SELF-GUIDED PRACTICE WORKBOOK [N62] CST Transformational Learning

# WORKBOOK TITLE: UNIT CLERK: RESIDENTIAL CARE





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

Duration	1 hour	
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 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> </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 – Residential Care Patient Admission

Activity 1.1 – Set Up a Location Patient List



# **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

PATIENT SCENARIO 1 – Residential Care Patient Admission

Activity 1.1 – Set Up a Location Patient List



# 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 <sup>2</sup>. 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.

PowerChart Organizer for Train, ResidentialCare1							
Task Edit View Patient Chart Links PatientList Help							
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🗄 📲 Exit 🔮 PM Conversation 👻 📾 Discern Reporting Portal 🖕							
🕄 🕄 Patient Health Education Materials 🕲 Policies and Guidelines 🕲 UpToDate 📮							
Patient List							
🔎 <mark>1</mark> 💐 🌴 🌴   🐠   🗉 🛍 🗠 🛍   💷 🛃 🚨	P Modify Patient Lists						
	Available lists:	Active lists:					
			1				
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- 3. From the Patient List Type window select Location.
- 4. Click the **Next** button in the bottom right corner.

PATIENT SCENARIO 1 – Residential Care Patient Admission	CLINICAL+SYSTEMS	
Activity 1.1 – Set Up a Location Patient List	TRANSFORMATION Our path to smarter, seamless care	LEARNING

Patient List Type	<b>—</b> X—
Select a patient list type:	
Assignment Assignment (Ancillary) CareTeam Custom Cocation 3 Medical Service Provider Group Query Relationship Scheduled	
Back Next 4 inish Canc	el

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.

Location Patient List		×
*Locations         Medical Services         Encounter Types         Care Teams         Relationships         Time Criteria         Discharged Criteria         Admission Criteria	Image: Second Second General Hospital         Image: Second Second General Hospital         Image: Second Second General Hospital         Image: Second General Hospital <td>* III</td>	* III
	Back Next Finish Can	cel

PATIENT SCENARIO 1 – Residential Care Patient Admission		
Activity 1.1 – Set Up a Location Patient List	Our path to smarter, seamless care	LEARNING

- 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.

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>	LGH Laboratory LGH Lions Gate Hospital LGH Lions Gate Hospital LGH 2 East CGH 2 East CGH 2 East CGH 2 East CGH 2 East CGH 2 East CGH 3 East CGH 3 Pediatric Observation CGH 4 West CGH 4 West CGH 4 West CGH 4 West CGH 5 East CGH 6 East CGH 6 Surgical Close Observation CGH 6 Surgical Close Observation CGH 6 West CGH 6 West CGH 7 East CGH 7 Neuro Critical Care	
Enter a name for the list: (Limited LGH 2 East 7	to 50 characters)	
	Back Next Finish 8	ancel

PATIENT SCENARIO 1 – Residential Care Patient Admission		×.		
Activity 1.1 – Set Up a Location Patient List	Our path to smarter, seamless care		LEARNING	

- 9. In the Modify Patient Lists window select your Location list.
- 10. Click the **Blue Arrow** icon 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.

P Modify Patient Lists		×
Available lists:	Active lists:	1
	New OK 11 and	el

### 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.

1

PATIENT SCENARIO 1 – Residential Care Patient Admission

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

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

- From Patient List, locate your assigned patient.
  - 1. Locate your patient, right click on the patient's name and select Open Patient Chart

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#### 2. Click on Patient Summary

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Task	Task Edit View Patient Chart Links Patient List Help						
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	xit 📾 Discern Reporting Portal 🔒 F	PM Conversation +					
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						CSTPRODREGHIM, CHANDLER • Recent • Name	• 4
Pati	ent List					[□] Full screen 🛛 🌏 3 mi	inutes ago
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1	Name	MRN Encounter # Age DOB Admitted Admitting Physician	Reason for Visi	Primary Care	Physician Visitor Status		*
	CSTLABAUTOMATION, TSY	700004376 700000006491 80 years 23-Aug-1937 23-Jun-2017 10:14 PDT	test	Plisvca, Rocco	, MD		
	CSTLABAUTOMATION, TST	700004371 700000006484 54 years 07-Jan-1963 23-Jun-2017 10:05 PDT	test	Plisvca, Rocco	, MD		
	CSTLABAUTOMATION, TSQ	700004368 700000006481 50 years 03-Feb-1967 23-Jun-2017 09:59 PDT	test	Plisvca, Rocco	, MD	Patient Summany 2	
Ĩ	CSTLABAUTOMATION, TSN	700004364 700000006477 25 years 21-Jun-1992 23-Jun-2017 09:55 PDT	test	Plisvca, Rocco	, MD	D IN D I	
ľ	CSTPRODREGHIM, CHANDLER	700008354 7000000016358 42 years 12-Feb-1975 11-Dec-2017 08:52 PST Plisvca, Rocco, MD		Brown, E	Datiant Samakat	Results Review	
	CSTLABAUTOMATION, TSP	700004367 700000006480 26 years 30-Aug-1991 23-Jun-2017 09:58 PDT	test	Plisvca, Ro	Patient Snapshot	Orders	
	CSTMUSE, TESTONE	700004894 7000000007250 53 years 21-Jun-1964 06-Jul-2017 15:49 PDT Plisvca, Rocco, MD	testing	Plisvca, Ro	Provider Information	Documentation	=
	CSTPRODEMPI, EGHADMIT	700004733 700000006927 97 years 01-Jan-1920 29-Jun-2017 13:50 PDT Plisvca, Rocco, MD	test EGH Admit	CERNER, C	Vicit Liet	Allergies	
	CSTLABAUTOMATION, TSV	700004373 700000006487 27 years 11-Jan-1990 23-Jun-2017 10:08 PDT	test	Plisvca, Ro	Visit Eistin	Diagnoses and Problems	
	CSTCORGBE, LOGIC	700005526 700000008299 29 years 08-Aug-1988 28-Jul-2017 14:15 PDT Caulton, NOLDAP, Gree	g test	Higgins, N	Inactivate Relationship	Listerio	
l C	CSTLABAUTOMATION, TSK	700004362 700000006475 30 years 19-May-1987 23-Jun-2017 09:52 PDT	test	Plisvca, Ro	Add/View Sticky Notes	Histories	
1 C	DONOTUSE, PAUL	700006591 7000000015519 70 years 10-Apr-1947 25-Nov-2017 12:30 PST Plisvcr, Carlton, MD	Increased SOB	Grafstein,		MAR Summary	
	CSTLABAUTOMATION, TSS	700004370 700000006483 116 years 12-Jun-1901 23-Jun-2017 10:04 PDT	test	Plisvca, Ro	Sort	Medication List	
	CSTAUTOMATION, SELENIUMTHRE	E 700006590 7000000010230 3 months 03-Sep-2017 13-Sep-2017 14:20 PDT Plisvca, Rocco, MD	RES	Plisvca, Ro	Hide	Form Browser	
	CSTLABAUTOMATION, TSM	700004365 700000006478 45 years 20-Mar-1972 23-Jun-2017 09:56 PDT	test	Plisvca, Ro	Customize Columns	Immunizations	
τ	CSTPRODMI, STEGH	700004276 7000000006197 116 years 01-Jan-1901 20-Jun-2017 08:38 PDT	Test	CERNER, C		Crawth Chart	
	CSTREGEMPI, ADTTWENTY	700004323 7000000007801 26 years 01-Aug-1991 19-Jul-2017 14:57 PDT Plisvca, Rocco, MD	Test	Plisvcc, Tré	Add to a Patient List	Growth Chart	
	CSTLABAUTOMATION, TSI	700004360 700000006472 72 years 17-Jan-1945 23-Jun-2017 09:47 PDT	test	Plisvca, Ro	Copy Ctrl+C	Lines/Tubes/Drains Summary	
	CSTPRODMED, TEST-W	700000607 700000000822 87 years 12-Jul-1930 05-Oct-2016 11:49 PDT Plisvca, Rocco, MD		Plisvca, Ro	Paste Ctrl+V	Clinical Research	
	CSTCOMPUTRITION, EGH TEST	700008857 7000000016520 50 years 01-Jul-1967 12-Dec-2017 13:20 PST Plisvca, Rocco, MD	Test	Plisvcc, Tre		CareConnect	
	CSILABAUTOMATION, TSG	/00004358 /000000064/0 30 years 01-Jan-1987 23-Jun-2017 09:45 PDT	test	Plisvca, Rd	New Results	Patient Information	
	CSILABAUTOMATION, TSU	/00004372 /00000006485 22 years 28-Aug-1995 23-Jun-2017 10:06 PDT	test	Plisvca, Ro	Onen Patient Chart	1 Peterence	
					open rutient chât	DRODRC TEST RESIDENTIAL CARE, Wednesday, 12 December 2017	09.41 DCT

- 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

P Assign a Relationship	×
For Patient: CSTMUSE, TESTONE	
Relationships:	
Patient Care 3 Quality / Utilization Review	
Unit Coordination	
OK 4 Cancel	

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



- 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 with 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.

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Task Edit View Patient Ch	Task Edit View Patient Chart Links Navigation Help								
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🔀 Tear Off 📲 Exit 📾 Discen Reporting Potal 🔒 PM Conversation 🖌 🖕									
🔇 Patient Health Education Mater	ials 戟 Policies and Guidelines 📢 UpToD	ate 🖕	1						
CSTPRODREGHIM, CHAN	DLER 🔳					← List →	Recent - Name	- 9	
CSTPRODREGHIM, CHAN	DLER DOB:12-Feb-1975	MRN:700008354	Code Status:			Location:EGH	EN1; E151; 01		
Allergies: Allergies Not Record	Age:42 years Gender:Male	Enc:7000000016358 PHN:9876426524	Dosing Wt:	Disease: Isolation:		Enc Type:Resid	ential ra Rocco MD	2	
Menu	🕈 🔷 - 🚹 Patient Summ	ary					[II] Full screen	2 0 minutes ago	
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Orders 🕂 Add	Handoff Tool	23 Summary	23 Assessment	23	Discharge	23 +		≤ =-	
Documentation	Informal Team							a -	
Allergies 🕂 Add	Communication		ommunication					<del>  C</del>   = *	
Diagnoses and Problems	Active Issues	Add new action			Add new comment				
Histories	Allergies (0)								
MAR Summary	Vital Signs and Measurements	No actions documented			No comments documented				
Medication List 🛛 🕂 Add	Documents	All Teams			All Teams				
Form Browser	Transfer/Transport/Accompan								
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Growth Chart	Lines/Tubes/Drains	Active Issues			Classi	fication: Medical and Patient	Stated - All Visi	ts   🖑   = -	
Lines/Tubes/Drains Summary	Intake and Output								
Clinical Research	Labs			,	Add new as: This visit •				
CareConnect	Micro Cultures	No results found							
Patient Information	Diagnostics								
Reference	Medications	Allowston							
	Home Medications	Allergies (0) 💠					All Visi	5   C   =*	
								-	

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

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- 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



### **Activity 1.3 – Introduction to Patient Summary**



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.

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Task Edit View Pi	atient Chart	Links Navigation Help								
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Q PACS Q FormFast	WEI ; 🖾 1	'ear Off 🏨 Exit 🦉 AdHoc 🎟 Medicatio	on Administration 🔒 PM Conversation	+ 🕌 Communicate + 📄 Medical Recor	d Request 💠 Add 👻 🛅 Docume	nts   Scheduling Appointment	Book 🗃 Discern Reporting Portal 💡			
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CSTLEARNING, DI	EMOTHET	A DOB:01-Jan-19	37 MRN:700008216		Proce		Location:LGH 6E; 624; 04			
Allergies: Allergies N	lot Recorded	Gender:Male	PHN:9876469824	Dosing Wt:	Isolat	ove: ion:	Attending:Plisvca, Rocco, MD			
Menu		< > • 👔 Patient Summar	y				(D) Full screen	Print 21	3 minut	tes ago
Patient Summary		A D D D S S 2005	-1004							
Orders	+ Add	Handoff Tool	tt Summary	22 Assessment	22 Discharge	20	1			
Single Patient Task List			() (Contrary)	11 contractor	ti cocarie				• /	-1
MAR		Informal Team Communication	Informal Team Communi	ication				12	sl =-	. A
Interactive View and 18/0		Active Issues	Informal ream commun	leadon						- 11
Results Review		Allergies (0)	Add new action			Add new comment				
Documentation	+ Add	Vital Signs and Measurements								
Medication Request		Documents (0)	No actions documented			No comments documented				1
Histories		Transfer/Transport/Accompanim	All Teams			All Teams				
Allergies	+ Add	ent (0)								
Diagnoses and Problems		Assessments (0)								
		Lines/Tubes/Drains	Active Issues				Classification: Medical and Patient Stated *	All Volts	2   = ·	- 11
CareConnect		Intake and Output				Address of This least - 0				
Clinical Research		Labs				Add new as: This visit •				
Form Browser		Imaging	No results found							
Growth Chart		Medications								
Immunizations		Home Medications								
Lines/Tubes/Drains Sum		Orders	Allergies (0) 💠					All Visits	3 ≡-	-
MAR Summary		Oxygenation and Ventilation	0	and the second se						
Medication List	+ Add	Pathology	Allergies not recorded. Add	an anergy.						
Patient Information		Histories								
Reference		Create Note	No results found				Recordinities Online: Terrenelate Consolet	- December	d	
		Interdisciplinary Care Plan					Complete	e reconcilia	oon	
		Interdisciplinary Rounding Summ ary Note	Vital Signs and Measurer	ments 🕂			Selected visit: Latest* Selected visit Last 12 hours		ð =-	
		Nursing Shift Summary	No results found							
		Select Other Note								
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							My notes only Group by encounter Display: My	atiple note to	Des -	- 11
4							a contract of the of th	and the th		<u> </u>

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

Activity 1.3 – Introduction to Patient Summary



### **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



TRANSFORMATIONAL LEARNING

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# Activity 2.1 –Orders Profile page

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 66^
- P Additional reference text available
- 6 Order waiting for Pharmacy verification

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



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 2.1 –Orders Profile page



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Activity 2.2 – Transcribe (Add) an Order



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# 🖢 Activity 2.2 – Transcribe (Add) an Order



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
- Select Cardiac Diet from the list 5.



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

- 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

P Ordering Physician
*Physician name
7
*Order Date/Time
13-Dec-2017 💭 🔽 0947 💭 PST
*Communication type
Phone Verbal
No Cosignature Required Cosignature Required
Paper/Fax
OK Cancel

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.



RC-Nurse, Tyro	ne 🗵						- List - 📴 Recent + Name - 🤉
RC-Nurse, Tyro	ne	DO8:1953-Jan-19	MRN:760000371	Code Status:	P	rocess:	ocation:HTH H1S; H104; 01
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Defined Commence		N P H Olders					
Patient summary		+ Add   I Document Medication by Hx   🐎 Check Interactions					Reconciliation Status Meds History    Admission    Discharge
Results Review		Orders Medication List Document In Plan					
Orders	+ Add						
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Allergies	🕈 Add	- Orders for Signature	4 HTH H15	T Order Name Status	2018- Inc. 02.07:45 PST		
<b>Diagnoses and Proble</b>		Plans	4 Patient Car	re	2010-381-02 07:43131		
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Mark Summary	<b>.</b>	© Orders		Healthy Heart Diet (C Order	2018-Mar-02 16:30 2018-Mar-02 16:	30 PST 28 PST - Dental Self (Secure Cheve	
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Form Browser		Patient Care					
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Lines/Tubes/Drains S	ummary	Continuous Infusions					
Clinical Persauch		C Medications					
		Laboratory					
CareConnect		Diagnostic Tests					
		Procedures					
Reference		Respiratory					
		- Allied Health		(None)			
		Consults/Hererrais		Cut Up			
		Supplies	▼ Details for	Healthy He Dental Soft/Easy to	Chew		
		Non Categorized	Details III	Order Comments Fine Chop	10		
		Medication History		Finger Food			
		Medication History Snapshot	+ % h.	I S Minced			
		Reconciliation History		Pursed			
			*Requested	Start Date/Time: Regular	PSI	Additional Diet Requirements (multi-select):	¥
				Texture Modifiers: Dental Soft/Easy to	Chew 🗸	Fluid Viscosity:	~
		Palated Perulte	24-hour Flui	d Restriction (mL):		Portion Size:	· ·
		Formulary Details					
		Variance Viewer	0 Missing Requi	red Details Orders For Cosignature	Orders For Nurse Review		11 Sign
							TRAIND TRAIN DECIDENTIAL CAREL Endsv 2019, March 02, 16:28 DCT

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



### **Activity 2.3 – Review Order Statuses and Details**



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

	ø	🕅 Order Name	Status	Dose	Details
⊿ Diet/Nutrition					
	$\checkmark$	General Diet (Diet Reg	Ordered		2018-Jan-03 10:44 PST
⊿	Laborat	tory			
		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



### 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

< 👻 🕆 🏦 Orders				[□] Full screen 🛛 🌏 1 minutes ago
+ Add	ive Orders   All Inactive Orders   All Acl Order Name ion Healthy Heart Diet (Cardiac Diet) Urine Culture (Urine C&S)	Ve Orders Status Ordered Ordered (Pending Collection)	Dose Details 13-Dec-2017 10: 2 S Urine, Midstream, Ro SPECIAL COLLECTION	Reconciliation Status Medis History Admission Quitoatient Renew Modify Copy Cancel and Reorder Suspend Activate Complete Cancel/Discontinue 3 Void Reschedule Task Times Document Intervention Add/Modify Compliance Order Information Comments Results Reference Information
Formulary Details Variance Viewer Orders For Cosig	nature Orders For Nurse Review			Advanced Filters Customize View Visable Order Information Hyperlink

- 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

P Ordering Physician	×
*Physician name	
7	
*Order Date/Time	ст
*Communication type	51
Phone Verbal No Cosignature Required Cosignature Required Paper/Fax Electronic	8
OK Cancel	

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

PATIENT SCENARIO 2 – Orders	

Activity 2.4 – Cancel/Discontinue an Order



Details for Healthy Heart Diet (Cardiac Diet)     Details Im Order Comments	
Discontinue Date/Time: 13-Dec-2017 💭 🔽 1017 💭 PST Discontinue Reason: 📔 🗸	
Orders For Cosignature Orders For Nurse Review	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 she 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.



PATIENT SCENARIO 3 – PM Conversation

Activity 2.4 – Cancel/Discontinue an Order



# **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

1

PATIENT SCENARIO 3 – PM Conversation

Activity 3.1 – Add a Process Alert



TRANSFORMATIONAL

# Activity 3.1 – Add a Process Alert

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
- H CE W P 120 G III III 🖱 And 🙁 Or High ELow A Comments Flag Date Pef 21-Nov-2017
- 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

🕄 Organization
Please select the facility where you want to view person aliases.
Facility Name Facility Alias
LGH Lions Gate 1
LGH Lions Gate Hospital 2
Facility:
LGH Lions Gate Hospital
3 OK Cancel

on
or



The Process Alert window displays. To activate the Violence Risk process alert on the patient's 2 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** The alert will now display within the **To Selected** box
- 7. Click Complete

To Process Alert				- • •
Medical Record Number: 700008217	Encounter Number:	Last Name: CSTLEARNING	First Name: DEMODELTA	Middle Name:
Preferred Name:	Previous Last Name:	Date of Birth: 01-Jan-1937	Age: 80Y	Gender: Male
BC PHN: 9876469817				
- ALERTS				
Process Alert:	1			
From Available:	Tos	Selected:		
Communication Barrier				
Difficult Intubation/Airway	E Move>			
Falls Risk 2	Select All			
Gender Sensitivity				
No Ceiling Lift	<b>v</b>			
r			4	Complete Cancel
Ready			PRODBC TEST.NU	RSE 21-Nov-2017 15:31

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



TRANSFORMATIONAL LEARNING

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PATIENT SCENARIO 4 – Discern Reporting Portal



# **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	Our path to smarter, seamless care



# Activity 4.1 – Print Report from Discern Reporting Portal



#### 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

Cerner			Weicome Tettown, Reso	macters [ Second 1 in
Reporting Portal		Q Search for P	ispet Tala	
Filters	All Reports (5) My Favorite	es (0)		10
	Report Name •	Categories	<ul> <li>Source</li> </ul>	Favorite
<ul> <li>Source</li> </ul>	Census by Facility/Unit	Census Reports	Public	
Categories	Patient Census by Location	Census Reports	Public	
	Process Alert Patlent List	Census Reports	Public	\$2.5
	Residencial Blank 31-Day MAR	Residential Care	Public	
	Residential MAR - PRN Sheet	Residential Care	Public	52

#### 3. Select Run Report

Residential Blank 31-Day MAR	Residential Care	Public	☆
Description:	Suggested Report User:	Reporting Application: CCL	Run Report
	Suggested Report Frequency:	Alternate Name:	Run Report in Background
	Support Reference Number: 9d74d3db-0ed2-491f-90d2-a28a919b038b	0-7-11-7-10-1-2004877E3_8961064	View Previous Run

- 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	CLINICAL+ SYSTEMS	
Activity 4.1 – Print Report from Discern Reporting Portal	Our path to smarter, seamless care	TRANSFORMATIONAL

Discern Prompt: BC_ALL_PHA_310	DAY_BLANK_RES_MAR:DBA
Output to File/Printer/MINE	MINE 👻 🖻
Select Search Option (PHN or MRN):	PHN 🗸
Enter Search Number:	9878182023 b
Select a Month:	January     ▲       February     ▲       March     ▲       April     ▲       Mav     C       ✓     III
Type the Year (four digits)	2018 d
Return to prompts on close of output	Execute e Cancel
Ready	

The Report will appear on the screen.

5. Click Print.

Reporting	g Portal																													
Reporting Po	ortal Residential Blank 31-Day MAR 🗙																													
🔒 🍯 🗖	A B A B O A A 15	)% •	4																											
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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.

PATIENT SCENARIO 4 – Discern Reporting Portal

End of Workbook



# End of Workbook

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