SELF-GUIDED PRACTICE WORKBOOK [N23] CST Transformational Learning

WORKBOOK TITLE:

# **Ambulatory: Cardiology Technologist**



Last update: February 6, 2018 (v20



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

Duration	90 minutes
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 scenarios that are applicable to your work setting.</li> <li>Work through different learning activities at your own pace</li> </ul>
Proficiency Assessment	<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 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 – 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 patient tasks in MPTL

### **SCENARIO OVERVIEW**

The **Multi-Patient Task List (MPTL)** displays specific tasks for multiple patients. Tasks are activities that need to be completed for the patient. 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 start, log into the Clinical Information System (CIS) with the username and password provided.

As a Cardiology Technologist you will complete the following activities:

Set up your view of the Multi-Patient Task List (MPTL)

Review MPTL functionality

Review patient tasks



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

1 As a Cardiology Technologist the first page you will see upon logging into the Clinical Information System (CIS) is the **Multi-Patient Task List (MPTL)**.



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

Multi-Patient Task List					
✓ ⊗ 図 á B、 興 兆					
Assigned Tas Customize Pat Scheduled Patient Care	ient View				
Task retrieval completed					
No Patients Found	Name	Medical Record Number	Location/Room/Bed	Task Status	Schedul

3



#### 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). For this activity select **LGH Cardiology Lab** as you location.

**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 process all the tasks in the **MPTL**. Alternatively, you can set up several separate location-based lists.

P Task List Properties	
Choose a Patient List Departmental View	Location Filter Cocation Groups All Location Groups All Locations BCG Bella Coola General Hos BCG Medical Imaging EGH Evergreen House CGH Breath Program CGH Cardiac Home Care CGH Cardiac Home Care CGH LGH Home Care CGH LGH Home Carte CGH LGH Home Care CGH LGH Intensive Rehabilite
View Assigned Tasks	Save
	6 OK Cancel

6. Click the **OK** button.

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 in 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, EEGTech	
Task Edit View Patient Chart Links TaskList Options Help	
😫 Multi-Patient Task List 🖃 Message Centre 🎬 Ambulatory Organizer 🖕 Patient List 🛅 Schedule 🎬 LearningLVE 🚽 🛱 CareConnect 🔃 PHSA PACS 💐 VCH and PHC PACS 🖏 MUSE 🖏 FormFast WFI	1 u
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Multi-Patient Task List	🗇 Full screen 👘 Print 💸 7 minutes ago
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Assigned Tarks	06-December-2017 06:30 Wednesda - 06 -December-2017 19-45 Wednesday PST
Scheduled Patient Care	Change Time Frame Criteria
Task retrieval completed	
No Patients Found Name Medical Record Number Location/Room/Bed Task Status Scheduled Date and Time Task Description Order Details	
The selected patients, time frame and filters for this view did not n	eturn any tasks



- 9. In the Time Frames tab select Defined Time Frame for your shift.
- 10. Select **12 Hour Day Shift**.
- 11. Click the **OK** button. The **Scheduled Patient Care** tab within the MPTL is now set with the correct patients and their tasks.
- 12. Click refresh S (top right corner of screen) to see the most current tasks

P Task List Properties	
Time Frames Patient List Choose one of the following: O Defined Time Frame	iterval 💿 Generic Time Frame
Range Previous Current Next Previous Current Next Previous 2 Hour Day Shift 8 Hour Day Shift 8 Hour Day Shift 8 Hour Day Shift 8 Hour Night Shift	<b>10</b> ft
Show me my: 16:00 - PST	
From: 29-Nov-2017 💌 v 16 To: 29-Nov-2017 🔍 v 16	37 № PST 38 № PST ОК 11 hcel

### 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 On the **MPTL** you will see the following:

- 1. Task list toolbar (hover over the icons to see their function)
- 2. Information bar with name of the patient list (far left) and the set time frame (far right)
- 3. Navigator window with patient names with associated tasks
- 4. List of patient tasks

P PowerChart Organizer for TestUser, CardiologyTechnician													
Task Edit View Patient Chart Links TaskList Options Help													
📪 Multi-Patient Task List 🖃 Message Centre 🎍 Patient List 🔤 Schedule 🎬 LearningLIVE 🍦 🖞 🕲 CareConnect 🛱 PHSA PACS 🛱 VCH and PHC PACS 🛱 MUSE 🙀 FormFast WFI 🖕													
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Multi-Patient Task List									[0]				
Departmental View, Assigned Tasks		2							07-December-2017 14:38 Thursday PST -				
Scheduled Patient Care													
Task retrieval completed													
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	60	CSTCARNASH, STEVE	LGH 3W / 315 / 01A	Pending	08-Dec-2017 08-Dec-2017	09:33 PST		Holter Monitor	08-Dec-2017 09:33 PST, Routine, Reason: Chest Pain, As per order				
3									4				

Reminder: Click refresh S (top right corner of screen) to see the most current tasks in MPTL

### 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 **MPTL** you can see the patients that are under your care. Let's locate a patient and review one of their tasks.
  - 1. Under the **Navigator** window, ensure the box is checked beside Your Patient's name.
  - 2. Right click on the task associated with Your Patient (i.e. Holter Monitor)
  - 3. Select Order Info to learn more about the order.

P PowerChart Organizer for TestUser, CardiologyTechnician												
Task Edit View Patient Chart Links TaskList Options Help												
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	66	CSTCARNASH, STEVE	LGH 3W / 315 / 01A	Pending	Chart Done	00.22 DCT		Holter Monitor	08-Dec-2017 09:33 PST, Routine, Reason: Chest Pain, As p			
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					Create Admin	Note						
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					Task Info							
					Patient Snapsh	not						
					Select All							
					Deselect All							
					Open Patient	Chart	•					
					Sort By		+					

- 4. The **Order Information** window opens. You can click the different tabs to review the order information.
- 5. Close the window when you finish reviewing the information.



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Task View Help												
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Original order entere Cardiology Departm	d and electro ent	onically s	signed by To	estCST, Gene	ralMedici	ne-Physician1	ORD, MD on 08-	Dec-2017 at	: 09:33 PST.			
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PRN Next Dose Dt Tm			No 08-Dec-201	.7 09:33 PST								
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								PRODBO	TEST.CARDT	ECH Friday,	08-December	2017 09:43 PST

# Key Learning Points

You can select specific patients for whom you would like to review tasks in the MPTL

Right click to see more about the order/task



### **PATIENT SCENARIO 2 – Review Chart**

#### **Learning Objectives**

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

Access a patient's chart from MPTL

Review a patient's chart

### **SCENARIO OVERVIEW**

In this scenario, we will review how to access the patient's chart and navigate the different parts of the chart to learn more about the patient

As a Cardiology Technologist you will complete the following activities:

Access a patient's chart from MPTL

Review patient's chart



# Activity 2.1 – Review Patient's Chart

To open your patient's chart:

1

- 1. Go to the MPTL and right click on their name
- 2. Select Open Patient Chart and Patient Summary



#### 3. You will need to establish a relationship

P Assign a Relationship	×
For Patient: CSTCARDDEMO, BOB DO NOT USE	
Relationships:	
Cardiology - Technician	
Quality / Utilization Review	
Research	
ОК	Cancel

- 4. Select Cardiology Technician
- 5. Click **OK**

Patient's chart will open to Patient Summary. 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, Medication Administration Record (MAR) and more.
- 4. The **Refresh** icon **I** icon updates the patient chart with the most up to date entries when clicked. It is important to click the **Refresh** icon frequently especially as other clinicians may be accessing and documenting in the patient chart simultaneously.

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Medication List 🛛 🕂 Add	Visit Summary			- •	Labs		≣•	•	Medications 🕂		_	≣• ⊘	- A		
Diagnoses and Problems	Selected visit				Selected visit 🔻			_	Selected visit						
Allergies	Attending Physician:	Plisvca, Rocco	08/12/17 09:31		No results found				⊿ Scheduled (0)						
Histories	Service: Resuscitation Status:	No results found	08/12/17 09:31		Diagnostics (0)		=.	•	4 Continuous (0) 4 DRN/Upschodulad Available (0)						
	Advance Directive:	No results found			Calatadada			~	Administered (0) Last 24 hours						
Results Review	Isolation:	No results found			Selected Wsit			_	Discontinued (0) Last 24 hours						
Documentation	Activity Order:	No results found			No results found								-		
Form Browser	Pain Score:	No results found			Measurements and Wei	uhts (0)	≡•		Documents (0)			≡• ∾			
MAR Summary	⊿ Assistive Devices (0	))			Selected visit	(-)			Selected visit 🔻						
Patient Information	No results found				No results found				No results found						
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Clinical Perearch	All Visits			- •	Micro Cultures (0)		≣•	•	Patient Education (0)			=• •			
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					No results found				No results found						
2	Problems			<b>-</b> •	(		_		Outstanding Orders (4)			≣• ∧			
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									PRODE	C TEST.CARDTECH Fri	day, 08-Decem	nber-2017 10:3	36 PST		

Note: The chart does not automatically refresh! When in doubt, click Refresh cicon



2 The **Patient Summary** will provide views of key clinical patient information.

- 1. There are different tabs including **Summary**, **Handoff tool**, **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 Patient Chart Links Navigation Help												
🔛 Multi-Patient Task List 🖂 Message Centre 🛉 Patient List 🗮 Schedule 腦 LearningLINE 🚽 Right Concercet 😋 PHSA PACS 🕲 VCH and PHC PACS 🕲 MUSE 🕲 Formfast WFI 💡												
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CSTCARNASH, STEVE 🛛 🗷						← List → 🎬 Recent - Name - 🤇						
CSTCARNASH, STEVE	DOB:08-D	Dec-1977 MRN:700008720			Process:	Location:LGH 3W; 315; 01A						
Allergies: Allergies Not Recorded	Gender:Fe	Female PHN:9876414583	Dosing Wt:		Isolation:	Attending:Plisvca, Rocco, MD						
Menu 🕴	<li>- 👘 Patient Summa</li>	nary				🗇 Full screen 🛛 📾 Print 🛛 🗞 4 minutes ago						
Patient Summary	A											
Single Patient Task List	Summary	23 Handoff Tool 2	3 Assessment	22 Discharge	22							
Orders 🕂 Add					- 1							
Medication List 🕈 🕈 Add	Informal Team	Informal Team Communication				2 =-						
Diagnoses and Problems	Communication	Informal Feath Commanication										
Allergies	Alleraios (0)	Add new action			Add new comment	_						
Histories	Vital Signs and Measurements					1						
	Documents (0)	No actions documented			No comments documented							
Documentation	Transfer/Transport/Accompan	All Teams			All Teams							
Form Browser	iment											
MAR Summary	Assessments	Active Issues				Classification: Medical and Patient Stated 👻 🛛 All Visits 🛛 🥭 📃 =-						
Patient Information	Lines/Tubes/Drains											
Reference	Intake and Output				Add new as: This Visit 👻 🭳							
Clinical Research	Labs	No results found										
CareConnect	Micro Cultures	TO FOULD FOUND										
	Diagnostics											
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	Orders	O allowing and an and a										
	Oxynenation and	Allergies not recorded.										
	Ventilation											
	Pathology	No results found				Reconciliation Status: Incomplete Complete Reconciliation						
	Histories											
	Create Note 2	Vital Signs and Measurements				Selected visit: Latest* Selected visit Last 12 hours						
	Interdisciplinary Care Plan 🔶											
	·											

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



### **PATIENT SCENARIO 3 - Orders**

#### **Learning Objectives**

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

- Review the Orders Profile
- Activate a Future Order
- Complete a task in MPTL
- Place a No Co-Signature required order
- Place an order from a paper requisition

### **SCENARIO**

As a Cardiology Technologist you will need to place orders from time to time. If you have a patient who is wearing an event monitor and the physician needs to read a 2<sup>nd</sup> strip from the event monitor an order will need to be added so that the interpretation of the 2<sup>nd</sup> strip can be entered into the system, and appropriate MSP billing can be completed. Additionally, if a patient comes into the clinic with a requisition for an ECG, this will also need to be entered into the system by the Cardiology Technologist under some circumstances.

As a Cardiology Technologist you will complete the following activities:

Review the Orders Profile

Activate a Future Order

Complete a task in MPTL

- Place a no co-signature required order
- Place an order from a paper requisition





1

# Activity 3.1 – Reviewing Orders Profile

- The Orders page is where you will access a full list of the patient's orders. To review orders, with your patient's chart open:
  - 1. Select Orders from the Menu

Menu	
Orthopedic Technician Su	ummary
Orders	🛨 Add
Single Patient Task List	
MAR	
Interactive View and I&O	
Results Review	
Documentation	
Medication Request	
Histories	
Allergies	🖶 Add
Diagnoses and Problems	

- 2. On the left side of the Orders page is the navigator (View) which includes several categories including:
  - **PowerPlans** (similar to paper PPOs) •
  - 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
- Order part of a PowerPlan
- নিয Order waiting for 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.



TRANSFORMATIONAL	
LEARNING	

Menu	ą	く> - A Orders						🗇 Full screen 👼 Print 👌	0 minutes ag
Provider View		+ Add Record	iliation •   🚴 Check Intera	rtions			F	Reconciliation Status	
Results Review								🕽 Meds History  Admission 🌘	Discharge
Orders	+ Add	Orders Medication List Document In Plan							
Medication List	- Add 1								
	T AUU	View	Displayed: All Active Orde	rs   All Inactive Orders   All Active Orders*	4			Show M	Vore Orders
Documentation	Add     Add	Orders for Signature							
		Plans	90 m) 12	Order Name	Status	Dose Details 🔻	Stop	Ordering Physician	La: ^
Alleraies	+ Add	Document In Plan	△ Admit/Transfer/Dis Admit/Transfer/Dis	scharge					
-		Medical	👘 🗹 😚	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-Phy	/sici Te
Diagnoses and Proble	ms	MED General Medicine Admission (Validated) (P	2 Status	Carda Shahara	0.4	21 Oct 2017 12 21 PDT 5 No C00 Critical Care Manufactured and the Attempt		al anna Dhuaisina Cananal Madi	fain at
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MAR Summany		Suggested Plans (0)		Incert Perinheral IV Catheter	Ordered	24-Oct-2017 13-24 PDT Unless already in place	24-Oct-2017 13:24 PDT	el earn Physician-General Medi	ficin el
		Orders	Ă Z Ā	Weight	Ordered	24-Oct-2017 13:24 PDT. Stop: 24-Oct-2017 13:24 PDT. On admission	24-Oct-2017 13:24 PDT	eLearn. Physician-General Medi	icin eLo
MAR		Admit/Transfer/Discharge	► Å 🗹 💀	Vital Signs	Ordered	24-Oct-2017 13:24 PDT, g8h		eLearn, Physician-General Medi	licin eLu
Form Browser		🖸 Status	i 👌 🗹	Admission History Adult	Ordered	24-Oct-2017 13:17 PDT, Stop: 24-Oct-2017 13:17 PDT	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cerner	SY
Patient Information		Patient Care				Order entered secondary to inpatient admission.			
		- C Activity	🔁 🗹	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
Interactive View and I8	80	Diet/Nutrition	<b>a a</b>			Urder entered secondary to inpatient admission.			
Lines/Tubes/Drains Su	ummary	Continuous Infusions	C) 🗹	Basic Admission Information Adult	Ordered	24-Oct-2017 13:17 PD1, Stop: 24-Oct-2017 13:17 PD1 Order entered secondary to inpatient admission.	24-Oct-2017 13:17 PD1	SYSTEM, SYSTEM Cerner	24
Growth Chart		Read Products	ê 🗹	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
		aboratony	• -			Order entered secondary to inpatient admission.			
Immunizations		Diannostic Tests	i 🖓 🗹	ED Readmission Risk	Ordered	24-Oct-2017 13:17 PDT, Stop: 24-Oct-2017 13:17 PDT	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cerner	SY
Clinical Research		Procedures				Order placed due to patient being admitted as an inpatient in the last 30 days.			
CareConnect		Respiratory	(1 ≤	Infectious Disease Screening	Ordered	24-Oct-2017 13:17 PDT Order entered secondary to inpatient admission	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cerner	SY
		Allied Health	A 🗹	Smoking Cessation Assessments	Ordered	03-Nov-2017 13:41 PDT	03-Nov-2017 13:41 PDT	TestCST. CardiothoracicSurgeo	n-P Te
		Consults/Referrals	Ă⊻	Insert Urinary Catheter (Insert Foley)	Ordered	03-Nov-2017 13:40 PDT, Indwelling	03-Nov-2017 13:40 PDT	TestCST, CardiothoracicSurgeo	n-P Te
		Communication Orders	⊿ Activity						
		Supplies	i 👘 🗹 🖻	Activity as Tolerated	Ordered	24-Oct-2017 13:24 PDT		eLearn, Physician-General Medi	licin eL
		UNION Categorized	⊿ Diet/Nutrition						
		Medication History	0 S	General Diet	Ordered	24-Oct-2017 13:24 PDT		eLearn, Physician-General Medi	icin eL
		Medication History Snapshot	<b>()</b>	Advance Diet as Tolerated	Ordered	03-Nov-2017 13:41 PDT, Advance diet to Regular, Provider must order starting diet. RN or R.		TestCST, CardiothoracicSurgeor	n-P Te
		Reconciliation History	4 Medications						
		2	() M () 2	acetaminophen (acetaminophen PRN range dose)	Urdered	dose range: s/2) to 050 mg, PO, q4h, PRN pain-mild or fever, drug form: tab, start: 24-Oct-2. Maximum acetaminophen 4 g/24 h from all sources	-	eLearn, Physician-General Medicine1, MD	3



### Activity 3.2 – Activating a Future Order

1

When patient comes into the Cardiology Lab they will have **future order(s)** placed for tests that need to be completed. You will need to **activate** these orders to be able to **complete them** (note: for some labs the clerk might activate these orders when the patient is checked in) To activate an order:

- 1. With the patient's chart open, click on the Orders tab in the menu
- 2. Check the **Diagnostic Tests** box (unchecked all other boxes-this will make it easier to find the order you are looking for)
- 3. Right click on the future order you want to activate (i.e. Graded Exercise Test)
- 4. Select Activate from the drop down menu



- 5. Note the order status changes to Activate
- 6. Click Orders for Signature



🔊 🕅 Order Name	Status	Dose Details		
⊿ Diagnostic Tests				
🔲 😚 🧰 Holter Monitor	Activate	12-Dec-2017 14:02 PST, R	Routine, Reason: Chest Pain, LGH Cardiology Lab, As per o	rder
-				
Datails for Holter Monitor				
Details Order Comments				
+ ∎ lh. ↓×				
*Requested Start Date/Time: 12/12/2017	PST PST	Priority:	Routine	
Reason for Procedure (multi-select): Chest Pain		Order for future visit:	Yes 💽 No	
Patient has Pacemaker: 🜔 Yes 💿 No		Patient has ICD:	Yes 💽 No	
Referred To Provider:		Scheduling Location:	LGH Cardiology Lab 🗸	
Notes to Scheduling:				
Orders For Cosignature Orders For Nurse Review				Orders For Signature

- 7. Click Sign
- 8. Click Refresh 2
- 9. The order status will change to **Ordered** and the task will show up in your MPTL

Key Learnings Points
 Future orders need to be activated to be completed
 Once activated the order will show up as a task in the MPTL



### Activity 3.3 – Completing a Task in MPTL

- 1 As you review patient tasks and complete orders it is important to document tasks as complete. Now that you have activated and completed the **Graded Exercise Test** task, you want to document the task as complete in your MPTL.
  - 1. Click the Multi-Patient Task List (MPTL) button in the toolbar

🚨 Multi-Patient Task List	🖃 Message Centre 🎬 Ambulatory Organizer  🛔 Patient List 🏢 Schedule 🎬 LearningLIVE 🖕 🤅 😋 CareConnect 🜊 F
🗄 🚽 Exit 🍰 PM Conversatio	n 🔻 🕞 Communicate 🔹 🕂 Add 👻 🛗 Scheduling Appointment Book 📑 Documents 🥃 Discern Reporting Portal 🍦
🖸 🔾 Patient Health Educatio	n Materials 🔇 Policies and Guidelines 🔍 UpToDate 🖕

- 2. Right click on the task you want to complete (i.e Graded Exercise Test)
- 3. Select Chart Done (Date/Time)



- 4. Review the **Date/Time** in the new window. (This can be adjusted as needed)
- 5. Click OK





- 6. The task now has a **Chart Done** icon **r** next to it.
- 7. Click the **Refresh** button right corner of the screen and the task falls off the task list

**Note:** You can also complete tasks using the Single-Patient Task List (SPTL) by following the same steps. The SPTL is accessed through the Menu when the patient's chart is open.

Menu	Ф
Patient Summary	
Orders	🕈 Add
Single Patient Task List	
Results Review	
Documentation	
Histories	
Allergies	
Diagnoses and Problems	

### Key Learning Points

Remember to document completed orders and tasks as done. This will clear them both from your SPTL and MPTL



# Activity 3.4 – Placing a No Co-Signature Required Order

1

Your patient is wearing an event monitor and needs a 2<sup>nd</sup> strip interpreted. This would be a no cosignature required order. To place an order:

Open the patient chart:

1. Click on the **+** Add button next to **Orders** in the dark grey menu

Menu	
Orthopedic Techni	ician Summary
Orders	🕂 Add

- 2. Type 'event monitor' into the search box and press enter
- 3. Select the appropriate order: Cardiac Event Monitor-Additional Strip

P CSTDEMO, TRAINING - Add Order			- •
CSTDEMO, TRAINING DOB:02	-Feb-19 MRN:700004600 Code Status:	Process:	Location:LGH 4E; 426; 01
Age:57 Allergies: Nuts, Peanuts, Adh Gender:	Female PHN:9876824737Dosing Wt:75 kg	Isolation:	Attending:Plisvcc, Trevor, MD
		1	
Search: event monitor Adv	vanced Options 👻 Type: 👘 Inpatient 🗣		
Cardiac Event Monitor	n : N		
Cardiac Event Monitor - Additional	Strip		
"Enter" to Search	when sights and symptoms of hypoglycernia are evident)		
	*		
		CSTDEMO TR	AINING - 700004600
		GIDEMO, IN	Done Done

- 4. Enter the physician's name
- 5. Select No Co-signature Required under communication type
- 6. Click OK



P Ordering Physician
*Physician name
*Order Date/Time
18-Dec-2017 🖉 💌 0919 🚔 PST
*Communication type
Phone Verhal
No Cosignature Required
Cosignature Required Paper/Fax Electronic
OK Cancel

### 7. Click Done

P SCOTT-LEARN, MARY - Add Order						
SCOTT-LEARN, MARY	DOB:1945-Mar-07	MRN:700004976	Code Status:	Process:	Location:LGH OCC MDC	
Allergies: No Known Medication Allerg	Age:72 years	Enc:700000008173	Docing White ka	Disease: Icolation	Enc Type:Outpatient	
Allergies. No known medication Allerg	ne Gender remaie	PHIN.9670769090	Dosing wildo kg	ISUIdUUII.	Attending.	
Search: 📃 🔍 Ad	dvanced Options 👻 Type:	Ambulatory (Meds as R	x) 🗸			
	Martin Caral John All					
Folder: Interna	i Medici Search Within:	•				
E/M Charges						
□ Labs						
PowerPlans						
POC Testing						
In Office Procedures						
Care Management						
Internal Medicine In Office Medications						
Immunizations						
Clinic Follow Up						
L						
					SCOTT-LEARN, MARY - 700004976	Done



8. In the orders window, complete any special instructions (as appropriate)

• Add          • Deconnet Medication by ML Recordition •          • Check Interaction         • Check         • Check         • C	< > - 者 Orders		🗇 Full screen 👼 Print 📌 5 minutes age
Orders       Medication List       Decement In Plan         View	🕂 Add   🦨 Document Medication by Hx   Recon	ciliation *   🕭 Check Interactions	Reconciliation Status Meds History  Admission Discharge
View          M offer for Signature         Overs for Signature	Orders Medication List Document In Plan		
View       Image: Status       Status </th <th>4</th> <th>Orders for Simplure</th> <th></th>	4	Orders for Simplure	
• I GH 42; 42:601 I.nc:200000003069 Admit: 04-Nev-2017 20:50 PDT         • Diagnostic Tests         Subcurrent In Plan         Subgested Plans (0)         Orders         • Orders         I during for Candrac Event Monitor Order         12-Dec-2017 10:41. PST         Orders         A Lotals for Cardiac Event Monitor - Additional Strip         Biolog Products         Boold Products         Boold Products         Biolog Products         Biol	View	Grownie orginaaus   응어에 또한 Order Name Status Start Details	
Plans       J Deposetic Tests         Occurrent IP Plans       Image: Cardiac Event Monto Order       12-Dec-2007 10.41. PST         Orders       Additional Infusions       Image: Cardiac Event Monto Order       12-Dec-2007 10.41. PST         Image: Cardiac Event Monto Order       12-Dec-2007 10.41. PST       Image: Cardiac Event Monto Order         Image: Cardiac Event Monto       Image: Cardiac Event Monto       Image: Cardiac Event Monto         Image: Cardiac Event Monto       Image: Cardiac Event Montor - Additional Strip         Image: Cardiac Event Montor - Additional Strip       Image: Cardiac Event Montor - Additional Strip         Image: Cardiac Event Montor - Additional Strip       Image: Cardiac Event Montor - Additional Strip         Image: Cardiac Event Montor - Additional Strip       Image: Cardiac Event Montor - Additional Strip         Image: Cardiac Event Montor - Additional Strip       Image: Cardiac Event Montor - Additional Strip         Image: Cardiac Event Montor - Additional Strip       Image: Cardiac Event Montor - Additional Strip         Image: Cardiac Event Montor - Additional Strip       Image: Cardiac Event Montor - Additional Strip         Image: Cardiac Event Montor - Additional Strip       Image: Cardiac Event Montor - Additional Strip         Image: Cardiac Event Montor - Additional Strip       Image: Cardiac Event Montor - Additional Strip         Image: Cardiac Event Montor - Addition Information	Orders for Signature	4 IGH 4E 426:01 Enc;700000013069 Admit: 04-Nov-2017 20:50 PDT	
Document In Plan         Suggeted Plans (I)         Orders         Adm/L Transfer/Discharge         Statist         Attaint Cre         Adm/L Transfer/Discharge         Statist         Continues Infusions         Medications         Bigsoposite Tests         Proceedures         Reprint Tests         Consults/Referrals         Consults/Referrals         Reconcilation History         Medication History         Released Results         Formulary Details         Promulary Details         Interpretation Proceed Datable         Interpretation Proceed Datable	Plans	A Diagnostic Tests	
Suggested Plans (0)         Orders         Identify Transfer[Discharge]         Status         Cathorization Status         Continuous Influsions         Medications         Biold Products         Status         Objectivitision         Operation         Biold Products         Biold Reaths         Orments         Products         Biold Reaths	Document In Plan	🗖 👘 Cardiac Event Monito Order 12-Dec-2017 10:41 12-Dec-2017 10:41 PST	
i ders         i ders         i der Status         i datus	Suggested Plans (0)		
Admid/Transfer/Discharge         Status         Status         Childen Care         Activity         Oter Nutrition         Continuous Infasions         Modications         Blood Products         Alaboratory         Diagostic Tests         Procedures         Respiratory         Allied Heath         Communication Orders         Supplies         Noc Astegorized         Medication History         Medication History         Resconciliation History         Related Results         Formulary Details         Musice Departed Details         Understander         Noc Astegorized         Medication History         Medication History <t< td=""><td>Orders</td><td></td><td></td></t<>	Orders		
Status	Admit/Transfer/Discharge		
Partient Care   Activity   Octimuous Infraisons   Continuous Infraisons   Middications   Blood Products   Aboratory   Diagnostic Tests   Procedures   Respiratory   Alicle Health   Connutrication Orders   Supplies   Medication History   Medication History   Medication History   Respirated Results   Formulary Details    There For Compute The For Computer Inference For Computer Inference For Supplies	Status		
	Patient Care		
Continuous Infusions         Continuous Infusions         Biolod Products         Chaptostic Tests         Procedures         Respiratory         Alleled Health         Communication Orders         Supplies         Mediciation History         Respective         Mediciation History         Retact Results         Formulary Detailis         Mediciation History         Mediciation Hi	Activity		
Continuous Infusions         Medications         Blood Products         Laboratory         Diagnostic Tests         Procedures         Reprint Provide         Allied Health         Communication Orders         Supplies         Non Categorized         Medication History         Related Results         Formulary Details         Medication History         Weitzer Niewer	Diet/Nutrition		
Medications         Blood Products         Classoratory         Disgnostic Tests         Procedures         Respiratory         Alided Health         Consult/Referrals         Consult/Referrals         Supplies         Non Categorized         Interfactor History         Resconclination History         Resconclination History         Medication History	Continuous Infusions		
Isload Products	Medications		
I aboratory       I betain for C-df dda'z Event Monitor - Additional Strip         I bigenostic Tests       Procedures         Procedures       Reprintory         Allied Heath       I III III IIII IIII IIII IIIIIIIIIIII	Blood Products	- a var Cardian Event Manitar - Additional Strin	
Procedures         Procedures         Reprintory         Alleld Health         Consult/Referatal         Consult/Referatal         Supplies         Wetlicktion History         Medication History         Related Results         Formulary Details         Musicry Nameron History         Medication History <t< td=""><td>Laboratory</td><td>▼ Details for Cardiac Event Monitor - Auditional Surp</td><td></td></t<>	Laboratory	▼ Details for Cardiac Event Monitor - Auditional Surp	
Reprint on y         Allied Health         Communication Orders         Supplies         Medication History         Medication History         Reconciliation History         Reconciliation History         Medication H	Diagnostic Tests	Tetails IB Order Comments	
Reprint ory         Allied Health         Communication Orders         Supplies         Non Categorized         Medication History         Related Results         Formulary Details         Medication History         Miscing Respared Medication History         Miscing Respared Medication History         Miscing Respared Medication History         Miscing Respared Medication History	Procedures		
Related Health       Image: Communication Orders         Supplies       Special instructions:         Supplies       Image: Special instructions:         Not Categorized       Image: Special instructions:         Reaconciliation History       Related Results         Formulary Detailis       Image: Special Instructions:         Viscore Viewer       Image: Special Instructions:	Respiratory		
Consults/Referals         Consults/Referals         Consults/Referals         Supples         Supples         Medication History         Related Results         Formulary Details         Winters for Details         Officient Resonand Details         Others Per aind Details         Others Per aind Details	Allied Health		
Communication Orders Communication Communication Orders Communication Communic	Consults/Referrals	*Requested Start Date/Time: 12/12/2017 A 1041 DST Special instructions	
Supplies     Wood Responsed     Medication History     Medication History Snapshot     Rested Results     Formulary Details     Musicon Bear and Details     Others: For Company:     Musicon Bear and Details     Others: For Company:     Other	Communication Orders		
Implementation     Implementation	- Supplies		
(i) Medication History Medication History Company Related Results Formulary Details Variabre Viewer (i) Mission Resided Details (Index Erg Controlution ) (Index Erg Nazze Review)	Non Categorized		
Medication History Snapshot            Beconciliation History Snapshot             Related Results             Formulary Details             Variance Viewer     (Information Details)	Medication History		
Related Results     Formulary Details     Unders For Controlution Orders For Controlution Orders For Name Review	-Medication History Snapshot		
Related Results Formulary Details Variance Viewer (In Mission Review Control to The State Review)	Reconciliation History		
Formulary Details Variance Viewer OMission Revised Details Orders Exc Costmontum Orders Exc Nurse Review Sign	Related Results		
Variance Viewer Division Bequired Details Directs For Cosimpluse Directors For Nurse Review	Formulary Details		
Vigit	Variance Viewer	0 Missing Required Details Orders For Cosignature Orders For Nurse Review	Sign

9. Click **Sign** to complete the order

10. Click refresh 📓 to see the completed order on the order profile



# Activity 3.5 – Placing an Order from a Paper Requisition

1

Your patient brings in a requisition for an ECG. This would be a paper/fax order. To place an order:

Open the patient chart:

1. Click on the **+** Add button next to **Orders** in the dark grey menu

Menu	
Orthopedic Techn	ician Summary
Orders	🕂 Add

- 2. Type 'ECG' into the search box and press enter
- 3. Select the appropriate order: ECG 12
- 4. For order sentence, select None and click OK

P Order Sentences						
Order sentences for: Electrocardiogram 12 Lead (ECG 12 Leac						
(None)						
T;N+120, Timed, 2 hours after initial						
T;N+240, Timed, 4 hours after initial						
T;N+360, Timed, 6 hours after initial						
Urgent						
Reset OK Cancel						

- 5. Enter the physician's name
- 6. Select Paper/Fax under communication type
- 7. Click OK



P Ordering Physician						
*Physician name						
*Order Date/Time						
12/12/2017 🔹 🗸 1056 🚔 PST						
*Communication type						
Phone Verbal No Cosignature Required Cosignature Required Paper/Fax Electronic						
OK Cancel						

#### 8. Click Done

SCOTT-LEARN, MARY - Add Order					- • •			
SCOTT-LEARN, MARY DOB:1945-Ma	r-07 MRN:700004976		Process: Dicease:	Location:LGH OCC MDC				
Allergies: No Known Medication Allergie Gender:Femal	PHN:9876789696	Dosing Wt:65 kg	Isolation:	Attending:				
Search: 📃 🔍 Advanced Options 👻	Type: 📕 Ambulatory (Meds as F	]x) ←						
💿 🚮 🚖 🔹 📬 🗈 Folder: Internal Medici Search with	in: All 👻							
■E/M Charges ↓Labs ■Radiology ■PowerPlans ■POC Testing ↓In Office Procedures □Care Management ■Oxygen/Sleep ■Internal Medicine In Office Medications ↓Inmunizations ■Clinic Follow Up								
SCOTT-LEARN, MARY - 700004976 Done								

9. In the orders window, complete any additional order information (as appropriate)



< > - 者 Orders		[II] Full screen	Print	€ 10 minutes ago
🕂 Add   🦨 Document Medication by Hx   Recon	ciliation •   🕭 Check Interactions	Reconciliation Sta	tus	ion 📵 Discharge
Orders Medication List Document In Plan				
	Orders for Similar va			
View	Orders for optionale			
Orders for Signature	4 IGH 4F-426-01 Enc;200000013069 Admit: 04-Nov-2017 20:50 PDT			
Plans				
Document In Plan	Electrocardiogram 12, Order 12-Dec-2017 10:53 12-Dec-2017 10:53 PST. Routine			
Suggested Plans (0)				
Orders				
Admit/Transfer/Discharge				
Status				
🔽 Patient Care				
- Activity				
- Diet/Nutrition				
Continuous Infusions				
- Medications				
Blood Products	= Partition Electrocardiogram 12 Lead (ECG 12 Lead)			
- Z Laboratory				
Diagnostic Tests	Tetails III Order Comments			
- Procedures				
- Respiratory				
Allied Health				
Consults/Referrals	*Requested Start Date/Time: 12/12/2017 💭 🔽 1053 💭 PST Priority: Routine 🗸			
Communication Orders				
- Supplies	Reason for Procedure (multi-select):			
Non Categorized	Special instructions			
Medication History	special instructions.			
Medication History Snapshot				
Polated Perulte				
Formulan/ Details				
Variance Viewer	Missing Required Dataits Orders For Costanature Orders For Nuise Beview		1	Sign
Fondinee Viewei				

10. Click **Sign** to complete the order

11. Click **refresh S** to see the completed order on the order profile

### Key Learnings Points

You must place an order for an additional event monitor strip to be interpreted by the physician When completing order details, yellow fields are mandatory

### 🖆 End Book

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