automatically be not visible on the active order profile page.

Key Learning Points

- Right click to mark an order as cancel/discontinued.
- Once lab and cardiology orders have been processed and resulted, the status of Complete will appear.
- Both of these actions will remove orders from patient's Order Profile.

PATIENT SCENARIO 3 – PM Conversation

Learning Objectives

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

- Add Process Alerts for your patients

SCENARIO

In this scenario, you will access PM Conversation to add a Process Alert

As a member of the Residential team, you will be completing the following activity:

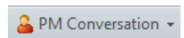
- Access PM Conversation
- Add a Process Alert

PATIENT SCENARIO 3 – PM Conversation Activity 3.1 – Add a Process Alert	CLINICAL + SYSTEMS TRANSFORMATION Our path to smarter, seamless care · TRANSFORMATIONAL LEARNING

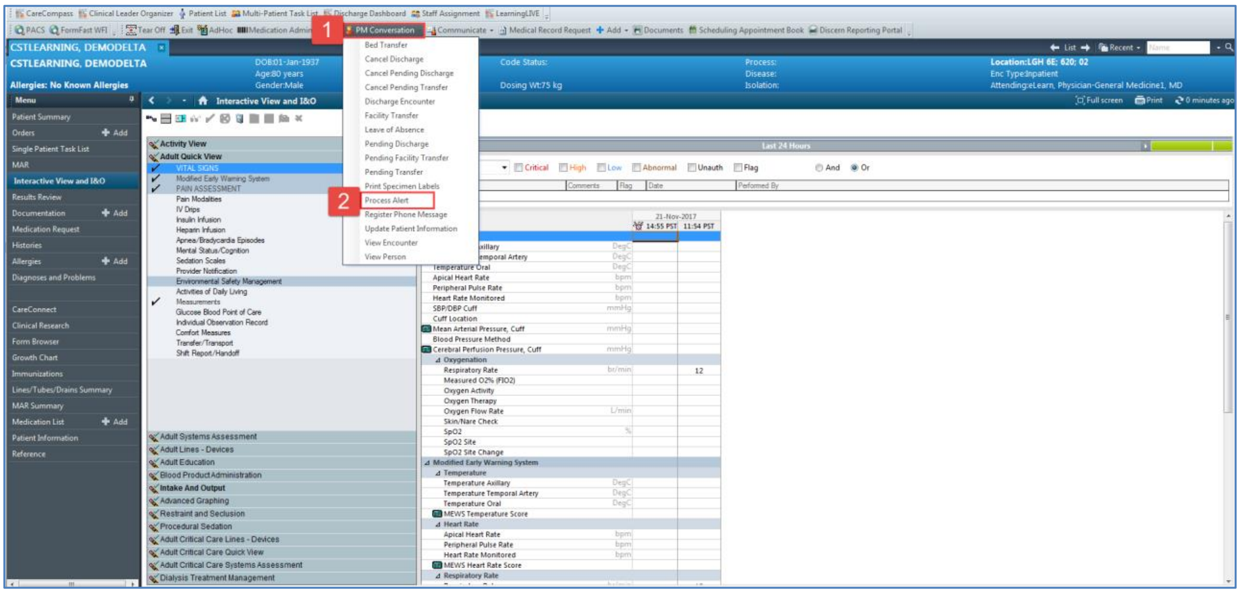
Activity 3.1 – Add a Process Alert

1 Patient Management Conversation (PM Conversation) provides access to manage alerts such as violence risk, encounter information, and demographics. Within the system, process alerts are flags that highlight specific concerns about a patient. These alerts display on the banner bar and can be activated by any clinician including nurses.

Let's look at how alerts are managed.

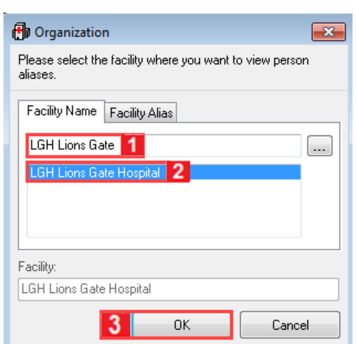
1. Click the drop-down arrow within **PM Conversation** 

in the Toolbar
2. Select **Process Alert** from the drop-down menu



An organization window will display to select location.

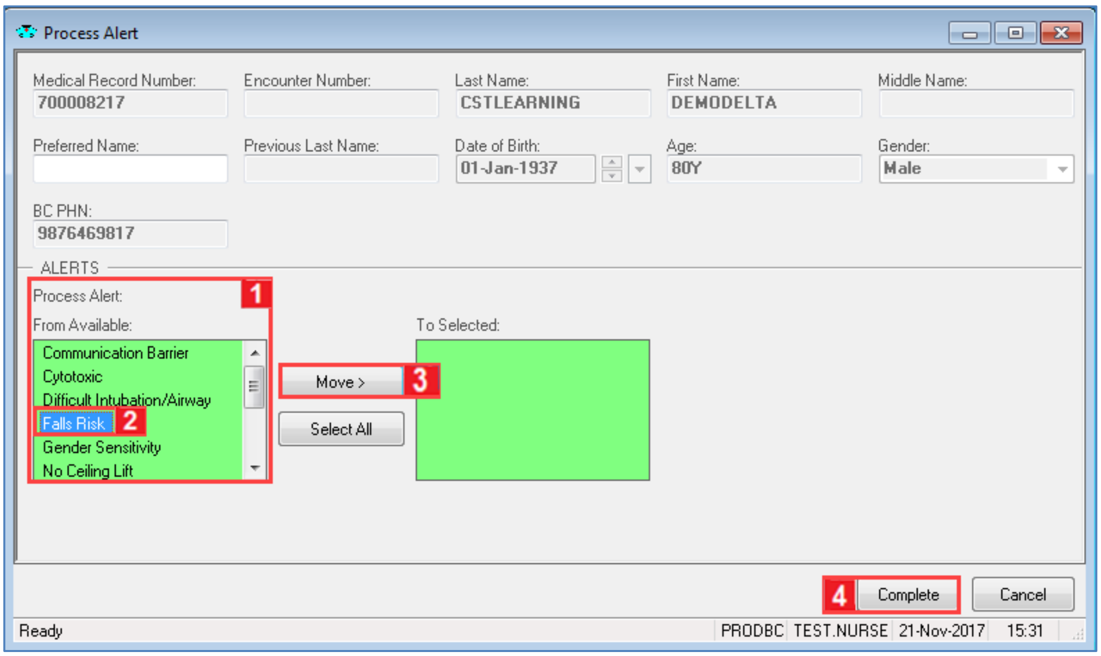
1. In the **Facility Name** field, type = *LGH Lions Gate* and press **Enter** on your keyboard
2. Select **LGH Lions Gate Hospital**
3. Click **OK**



PATIENT SCENARIO 3 – PM Conversation	

2 The **Process Alert** window displays. To activate the **Violence Risk** process alert on the patient's chart:

4. Click into the empty **Process Alert** box. A list of alerts that can be applied to the patient will display. **Note:** This box will be empty until you click into it.
5. Select **Violence Risk**
6. Click **Move** Move > The alert will now display within the **To Selected** box
7. Click **Complete**



3

1. Click **Refresh** to update the chart
2. Once complete, the process alert will appear within the banner bar of the chart where it is visible to all those who access the patient's chart.

Key Learning Points

- Using PM Conversation allows you to manage alerts, patient location, and demographics
- Updating Process Alerts in PM Conversation allow clinicians to see specific concerns related to the patient in the Banner Bar

PATIENT SCENARIO 3 – PM Conversation	

PATIENT SCENARIO 4 – Discern Reporting Portal

Learning Objectives

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

- Utilize Discern Reporting Portal for printing paper reports

SCENARIO

The physician came in to assess the patient and has ordered a new medication. You notice there is no more space on the monthly MAR report and need to print a blank MAR for this patient so this medication can be added onto the MAR report.

Pharmacy will print MARs monthly. Therefore, you must print blank MAR to add the newly ordered medication. The newly ordered medication will be visible on the CIS under the Orders Profile page.

As a Residential Care Unit Clerk, you will be completing the following activities:

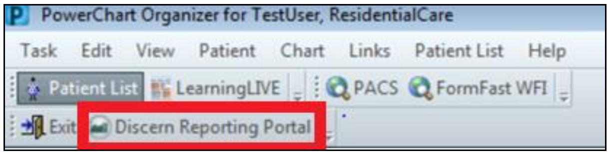
- Access the Discern Reporting Portal
- Find and Print Reports

PATIENT SCENARIO 4 – Discern Reporting Portal Activity 4.1 – Print Report from Discern Reporting Portal	CLINICAL + SYSTEMS TRANSFORMATION Our path to smarter, seamless care · TRANSFORMATIONAL LEARNING

Activity 4.1 – Print Report from Discern Reporting Portal

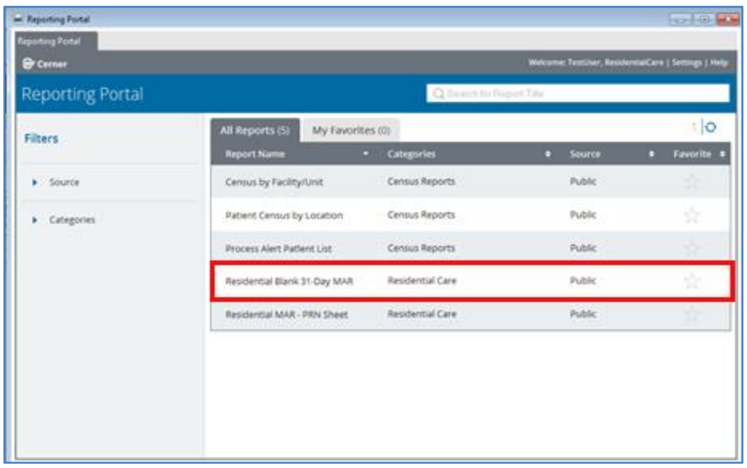
1

1. Select the **Discern Reporting Portal** in the toolbar

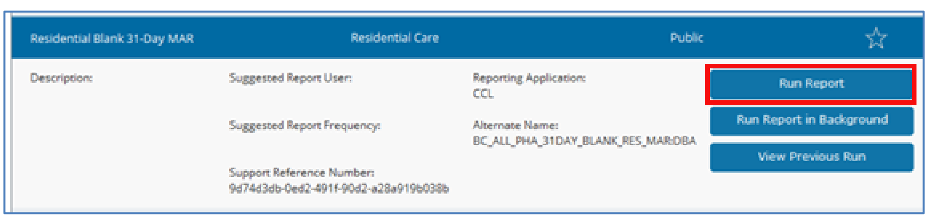


The Reporting Portal will appear and display available reports in the All Reports tab

2. Select the **Residential Blank 31-Day MAR** report



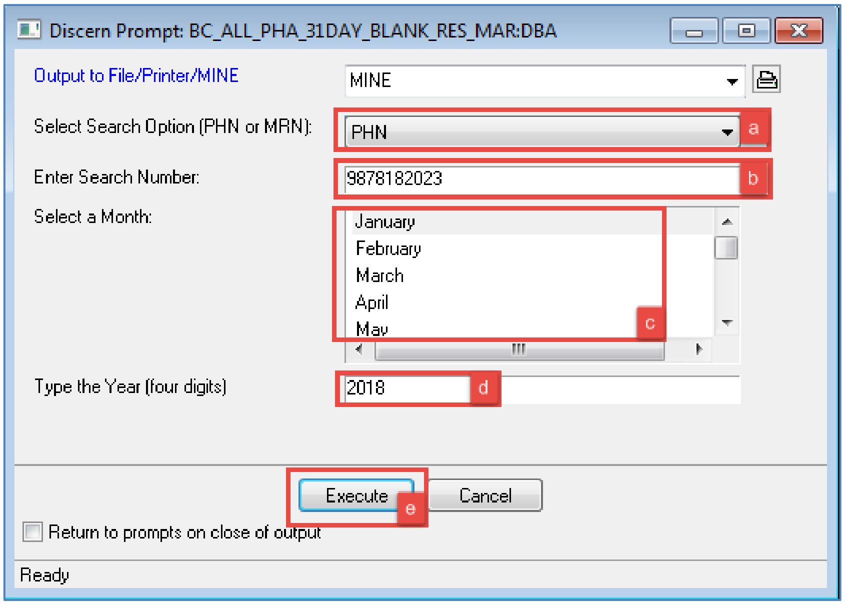
3. Select **Run Report**



4. Discern Prompt Window appears
   a. **Select Search Option (PHN or MRN)** = *PHN*
   b. **Enter Search Number** = *[Patient PHN]*
   c. **Select a Month** = *Current Month*
   d. **Type the Year** = *Current Year*
   e. Click **Execute**

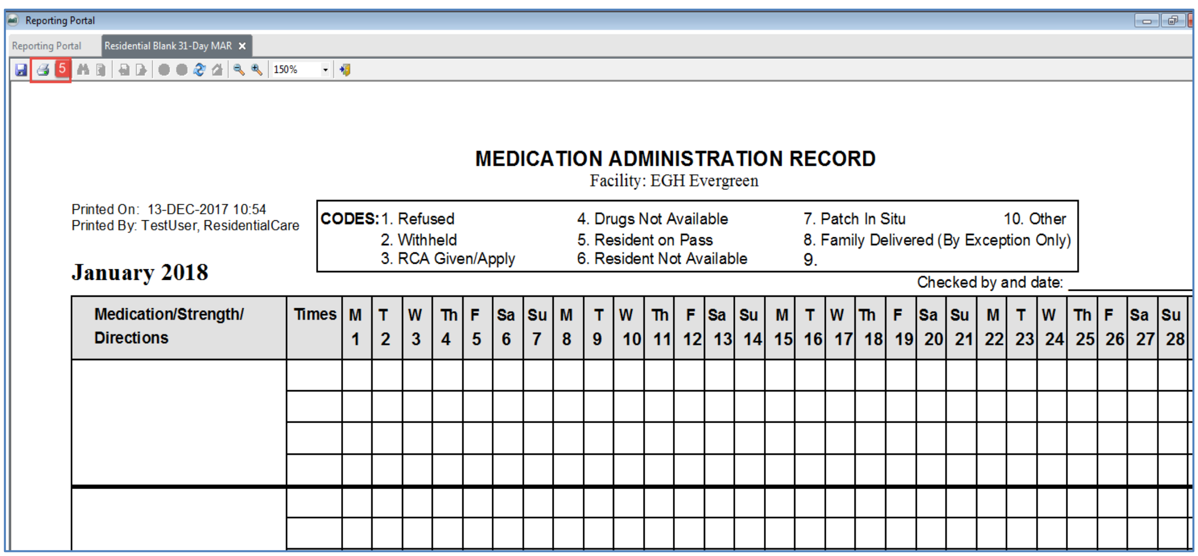
PATIENT SCENARIO 4 – Discern Reporting Portal

Activity 4.1 – Print Report from Discern Reporting Portal



The Report will appear on the screen.

5. Click **Print.**



PATIENT SCENARIO 4 – Discern Reporting Portal Activity 4.1 – Print Report from Discern Reporting Portal	

Key Learning Points

- The Discern Reporting Portal is accessible through the toolbar.
- The Residential Care 31-Day Blank MAR and PRN Effectiveness Sheet can be found within Discern Reporting Portal.
- Pharmacy will continue to do a batch report for the monthly MAR.

End of Workbook

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