SELF-GUIDED PRACTICE WORKBOOK [N57]
CST Transformational Learning

WORKBOOK TITLE:

Unit Clerk: General

TABLE OF CONTENTS

SELF-GUIDED PRACTICE WORKBOOK

Duration	**1.5 hours**
Before getting started	Sign the attendance roster (this will ensure you get paid to attend the session) Put your cell phones on silent mode
Session Expectations	This is a self-paced learning session The workbook provides a compilation of different scenarios that are applicable to your work setting Work through different learning activities at your own pace
Key Learning Review	At the end of the session, you will be required to complete a Key Learning Review This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.

Using 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 – Multi-Patient Task List

Learning Objectives
At the end of this Scenario, you will be able to: ■ Set up Multi-Patient Task List (MPTL) ■ Review and complete patient tasks in MPTL

SCENARIO

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

As an Unit Clerk you will complete the following activities:

- Set up your view of the Multi-Patient Task List (MPTL)
- Review MPTL functionality
- Review patient tasks
- Complete patient tasks

Activity 1.1 – Set up your view of the Multi-Patient Task List

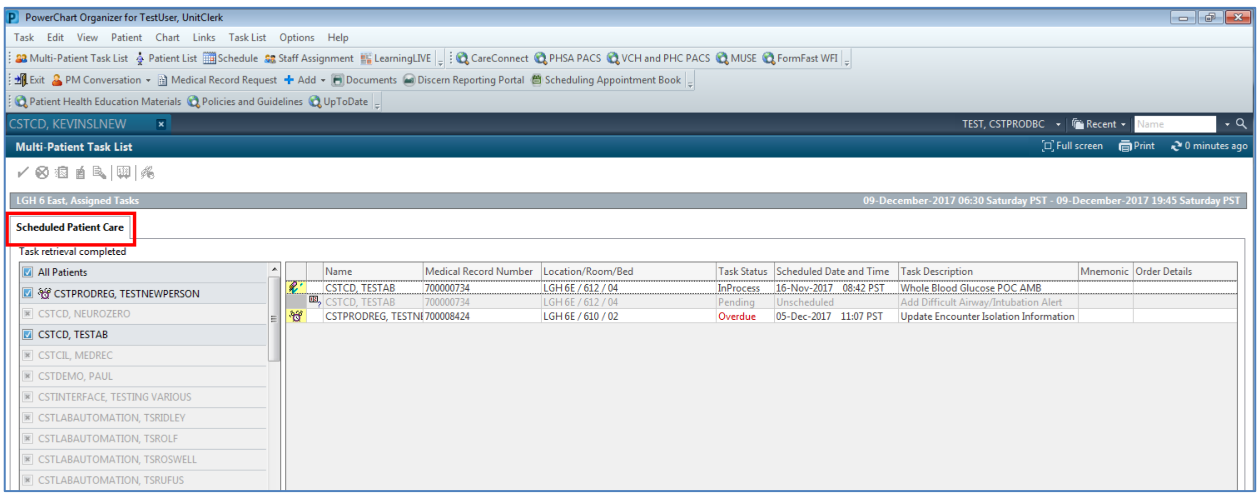
1 The **Multi-Patient Task List (MPTL)** displays your patient list and a list of tasks associated with the patients. Tasks are activities that need to be completed for the patients. Tasks are generated by certain orders or rules in the system and show up in a list format to notify you to complete specific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

To navigate to the MPTL:

Click on the **Multi-Patient Task List** 

on the toolbar

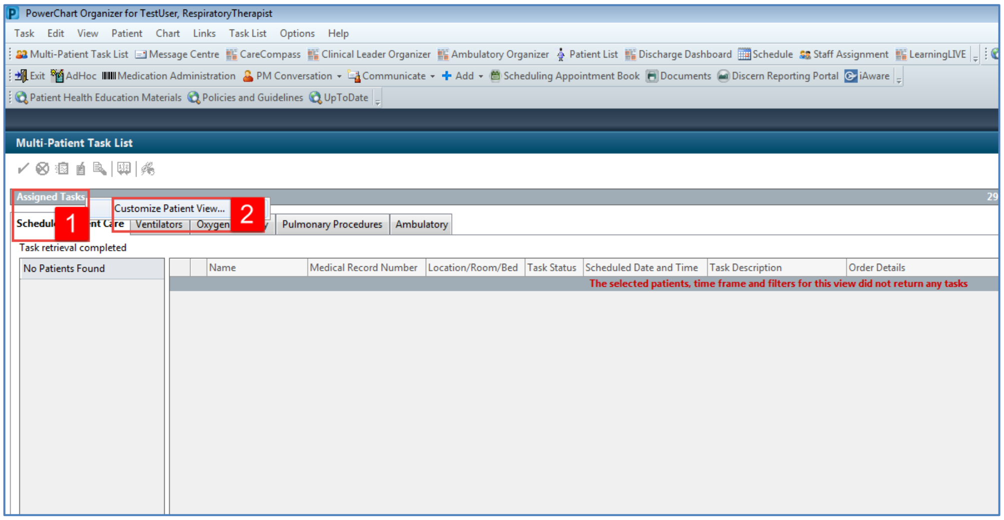
The **MPTL** for Unit Clerks has only one tab for **Scheduled Patient Care** tasks. The tab (task category) is used to group tasks.



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

The first time you log in, you will need to set up the **MPTL**. To do this you need to select the appropriate **Patient List** and **Time Frame** to display. You will only have to set up the MPTL once. The next time you sign into the system the **MPTL** will populate with the **Patient List** and **Time Frame** that you have selected.

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

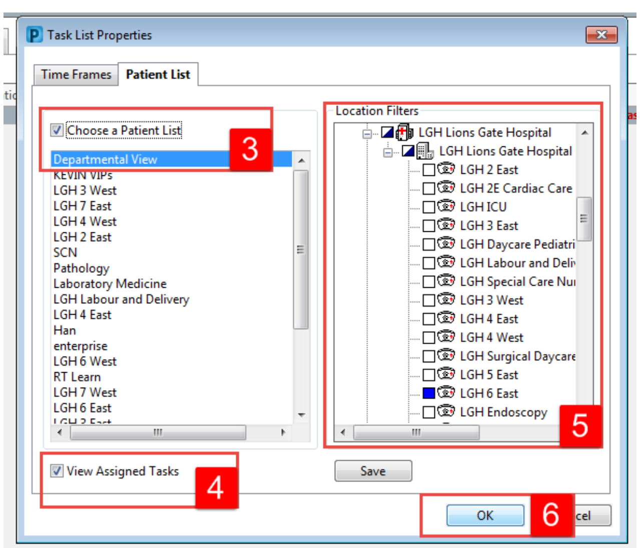


Within the **Task List Properties** window:

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

NOTE: Only choose locations for units you are working on. If you choose an entire hospital or too many locations, the system might not be able to process all the tasks in the MPTL. Alternatively, you can set up several separate location-based lists.

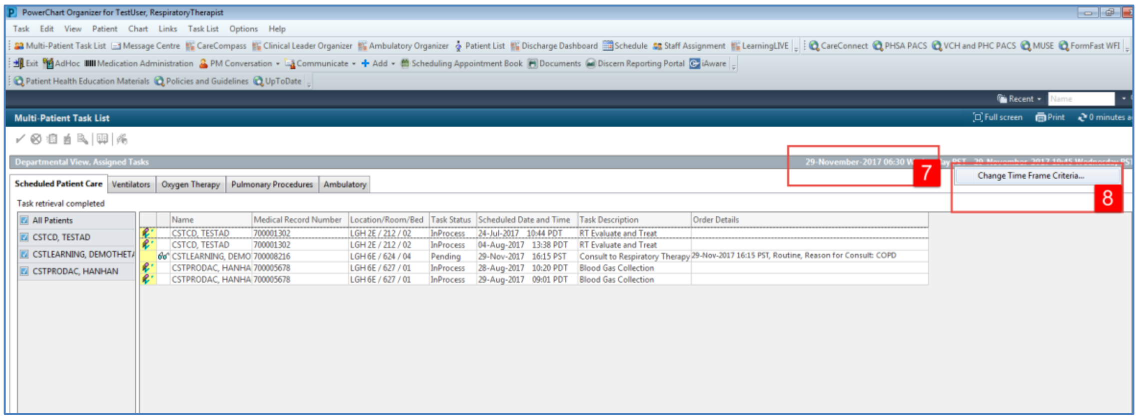
6. Click **OK**



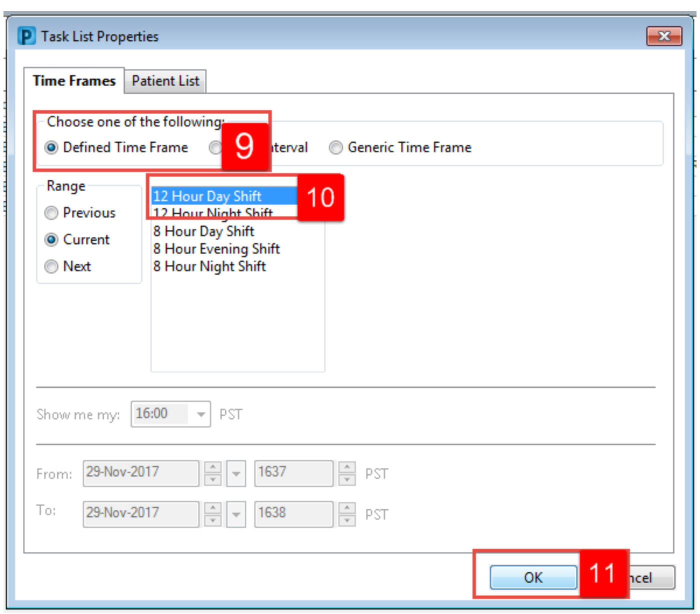
After selecting the appropriate Patient List you need to set up the **Defined Time Frame**.

To select appropriate **Time Frame** for your MPTL:

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



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



NOTE: When you float to a different unit or department you will need to set up the Patient List with the new location to populate the MPTL**.**

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

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

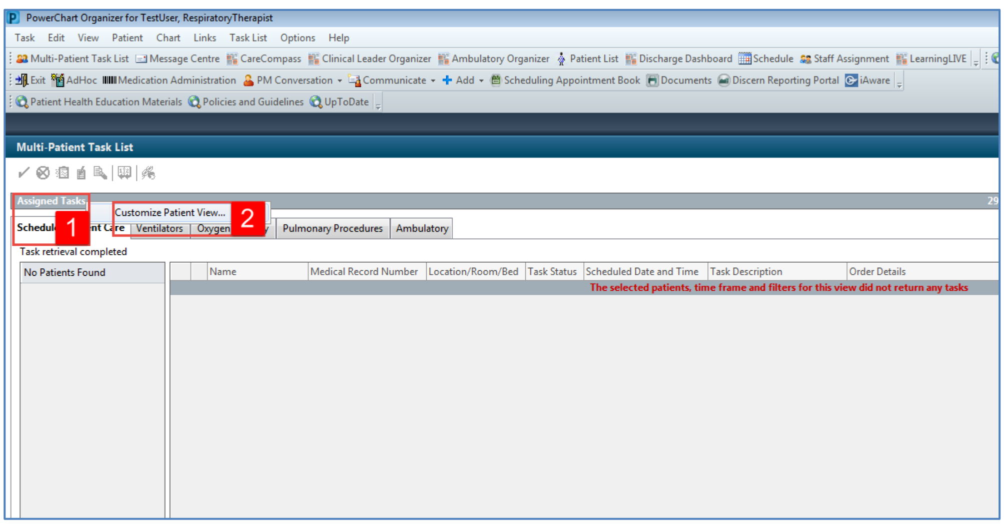
Departmental View: Used when you are looking at an entire department. Discharged patients will stay on this list for a short while allowing you to easily find them if you did not finish your documentation.

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

The first time you log in, you will need to set up the **MPTL**. To do this you need to select the appropriate **Patient List** and **Time Frame** to display. You will only have to set up the MPTL once. The next time you sign into the system the **MPTL** will populate with the **Patient List** and **Time Frame** that you have selected.

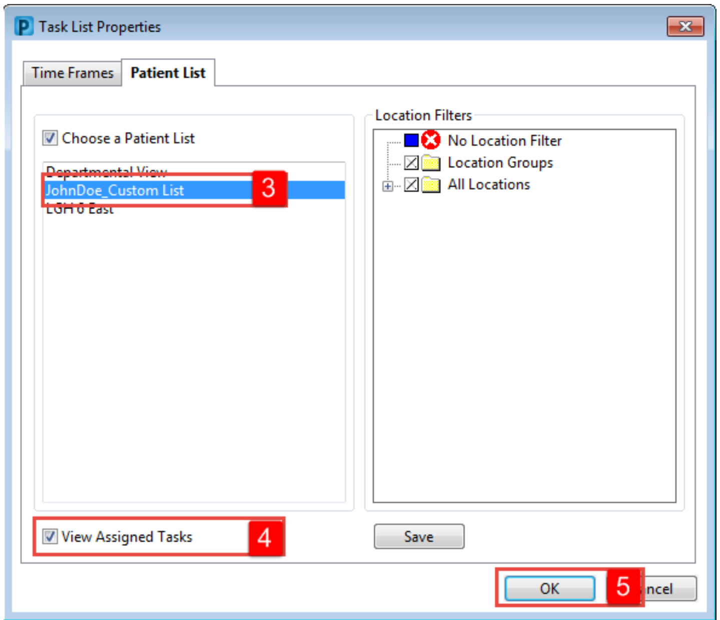
Follow these steps to set up the appropriate **Patient List:**

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



Within the **Task List Properties** window:

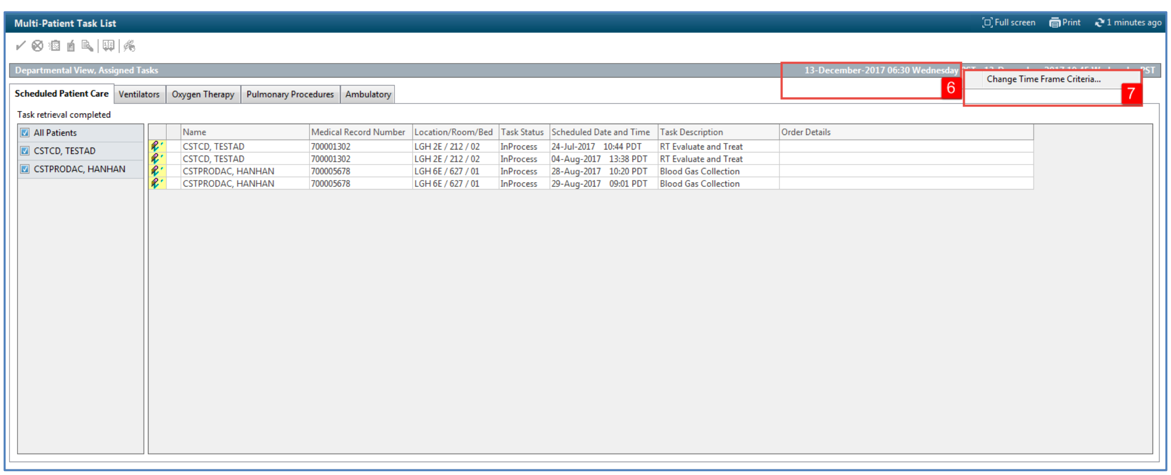
3. In the Patient List tab, select **Choose a Patient List** and select **YourName_Custom List**
4. Ensure **View Assigned Tasks** is checked as this will ensure tasks display on your **MPTL**.
5. Click **OK**



After selecting the appropriate Patient List you need to set up the **Defined Time Frame**.

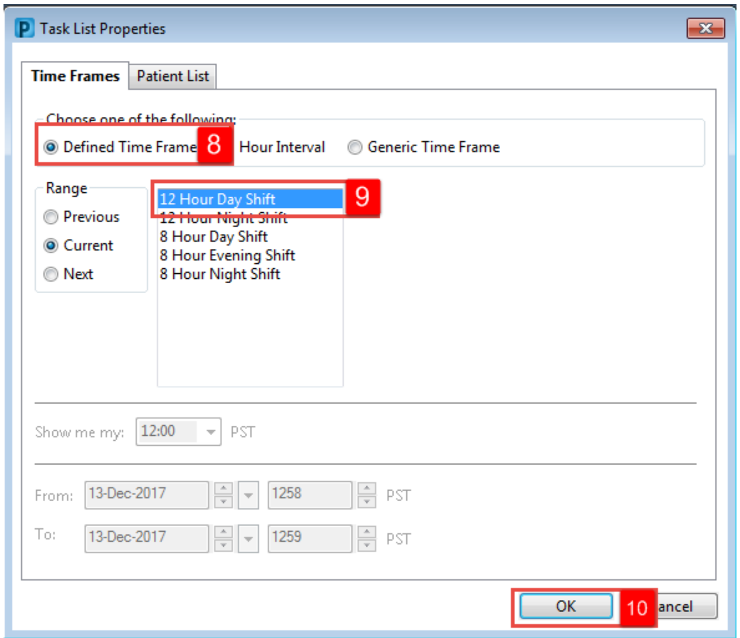
To select appropriate **Time Frame** for your MPTL:

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



The **Task List Properties** window opens.

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



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

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

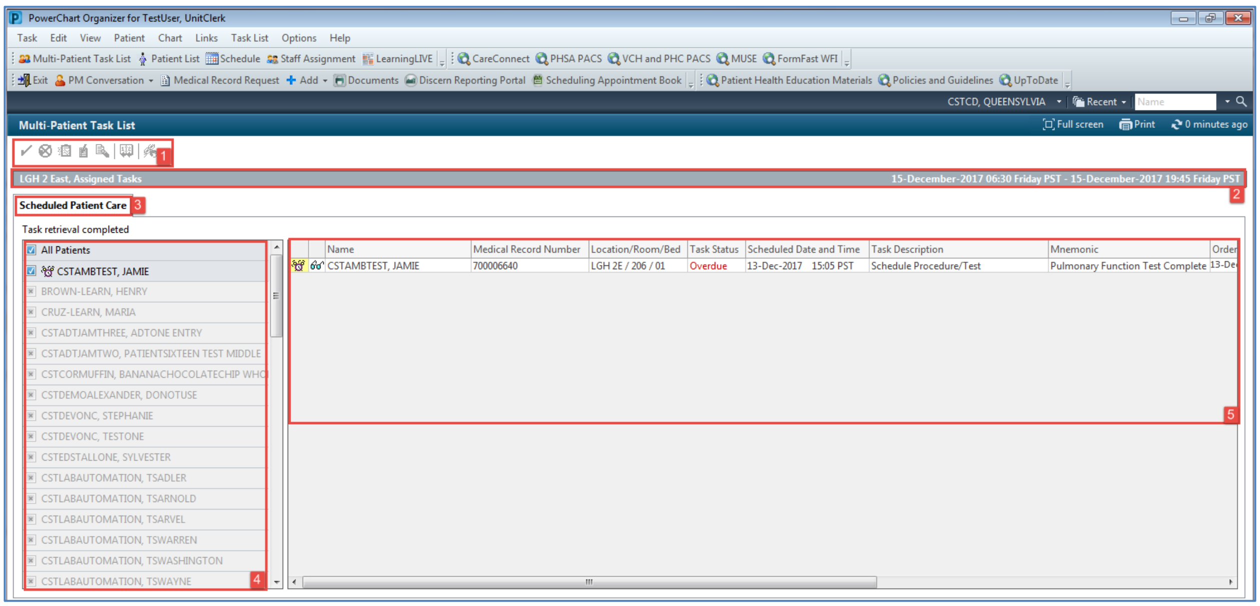
Key Learning Points

- The MPTL is the first page you will see upon logging in
- The MPTL is a tool used to display tasks for multiple patients
- You must select the correct patient list(s) and define the appropriate time frame in order to see assigned tasks for your patients
- Click refresh to ensure you can see the most current tasks

Activity 1.2 – Review MPTL functionality

1 Now that you have set up your view of the **Multi-Patient Task List,** you will be able to review the following:

1. **Task list toolbar** - hover over the **icons** to discover their functions.
2. **Information bar** the with name of the patient list (far left) and the set time frame (far right).
3. **Task categories** (tabs) – to group tasks.
4. **Navigator** window displays a list of your patients
5. List of patient tasks. Task names are displayed in the **Task Description** column.



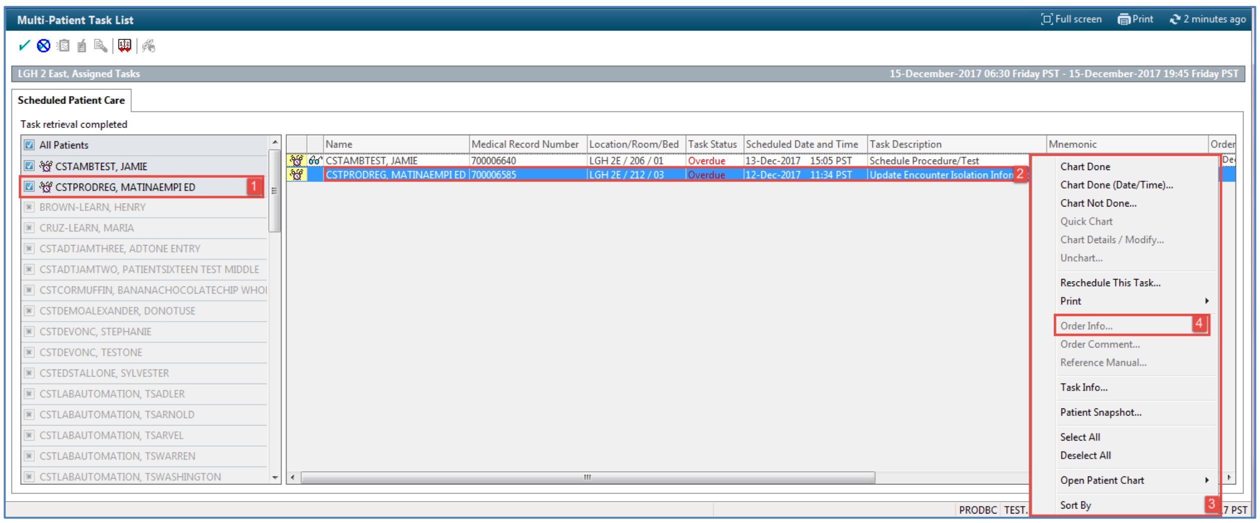
Key Learning Points

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

Activity 1.3 – Review Patient Tasks

1 After setting up the **Multi-Patient Task List** you can see the patients that are in your unit with orders or tasks associated with them. Let's locate a patient and review one of their tasks.

1. Under the **Navigator** window with patient names, locate the correct patient and click on **IP-UC-One,** [**Patient First Name**].
2. Review task(s) associated with your patient.
3. Right click on the task associated with your patient (i.e **Electrocardiogram 12 Lead STAT**)



Certain orders will have **Order Information** attached to it and additional information can be reviewed by the user.

4. If that option is available, select **Order Info…** to learn more about the order.

For the following steps, please review screenshot below.

5. The **Order Information** window opens. You can click the different tabs to review the order information.

6. Click the **Exit** icon to close the window when you finish reviewing the information.

NOTE: The **Exit** icon is recommended to close the window because you may accidentally close the whole CIS if you click the red x (top right hand corner).

Key Learning Points

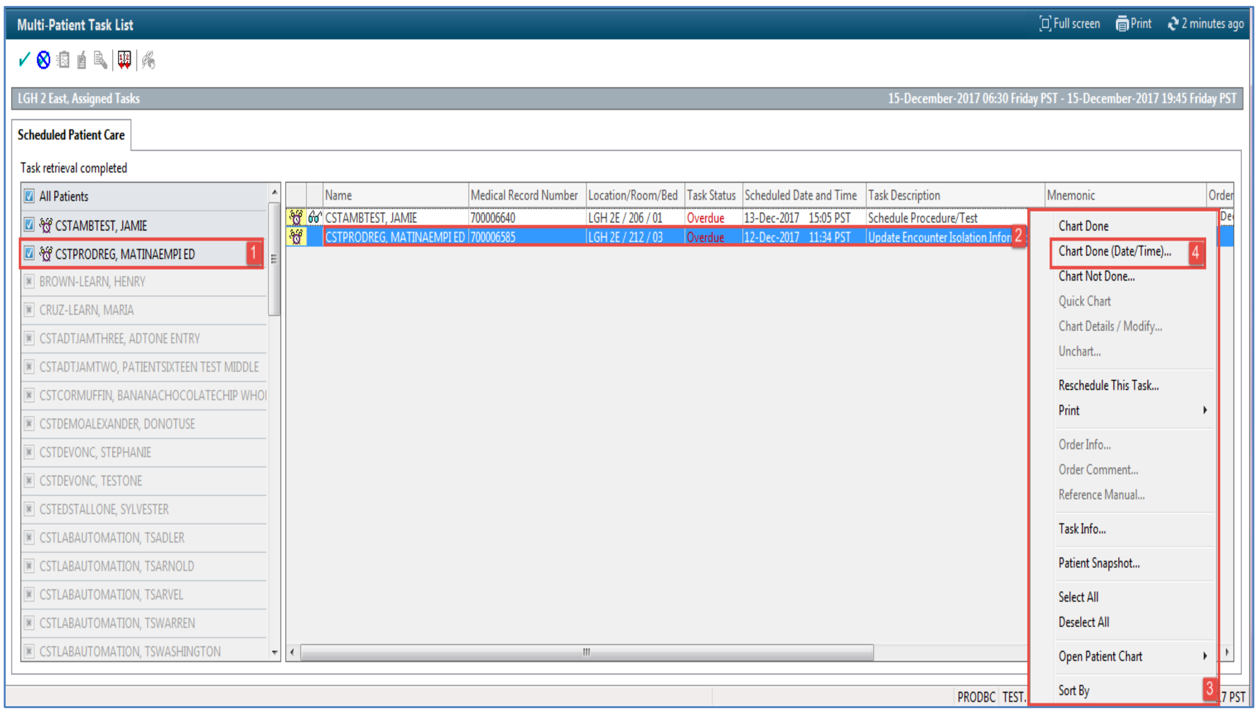
- Certain orders or tasks will appear on your MPTL to action.
- You can review additional information for certain orders by clicking on Order Information.

Activity 1.4 - Document a Patient Task as Complete

1 As you review patient tasks and complete orders, it is important to document tasks as complete. Documenting that a task has been completed will allow the task to be cleared from your **Multi-Patient Task List** and will declutter your MPTL with remaining tasks that you need to complete.

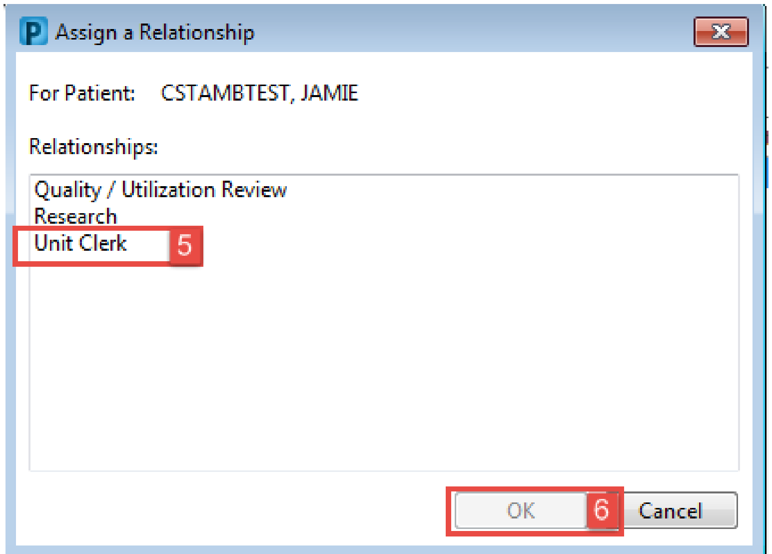
After reviewing the task and paging for the STAT ECG, you want to document the task as complete.

1. Under the **Navigator** window with patient names, locate the correct patient and click on [**patient name**]. Clicking on the patient name will take you to the patient's list of tasks on the right panel.
2. Review task(s) associated with your patient.
3. Right-click on the task associated with your patient (i.e **Electrocardiogram 12 Lead STAT**)
4. Click **Chart Done (Date/Time)…**



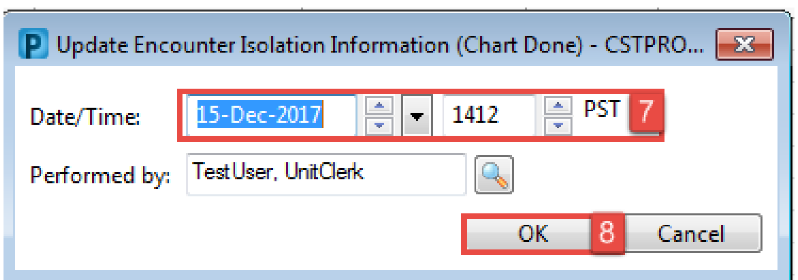
5. You will be asked to establish a relationship with the patient before you can open the patient's chart or proceed with completing a task. Select **Unit Clerk** in the **Assign a Relationship** window.

6. Click **OK**



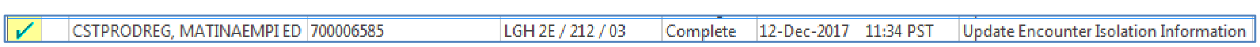
The **Chart Done** window opens.

7. Review the **Date/Time** cells in the **Chart Done** window and adjust details as needed**.**
8. Click **OK**



NOTE: The task can also be documented as Chart Not Done or Reschedule Task.

9. The task now will now have a **Chart Done** icon next to it.



10. Click **Refresh** near the top right corner of the screen and the task will fall off the task list.

Key Learning Points

- Document the task as Chart Done in the MPTL only after you have completed the action associated to the task.

- Click refresh after completing the task so it will fall off the task list.

PATIENT SCENARIO 2 – Accessing and Navigating the Patient's Chart

Learning Objectives

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

- Access patient chart and review information including Patient Summary, Orders and more

SCENARIO

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

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

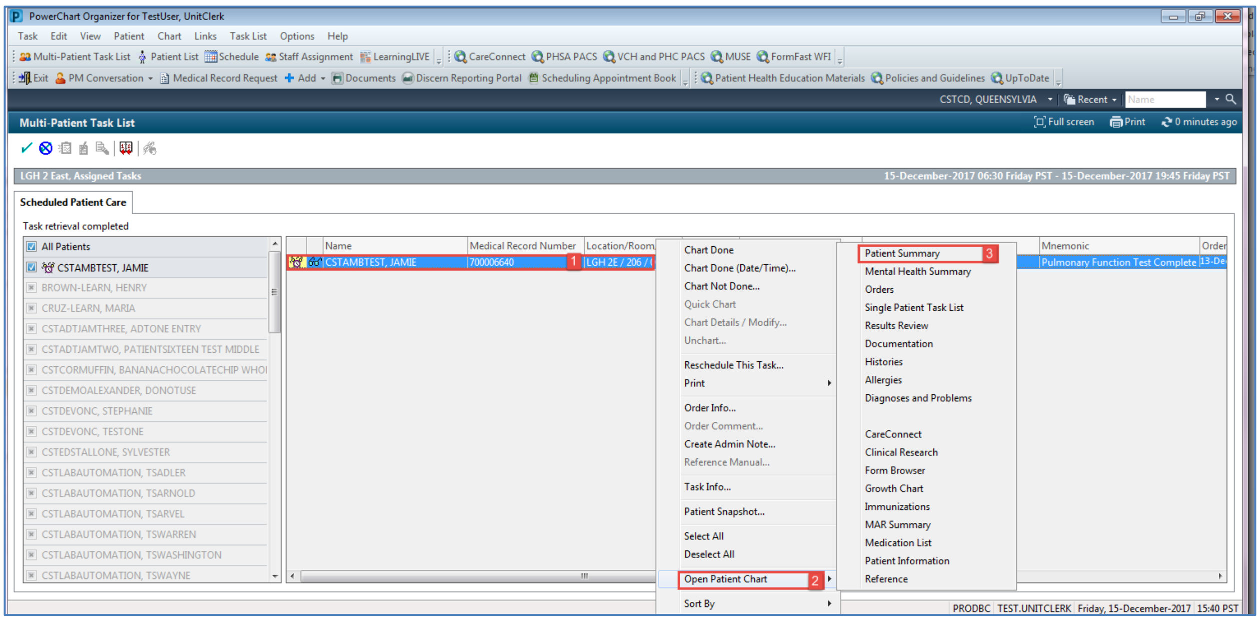
- Review patient information
- Become familiar with the Single Patient Task List (SPTL)
- Review the Orders Profile

Activity 2.1 – Introduction to Banner Bar, Toolbar, and Menu

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

1. Right click on the **patient's name**
2. Select **Open Patient Chart**
3. Select **Patient Summary**

You can also access the Patient Chart from the Patient List.



2 The patient's chart is now open to the **Patient Summary** page. Before we proceed any further, let's go through an overview of the general screen.

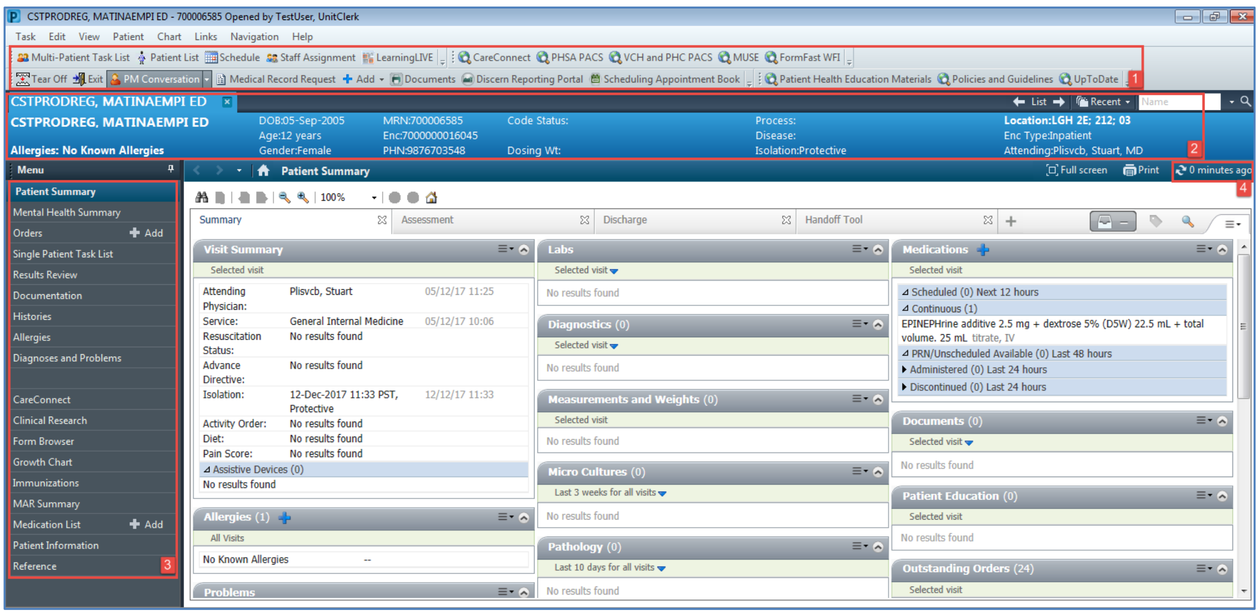
1. The **Toolbar** is at the top of the patient's chart and it contains buttons that allow you to access various tools within the Clinical Information System.
2. The **Banner Bar** displays patient demographics and important information that is visible to anyone accessing the patient's chart. Information 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, Medication Administration Record (MAR) and more.

4. The **Refresh** icon  updates the patient chart with the most up to date entries when clicked. It is important to click **Refresh** frequently as other clinicians may be accessing and documenting in the patient chart simultaneously.

NOTE: The chart does not automatically update. When in doubt, click **Refresh**



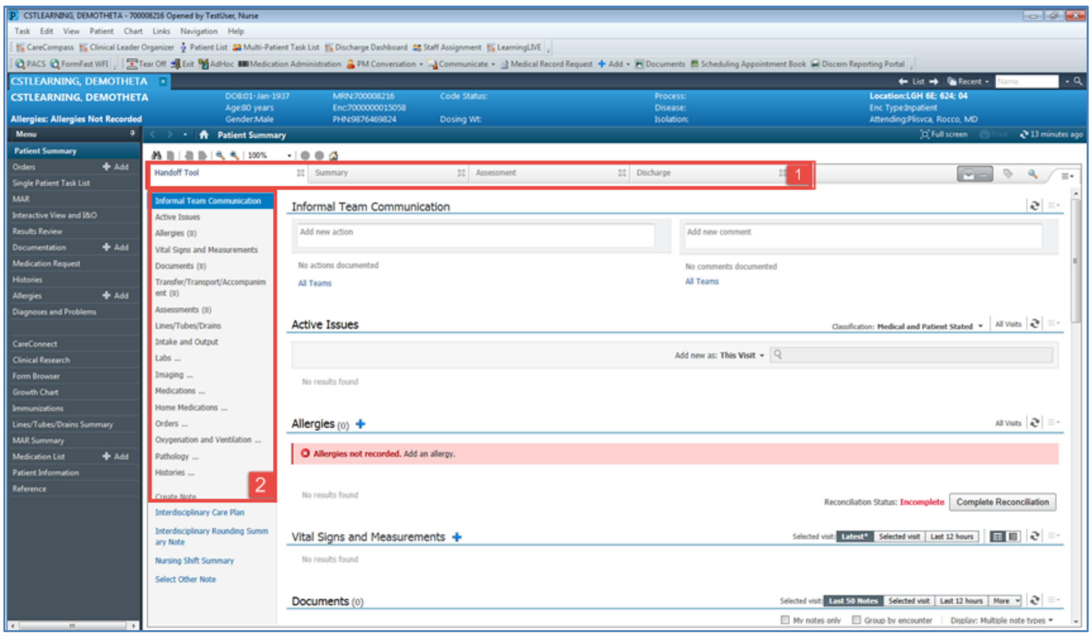
Key Learning Points

- 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 patient chart should be refreshed regularly to view the most up-to-date information.

Activity 2.2 – Introduction to Patient Summary

1 Upon accessing the patient's chart you will see the **Patient Summary** page 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 

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Key Learning Points

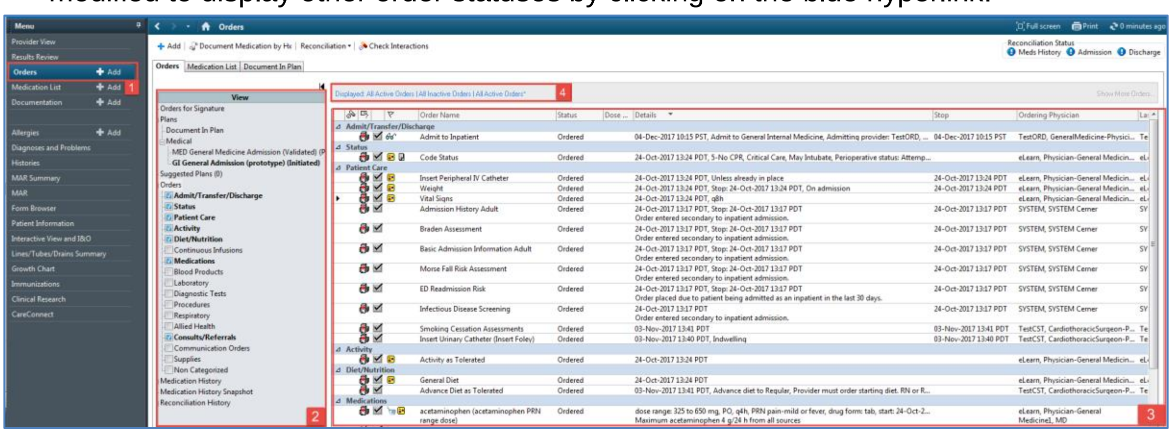
- Patient Summary provides access to key information about the patient.
- Click the Refresh icon to get the most updated information on the patient.

Activity 2.3 – Orders Profile

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

To navigate to the **Orders Profile** and review the orders:

1. Select **Orders** from the **Menu**
2. On the left side of the Orders Profile is the navigator (**View**) which includes several categories including:
   - **Plans**
   - **Categories of Orders**
   - **Medication History**
   - **Reconciliation History**
3. On the right side is the **Orders Profile** where you can:
   - Review the list of **All Active Orders**
     Moving the mouse over order icons allows you to **hover to discover** additional information.
     Some examples of icons and their meanings are:
     - Order requires nurse review
     - Additional reference text available
     - Order is part of a PowerPlan (Order Set)
     - Order requires Pharmacy verification
4. Notice the display filter default setting is set to display **All Active Orders**. This can be modified to display other order statuses by clicking on the blue hyperlink.



Key Learning Points

- The Orders page consists of the orders view (Navigator) and the order profile.
- The Orders View displays the lists of PowerPlans (order sets) and clinical categories of orders.
- The Order Profile displays All Active Orders for a patient and can be filtered.

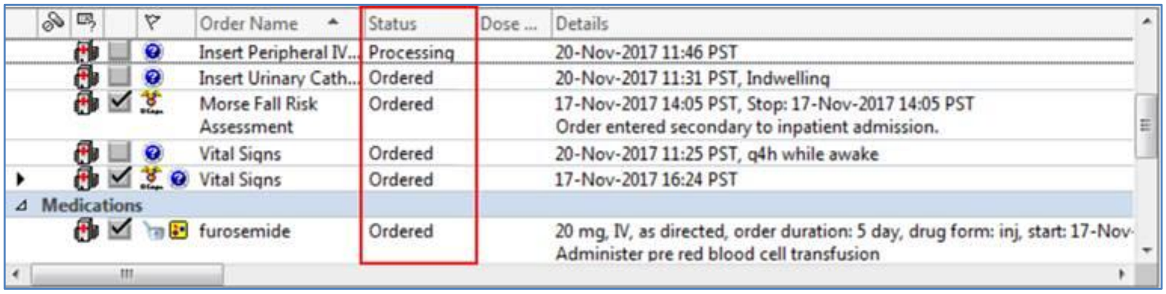
Activity 2.4 – Review Order Statuses and Details

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

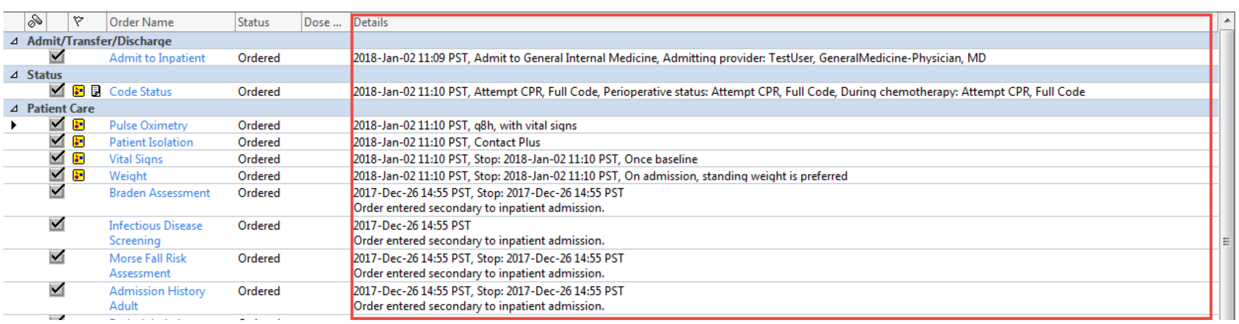


Order Name	Status	Dose ...	Details
Insert Peripheral IV...	Processing		20-Nov-2017 11:46 PST
Insert Urinary Cath...	Ordered		20-Nov-2017 11:31 PST, Indwelling
Morse Fall Risk Assessment	Ordered		17-Nov-2017 14:05 PST, Stop: 17-Nov-2017 14:05 PST Order entered secondary to inpatient admission.
Vital Signs	Ordered		20-Nov-2017 11:25 PST, q4h while awake
Vital Signs	Ordered		17-Nov-2017 16:24 PST
Medications			
furosemide	Ordered		20 mg, IV, as directed, order duration: 5 day, drug form: inj, start: 17-Nov- Administer pre red blood cell transfusion

To review order details:

Focus on the **Details** column of the Orders page.
If there is additional information, you can hover your mouse over the order to discover more information.

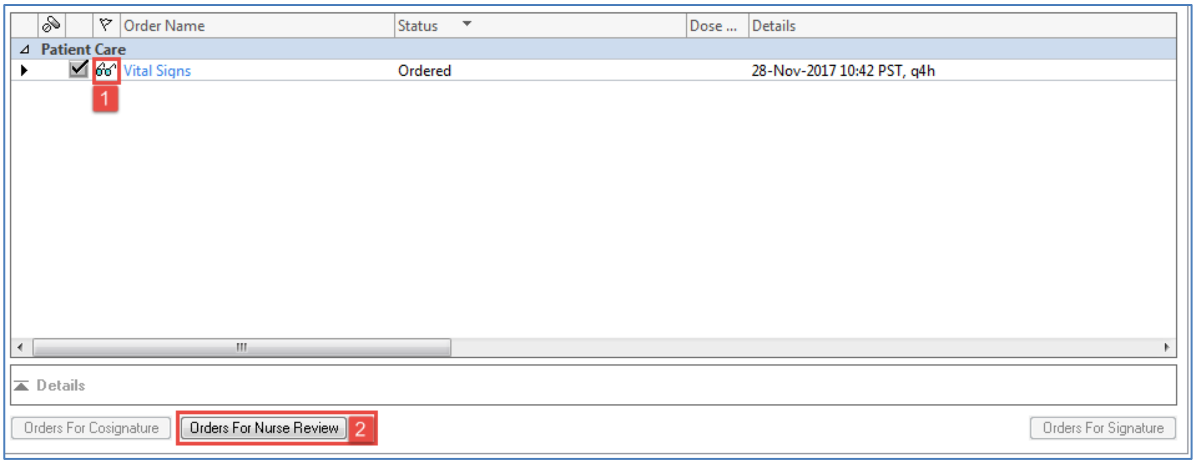
NOTE: The start date and that orders are organized by clinical category



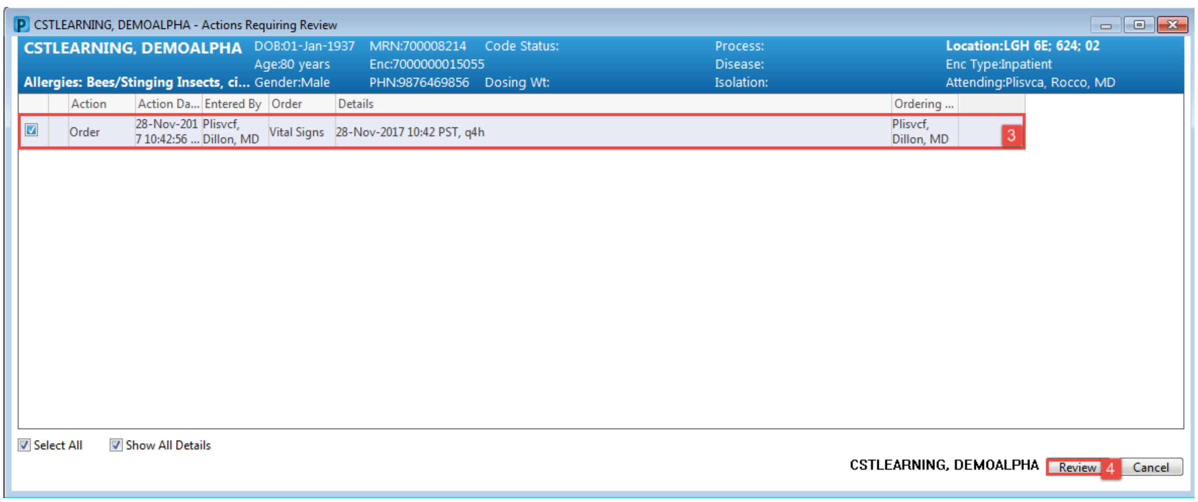
Order Name	Status	Dose ...	Details
Admit/Transfer/Discharge			
Admit to Inpatient	Ordered		2018-Jan-02 11:09 PST, Admit to General Internal Medicine, Admitting provider: TestUser, GeneralMedicine-Physician, MD
Status			
Code Status	Ordered		2018-Jan-02 11:10 PST, Attempt CPR, Full Code, Perioperative status: Attempt CPR, Full Code, During chemotherapy: Attempt CPR, Full Code
Patient Care			
Pulse Oximetry	Ordered		2018-Jan-02 11:10 PST, q8h, with vital signs
Patient Isolation	Ordered		2018-Jan-02 11:10 PST, Contact Plus
Vital Signs	Ordered		2018-Jan-02 11:10 PST, Stop: 2018-Jan-02 11:10 PST, Once baseline
Weight	Ordered		2018-Jan-02 11:10 PST, Stop: 2018-Jan-02 11:10 PST, On admission, standing weight is preferred
Braden Assessment	Ordered		2017-Dec-26 14:55 PST, Stop: 2017-Dec-26 14:55 PST Order entered secondary to inpatient admission.
Infectious Disease Screening	Ordered		2017-Dec-26 14:55 PST Order entered secondary to inpatient admission.
Morse Fall Risk Assessment	Ordered		2017-Dec-26 14:55 PST, Stop: 2017-Dec-26 14:55 PST Order entered secondary to inpatient admission.
Admission History Adult	Ordered		2017-Dec-26 14:55 PST, Stop: 2017-Dec-26 14:55 PST Order entered secondary to inpatient admission.

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

1. A **Nurse Review** icon appears to the left of the order. This serves to acknowledge the order needs to be reviewed by a nurse.
2. The nurse should click the **Orders for Nurse Review** button to open the Review window.



3. Review order details.
4. Click **Review**



Key Learning Points

- Nurses should always verify the status of orders.
- Hover to Discover to view additional order information.

Activity 2.5 – Single Patient Task List (SPTL)

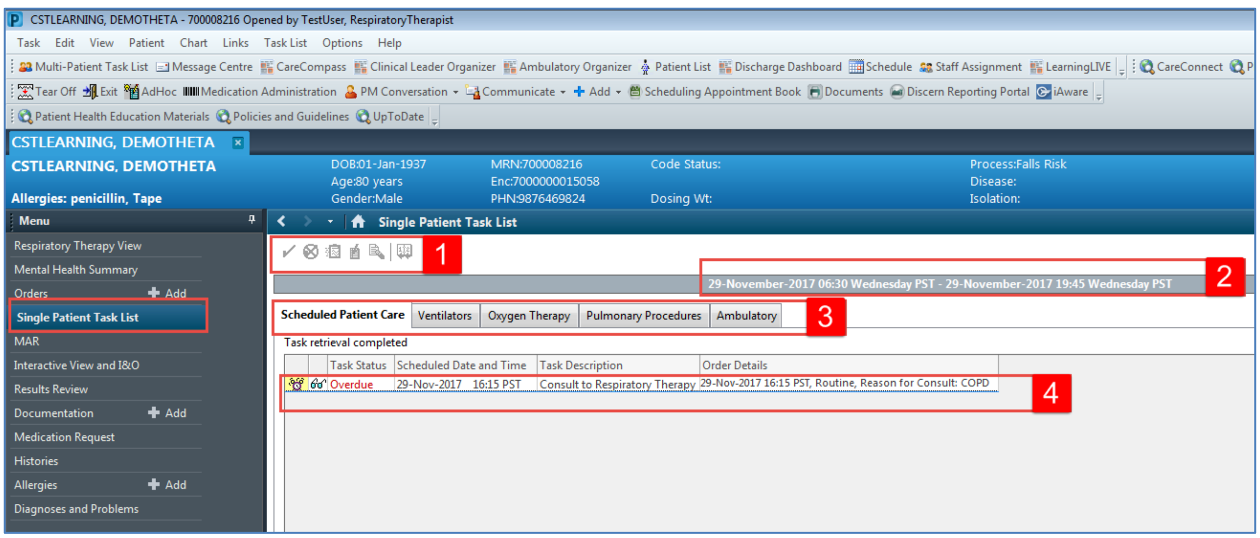
1 The **Single Patient Task List** (**SPTL**) is accessible via the Menu. It displays all tasks available for the specific patient whose chart you are viewing.

The tools and functionalities of the **SPTL** are similar to the **Multi-Patient Task List**.

You may find it helpful to review and complete any tasks for your patient from the SPTL when you have the Patient Chart open already instead of navigating back to the MPTL.

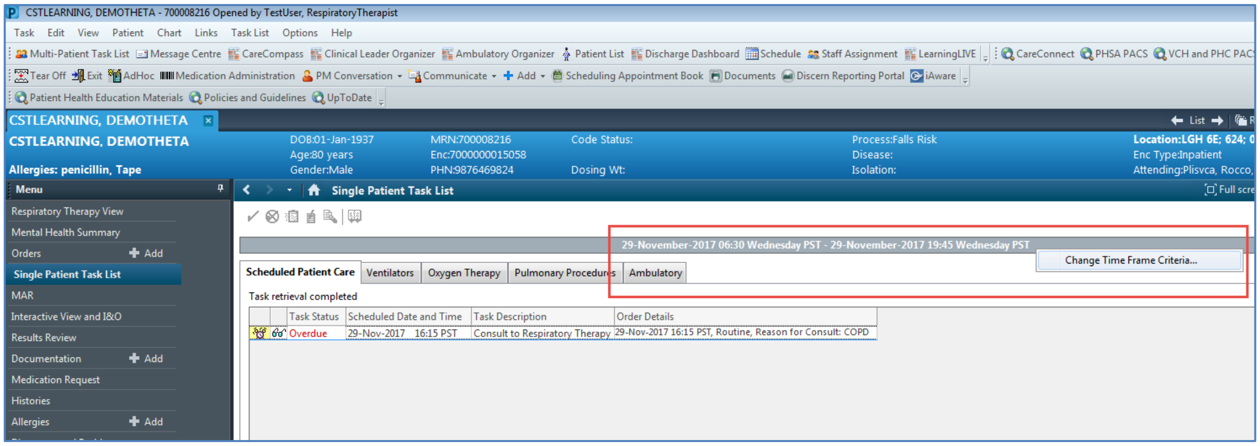
Click on the **Single Patient Task List** in the **Menu.** You will see:

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



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

1. On the grey information bar, right click then select **Change Time Frame Criteria**.
2. The **Task List Properties** window will open. Under the **Time Frames** tab, select **Defined Time Frame** for your shift.
3. Under **Range**, ensure **Current** is selected. Click **12 Hour Day Shift.**
4. Click the **OK** button. The Task Categories (Tabs) within the SPTL are now correctly set for your day shift.



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

Key Learning Points

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

End of Workbook

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