SELF-GUIDED PRACTICE WORKBOOK [N57] CST Transformational Learning

WORKBOOK TITLE:

Unit Clerk: General







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***** 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

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 ²² Multi-Patient Task List</sup> 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.

PowerChart Organizer for TestUser, RespiratoryTherapist		
Task Edit View Patient Chart Links Task List Options Help		
🗄 🖴 Multi-Patient Task List 🖃 Message Centre 🌃 CareCompass 🎬 Clinical Leade	Organizer 🎬 Ambulatory Organizer 🎍 Patient List 🎬 Discharge Dashboard 🛅 Schedule 🎿 Staff Assignment 腦 LearningLIVE 🍦 🕅 😋 CareConnect 😋 PHSA PACS 🔮	🕽 VCH and PHC PACS 🜊 MUSE 🜊 FormFast WFI 🍦
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😧 Patient Health Education Materials 💐 Policies and Guidelines 💐 UpToDate 💡		
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Task retrieval completed		8
All Patients Name Medical Record I	umber Location/Room/Bed Task Status Scheduled Date and Time Task Description Order Details	
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CSTPRODAC, HANHAN	LGH 6E / 527 / 01 In Process 28-Aug-2017 10:20 PDT Blood Gas Collection	
CSTPRODAC, HANHA 700005678	LGH 6E / 627 / 01 InProcess 29-Aug-2017 09:01 PDT Blood Gas Collection	

- 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.

P Task List Properties	×
Time Frames Patient List	
Choose one of the following © Defined Time Frame © 9 terval © Generic Time Frame	
Range 12 Hour Day Shift 10 Previous 12 Hour Night Shift 10 © Current 8 Hour Day Shift 8 Hour Evening Shift © Next 8 Hour Night Shift	
Show me my: 16:00 - PST	
From: 29-Nov-2017 👘 💌 1637 👘 PST To: 29-Nov-2017 👘 💌 1638 👘 PST	
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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

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ł	📲 Exit 🤷 AdHoc 🎟 Medication	Admini	istration 🔒 PM C	Conversation 👻 🕌 Comr	nunicate 👻 🕂	Add 👻 🛅 Sche	duling Appoi	ntment Book 🖲 Document	s 🗃 Discern Reporting Portal	🕞 iAware 💡
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Ľ	Task retrieval completed									
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								The selected patients, tin	ne frame and filters for this vi	ew did not return any tasks
Ш										

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



P Task List Properties	
Time Frames Patient List	
Choose a Patient List Departmental View JohnDoe_Custom List 10H 0 Fast	Location Filter
View Assigned Tasks	Save
	OK 5 ncel

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.

Multi-Patient Task List										🖶 Print	€ 1 minutes
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Departmental View, Assig	ned Task	5						13-December-2017 06:30 Wednesday		301710.45	
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Task retrieval completed								L			
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		CSTCD, TESTAD	700001302	LGH 2E / 212 / 02	InProcess	04-Aug-2017 13:38 PD1	RT Evaluate and Treat				
COTPRODAC, HANNA	1 N	CSTPRODAC, HANHAN	700005678	LGH 6E / 627 / 01	InProcess	28-Aug-2017 10:20 PD1 20 Aug 2017 00:01 PD1	Blood Gas Collection				

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.



🕽 Task List Prope	rties	×
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Show me my: From: 13-Dec-	12:00 ▼ PST 2017 ★ ▼ 1258	× PST
To: 13-Dec-	2017	PST

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.

- 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

1



Activity 1.2 – Review MPTL functionality

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.

PowerChart Organizer for TestUser, UnitClerk										
Task Edit View Patient Chart Links Task List	0	ptions Help								
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Task retrieval completed	_ •									
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BROWN-LEARN, HENRY	E									
CRUZ-LEARN, MARIA	Ш									
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CSTDEVONC, STEPHANIE										5
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CSTLABAUTOMATION, TSWARREN										
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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)

Multi-Patient Task List							🗇 Full screen 🛛 👼 Print	2 minutes ago
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Scheduled Patient Care								
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All Patients	Name	Medical Record Number	Location/Room/Bed	Task Status	Scheduled Date and T	me Task Description	Mnemonic	Order
	😚 😚 CSTAMBTEST, JAMIE	700006640	LGH 2E / 206 / 01	Overdue	13-Dec-2017 15:05 P	ST Schedule Procedure/Test	Chart Done	De
STREAM AND A STREAM AND AND A STREAM AND	CSTPRODREG, MATINAEMPI EL	D 700006585	LGH 2E / 212 / 03	Overdue	12-Dec-2017 11:34 P	T Update Encounter Isolation Infor	Chart Done (Date/Time)	
BROWN-LEARN, HENRY							Chart Not Done	
CRUZ-LEARN, MARIA							Quick Chart	
CSTADTJAMTHREE, ADTONE ENTRY							Chart Details / Modify	
CSTADTJAMTWO, PATIENTSIXTEEN TEST MIDDLE							Unchart	
CSTCORMUFFIN, BANANACHOCOLATECHIP WHO							Reschedule This Task	
K CSTDEMOALEXANDER, DONOTUSE							Print	,
K CSTDEVONC, STEPHANIE							Order Info	4
CSTDEVONC, TESTONE							Order Comment	
CSTEDSTALLONE, SYLVESTER							Reference Manual	
CSTLABAUTOMATION, TSADLER							Task Info	
CSTLABAUTOMATION, TSARNOLD							Patient Snapshot	
CSTLABAUTOMATION, TSARVEL							Select All	
CSTLABAUTOMATION, TSWARREN							Deselect All	
CSTLABAUTOMATION, TSWASHINGTON	•						Open Patient Chart	F
						PRODBC TES	T. Sort By	3 7 PST

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 ⁴ to close the window when you finish reviewing the information.

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Task Vi	ew Help									
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Respira	tory Therapy	/ Follov	ving							
· ·			-							
Details	Additional Info	History	Comments	Validation	Results	Ingredients	Pharmacy	5		
Details								-		
Reques	, ted Start Date/Tin	ne 08-N	ov-2017 15:52	PST						
Consta	nt order	Ves								
		105								

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).

- 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

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)...



 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

P Assign a Relationship
For Patient: CSTAMBTEST, JAMIE
Relationships:
Quality / Utilization Review
Research
one clerk 0
OK 6 Cancel

The Chart Done window opens.

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

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	P Update Enco	ounter Isolation In	formation (C	Chart Done) - CST	PRO 론					
	Date/Time:	15-Dec-2017	- 14	412 🚔 PST	7					
	Performed by:	TestUser, UnitCle	rk	<u>_</u>						
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9	. The task n	ow will now h	ave a Ch a	art Done icon	🔽 nex	kt to it.				
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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

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.

PowerChart Organizer for TestUser, UnitClerk					- 2 -						
Task Edit View Patient Chart Links TaskList Op	tions Help										
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Scheduled Patient Care											
Task retrieval completed											
All Patients	Name	Medical Record Number Location/Room	Chart Done	Dationt Summany 2	Mnemonic Order						
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BROWN-LEARN, HENRY			Chart Not Done	Orders							
CRUZ-LEARN, MARIA			Quick Chart	Single Patient Task List							
CSTADTJAMTHREE, ADTONE ENTRY			Chart Details / Modify	Results Review							
CSTADTJAMTWO, PATIENTSIXTEEN TEST MIDDLE			Unchart	Documentation							
CSTCORMUFFIN, BANANACHOCOLATECHIP WHO			Reschedule This Task	Histories							
CSTDEMOALEXANDER, DONOTUSE			Print	Allergies Disenses and Dasklands							
CSTDEVONC, STEPHANIE			Order Info	Diagnoses and Problems							
■ CSTDEVONC, TESTONE			Order Comment	CareConnect							
CSTEDSTALLONE, SYLVESTER			Create Admin Note	Clinical Research							
CSTLABAUTOMATION, TSADLER			Reference Manual	Form Browser							
CSTLABAUTOMATION, TSARNOLD			Task Info	Growth Chart							
CSTLABAUTOMATION, TSARVEL			Patient Snapshot	Immunizations							
CSTLABAUTOMATION, TSWARREN			Select All	MAR Summary							
CSTLABAUTOMATION, TSWASHINGTON			Deselect All	Patient Information							
CSTLABAUTOMATION, TSWAYNE	•		Open Patient Chart 2	Reference	•						
			Sout Ru								
			JULTUY	PRODBC TES	T.UNITCLERK Friday, 15-December-2017 15:40 PST						

- 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 with 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

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Task Edit View Patient Chart Lini	nks Navigatio	n Help							
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Allergies: No Known Allergies	Ge	nder:Female	PHN:9876703548	Dosin	ig Wt:	Isolati	on:Protective	Attending:Plisvcb, Stuart, MD	2
Menu 🕈 <	> • 🖬	Patient Summary						[□] Full screen 🛛 📻 Prin	nt 🍠 0 minutes age
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Orders 🕂 Add	unnury		Nabesoniene		N Discharge	L			· · ·
Single Patient Task List	Visit Summa	ry		≡- ∾	Labs		≡• ∾	Medications 💠	≡•
Results Review	Selected visit				Selected visit 🔻			Selected visit	
Documentation	Attending	Plisvcb, Stuart	05/12/17 11	:25	No results found			⊿ Scheduled (0) Next 12 hours	
Histories	Physician:	Conoral Internal Me	dicina 05/13/17 10	-06			_	▲ Continuous (1)	
Allergies	Resuscitation	No results found	Suicine 05/12/17 10	.00	Diagnostics (0)		=• •	volume, 25 mL titrate, IV	mL + total =
Diagnoses and Problems	Status:				Selected visit 🔻			▲ PRN/Unscheduled Available (0) Last 48 hours	
A	Advance	No results found			No results found		Administered (0) Last 24 hours		
Concenter	solation:	12-Dec-2017 11:33	PST, 12/12/17 11	:33	Maaguramanta and Waight	c (0)	=- 0	 Discontinued (0) Last 24 hours 	
Clinical December		Protective			Celebol vice	s (0)		(D	=
A A	Activity Order:	No results found			Selected visit			Documents (0)	=- ~
Form Browser	Pain Score:	No results found			No results found			Selected visit 💙	
Growth Chart	Assistive Devi	ces (0)			Micro Cultures (0)		≡• ∾	No results found	
Immunizations N	No results found	1			Last 3 weeks for all visits 🔷			Patient Education (0)	≡• ♠
MAR Summary	Allergies (1)			=- @	No results found			Selected visit	
Medication List 🕂 Add	All Vieite	T						No results found	
Patient Information All Visits		_	Pathology (0) =• 🔿		≡• ∾	no results round			
Reference 3	NU KHUWN Aller	(nown Allergies			Last 10 days for all visits 🗢		Outstanding Orders (24)	≡• ∾	
	Problems			≡•⊗	No results found			Selected visit	-

- 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 CSTLEANNING, DEMOTHETA - XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX											
Task Edit View Patient Char	t Links Navigation Help										
K CareCompass K Clinical Leader	Organizer 🎍 Patient List 🚨 Multi-Patie	ent Task List 👫 Discharge Dashboard 🚨 Staff Assignn	nent 🌇 LearningLIVE 💡								
🔍 PACS ழ Form Fait WRI 🗍 🔀 Tear Off 🍂 Exit 🧌 AdHoce 🎟 Medication Administration a 🎴 PM Conversation + 🍟 Conversation + 🍟 Medical Record Reputst 💠 Add + 👘 Documents 🏥 Scheduling Appointment Book 💭 Discent Reporting Portal 💡											
CSTLEARNING, DEMOTHET	← Lit → In Recet + Name + Q										
CSTLEARNING, DEMOTHET	A DOB:01-Jan-19	37 MRN:700008216 Code S 544/7000008216 Code S		Process:	Location:LGH 6E; 624; 04						
Allergies: Allergies Not Recorded	d Gender:Male	PHN:9876469824 Dosing		Isolation:	Attending/Plisvca, Rocco, MD						
Menu 9	< > • 🔒 Patient Summar	v			[0] Full screen 👘 Print 💸 13 minutes ago						
Patient Summary	A D - D - S S 100%										
Orders 💠 Add	Handoff Tool	22 Summary 22	Assessment	22 Discharge 23							
Single Patient Task List											
MAR	Informal Team Communication	Informal Team Communication			2 - Î						
Interactive View and I&O	Active Issues										
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	enc (u)										
Diagnoses and Problems	Assessments (0)	Active Issues			41 Yes 2 =-						
	Lines/Tubes/Drans	Active Issues			Cassification: Medical and Patient Stated • Revised •						
CareConnect	Labs	Add new as: This Visit + Q									
Clinical Research	Laura inc										
Form Browser	Medications	No results found									
browsh chart	Home Medications										
Liner/Tuber/Trains Summers	Orders				All Webs						
MAR Summary	Ovvsenation and Ventilation	Antigres (0)									
Medication List + Add	Pathology	O Allergies not recorded. Add an allergy.									
Patient Information	Histories										
Reference	2										
	Create Note	No results found			Reconcilation Status: Incomplete Complete Reconciliation						
	Interdisciplinary Care Plan										
	Interdisciplinary Rounding Summ ary Note	Vital Signs and Measurements 💠			Selected visit: Latest* Selected visit Last 12 hours 🗐 🔟 🥹 💷						
	Nursing Shift Summary	No results found									
	Select Other Note										
		Documents (0) Selected visit Last 50 Notes Selected visit Last 12 hours More									
< >					Mv notes only 🔲 Group by encounter 🛛 Display: Multiple note types 👻 🗣						

2 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 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:

- 66 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.

Menu	ę	< > • 🕈 Orders						(0) Full screen	minutes ago
Provider View		Add Document Medication by He Research	listing a l Chark Interne	tion			3	Reconciliation Status	
Results Review		T Hou g Document meancement by the meconce	and a cuer ment	0011				Meds History Admission	Discharge
Orders	+ Add	Orders Medication List Document In Plan							
Medication List	+ Add 1	K	Disclosed All Active Deday	128 Jacobia Dolari I Al Antica Dolari	4				
Documentation	+ Add	View	and a second second second	Permission contraction of the second second	100				
		Direct for signature	8 B P	Order Name	Status	Dose Details *	Stop	Ordering Physician	La: *
10000000		Decoment In Plan	⊿ Admit/Transfer/Dis	charge					
Altergies	+ Add	Medical	🖶 🗹 66°	Admit to Inpatient	Ordered	04-Dec-2017 10:15 PST, Admit to General Internal Medicine, Admitting provider: TestORD,	04-Dec-2017 10:15 PST	TestORD, GeneralMedicine-Physic	i. Te
Diagnoses and Problem		MED General Medicine Admission (Validated) (P	⊿ Status						
Histories		GI General Admission (prototype) (Initiated)	Q K 8 0	Code Status	Ordered	24-Oct-2017 13:24 PDT, 5-No CPR, Critical Care, May Intubate, Perioperative status: Attemp.		eLearn, Physician-General Medicin	s., el-
A CONTRACTOR OF CONTRACTOR		Sunnected Plans (0)	a Patient Care						
MAR Summary		Orders	200	Insert Peripheral IV Catheter	Ordered	24-Oct-2017 13:24 PDT, Unless already in place	24-Oct-2017 13:24 PDT	eLearn, Physician-General Medicin	- el
MAR		Admit/Transfer/Discharge		Weight	Ordered	24-Oct-2017 13:24 PDT, Stop: 24-Oct-2017 13:24 PDT, On admission	24-Oct-2017 15:24 PDT	eLearn, Physician-General Medicin	- eL
Party Distance		Status		Vital Signs	Ordered	24-Oct-2017 13:24 PD1, q8h		eLearn, Physician-General Medicin	L eL
Form Browser		Patient Care		Admission History Adult	Ordered	24-Oct-2017 1317 PDT, Stop: 24-Oct-2017 1317 PDT Order entered secondary to instalient admission	24-Oct-201/131/PD1	SYSTEM, SYSTEM Cemer	54
Patient Information		Activity	8 M	Braden Assessment	Ordered	24-Oct-2017 13:17 PDT, Stop: 24-Oct-2017 13:17 PDT	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cerner	SY
Lines/Tubes/Drains Sun		Continuous Infusions	∂ ⊻	Basic Admission Information Adult	Ordered	24-Oct-2017 13:17 PDT, Stop: 24-Oct-2017 13:17 PDT	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cemer	SV E
Growth Chart		Blood Products		Morse Fall Risk Assessment	Ordered	24-Oct-2017 13:17 PDT, Stop: 24-Oct-2017 13:17 PDT	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cerner	SY
Immunizations		Laboratory	AV	ED Baadmirring Rick	Ordered	Urder entered secondary to inpatient admission. 34. Oct. 2017 12:17 PDT. Store: 34. Oct. 2017 12:17 PDT	34-0-+-3017 12-17 PDT	SYSTEM SYSTEM Carpar	cv
Clinical Research		Diagnostic Tests	0 61	ED Readmission Risk	Ordered	Order placed due to patient being admitted as an inpatient in the last 30 days.	24-06-2017 13:17 PD1	STSTEM, STSTEM CEME	37
CareConnect		Respiratory	⊕ ⊠	Infectious Disease Screening	Ordered	24-Oct-2017 13:17 PDT Order entered secondary to inpatient admission.	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cemer	SY
		Allied Health	8 M	Smoking Cessation Assessments	Ordered	03-Nov-2017 13:41 PDT	03-Nev-2017 13:41 PDT	TestCST, CardiothoracicSurgeon-P	P Te
		Consults/Referrals	ð M	Insert Urinary Catheter (Insert Foley)	Ordered	03-Nov-2017 13:40 PDT, Indwelling	03-Nov-2017 13:40 PDT	TestCST, CardiothoracicSurgeon-F	P_ Te
		Communication Orders	d Activity						10000
		Supplies	🔁 🗹 😣	Activity as Tolerated	Ordered	24-Oct-2017 13:24 PDT		eLearn, Physician-General Medicin	a. el
		Non Categorized	⊿ Diet/Nutrition						
		Medication History	0 M 0	General Diet	Ordered	24-Oct-2017 13:24 PDT		eLearn, Physician-General Medicin	n_ eL
		Medication History Snapshot	e M	Advance Diet as Tolerated	Ordered	03-Nov-2017 13:41 PDT, Advance diet to Regular, Provider must order starting diet. RN or R.		TestCST, CardiothoracicSurgeon-F	P Te
5		Reconciliation History	⊿ Medications						
1		2	9 M 70	acetaminophen (acetaminophen PRN range dose)	Ordered	dose range: 325 to 650 mg, PO, q4h, PRN pain-mild or fever, drug form: tab, start: 24-Oct-2. Maximum acetaminophen 4 g/24 h from all sources	e	eLearn, Physician-General Medicine1, MD	3



- 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

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

e	\$ B		8	Order Name *	Status	Dose	Details	•
	e.		0	Insert Peripheral IV	Processing		20-Nov-2017 11:46 PST	
	- 🔁		0	Insert Urinary Cath	Ordered		20-Nov-2017 11:31 PST, Indwelling	
	0		10	Morse Fall Risk Assessment	Ordered		17-Nov-2017 14:05 PST, Stop: 17-Nov-2017 14:05 PST Order entered secondary to inpatient admission.	-
	- 🔁		0	Vital Signs	Ordered		20-Nov-2017 11:25 PST, q4h while awake	
•	- 🔁		3 0	Vital Signs	Ordered		17-Nov-2017 16:24 PST	
⊿ №	Medica	ation	5			1		
	•		1	furosemide	Ordered		20 mg, IV, as directed, order duration: 5 day, drug form: inj, start: 17-Nov Administer pre red blood cell transfusion	+
4	_		1				•	

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.



1

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

			-			_				
00	\$	Order Name	Status	Dose	Details					
⊿ Admit/	/Transf	er/Discharge								
\checkmark	i	Admit to Inpatient	Ordered		2018-Jan-02 11:09 PST, Admit to General Internal Medicine, Admitting provider: TestUser, GeneralMedicine-Physician, MD					
⊿ Status										
\checkmark	í 🗈 🛛	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	t Care									
▶ ⊻	í 🗈	Pulse Oximetry	Ordered		2018-Jan-02 11:10 PST, q8h, with vital signs					
\checkmark	í 🗈	Patient Isolation	Ordered		2018-Jan-02 11:10 PST, Contact Plus					
\checkmark	í 🗈	Vital Signs	Ordered		8-Jan-02 11:10 PST, Stop: 2018-Jan-02 11:10 PST, Once baseline					
\checkmark	í 🗈	Weight	Ordered		:18-Jan-02 11:10 PST, Stop: 2018-Jan-02 11:10 PST, On admission, standing weight is preferred					
\checkmark	i	Braden Assessment	Ordered		17-Dec-26 14:55 PST, Stop: 2017-Dec-26 14:55 PST					
					rder entered secondary to inpatient admission.					
\checkmark	1	Infectious Disease	Ordered		2017-Dec-26 14:55 PST					
		Screening			Order entered secondary to inpatient admission.	Ξ				
\checkmark	1	Morse Fall Risk	Ordered		2017-Dec-26 14:55 PST, Stop: 2017-Dec-26 14:55 PST					
		Assessment			Order entered secondary to inpatient admission.					
\checkmark	1	Admission History	Ordered		2017-Dec-26 14:55 PST, Stop: 2017-Dec-26 14:55 PST					
	_	Adult			Order entered secondary to inpatient admission.					
100										

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.



	S	8	Order Name	Status 🔻	Dose	Details					
⊿	△ Patient Care										
►		1 66	Vital Signs	Ordered		28-Nov-2017 10:42 PST, q4h					
		1									
		_									
			III				4				
-	Detail	2									
	o o tum										
0	ders Fo	or Cosigr	nature Orders For Nurse Review 2				Orders For Signature				

- 3. Review order details.
- 4. Click Review

P C	P CSTLEARNING, DEMOALPHA - Actions Requiring Review										
CS	TLEARN	NG, DEMOALPHA	DOB:01-Jan-1 Age:80 years	937 MRN:700008214 Enc:700000001505	Code Status: 5		Process: Disease:		Location:LG Enc Type:Inp	iH 6E; 624; 02 atient	
Alle	ergies: Bee	s/Stinging Insects, ci	. Gender:Male	PHN:9876469856	Dosing Wt:		Isolation:		Attending:Pli	isvca, Rocco, MD	
	Action	Action Da Entered	By Order	Details				Order	ing		
	Order	28-Nov-201 Plisvcf, 7 10:42:56 Dillon, N	/ID Vital Signs	28-Nov-2017 10:42 PST, q4	ih			Plisvc Dillon	f, , MD 3		
V Se	elect All	Show All Details									
								CSTLEARN	NG, DEMOALF	PHA Review 4	Cancel

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



Activity 2.5 – Single Patient Task List (SPTL)

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

1

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.



P CSTLEARNING, DEMOTHETA - 700008216 Opened by TestUser, RespiratonyTherapist										
Task Edit View Patient Chart Links	Task List Options Help									
😫 Multi-Patient Task List 🔄 Message Centre 🞬 CareCompass 🎬 Clinical Leader Organizer 📓 Ambulatory Organizer 🐇 Patient List 🛒 Discharge Dashboard 🚟 Schedule 😂 Staff Assignment 🎬 Learning LIVE 📄 🕄 CareConnect 🍓 PHSA PACS 🔞 VCH and PHC PAC										
🔀 Tear Off 📲 Exit 🦉 AdHoc 🎟 Medicatio	n Administration 🔒 PM Conversation 👻 🕞 Communicate	🔹 🕂 Add 👻 🛗 Scheduling Appointment Book 📻 Doc	uments 🝙 Discern Reporting Portal 🕞 iAware 💡							
Ratient Health Education Materials 🕄 Po	icies and Guidelines 🕄 UpToDate 🚊									
CSTLEARNING, DEMOTHETA ×				← List → 🍘 R						
CSTLEARNING, DEMOTHETA	DOB:01-Jan-1937 MRN:700008	3216 Code Status:	Process:Falls Risk Disease	Location:LGH 6E; 624; 0						
Allergies: penicillin, Tape	Gender:Male PHN:987646	9824 Dosing Wt:	Isolation:	Attending:Plisvca, Rocco,						
Menu	🕴 < 🔹 🛧 Single Patient Task List			[□] Full scre						
Respiratory Therapy View										
Mental Health Summary										
Orders 🕂 Add		29-November-2017 06:30	0 Wednesday PST - 29-November-2017 19:45 Wednesday PST	Change Time Frame Criteria						
Single Patient Task List	Scheduled Patient Care Ventilators Oxygen Thera	Scheduled Patient Care Ventilators Oxygen Therapy Pulmonary Procedures Ambulatory								
MAR	Task retrieval completed									
Interactive View and I&O	Task Status Scheduled Date and Time Task	k Description Order Details								
Results Review	3 00 Overdue 29-Nov-2017 16:15 PST Con	sult to Respiratory Therapy 29-Nov-2017 16:15 PST, Routin	ne, Reason for Consult: COPD							
Documentation 🕂 Add										
Medication Request										
Histories										
Allergies 🕂 Add										



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

- 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.