SELF-GUIDED PRACTICE WORKBOOK [N51-B] CST Transformational Learning

WORKBOOK TITLE: Ambulatory: General Allied Health







TABLE OF CONTENTS

•	SELF-GUIDED PRACTICE WORKBOOK	3
•	Using Train Domain	4
•	PATIENT SCENARIO 1 – Ambulatory Organizer	5
	Activity 1.1 – Accessing Ambulatory Organizer	6
	Activity 1.2 – Setting Resource Lists	6
	Activity 1.3 – Overview of Day View	8
	Activity 1.4 – Overview of Calendar View	12
	Activity 1.5 – Overview of Open Items View	13
•	PATIENT SCENARIO 2 – Message Centre	14
	Activity 2.1 – Message Centre Overview	15
	Activity 2.2 – Creating a Message	18
	Activity 2.3 – Replying to a Message	20
	Activity 2.4 – Forwarding a Message	21
	Activity 2.5 – Deleting a Message	22
	Activity 2.6 – Creating and Removing a Proxy Inbox	23
	End Book	



\$ SELF-GUIDED PRACTICE WORKBOOK

Duration	60 minutes
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 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 would like to see a list of the day's patients. To start, log into the Clinical Information System (CIS) with the username and password provided.

As an Allied Health Professional you will complete the following activities:

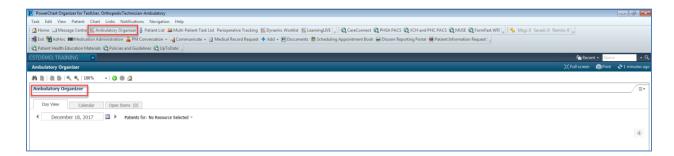
- Set-up a resource list
- Review the functions of Day View
- Review the functions of Calendar View
- Review the Open Items view

1



Activity 1.1 – Accessing Ambulatory Organizer

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



Activity 1.2 – Setting Resource Lists

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:

Home		🗇 Full screen 🛛 🗃 Print 🛛 🎝 minutes ago
Inbox Proxies Pools		
Display: Last 90 Days	Ambulatory Organizer	
- Inbox Items (5) Results	Day View Calendar Open Items (0)	
Documents Messages (5/8)	December 13, 2017 December 13, 2017 Patients for: No Resource Selected ~	
General Messages (5/8)		۲
Work Items (0) Saved Documents		
Reminders		
Notifications Sent Items		
Trash Notify Receipts (1/1)		
	No Patients Found	

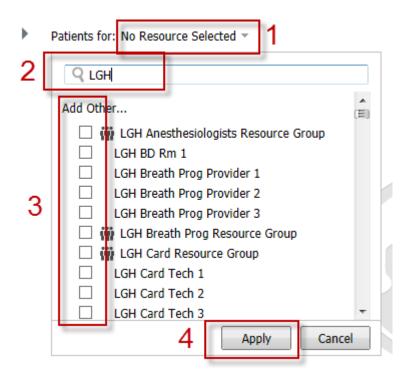
To view the schedule of one or several providers/locations,

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 Rehab Resource Group)
- 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

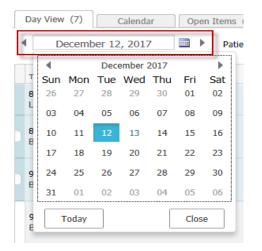


Activity 1.3 – Overview of Day View

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

Time	Duration	Patient	Details	Status (as of 1:10)	Notes	٢
8:00 AM Saunders, James MD	1 min	CSTSNDEMOMINOR, ONE 43 Years, Female	Biopsy Skin Torso	Checked In LGH Lions Gate LGH MTR LGHOR MTRA	Ģ	
9:20 AM Confortin, Mary PT	2 hrs 40 mins	CSTSCHEMPI, PAUL-JOSEPH 67 Years, Male	Inpatient	Confirmed LGH RAN	Reason for Visit : Inpatient coming for an appointe	mnt

Ambulatory: General Allied Health



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).

Go to the patient column:

3

1. Hover over the patient name to discover more information

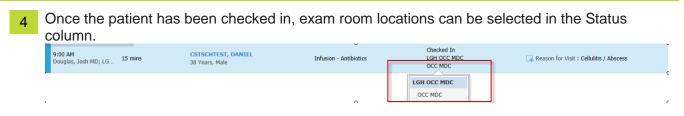
8:30 AM Douglas, Josh MD; LG 15 mins	CSTSCHTEST, ROSEMARY 21 Years, Female	Reason for Visit : Cellulitis / Abscess
	FIN: 700000015940 DOB: 04/11/1996	

- 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

8:00 AM LGH JRAC/RASC RN 1;	2 hrs 15 mins		Appointment View Appointment History View	^	up	Confirmed LGH JRAC	4	
8:30 AM Douglas, Josh MD; LG	15 mins	CSTSCHTEST, ROSEM 21 Years, Female	Ambulatory Nurse Summary Orders Single Patient Task List	1		Seen by Provider LGH OCC MDC OCC MDC	Reason fo	or Visit : Cellulitis / Abscess
			MAR MAR Summary Interactive View and I&O Results Review Documentation Medication Request Histories Diagnoses and Problems Allergies	ш				

Ambulatory: General Allied Health





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

Res	ource Group : 🐨 I GH MDC Resource Group 🔻		-	1
	Comments			
tai	Add New Comment	1		Notes
AC				F
fus	(0 / 255)	Save Cancel		Reason for Visit : Cellulitis / Abscess

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.

Ambulatory Organizer					∕≡∙
Day View (3) Calendar Open Items (4	8)				
December 6, 2017 December 6, 2017	nts for: 🗰 LGH Cast Resource Group ; 🗰 LGH	H JRAC Resource Group ; 🗰 LGH MDC F	Resource Group 👻		
Time [^] 3 Duration 4	Patient 5	Details 6	Status (as of 7:25)	Notes 8	۲
9:15 AM 45 mins Baggoo, Alan MD	CSTPRODBCSN, MEREDITH 37 Years, Female	Tonsillectomy	Cancelled LGH Lions Gate LGH Main OR LGHOR WHS	P	
11:00 AM Baggoo, Alan MD 25 mins	CSTPRODBCSN, ANESTHESIA 47 Years, Female	Arthrodesis Knee	Post-Op LGH Lions Gate LGH Main OR LGHOR GRV	B	
12:45 PM LGH JRAC/RASC RN 1; 2 hrs 15 mins		JRAC Rehab Class Group	Confirmed LGH JRAC	Ģ	
3:00 PM LGH Cast Tech 1; LGH 15 mins	CSTSCHTEST, CHARLIE 27 Years, Male	Cast F/Up	Checked In LGH Cast Clinic Location Not Defined	Reason for Visit : assessment	
Note Not Started Task List Complete	SPIEGEL, SPIKE 19 Years, Male	Transfusion - Red Blood Cells	Seen By Nurse LGH OCC MDC OCC MDC	Reason for Visit : infusion	
9:00 AM Douglas, Josh MD; LG 15 mins	CSTSCHTEST, DANIEL 38 Years, Male	Infusion - Antibiotics	Checked In LGH OCC MDC OCC MDC	Reason for Visit : Cellulitis / Abscess	
			LGH OCC MDC OCC MDC		
8:30 AM Douglas, Josh MD; LG 15 mins	CSTSCHTEST, ROSEMARY 21 Years, Female Name: CSTSC MRN : 7000079 FIN : 7000000	0	Seen by Provider LGH OCC MDC OCC MDC	🕞 Reason for Visit : Cellulitis / Abscess	



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

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

tab to see the different views

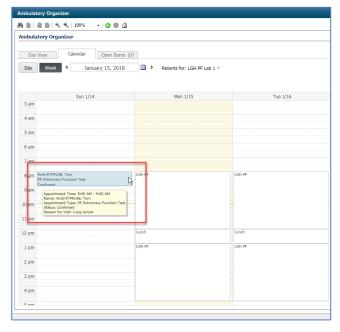
The date of the Calendar tab can be adjusted similar to the way the date on the Day View tab is adjusted.



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

1. Set you resource to: LGH Rehab Resource Group

You can hover over the coloured appointment blocks to view additional information





Activity 1.5 – Overview of Open Items View

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 Rehab Resource Group

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
Vesterday (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	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 – Message Centre

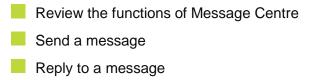
Learning Objectives

- 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 Allied Health Professional you will complete the following activities:



- Forward a message
- Delete a message
- Set-up a proxy inbox



Activity 2.1 – Message Centre Overview

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 Message Centre button in the toolbar.

The screenshot below shows the basic layout of Inbox Summary.

PowerChart Organizer for TestAMB, GeneralMed	Inbox Summary
Task Edit View Patient Chart Links N	The Inbox Summary provides you with a
🗄 🖃 Message Centre 📲 Patient Overview 🎬 Amb	quick view of all of the items in your Inbox.
🤅 🍫 Propo.: 1 Abnor.: 1 Criti.: 1 🝦 🗄 📶 Exit 🔤	The Inbox Summary consists of 3
	separate tabs:
Message Centre	1. Inbox
Inbox Summary 4	2. Proxies
Inbox Provies Pools	3. Pools
Inbox Proxies Pools	What do these tabs mean?
Display: Last 90 Days 🔹 🛄	
	Inbox: Your own Inbox
Priority Items (2)	Province Inhoves for which you have
▪ Inbox Items (56)	Proxies: Inboxes for which you have proxy rights
Work Items (3)	Pools: Pool Inboxes
Notifications	



The screenshot below shows the basic layout of your own Inbox

Inbox Summary 7 Inbox Proxies Pools	The Inbox tab contains items that the clinician can complete within Message Centre.
Display: Last 90 Days	 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 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 ^{Copen} to view.

Message Centre				r4						
1 ox Summary 🕈	Messages X	5								
Inbox Proxies Pools	Communicate	e 🕑 🍞 Open 🗟	Reply 🚔 Reply A	II 🙈 Forward 🎦	Delete 📲 Messag	e Journal 📴 Selec	t Patient 🛄 Sele	ct All 🚓 Patien	t Match	
Display: Last 90 Days 🚽 2	Priority	Patient Name	From	Subject	Due Date	Create Da 🗸	То	Status	Assigned	Update Date
Clast 30 Days		General-Allied	TestUser, Occ	FW: General M		2018-Jan-30 0	TestUser, Orth	Pending		2018-Jan-30 0
Inbox Items (1)										
Results										
Documents										
Messages (1/1)										
E Work Items (0)										
Saved Documents										
Reminders										
Deficient Documents										
Notifications										
Sent Items										
Trash										
Notify Receipts										



Activity 2.2 – Creating a Message

Complete the following steps to create a new message:

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

Message Centre							
Inbox Summary	4	Abno	ormal X				
Inbox Proxies Pools		<u>_</u>	Communica	ate 🕶	12	Open	🗯 Message Journal 🔀 Forwa
		0	Message				Abnormal
Display: Last 60 Days		0	Reminde	r	SINC		Critical: 0 I
Inbox Items (2)		52	Consult				
 Results (0/1) 							
Abnormal (0/1)							
 Documents (2/4) 							
Sign (1/2)							
Review (1/2)							

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

Patient:	1) (Å

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.

IC PHN:	VIP I	Deceased A	lerts BC PHN	MBN N	lame	DOB Ao	Gender	Address		Address (2)	City Por	tal/Zin Code	Home PF	hone Historical MRN
	0					(ABY 1945-Mar-07 72			THER		VANCOVUEB V7			
BN:													100010000	
st Name:														
ott-learn														
it Name:														
18:														
elenite 🛓 🔺														
inder:														
▼ ostal/Zip Code:														
y Phone Number:														
	Facility	9	Encounter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room	Bed	Est Arrival Date	Reg Date	Disch Date		Attending Provider
counter #:				700000008212		Infectious Diseases	LGH OCC MDI			2017-Jul-31 8:00				
				700000008214 700000008211		Infectious Diseases Infectious Diseases	LGH OCC MDI			2017-Aug-02 9:30 2017-Jul-28 10:00				
à #:						Infectious Diseases	LGH OCC MDI			2017-Aug-03 11:30				
torical MBN:						Infectious Diseases	LGH OCC MDI			2017-Aug-01 9:00				
stoncal MHN:						Infectious Diseases	LGH OCC MDI			2017-Jul-27 8:00	2017-Jul-27 11:0			
	s¶ LG	H Lions Gate	700000007379	700000007413	Inpatient	General Internal Medicin	EGH 3W	321	01B		2017-Jul-10 15:3	9 2017-Jul-2	414:08	Core Provider, Admit Internal Test, ME
Search Reset	-													
	-													
	-													
	4													

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

neral Allied Health		CLINICAL + SYSTEMS TRANSFORMATION Our path to strartice, seamless care
New Message		
Task Edit		
🧜 High 🖞 Notify 📓 Message Journal 🖉	Portal Options	aunch Orders 🖑
Patient:		Caller #:
To:		🕅 🗌 Include me
сс:	Provider:	To consumer Disable further replies
Subject: General Message		▼ Save to Chart As: Phone Message/Call ▼

5. From the 'To' and 'CC' boxes, enter the first few letters of the recipient's last name

click search B or press ENTER. For this activity ask your class instructor who to send the message to.

Task ? High	Edit 🐛 Notify 📓 Message Journal 🔓 Portal Option	15	² Launch C	Orders
Patient:		Caller:	Caller #:	
To: CC: Subject		@	Include Image: Construction of the state of the sta	
В	rowse Documents Other Attachments			

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

Provider:				M
•	V Save to Chart	As:	Phone Message/Call	

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

📝 Save to Chart	As:	Phone Message/Call 🔹
		General Message
		Pharmacy Communication
		Phone Message/Call

8. From the message box compose the message.

Message												
Arial 👻	10	•	-	۹	۹	1 🖻 💼 👋	<u>₿</u> ⊻ <i>I</i> 5		å '	Ф[Ф		
General Message:												~
												=
												-
Actions												
Patient Needs Appointment								Remin	nd on:	• •/•	/	
Needs Lab Before Refill												
Please Call Patient with Result								Du	ue on:		/****	*
Message Left for Patient to Re Agree with Message	eturn Cal											
See Note In Chart											Send	Cancel



- 9. Select any additional Actions (as appropriate)
 - Action

Actions	
Patient Needs Appointment	
Needs Lab Before Refill	
Please Call Patient with Results	
Message Left for Patient to Return Call	
Agree with Message	
See Note In Chart	

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.

Remind on:	▼ **/*** ▲ ▼ ▼	×
Due on:	▼ **/**/**** ▲	×
Se	nd	
11. Click	to complete the message	

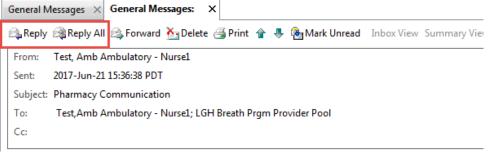
Note: you can also create a message by clicking the communicate button in the toolbar and following the steps above.



Activity 2.3 – Replying to a Message

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

1

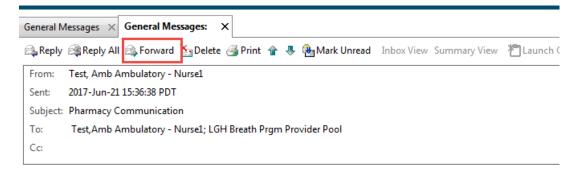




Activity 2.4 – Forwarding a Message

Complete the following steps to forward a message:

- 1. Open a message in the inbox
- 2. Click Forward
- 3. Click the **search** ^(M) 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 2.5 – Deleting a Message

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 煔

Message Centre	
Inbox Summary 📮	General Messages × General Messages: ×
Inbox Proxies Pools	🖧 Reply 🎕 Reply All 🙈 Forward 🎽 Delete 💆 Print 😭 🐺 🍓 Mark Unread 🛛 Inbox View Summary View 🔭 Launch Orders

2. With the message open, click **Delete** ^{Mark}.

Messages × General Messages: ×			
🚑 Reply 🚑 Reply All 🙈 Forward 🎽 Delete	🍜 Print 👚 🐥 🍓 Mark Unread	Inbox View Summary View	Taunch Orders



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 2.6 – Creating and Removing a Proxy Inbox

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

Inbox Summary	.
Inboy Proxies Pools	
Proxy: Manag Display:	
• • • • • • • • • • • • • • • • • • •	
 When the window opens of Search for the user you w 	lick the Add button ant to assign as a proxy (ask your class instructor)
 Select the items you want button Select a begin date and e 	to grant proxy rights to view or select the Grant All ->>
6. Click Accept & Next	
USEr	valuble forms Granted Rems Granted Rems Messages Control Message
Begin Date 29-Nov-2017 * 0938 * End Date 29-Dec-2017 * 0938 *	Cetter's or intro Evalus FVI Evalus FVI Ev
	Accept & Next Cancel

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

Remove



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.