SELF-GUIDED PRACTICE WORKBOOK [N22]
CST Transformational Learning

WORKBOOK TITLE:

Ambulatory: EEG Technician

CLINICAL + SYSTEMS TRANSFORMATION
Our path to smarter, seamless care

TRANSFORMATIONAL LEARNING

TABLE OF CONTENTS

SELF-GUIDED PRACTICE WORKBOOK

Duration	2 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. ▪ A 15 min break time will be provided. You can take this break at any time during the session. ▪ The workbook provides a compilation of different scenarios that are applicable to your work setting. ▪ Work through the different learning activities at your own pace
Proficiency Assessment	▪ 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 – Ambulatory Organizer

Learning Objectives
At the end of this Scenario, you will be able to: - Set-up a resource list - Recall the functions of Day View, Calendar View and Open Items View in Ambulatory Organizer

SCENARIO OVERVIEW

The Ambulatory Organizer provides a comprehensive display of scheduled appointments. It provides a snapshot of the current day's appointments, including appointment gaps, appointment times and details, patient information and status, and outstanding items to be completed at each visit. The Ambulatory Organizer will help to organize the clinic workflow at the day, week, or month level.

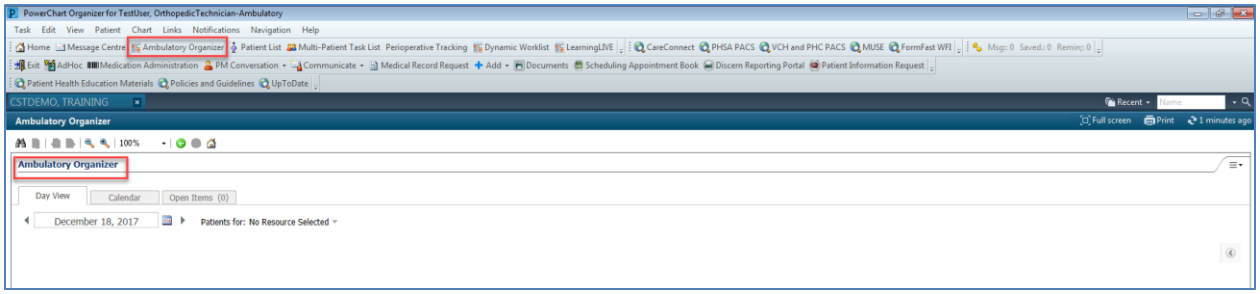
Upon arrival to the Ambulatory clinic, you look to retrieve a list of the day's patients. To start, log into the Clinical Information System (CIS) with your provided username and password.

As an EEG Technician you will complete the following activities:

- Set-up a resource list
- Review the functions of Day View
- Review the functions of Calendar View
- Review the Open Items view

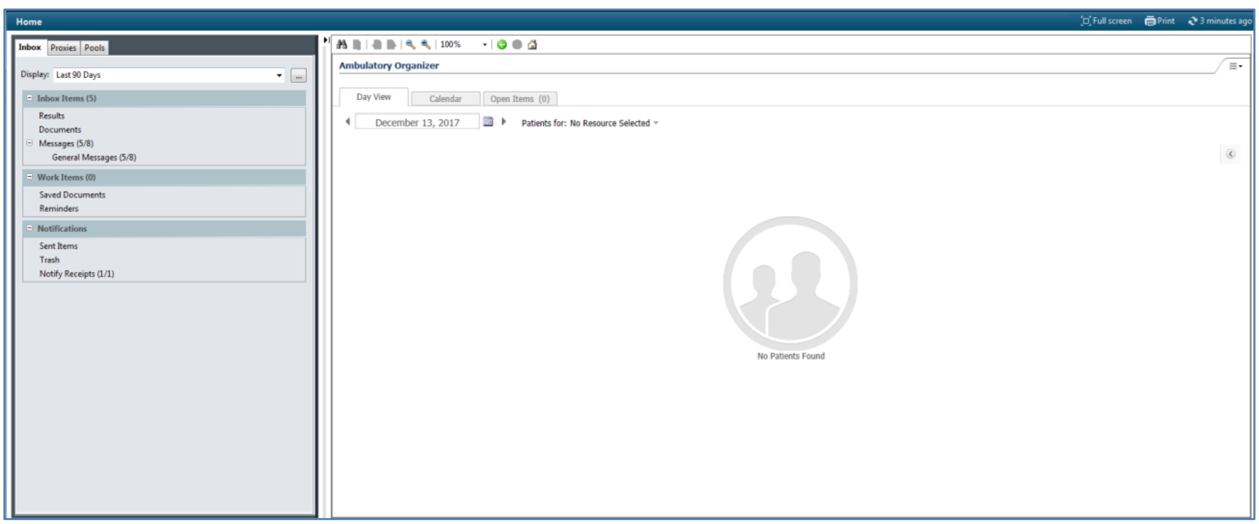
Activity 1.1 – Accessing Ambulatory Organizer

1 The Ambulatory Organizer can be accessed from any screen within PowerChart by selecting the Ambulatory Organizer button in the toolbar.



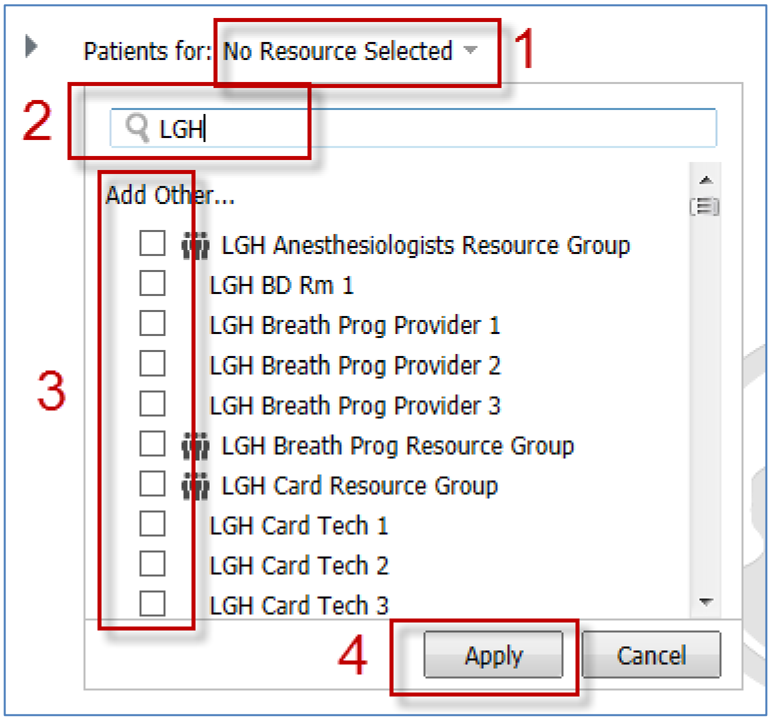
Activity 1.2 – Setting Resource Lists

1 Since this is the first time the Ambulatory Organizer has been used, no patient information will be presented until you select a provider or resource location. The screen will look similar to this:



To view the schedule of one or several providers/locations,

1. Select the drop down beside Patients for: No Resource Selected
2. Click in the search field and begin typing **LGH….**
3. Scroll through the list and select the name from the “Add Other” section (for the purpose of this activity set your resource to: **LGH EEG Tech**)
4. Select Apply to display the schedule.



Key Learning Points

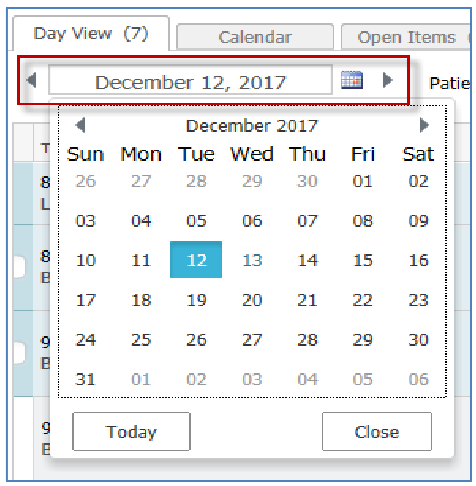
- When you first login you must set resources to be able to view the calendar

Activity 1.3 – Overview of Day View

1 The Day View is a list of your scheduled appointments for the day.

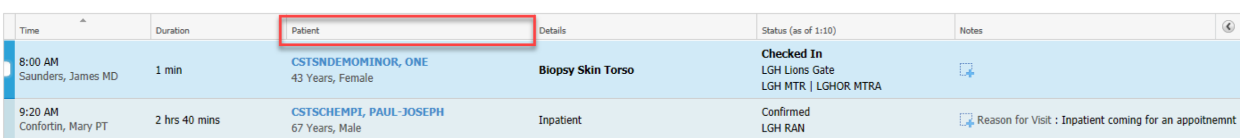
Note: The Day View is the default view if you have not previously logged into the Ambulatory Organizer. After that, whichever view you last select will display first when opening Ambulatory Organizer.

The date of the schedule on the Day View tab can be adjusted by using the left and right arrows next to the date field. The date can also be adjusted by selecting the calendar icon to the right of the date field and choosing a date from the calendar.



2 Appointment details are displayed in columns that can be sorted by selecting the column header.

1. Select the patient column heading and see how the list is sorted

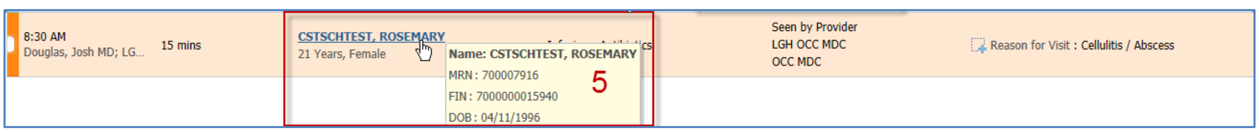


Appointments are colour coded based on the following (for the purpose of training all patients are colour coded the same):

Color Status	Definition
	Light blue indicates a confirmed appointment.
	Medium blue indicates a checked in appointment.
	Green indicates a seen by nurse, medical student, or custom status has taken place.
	Orange indicates a seen by physician, mid-level provider, resident, or custom status has taken place.
	Dark grey indicates the appointment has been checked out.
	White indicates a no show, hold, or canceled appointment (these appointment types are displayed if the system administrator has configured them to display).

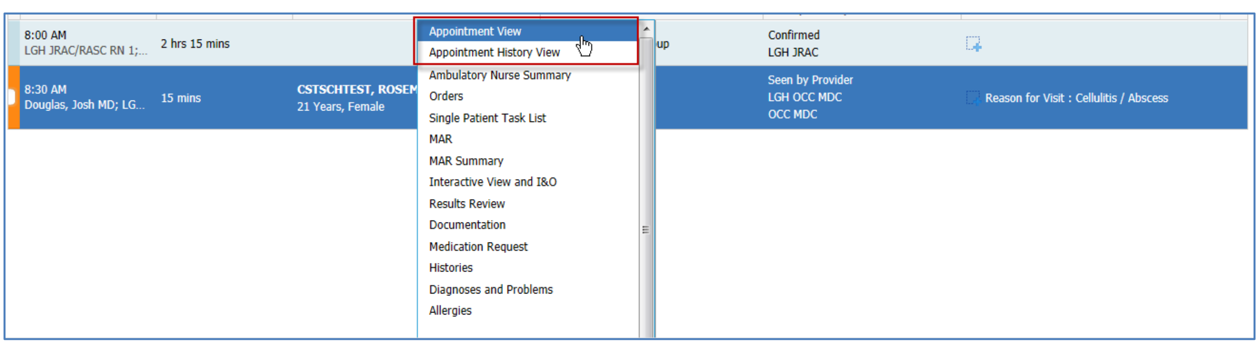
3 Go to the patient column:

1. Hover over the patient name to discover more information

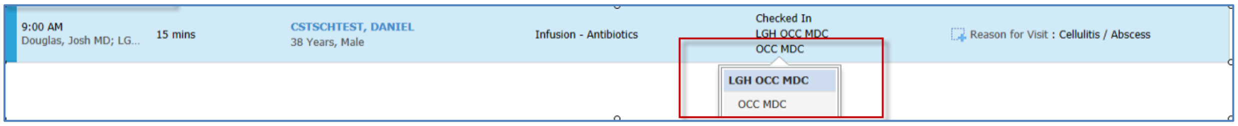


2. You can navigate directly to the patient chart by clicking on the patient's name or right clicking the patient's name and selecting the appropriate tab in the chart

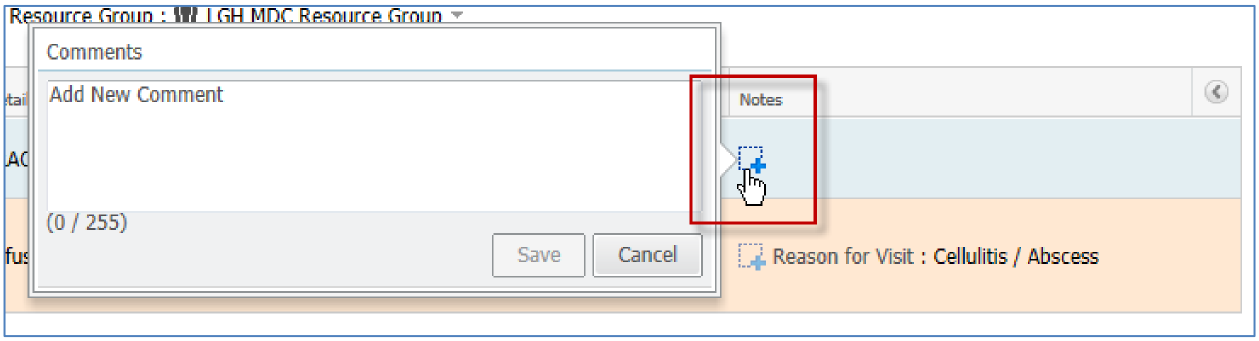
3. You can also view appointment history by right clicking on the patient's name



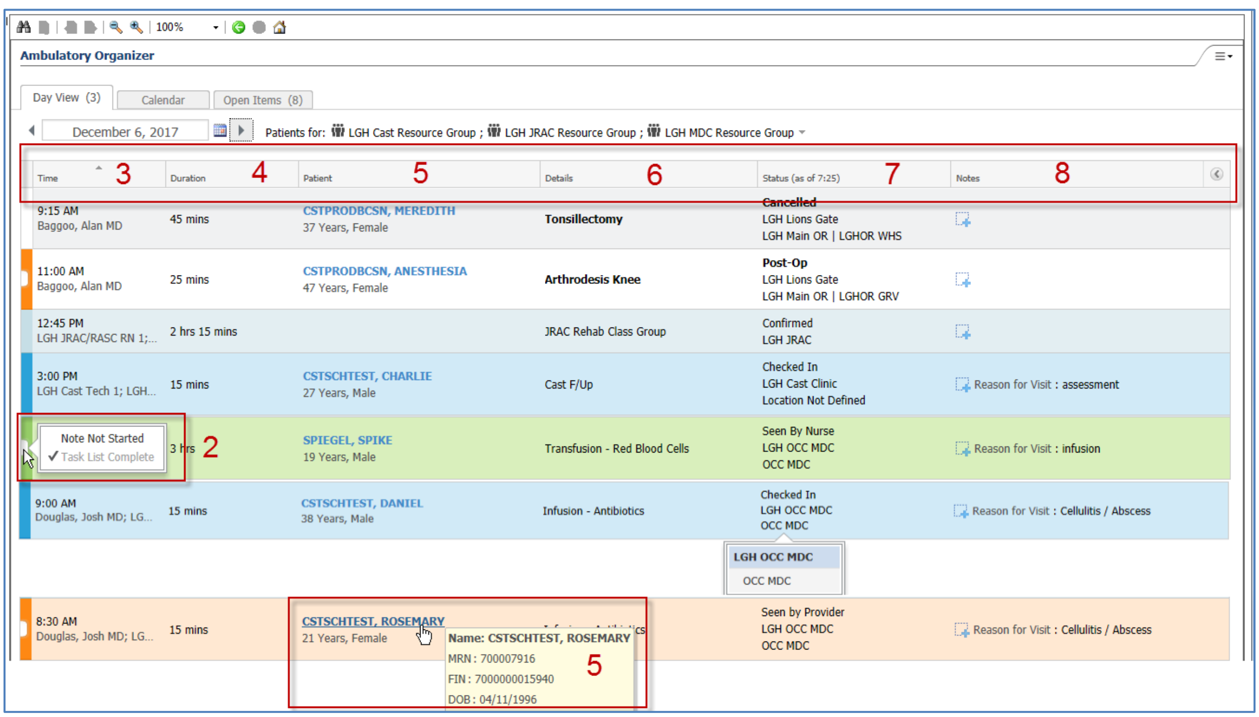
4 Once the patient has been checked in, exam room locations can be selected in the Status column.



Comments can be added by any user in Ambulatory Organizer by selecting the icon in the **Notes** column.



Note: The screenshot below is provided as an example of what a fully operational Day View might look like. Please ignore the numbers in the screenshot.



Key Learning Points

- You can navigate to your patient's chart from ambulatory organizer
- You must set resources to be able to view the appointments

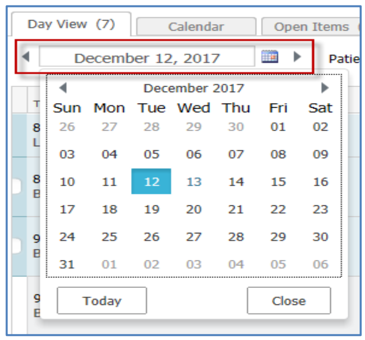
Activity 1.4 – Overview of Calendar View

1

The Calendar View can display the schedule for a day or a week interval for multiple providers.

1. Click on the Day or Week tab to see the different views

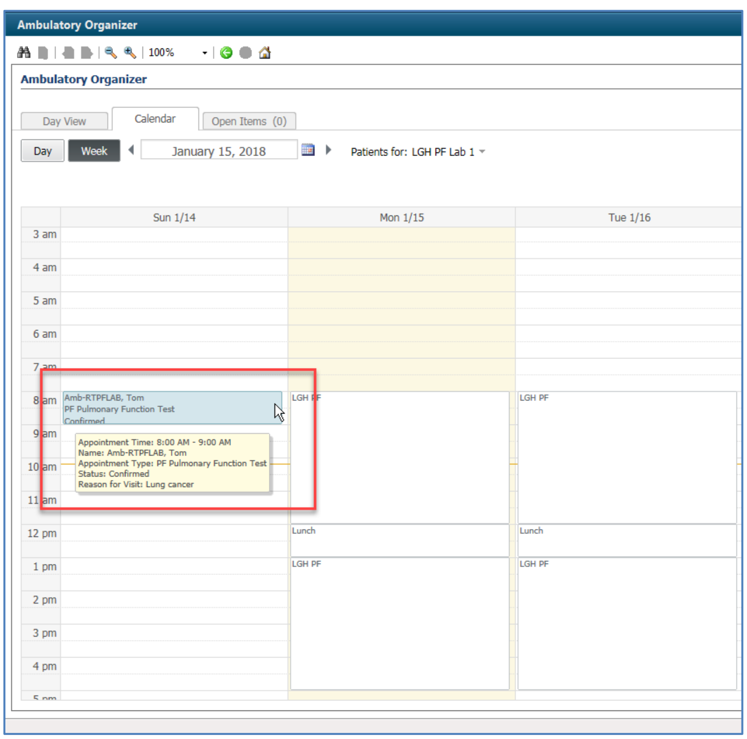
The date of the Calendar tab can be adjusted similar to the way the date on the Day View tab is adjusted.



Setting the resources for the calendar views works the same as the day view.

1. Set you resource to: **LGH EEG Tech**

Hover over the coloured appointment blocks to view additional information



Activity 1.5 – Overview of Open Items View

1 The Open Items view will display patients with outstanding items who have been seen in the last seven days. **Note: For training purposes you will not have any outstanding items available to view. Please read the following information for your learning.**

You will need to set your resource as you did with the Day and Calendar Views

1. Set your resource to: **LGH EEG Tech**

Similar to the Day View, Open Items provides specific summaries concerning the patient including appointment details, notes, and outstanding actions.

Appointment	Patient	Details	Notes	Outstanding Actions
More Than 2 Days Ago (1)				
06 December, 2017 3:00 PM	CSTSCHTEST, CHARLIE 27 Years, Male	Cast F/Up	Reason for Visit : assessment	Note Not Started ✓ Task List Complete
Yesterday (3)				
12 December, 2017 9:00 AM	CSTDEMOALEXANDER, DONOTUSE 47 Years, Male	Cast New	Reason for Visit : Cast Chief Complaint: CAST APPLICATION FOR RIGHT ARM	Note Not Started ✓ Task List Complete
12 December, 2017 11:00 AM	CSTDEMOCHRIS, DONOTUSE 57 Years, Male	Cast New	Reason for Visit : Cast	Note Not Started ✓ Task List Complete
12 December, 2017 1:00 PM	CSTDEMOELAINE, DONOTDISCHARGE 57 Years, Female	Cast New	Reason for Visit : Cast	Note Not Started ✓ Task List Complete

Selecting the View 7 More Days button will display outstanding items for the selected providers for an additional seven days. The date will update accordingly.

In the **Outstanding Actions** column, certain items concerning the status of the patient can be viewed, including notes and task list.

You can click on any of the **Outstanding Actions** to navigate to that particular page where the patient's information can be created and edited.

Key Learning Points

- You must set resources to be able to view appointments and items in the Calendar and Open Items View

PATIENT SCENARIO 2 – 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

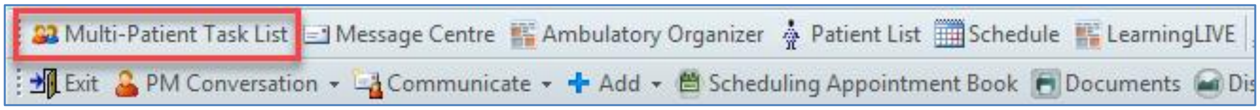
The **Multi-Patient Task List (MPTL)** displays specific tasks for multiple patients.Tasks are activities that need to be completed for the patient. Tasks are generated by certain orders or rules in the system and show up in a list format to notify you to complete specific patient care activities. They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

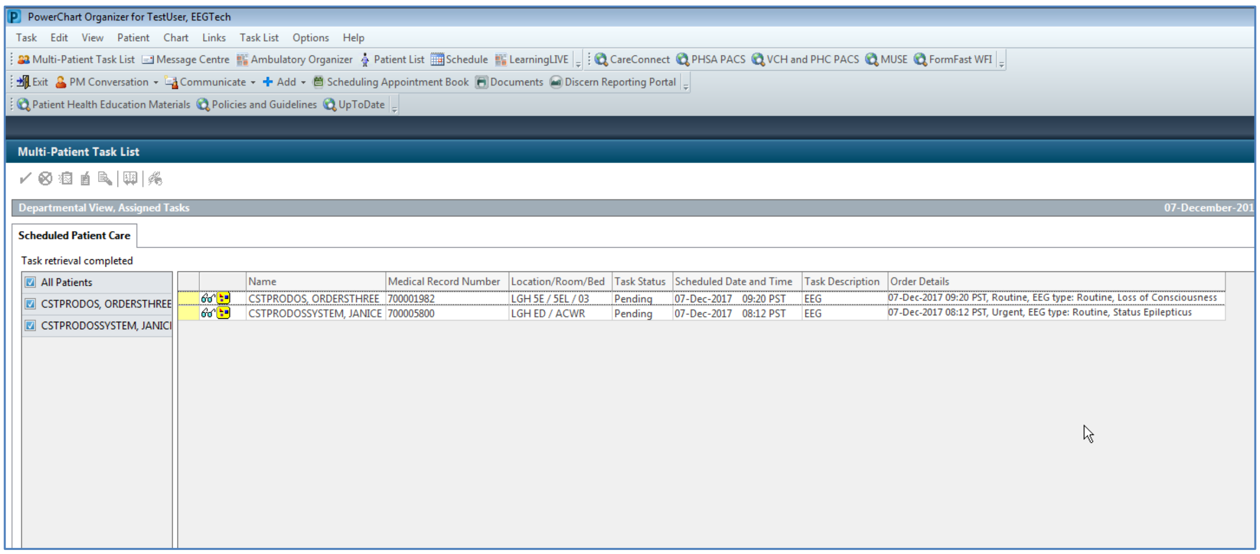
As a EEG Technician you will complete the following activities:

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

Activity 2.1 – Set up your view of the Multi-Patient Task List

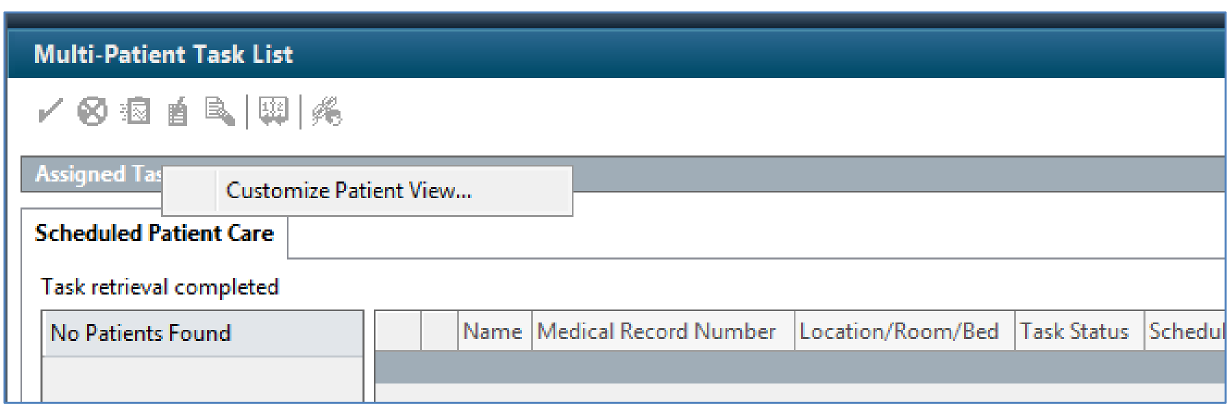
1 As an EEG Tech the first page you will see upon logging into the Clinical Information System (CIS) is the **Multi-Patient Task List (MPTL).** Navigate back to the MPTL by clicking on the MPTL button in the toolbar.





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. This will need to be done for each tab.

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

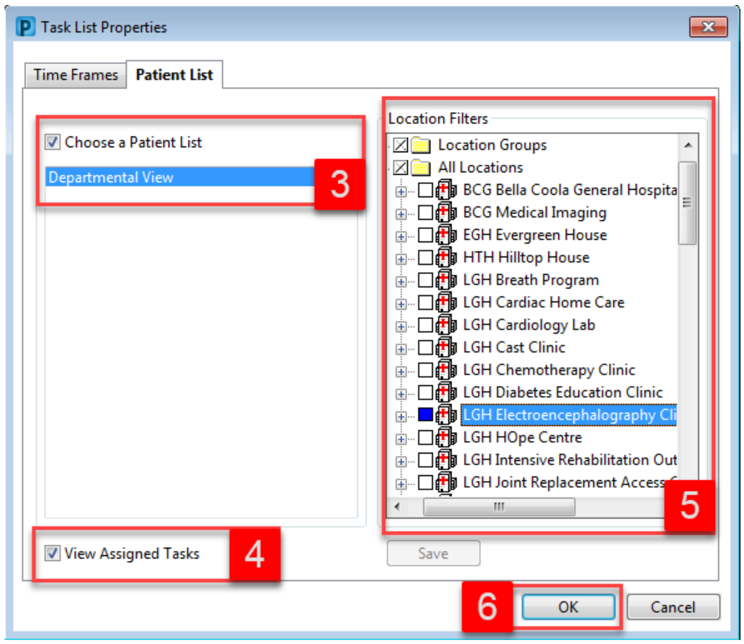


Within the **Task List Properties** window:

1. In the Patient List tab, select **Choose a Patient List** and select **Departmental View**

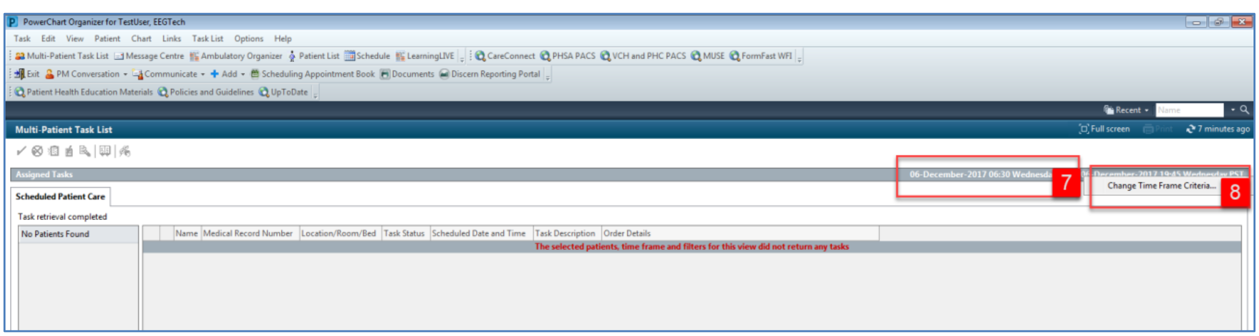
2. Ensure **View Assigned Tasks** is checked as this will ensure tasks display on your **MPTL**.
3. Select the appropriate location using the location filter (use the + symbol to expand the location tree until you find the desired unit). For the purpose of this activity use **LGH Electroencephalography Clinic** as your 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.
4. Click the **OK** button.



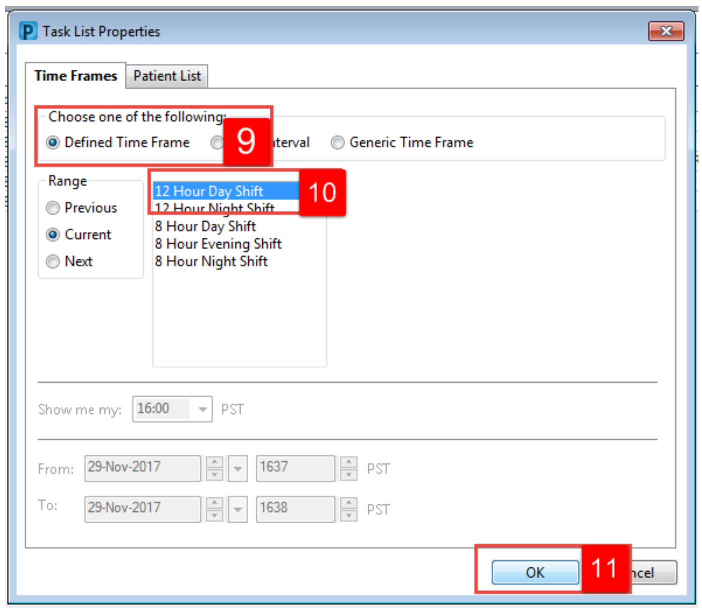
After selecting the appropriate Patient List you need to set up the **Defined Time Frame**.
To select appropriate **Time Frame** for your MPTL:

1. Right-click the **date range** in the far right hand side of the grey information bar
   2. 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 the **OK** button. The **Scheduled Patient Care** tab within the MPTL is now set with the correct patients and their tasks.
12. Click the **Refresh button**  near the top right corner of the screen to update the task list



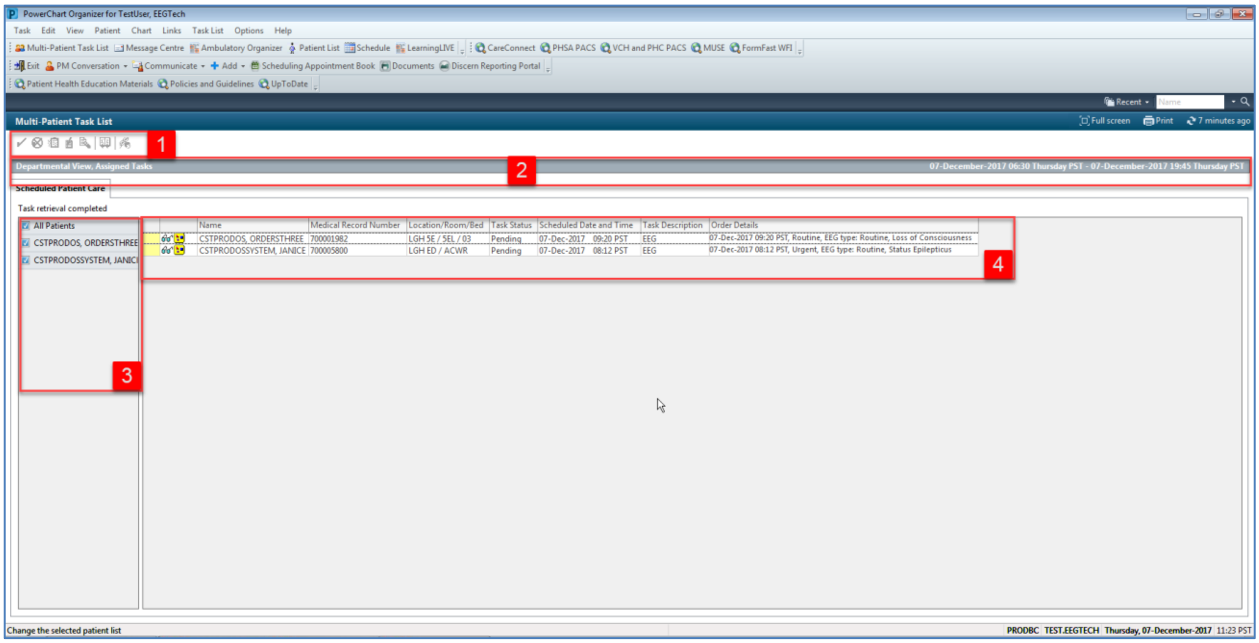
Key Learning Points

- 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 2.2 – 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



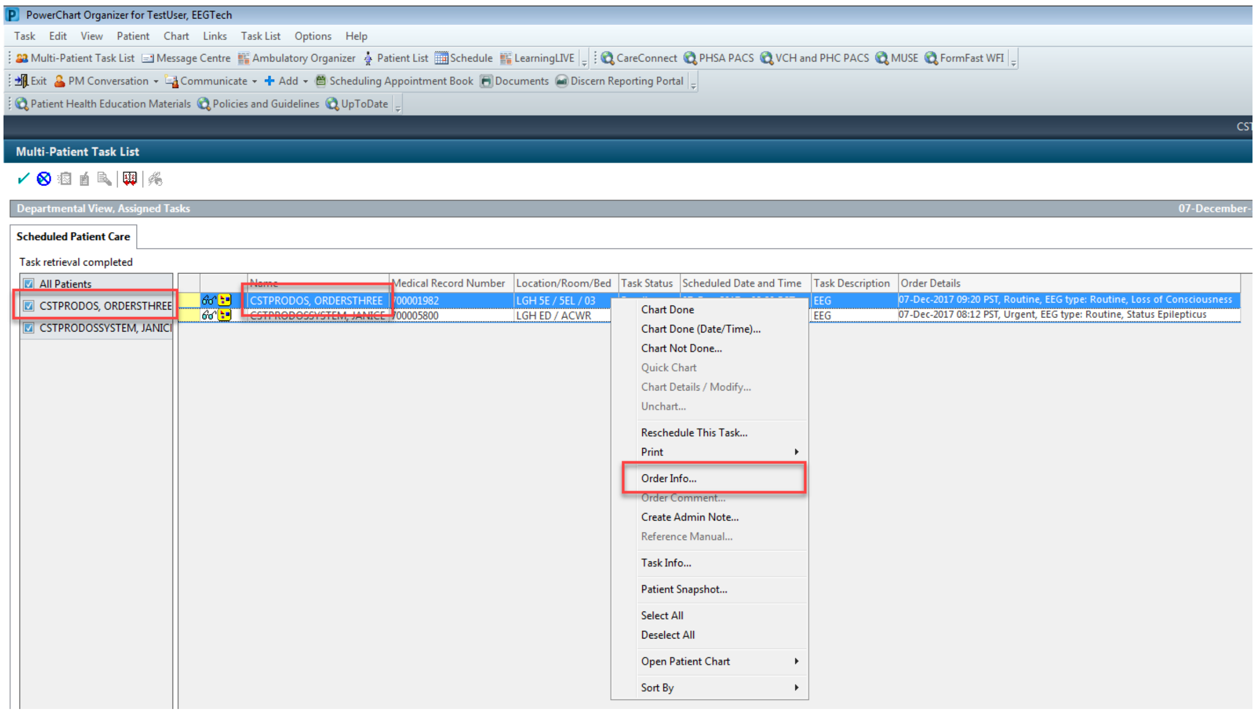
Key Learning Points

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

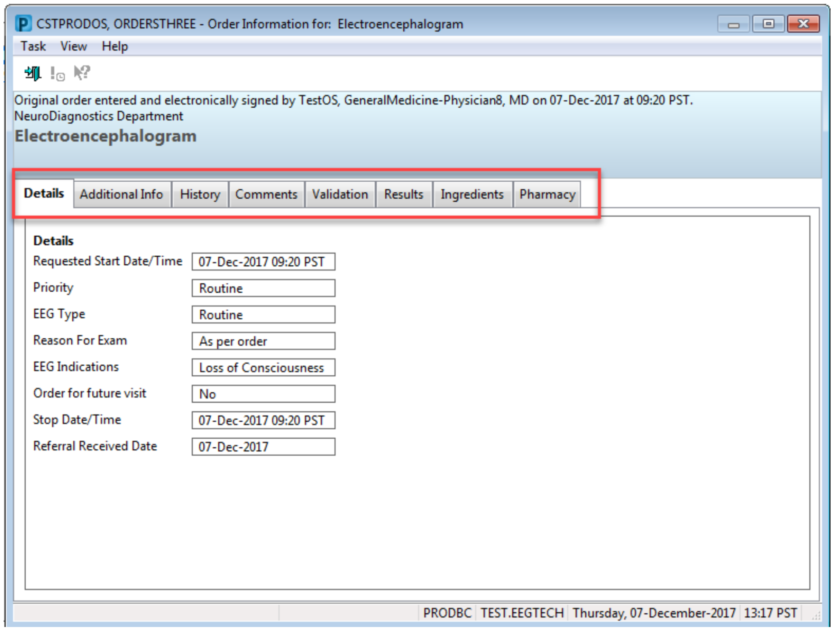
Activity 2.3 – Review Patient Tasks

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. **EEG**)
3. Select **Order Info** to learn more about the order.



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.



Key Learning Points

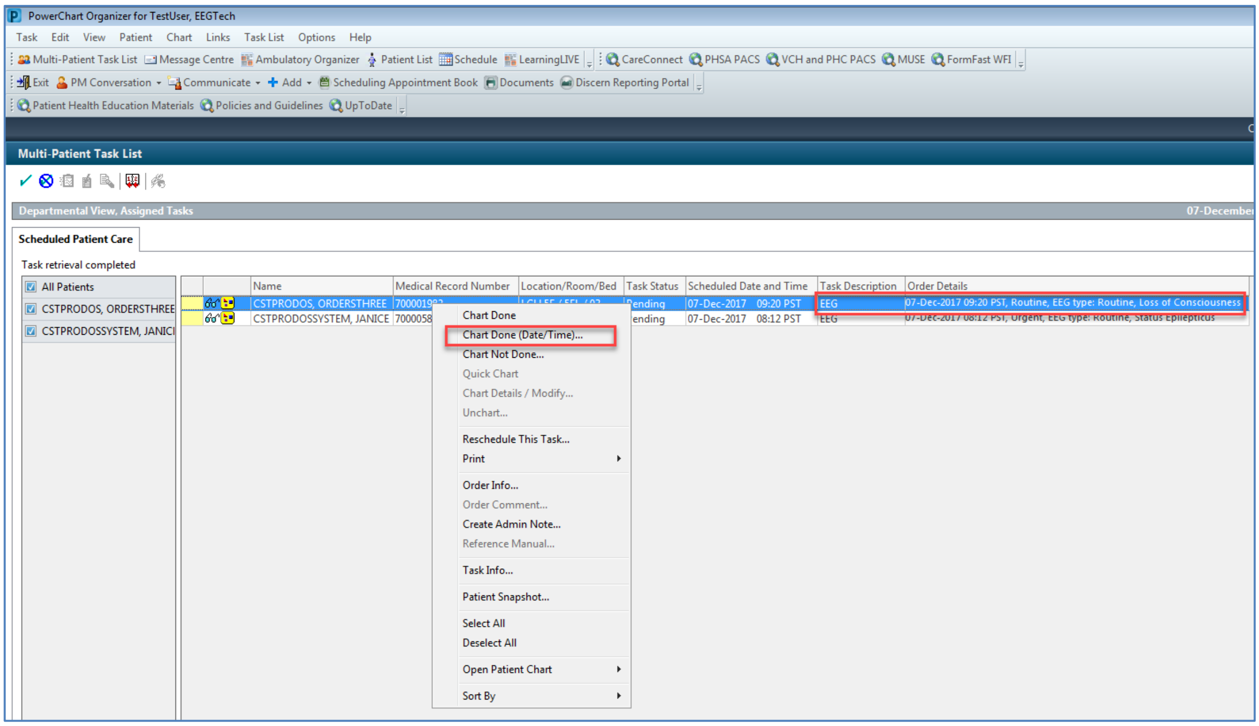
- You can select specific patients for whom you would like to review tasks in the MPTL
- Right click to see more about the order/task

Activity 2.4 – Completing a Task in MPTL

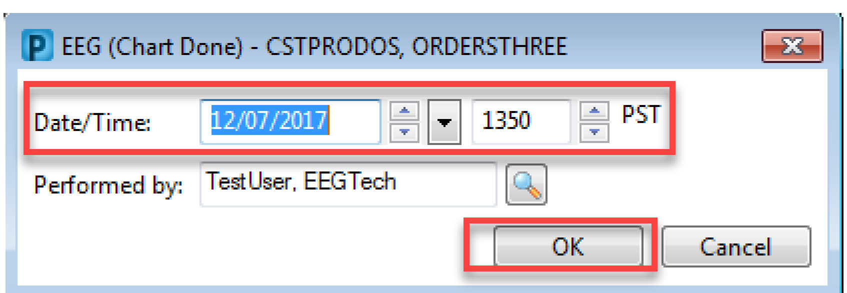
1 As you review patient tasks and complete orders it is important to document tasks as complete.

You completed the EEG task in your MPTL now let's document the task as complete.

1. Right click on the task you want to complete (i.e **EEG**)
2. Select **Chart Done (Date/Time)**

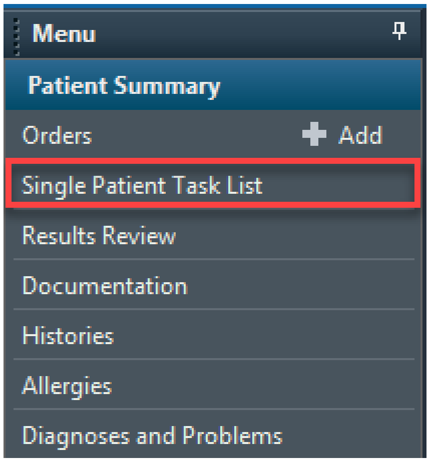


3. Review the **Date/Time** in the new window**.** (This can be adjusted as needed)
4. Click **OK**



5. The task now has a **Chart Done** icon next to it.
6. Click the **Refresh** button near the top 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.



Key Learning Points

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

PATIENT SCENARIO 3 – Review Chart

Learning Objectives

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

- Access a patient's chart from Ambulatory Organizer
- Review a patient's chart

SCENARIO OVERVIEW

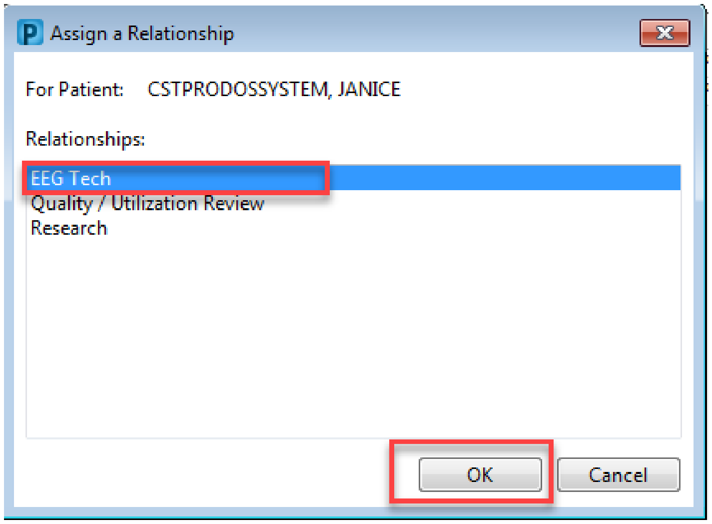
In this scenario, we will review how to access the patient's chart and navigate the different parts of the chart to learn more about the patient

As a EEG Technician you will complete the following activities:

- Access a patient's chart from Ambulatory Organizer
- Review patient's chart

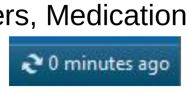
Activity 3.1 – Review Patient's Chart

1 From the day view of the Ambulatory Organizer, click on Your Patient's name. This will take you directly into to his chart but you must first **establish a relationship.**

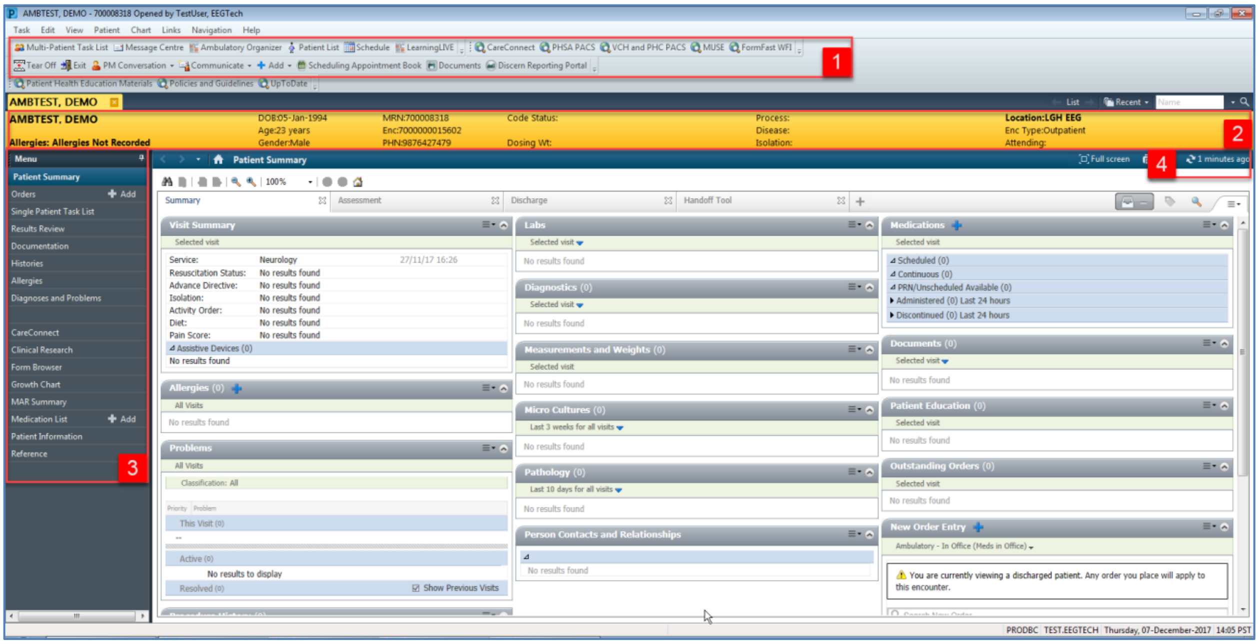


1. Select **EEG Tech**
2. Click **OK**

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 

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

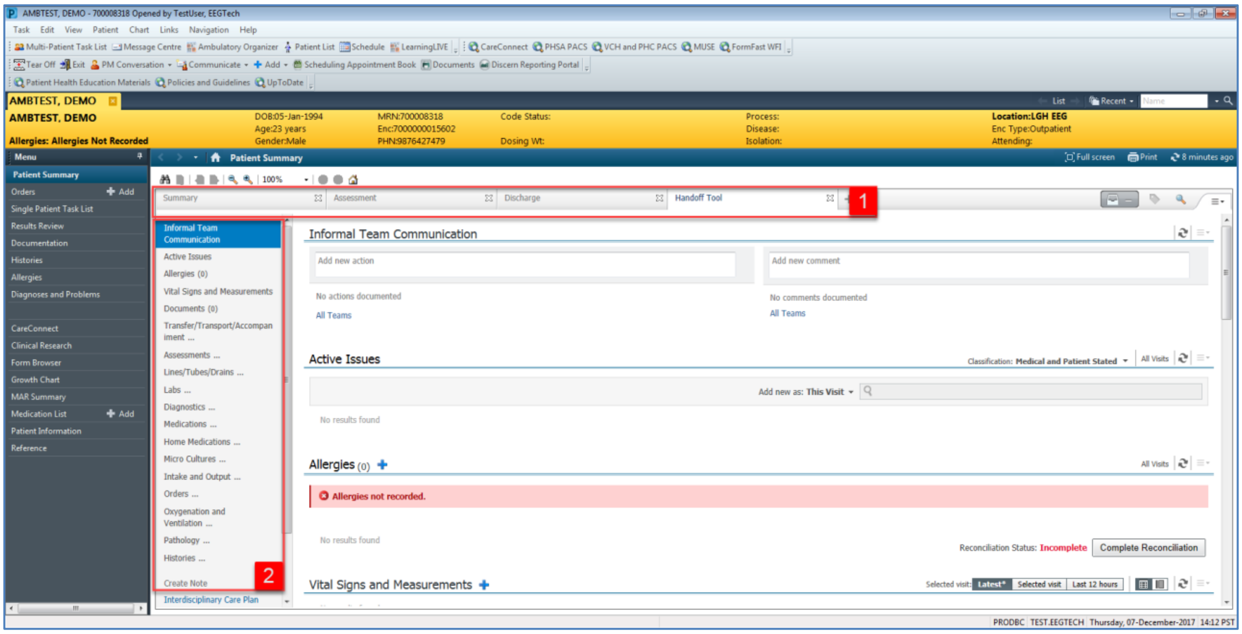


Note: The chart does not automatically refresh! When in doubt, click Refresh 

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

1. There are different tabs including **Summary, Assessment, Discharge,** and **Handoff Tool** 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.



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 4 - Orders

Learning Objectives
At the end of this Scenario, you will be able to: ■ Review the Orders Profile ■ Activate a Future Order

SCENARIO

When patient comes into the EEG 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. In this scenario we will review orders and learn how to activate a future order.

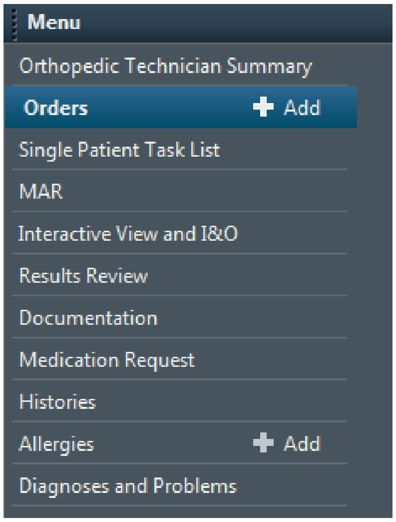
As a EEG Technician you will complete the following activities:

- Review the Orders Profile
- Activate a Future Order

Activity 4.1 –Reviewing Orders Profile

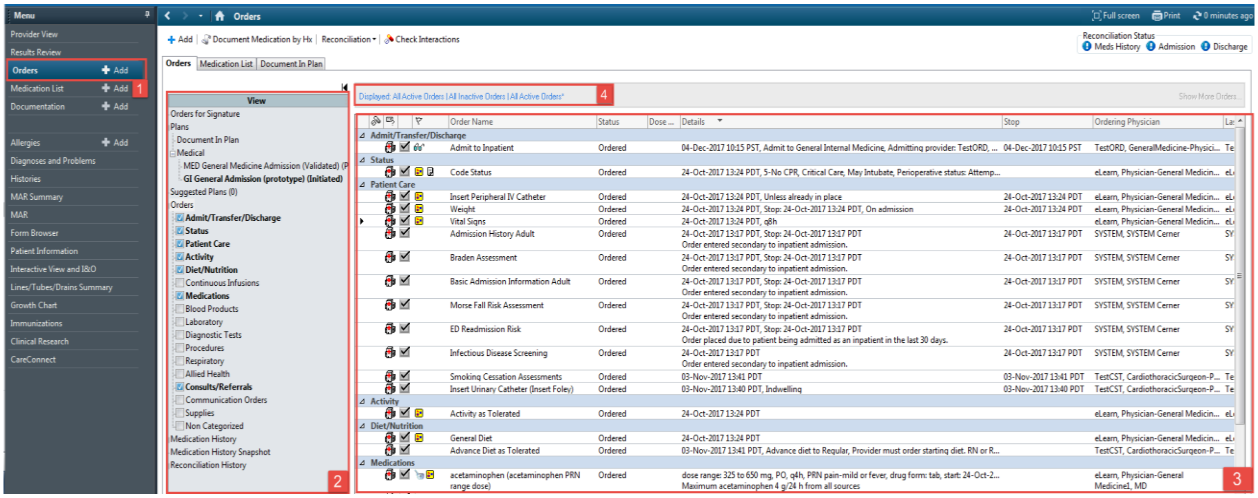
1 The **Orders** page is where you will access a full list of the patient's orders. To review orders, with your patient's chart open:

1. Select **Orders** from the **Menu**



2. On the left side of the Orders page is the navigator (**View**) which includes several categories including:
   - **Plans**
   - **Categories of Orders**
   - **Medication History**
   - **Reconciliation History**
3. On the right side is the order profile where you can:
   - Review the list of **All Active Orders**
     Moving the mouse over order icons allows you to **hover to discover** additional information.
     Some examples of icons are:
     - Order for nurse to review
     - Additional reference text available
     - Order part of a PowerPlan
     - 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.

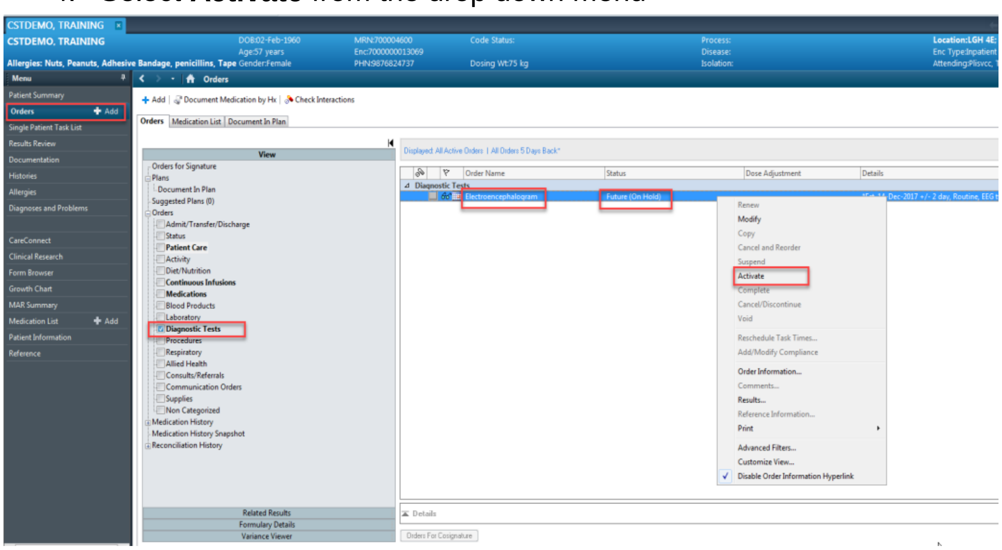


Activity 4.2 – Activating a Future Order

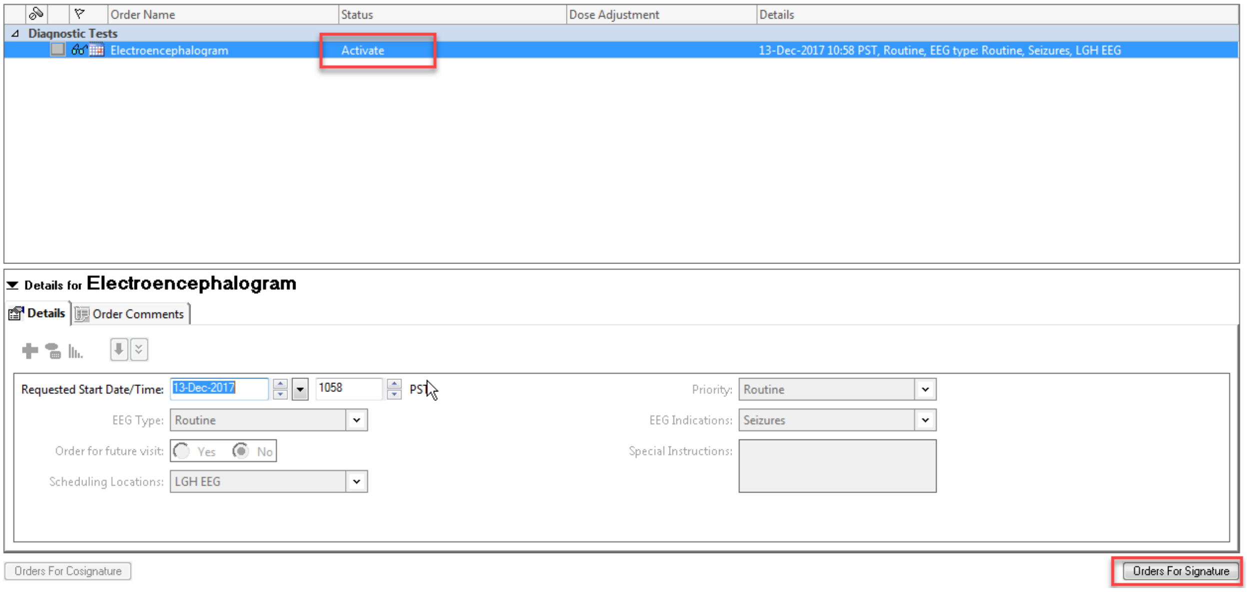
1 When patient comes into the EEG Lab they will have future order(s) placed for tests that need to be completed. You will need to activate these orders to be able to complete them (note: for some labs the clerk might activate these orders when the patient is checked in)

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. EEG)
4. Select **Activate** from the drop down menu



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



7. Click **Sign**
8. 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

PATIENT SCENARIO 5 – Message Centre

Learning Objectives
At the end of this Scenario, you will be able to: - Recall the functions of Message Centre - Send a message - Reply to a message - Forward a message - Delete a message - Set-up a proxy inbox

SCENARIO OVERVIEW

Message Centre is an internal messaging component within the Clinical Information System (CIS) that is used in the outpatient clinical spaces. It is used to address patient related documents, results and messages that are sent from the lab system, forwarded results from other clinicians or general messages. Message Centre will be utilized between Outpatient providers, clinical nursing, clinic clerical and Allied Health. **NOTE: The Message Centre is a part of the legal medical record and communication should pertain to patient chart**.

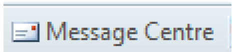
As an EEG Technician you will complete the following activities:

- Review the functions of Message Centre
- Send a message
- Reply to a message
- Forward a message
- Delete a message
- Set-up a proxy inbox

Activity 5.1 – Message Centre Overview

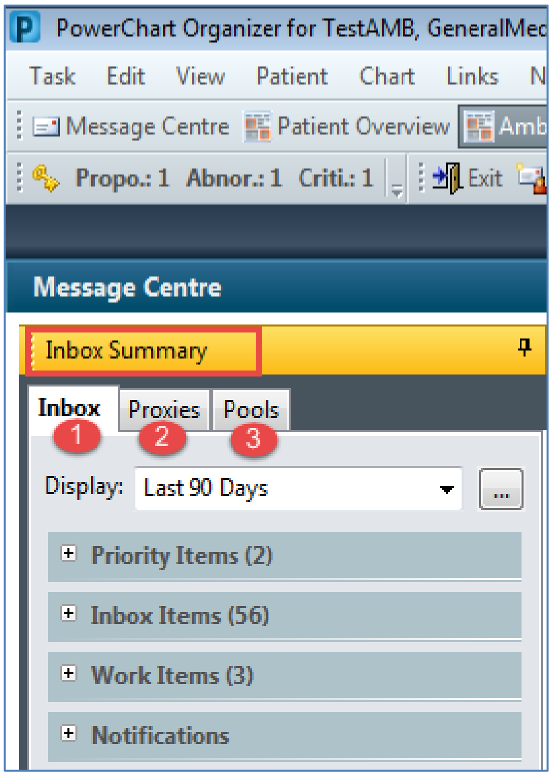
1 Message Centre allows you to communicate with other health care professionals, forward information and results and also allows you to receive colleague's messages when they are away via the **proxy** function.

Message Centre can be accessed from any screen within PowerChart by selecting the



button in the toolbar.

The screenshot below shows the basic layout of **Inbox Summary**.



Inbox Summary
The Inbox Summary provides you with a quick view of all of the items in your Inbox.

The Inbox Summary consists of 3 separate tabs:

1. Inbox
2. Proxies
3. Pools

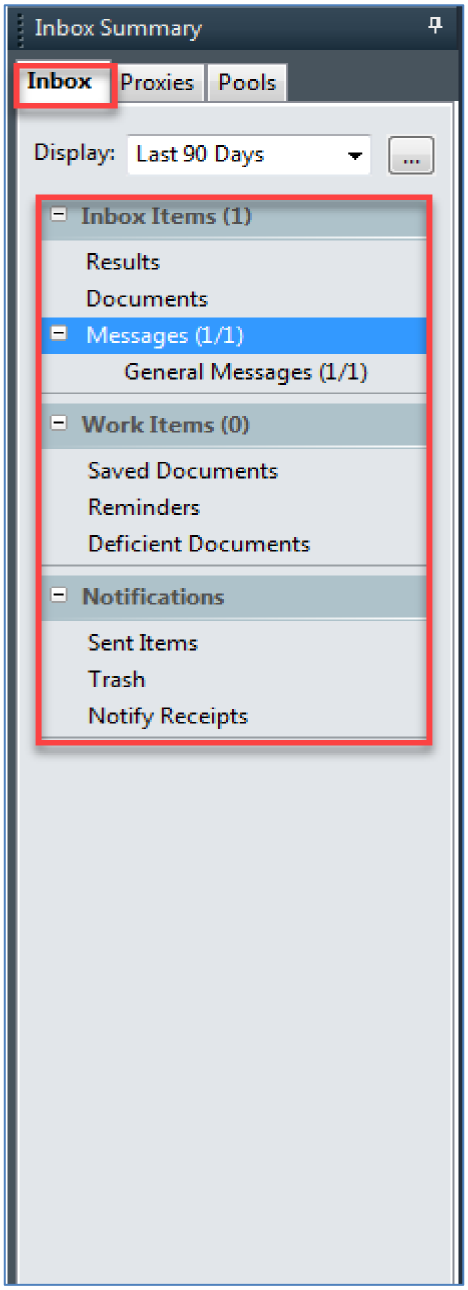
What do these tabs mean?

Inbox: Your own Inbox

Proxies: Inboxes for which you have proxy rights

Pools: Pool Inboxes

The screenshot below shows the basic layout of your own **Inbox**



The Inbox tab contains items that the clinician can complete within Message Centre.

Some examples of items within the inbox tab include (**these vary based on profession**):

- Results (outpatient only)
- Documents for review
- Messages pertaining to patients

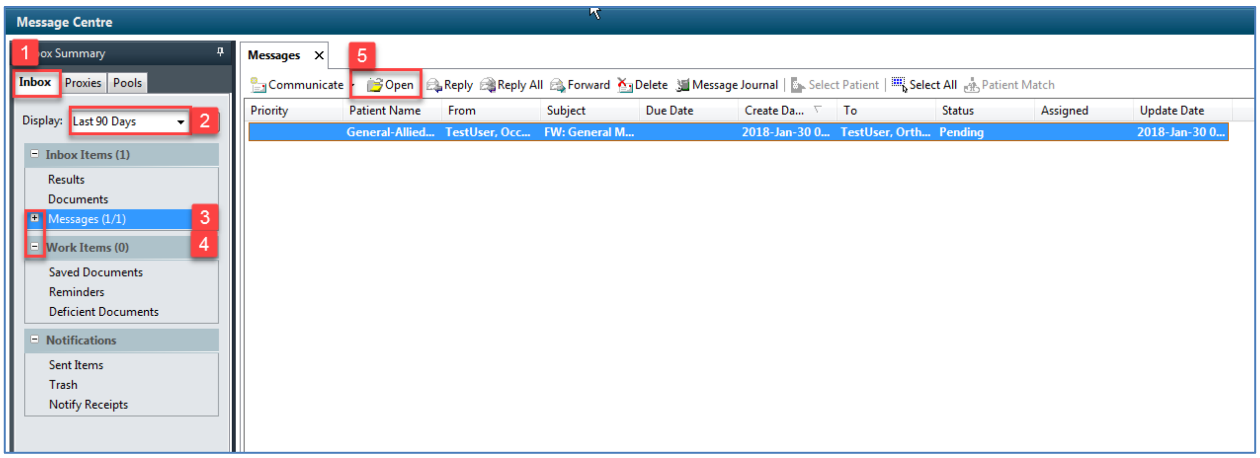
The Work Items section includes (**these vary based on profession**):

- Saved documents- documents that have not been signed during the documentation process, you can access them here and sign them
- Reminders-If you send a message with a reminder, it will be saved here for access later.
- Deficient Documents-Health Records will send you a deficient documents notification if a required document has not been created on your patient's chart.

2 The Inbox tab allows you to access any message in the Inbox. Inbox notifications are divided into **categories, folders and sub-folders**; the number displayed next to the category name, indicates the number unread.

Complete the following steps to access results, documents, messages and other notifications:

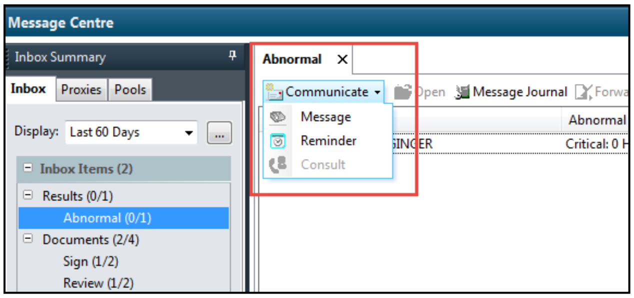
1. Click to select the corresponding tab you would like to work (i.e Inbox tab as shown below)
2. Click **display** drop down to change the date range
3. Click **plus sign** (**+**) next to the category to expand it
4. Click **minus sign** (**-**) next to the category to collapse it.
5. Double-click any item or select it and click Open to view.



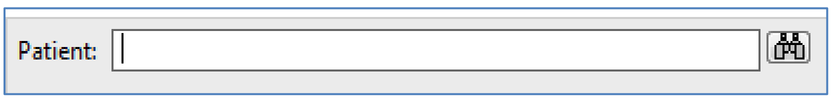
Activity 5.2 – Creating a Message

1 Complete the following steps to create a new message:

1. From the toolbar, click the **Communicate** drop down menu and select **Message**

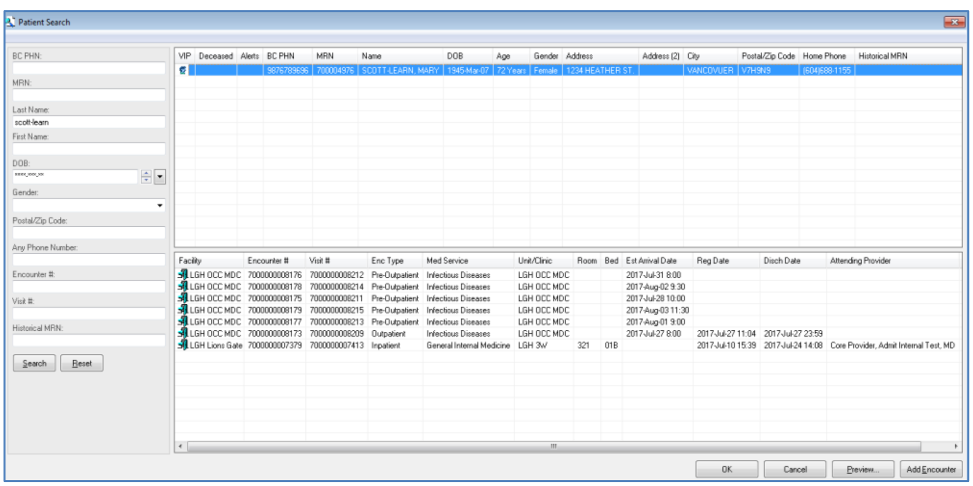


2. From the Patient box, enter the patient's name and click **search** . For this activity use Your Patient.

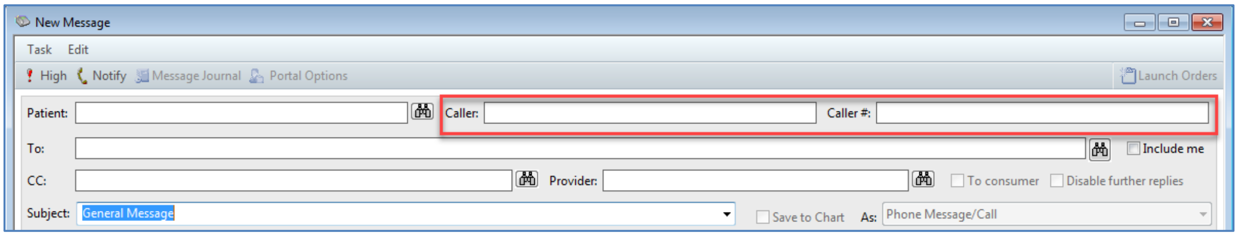


3. From the Patient Search window, select the **patient** and select **today's encounter** and click **OK**.

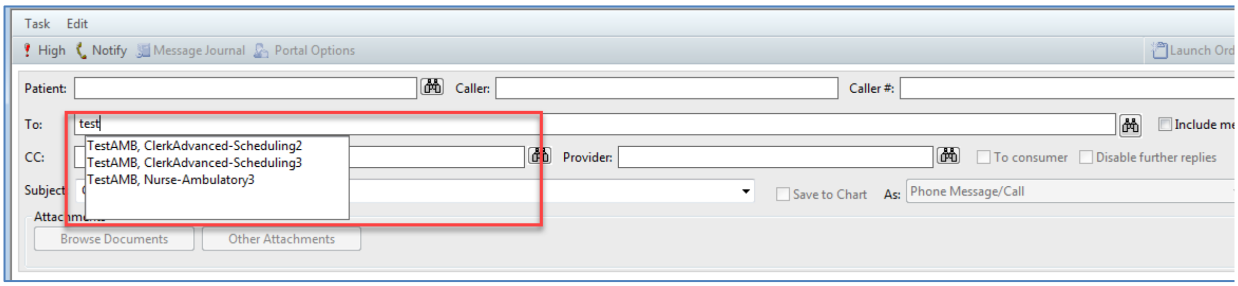
   Note: If the message is not related to an existing encounter, you will need to create a new phone message encounter. To create a new phone message encounter refer to the Quick Reference Guide: PM Conversation-Phone Message Encounter



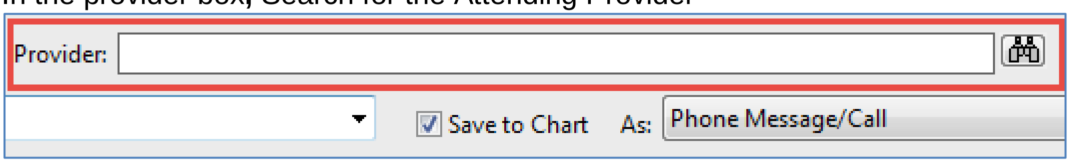
4. The patient's name is automatically entered in the Caller box.



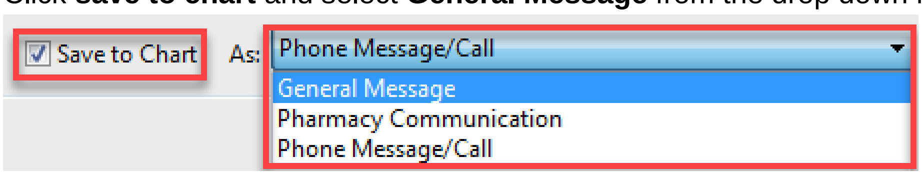
5. From the ‘**To**’ and ‘**CC**’ boxes, enter the **first few letters** of the recipient's last name click **search** or press **ENTER**. For this activity ask your class instructor who to send the message to.



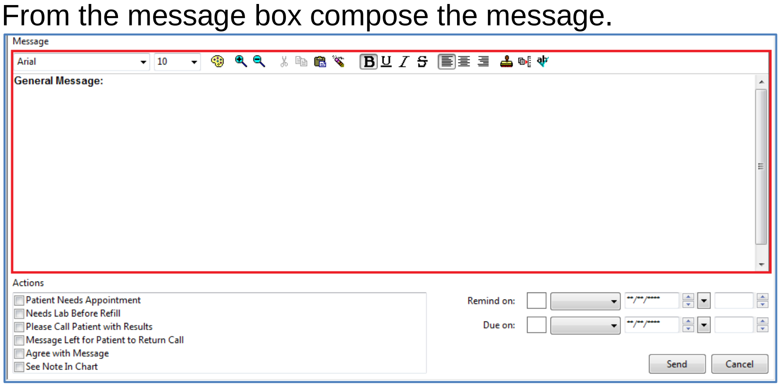
6. In the provider box**,** Search for the Attending Provider



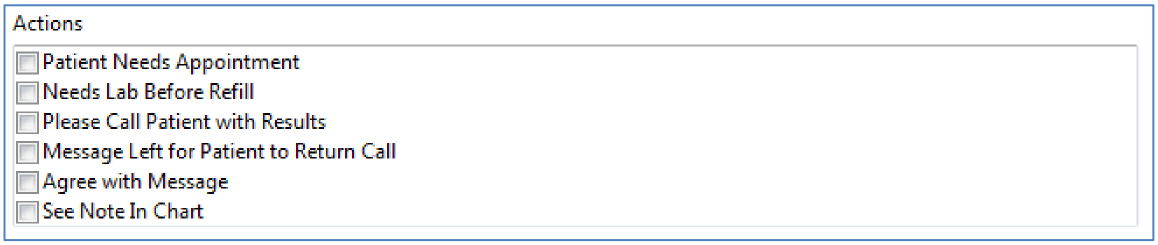
7. Click **save to chart** and select **General Message** from the drop down menu



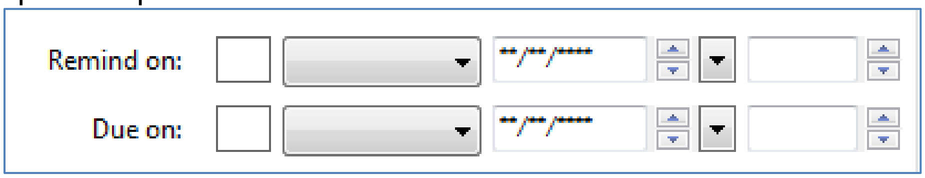
8. From the message box compose the message.



9. Select any additional **Actions** (as appropriate)



10. To set a reminder to follow up on a message, enter the appropriate time parameters in the **remind on** field. Reminders help ensure that patient care activities for a specified patient are carried out at a later time.



11. Click 

to complete the message

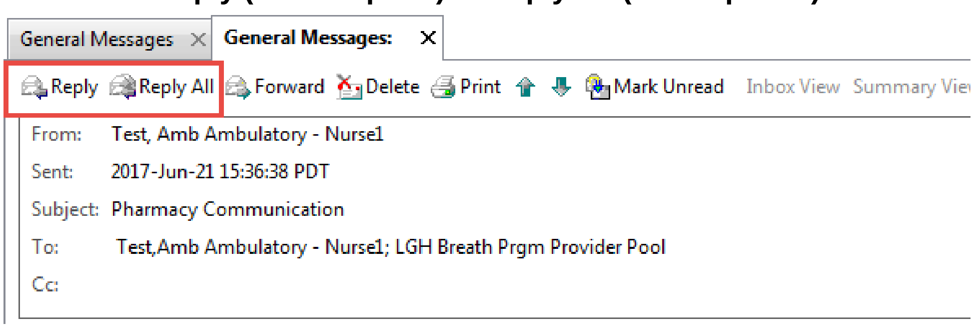
Note: you can also create a message by clicking the communicate button in the toolbar and following the steps above.

Activity 5.3 – Replying to a Message

1

Complete the following steps to reply to a message:

1. Open and read any message in the inbox.
2. Click either **Reply (one recipient)** or **Reply All (all recipients)**



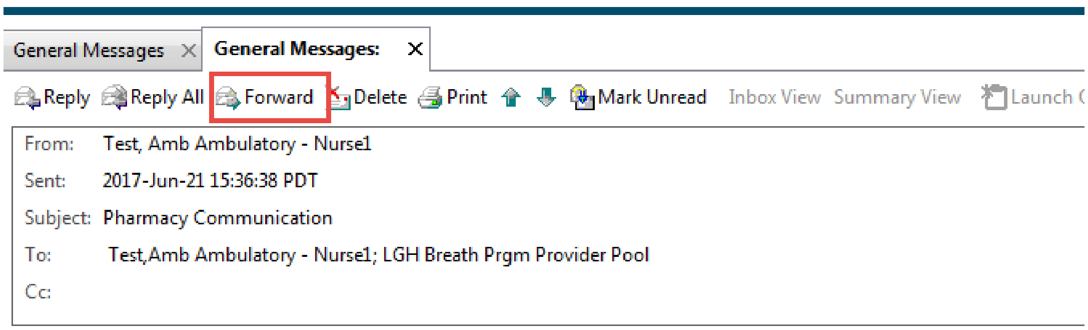
3. Compose your message. Choose a typical message you may write to a colleague.
4. Click **Send**

Activity 5.4 – Forwarding a Message

1

Complete the following steps to forward a message:

1. Open a message in the inbox
2. Click **Forward**
3. Click the **search** button next to the '**To**' box.
4. Select a recipient, for this activity, ask your class instructor who to forward the message to and click **OK**.



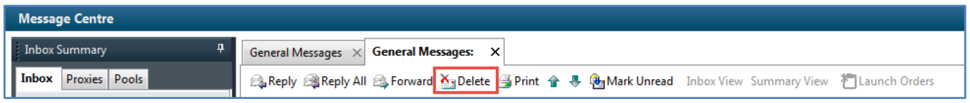
5. Compose the message. Choose a typical message that you would send to a colleague.
6. Save a copy of the message to the patient's chart. Click **Save to Chart**
7. Click **Send**.

Note: You can also forward a message directly from the list of messages displayed in the Inbox workspace without opening it by selecting the message in the notification list and clicking **forward**.

Activity 5.5 – Deleting a Message

1 Messages can be deleted in one of two ways:

1. Select a message you want to delete from the message list in the Message Centre and click **Delete**



2. With the message open, click **Delete** .

Key Learning Points

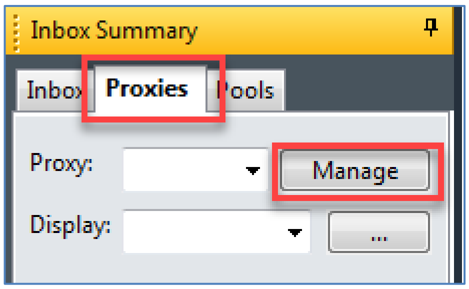
- You can create, reply to, forward and delete messages in Message Centre
- Messages sent in Message Centre are part of the legal medical record and communication should pertain to the patient chart

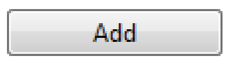
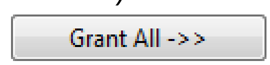
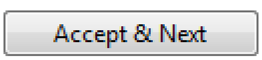
Activity 5.6 – Creating and Removing a Proxy Inbox

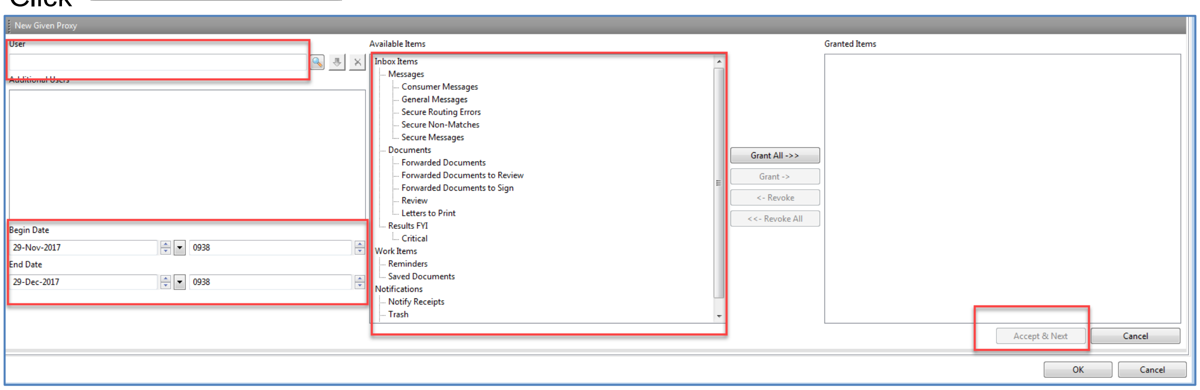
1 Proxy inboxes can be used to view messages in a colleague's inbox when they are away. You need to grant proxy rights for a colleague to view your inbox.

Creating a Proxy Inbox:

1. Click the **Proxies** tab and click the **Manage** button

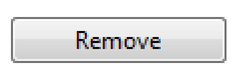


2. When the window opens click the  button
3. Search for the user you want to assign as a proxy (ask your class instructor)
4. Select the items you want to grant proxy rights to view or select the  button
5. Select a begin date and end date
6. Click 



7. Click **OK**

Removing a Proxy Inbox:

1. Click the **Proxies** tab and click the **Manage** button
2. When the window opens select the user you want to remove and click the  button
3. Click **OK**

Key Learning Points

- Proxy inboxes can be created so colleagues can view your messages while you are away

End Book

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