SELF-GUIDED PRACTICE WORKBOOK [N24] CST Transformational Learning

WORKBOOK TITLE: Ambulatory: Orthopedic Technician







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***** 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 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 Orthopedic 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

The Ambulatory Organizer is the landing page (split screen with Message Centre) for the Orthopedic Technician

The Ambulatory Organizer can be accessed from any screen within PowerChart by selecting the

Kambulatory Organizer button in the toolbar.



1

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	(D) Full screen 🍎 Print 🕹 3 minut
Inbox Proxies Pools Display: Last 90 Days	A B B B B B B B B B B B B B B B B B B B
☐ Inbox Items (5) Results Documents General Messages (5/8) General Messages (5/8)	Day View Calendar Open Rems (0) Control Contr
Work Items (0) Saved Documents Reminders	
Notifications Sett homs Trash Hotify Receipts (1/2)	Is 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 Cast Tech 1)
- Apply 4. Select 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

Time	Duration	Patient	Details	Status (as of 1:10)	Notes	۲
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	4	
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	emnt

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

8:30 AM Douglas, Josh MD; LG 15 mins	CSTSCHTEST, ROSEMARY 21 Years, Female	Name: CSTSCHTEST, ROSEMARY	Seen by Provider LGH OCC MDC OCC MDC	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	Ģ
8:30 AM Douglas, Josh MD; LG	15 mins	CSTSCHTEST, ROSEM 21 Years, Female	Ambulatory Nurse Summary Orders Single Patient Task List			Seen by Provider LGH OCC MDC OCC MDC	Reason for Visit : Cellulitis / Abscess
			MAR				
			MAR Summary				
			Interactive View and I&O				
			Results Review				
			Documentation	=			
			Medication Request				
			Histories				
			Diagnoses and Problems				
			Allergies				

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

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
		0	LGH OCC MDC OCC MDC	, ,



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

Rę	source Group : 🖤 LGH MDC Resource Group 🔻	
	Comments	
tai	Add New Comment	Notes
AC		E
	(0 / 255)	
fus	Save	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.

A							
Ambulatory Organizer						_ ≡•	
Day View (3) Calendar Open Items (8) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1) Image: Complex Group (1)							
Time ³	Duration 4	Patient 5	Details 6	Status (as of 7:25) 7	Notes 8	۲	
9:15 AM Baggoo, Alan MD	45 mins	CSTPRODBCSN, MEREDITH 37 Years, Female	Tonsillectomy	Cancelled LGH Lions Gate LGH Main OR LGHOR WHS	G		
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	P		
12:45 PM LGH JRAC/RASC RN 1;	2 hrs 15 mins		JRAC Rehab Class Group	Confirmed LGH JRAC	4		
3:00 PM LGH Cast Tech 1; LGH	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	3 trs 2	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	HTEST, ROSEMARY	Seen by Provider LGH OCC MDC OCC MDC	Reason for Visit : Cellulitis / Abscess		
		FIN: 7000000 DOR: 04/11/19	15940 5				

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 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.

Day View (7)			(Calenda	Open Items				
		D	ecemb	er 12	2, 2017	7		• Pi	atie
Ê		•		Dece	ember 2	2017		•	_
	Т	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	8	26	27	28	29	30	01	02	
	L	03	04	05	06	07	08	09	
	8 B	10	11	12	13	14	15	16	
	-	17	18	19	20	21	22	23	_
	9	24	25	26	27	28	29	30	
	B	31	01	02	03	04	05	06	
	9 E		Foday				Clos	e	

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

1. Set you resource to: LGH Cast Tech 1

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

	▶ 🔍 🔍 100% 🛛 🔹 🏠		
mbulato	ory Organizer		
Day Vie	ew Calendar Open Items (0) Week January 15, 2018	Patients for: LGH PF Lab 1 *	
	Sun 1/14	Mon 1/15	Tue 1/16
3 am			
4 am			
5 am			
6 am			
7.am		_	
8 am Am	nb-RTPFLAB, Tom Pulmonary Function Test	LGH F	LGH PF
9 am	Appointment Time: 8:00 AM - 9:00 AM Name: Amb-RTPFLAB, Tom		
10 am	Status: Confirmed Reason for Visit: Lung cancer		
11 am			
12 pm		Lunch	Lunch
1 pm		LGH PF	LGH PF
2 pm			
3 pm			
4 pm			



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 Cast Tech 1

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 Age	o (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 – Review Patient's Chart and Document

Learning Objectives

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

- Review the patient chart from Orthopedic Technician Summary page
- Recall the functions of Single Patient Task List (SPTL)
- Document in an electronic form (PowerForm)

SCENARIO

In this scenario, Your Patient is a 49 year old man who was on his way to the gym and missed the last step on a set of stairs. He fell and sustained a fractured left talus and a left Colles' fracture. Your Patient has been registered and checked in by the clerk and by clicking on the comments section in the **Ambulatory Organizer** you can see that he is here for a 6 week follow-up.

As an Orthopedic Technician working in an ambulatory setting you will complete the following activities:

- Review the patient's chart
- Review the Single Patient Task List
 - Document in an electronic form (PowerForm)



Activity 2.1 – Review Patient's Chart

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.**

📕 📕 🔍 🔍 100%	• 😋 🛑 🟠							
mbulatory Organizer								=·
Day View (5) Calendar November 21, 2017	Open Items (0)	LGH Cast Providers Reso	urce Group ; 🗰 LGH Cast Resource Group ; LGH Cast Tech 1 ; LGH Cast Tech	2 -				
Time	Duration	Patient			Status (as of 1:43)	Notes	s	۲
9:00 AM Baggoo, Alan MD	35 mins	CSTSNDUNN, STC 80 Years, Male	Assign a Relationship For Patient: CSTSNDUNN, STCHRIS		Intra-Op LGH Lions Gate LGH Main OR LGHOR KC			
9:00 AM Baggoo, Alan MD	3 hrs 5 mins	CSTPRODBCSN, A 4 Years, Female	Kelationships: Orthopedic Technician Quality / Utilization Review Research	p Femur	Confirmed LGH Lions Gate LGH Main OR LGHOR GRS	4		
10:00 AM Baggoo, Alan MD	35 mins	CSTSNGREYHEIM 70 Years, Male	Unit Coordination		LGH Lions Gate LGH Main OR LGHOR KC			
11:00 AM Baggoo, Alan MD	35 mins	CSTSNJAMESON, 3 57 Years, Male			LGH Lions Gate LGH Main OR LGHOR KC			
12:05 PM Baggoo, Alan MD	55 mins	No appointments						
1:00 PM Baggoo, Alan MD	3 hrs 5 mins	CSTPRODBCSN, B 47 Years, Female	OK Cancel	p Femur	Confirmed LGH Lions Gate LGH Main OR LGHOR GRS	4		
						lş		

- 1. Select Orthopedic Technician
- 2. Click OK

Patient's chart will open to **Orthopedic Technician 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 **and the most of the**

CSTDEMO, TRAINING - //	00004000 Opened by TestUs	er, Orthopedic Lechnician-Ambulatory							
Task Edit View Patier	nt Chart Links Notifica	ations Navigation Help							
🚰 Home 🖃 Message Cen	itre 🎍 Patient List 🔉 Multi	-Patient Task List Perioperative Tracking	📲 Dynamic Worklist 📲 Learr	ningLIVE 🝦 🤅 😋 CareConnect 🔞 PHS	A PACS 🐧 VCH and PHC PACS 🐧 N	IUSE 🔃 FormFast WFI 🝦 🦂 Msg:: 0	Remin;: 0 Saved.: 0 🖕		
📰 Tear Off 🗐 Exit 🎽 Ad	Hoc IIIIMedication Adminis	stration 🔒 PM Conversation 👻 🛂 Com	municate 👻 🗟 Medical Record	Request 💠 Add 👻 📻 Documents 👹	Scheduling Appointment Book 🧃 Di	scern Reporting Portal 💡	1		
Q Patient Health Education	n Materials 🔍 Policies and (Guidelines 😋 UpToDate 💡							
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CSTDEMO, TRAININ	G	DOB:02-Feb-1960	MRN:700004600	Code Status:	Pro	cess:Falls Risk,Violence Risk	Locat	tion:LGH 4E; 426; 01	
Allergies: Nuts, Peanuts,	penicillins, Tape	Age:57 years Gender:Female	Enc:700000013069 PHN:9876824737	Dosing Wt:75 kg	Dis Iso	ease: lation:	Enc T Atten	ype:Inpatient ding:Plisvcc, Trevor, MD	2
Menu		< > 🝷 🏦 Orthopedic Tec	hnician Summary					🔲 Full screen 🛛 👼 Print 🔍	1 hours 55 minutes a
Orthopedic Technician Sur	nmary		-10.04						4
Orders 🚽		Waddlaw	M Clinical Staff Orders	P2 Damoaraphics	M Eubera Order	r 12 Cummar			D A
Single Patient Task List		WORSDW	23 Clinical Scall Orders	2.5 Demographics	23 Puture order	5 23 Sommar	1		· ·
		Reason for Visit	Densen for M-th						
		Home Medications (3)	Reason for VISIt					2860	100 Yon 10 = 1
		Clinical Notes (1)	No results found						1
Documentation		Vital Signs and Measurements							-
Medication Request		Labs	Home Medications	(2)				,	I Visits 🔊 🖃
		Medications	Tiome Predicadons	(5)					
Allergies 🚽		Intake and Output	Medication	*		Responsible Provider	Compliance	Estimated Supply Remaining	
Diagnoses and Problems		S New Order Entry	glyBURIDE 10 mg,	PO, BID with meals, for 30 day, 60 tab	, 0 Refill(s)	-		0 days remaining	
		Outstanding Orders (22)	metFORMIN 500 m	g, PO, BID with meals, for 30 day, 60 t	tab, 0 Refill(s)	🥯		0 days remaining	
		Orders (20)	a non-formulary medi	ication (Ginseng) 1 tab, PO, 0 Refill(s)		-	-	-	
		Allergies (4)					Docum	ant History Toromolata	alata History
		3 Pathology					Docum	complete Comp	piece matory
		Imaging							
		Visits	Clinical Notes (1)				Selected visit-	50 Notes Selected visit Last 12	hours 2 =-
Lines/Tubes/Drains Summar		Histories	Chilled Hotes (1)						
		Active Issues					My notes only Grou	up by encounter Display: Facility	r defined view *
Medication List 🔹		Lines/Tubes/Drains	Time of Service	Subject	Note Type	Author	Last Updated	Last Updated By	
Patient Information		Microbiology	29/11/17 10:40	nurse note	Nursing Shift Summary	TestORD, Nurse	29/11/17 10:41	TestORD, Nurse	
Recurring Injections Flowshe			* Displaying up to the last	t 50 recent notes for the selected visit					
Reference									
Visit Summary			Vital Signs and Me	asurements 🕂 🚽			Selected visit: Latest*	Selected visit Last 12 hours	e =-
	3			NOV 29, 2017	40.40	40.40	NOV 27, 2017	43.30	

Note: The chart does not automatically refresh! When in doubt, click Refresh 20 minutes ago

The Orthopedic Technician Summary will provide views of key clinical patient information.

- There are different tabs including Workflow, Clinical Staff Orders, Demographics, Future Orders, and Summary 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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Alloma Merrana Centre	Patient List 53 Multi-	Datient Tark List Perionerative Tracking	IE Dunamic Worklist	ing INE	SA DACS 🔗 VCH and DHC DACS 🔗 MIKE	Remeat WEI	amin: 0 Savad : 0		
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			Enc:700000013069					nc Type:Inpatient	
Allergies: Nuts, Peanuts, penic	illins, Tape	Gender:Female	PHN:9876824737	Dosing Wt:75 kg	Isolatio		A1	ttending:Plisvcc, Trevor, MD	
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Diagnoses and Problems		Maw Order Entry	alvBURIDE 10 mg.	PO. BID with meaks for 30 day. 60 ta	1. () Refill(s)			0 days remaining	_
		Outstanding Orders (22)	metFORMIN 500 me	a. PO. BID with meals, for 30 day, 60	tab. 0 Refill(s)			0 days remaining	
CareConnect		Orders (20)	non-formulary media	cation (Ginseng) 1 tab, PO, 0 Refill(s)	and a constant	-	-		
Clinical Research		Allernies (4)							_
		Pathology					Do	cument History: Incomplete Complete Histor	ry
Growth Chart		Imaging							
		Visits							1-
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		Active Issues				[My notes only	Group by encounter Display: Facility defined vie	
Medication List 🛛 🕂 Add		Lines/Tubes/Drains	Time of Service	Subject	Note Type	Author	Last Updated	Last Updated By	
		Microbiology	29/11/17 10:40	nurse note	Nursing Shift Summary	TestORD, Nurse	29/11/17 10:41	TestORD, Nurse	
			* Displaying up to the last	50 recent notes for the selected visit					
		2							
		Z	Vital Signs and Mea	asurements 🕂 🗕			Selected visit: Lates	t* Selected visit Last 12 hours 🏢 💷 🏖	<u> </u> =-
				NOV 29 2017			NOV 27, 2017		<u> </u>
				** ##	** **	** **		4 % MA	-
							PROD	DBC TEST.AMBORTHTECH Friday, 01-December-203	17 11:05 PST

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 Orthopedic Technician Summary provides access to key information about the patient

Click the Refresh icon to get the most updated information on the patient



Activity 2.2 – Single Patient Task List (SPTL)

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

The tools and functionalities of the **SPTL** are similar to the **Multi-Patient Task List (MPTL)**. For more information on MPTL refer to the e-learning module for MPTL.

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

- 1. Task List toolbar
- 2. Time Frame for the tasks to be displayed
- 3. List of Tasks

CSTSCHTEST, CHARLIE - 700008678 Opened by TestUse	er, OrthopedicTechnician-Ambulatory					
Task Edit View Patient Chart Links Notificat	ions Task List Options Help					
🗄 🚰 Home 🖃 Message Centre 🛔 Patient List 🔐 Multi-I	Patient Task List Perioperative Tracking	🎬 Dynamic Worklist 📲 Learning	LIVE 📮 🗄 😋 CareConnect	t 🔃 PHSA PAC	'S 🔇 VCH and PHC PACS 🔇 MUSE 🔇 FormFast WFI 📮 🗄 🍫 R	emin;: 0 Saved.: 0
🗄 🔀 Tear Off 📲 Exit Milli AdHoc 💵 Medication Administ	ration 🔒 PM Conversation 👻 🕌 Comm	nunicate 👻 🛅 Medical Record Rec	juest 🕂 Add 🗸 📻 Docun	ments 🛗 Schee	duling Appointment Book 🗃 Discern Reporting Portal 🖕	
🗄 😋 Patient Health Education Materials 🔇 Policies and Gu	idelines 🔇 UpToDate 🖕					
CSTSCHTEST, CHARLIE						
CSTSCHTEST, CHARLIE	DOB:06-Dec-1990	MRN:700008678	Code Status:		Process:	
Allernies: Allernies Net Reserved	Age:27 years	Enc:7000000016181	Docing Mit		Disease:	
Allergies. Allergies Not Recorded	Gender.Male	PHN/9870415592	Dosing wit.		Isolation.	
Menu 4	Single Patient T	ask List				
Orthopedic Technician Summary						
Orders 🕂 Add						
Single Patient Task List			06-De	cember-2017	06:30 Wednesday PST - 06-December-2017 19:45 Wednesday I	^{PST} 2
MAR	Office/Clinic Task					
Interactive View and I&O	Task retrieval completed					
Results Review	Provider Name	Task Description	Mnemonic	Task Status	Order Details	Order Status
Documentation	60 TestUser, Orthopedics-Physi	cian, MD Orthopedic Device Care	Apply Adult Cast Long Leg	g Pending	06-Dec-2017 14:58 PST, Bilateral, once, Stop: 06-Dec-2017 14:58 PST	Ordered
Medication Request	ord TestUser, Orthopedics-Physi	cian, MD Orthopedic Device Care	Apply Adult Cast Short Arr	m Pending	06-Dec-2017 14:59 PS1, Bilateral, once, Stop: 06-Dec-2017 14:59 PS1	Ordered
Histories						3
Allergies 🕂 Add						
Diagnoses and Problems						

- 2 The **Time Frame** can be changed to the appropriate date.
 - 1. On the grey information bar, right click then select Change Time Frame Criteria.

P CSTSCHTEST, CHARLIE - 700008078 Opened by T	estuser, Urthopedic Lechnician-Ambulatory						
Task Edit View Patient Chart Links No	tifications Task List Options Help						
🗄 🚰 Home 🖃 Message Centre 🛔 Patient List 🚨 M	Multi-Patient Task List Perioperative Tracking	🎬 Dynamic Worklist 📲 Learni	ngLIVE 🝦 🗄 😋 CareO	onnect 戟 PHSA PAC	'S 🔞 VCH and PHC PACS 🕲 MUSE 🐧 FormFast WFI 🖕 🗄 🍫	Remin;: 0 Saved.: 0	Msg:: 0 🖕
🗄 🎛 Tear Off 📲 Exit Mathead Mathead Contraction Adr	ministration 🏯 PM Conversation 👻 🕞 Com	municate 👻 🛅 Medical Record R	equest 🕂 Add 🕶 🖲	Documents 🛗 Scher	duling Appointment Book 📾 Discern Reporting Portal 🝦		
👯 🕄 Patient Health Education Materials 🔇 Policies a	ind Guidelines 🔇 UpToDate 🝦						
CSTSCHTEST, CHARLIE							🗲 List
CSTSCHTEST, CHARLIE	DOB:06-Dec-1990 Age:27 years	MRN:700008678 Enc:7000000016181	Code Status:		Process: Disease:		Location:LGH Cast Enc Type:Outpatien
Allergies: Allergies Not Recorded	Gender:Male	PHN:9876415592	Dosing Wt:		Isolation:		Attending:
Menu	👎 < 👻 🛉 者 Single Patient 1	ask List					j;
Orthopedic Technician Summary			_				
Orders 🕂 Add							
Single Patient Task List				06-December-2017	06:30 Wednesday PST - 06-December-2017 19:45 Wednesda	Change Ti	me Frame Criteria
MAR	Office/Clinic Task		L				
Interactive View and I&O	Task retrieval completed						
Results Review	Provider Name	Task Description	Mnemonic	Task Status	Order Details	Order Status	
Documentation	60' TestUser, Orthopedics-Phys	ician, MD Orthopedic Device Car	e Apply Adult Cast L	ong Leg Pending	06-Dec-2017 14:58 PST, Bilateral, once, Stop: 06-Dec-2017 14:58 P	ST Ordered	
Medication Request	or Testuser, Orthopedics-Phys	ician, MD Orthopedic Device Car	e Apply Adult Cast S	nort Arm Pending	06-Dec-2017 14:59 PS1, bilateral, once, stop: 06-Dec-2017 14:59 P.	Ordered	
Histories							

2. The Task List Properties window will open. Under the Time Frames tab, select



Defined Time Frame for your shift.

- 3. Under Range, ensure Current is selected. Click 12 Hour Day Shift.
- 4. Click the **OK** button. The Task Categories (Tabs) within the SPTL are now correctly set for your day shift.

Task List Properties	3
Time Frames Patient List	
Choose one of the following: O Defined Time Frame O Hour Interval O Generic Time Frame	
Range 12 Hour Day Shift Previous 12 Hour Night Shift © Current 8 Hour Day Shift	
Next 8 Hour Night Shift	
Show me my: 08:00 - PST	
From: 12/07/2017 💌 0807 🔺 PST	
To: 12/07/2017 N V 0808 A PST	
OK Cancel	

- Key Learning Points
- The SPTL displays all tasks available for the specific patient whose chart you are viewing
- If tasks are not displayed check that the time frame is correct

1



Activity 2.3 –Completing Tasks in SPTL and Documenting in an Electronic Form (PowerForm)

After assessing your patient and completing the order, you want to complete the task in the SPTL.

1. Double click on the task Remove Cast (left ankle)

1	Office/Clinic Task							
	Task retrieval comp	leted						_
	Provider N	lame	Task Description	Mnemonic	Task Status	Order Details	Order Status	
	oo TestAMB,	Surgeon-Physician, MD	Orthopedic Device Care	Remove Cast	Pending	06-Dec-2017 07:29 PST	Ordered	

An electronic form (PowerForm) will open for **Orthopedic Device Care**. As you can see, the form is made up of a number of elements. Let's explore.



- 1. In the information bar you can see title of the form and patient's name
- 2. The toolbar contains the following icons:

Ambulatory: Orthopedic Technician

Icon	Action
∢	Sign Form . Charting entries are recorded and are displayed on the patient's chart. Results are accessible immediately to others.
H	Save Form . This button saves your entries and returns you to the previous window. When you save a form, an In Progress status is displayed in the status bar at the bottom right of the form. Documentation up to this point is not displayed until the form is signed.
0	Cancel. This button cancels your entries and returns you to the previous window.
an a	Clear . This button clears your entries and allows you to begin again.
7	Result Info . This button allows you to enter the name of the person for whom you are entering ad hoc charting. The system records the charting in the name of that person but tracks that you were the individual who actually entered the results into the system. The person's name you selected, along with the date and time, are shown on the coloured banner near the top of the window.
÷	Previous. This button opens the previous section.
٠	Next. This button opens the next section.
	Clinical Calculator . This button opens the Online Clinical Calculator window that allows you to calculate the answer to the selected formula.
	Charge Details . This button opens the Charge Details dialog box where you can attach diagnosis codes and other related details to any charges generated as a result of documenting the form.

- 3. The **performed on** section allows you to change the date and time that the form was completed
- 4. The form has multiple sections you can see the section titles here.
- 5. Square buttons allow you to select multiple answers
- 6. Radio (round) buttons allow you to select only 1 answer
- 7. Blank boxes allow you to type freetext

2 Now let's practice filling out the form. Complete the **Orthopedic Device Care Form** based on

Your Patient's history and using assessment data that you would normally expect for a patient with a fractured talus.

- 1. When you have finished filling out the form complete and sign the form by clicking the green checkmark \checkmark .
- 2. Once you have signed the PowerForm, the **Chart Done** icon will appear next to the task in the SPTL
- 3. Click the Refresh button and the task will fall off the SPTL

Note: if you save \blacksquare a form without signing it, only you can view the form through the Form Browser in the Menu of the patient's chart. The form will only be viewable by others when it is signed \checkmark .

Key Learning Points

- PowerForms are electronic forms used to chart patient information.
- PowerForms may be broken up into several sections. Section headings are displayed to the left side of the PowerForm
- If you save a document without signing it, only you can view the document (you can access the document through **Form Browser** to complete it)

Activity 2.4 – Modifying Existing PowerForms

1 It may be necessary to modify an existing PowerForm if information was entered incorrectly. Note: If new or updated information needs to be documented, it is recommended to start a new PowerForm and not to modify an already existing PowerForm.

To modify an existing PowerForm:

- 1. Select Form Browser in the Menu
- 2. Right click on the PowerForm you just signed and select modify

- 3. Modify any section of the PowerForm
- 4. Click green checkmark ✓ to sign the documentation.
- 5. When you return to this document in the form browser, it will show the document has been modified.

Key Learning Points

- A document can be modified if needed
- A modified document will show up as (Modified) in the Form Browser

Activity 2.5 – Uncharting Existing PowerForms

1 It may be necessary to unchart an existing PowerForm if, for example, the PowerForm was completed on the wrong patient or it was the wrong PowerForm.

To unchart an existing PowerForm:

- 1. Select Form Browser in the Menu
- 2. Right click on the PowerForm you just signed and select unchart

- 3. Enter a reason for uncharting in the comment box of the new window = Wrong Patient
- 4. Click green checkmark ✓ to sign the documentation.

P Orthopedic Device Care (Unchart) - CSTSCHTEST, CHARLIE
✓ ○ ※ 👩
*Performed on: 12/07/2017 🛓 v 1512 🖕 PST By: TestUser, OrthopedicTechnician-Ambulatory
Uncharting this form will change the status of all the results associated with this form to 'In Error'
Comment: Wrong patient

5. Uncharting the form will change the status of all the results associated with the form to **In Error**. A **red-strike** through will also show up across the title of the **PowerForm**.

Key Learning Points

A document can be uncharted if needed

An uncharted document will show up as (In Error) in the Form Browser

PATIENT SCENARIO 3 – 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 Orthopedic 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 3.1 – Message Centre Overview

As mentioned before when you log in as an Orthopedic Technician you will see your **Message Centre** inbox (to the left of the screen) and the **Ambulatory Organizer** (to the right of the screen).

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**.

The screenshot below shows the basic layout of your own Inbox

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.

Message Centre				М.						
1 ox Summary 📮	Messages ×	5								
Inbox Proxies Pools	Communicate	🔁 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
 Inbox Items (1) 		General-Allied	TestUser, Occ	FW: General M		2018-Jan-30 0	TestUser, Orth	Pending		2018-Jan-30 0
Results										
Documents Messages (1/1) Work Items (0) Sund Documents										
Reminders Deficient Documents										
Notifications										
Sent Items Trash Notify Receipts										

1

Activity 3.2 – 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 🛛 🕈	Abnormal X	
Inbox Proxies Pools	🕒 Communicate 🗸 💕 Dpen 💥 Mess	age Journal 🔀 Forwa
	💿 Message	Abnormal
Display: Last 60 Days -	💿 Reminder 🔤 INCER	Critical: 0 H
 Inbox Items (2) 	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:	m

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

C PHN:	VIP	Deceased	Alerts BC P	N MRN	Name	DOB AG	ye Gier	der Ar	ddress	-	Address (2) C	aty P	ostal/Zip Code	Home Ph	ione Histo	rical MRN
RN:			30/0	03030 700004376	SCUTTICEARN,	19481 1340/Mario/ 72	Teas Per	-345 1.4	098 1109	unen.	51. 8	ANCOVIEN	mana	[604]000	1100	
st Name:																
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st Name:																
08:																
ayaaya 🚊 🖷																
ender:																
estal/Zip Code:																
ny Phone Number:	L															
	Fac	iky	Encounter	Visit #	Enc Type	Med Service	Unit/Clin	ic	Room	Bed	Est Arrival Date	Reg Date	Disch Dab	. /	Attending Pro	vider
ncounter #:	3	LGH OCC MD	70000000	176 7000000082	12 Pre-Outpatient	Infectious Diseases	LGH OC	CMDC			2017-Jul-31 8:00 2017-but-02 9:20					
er H	- S	LGH OCC MD	70000000	175 7000000082	11 Pre-Outpatient	Infectious Diseases	LGH OC	C MDC			2017-Jul-28 10:00					
	- -	LGH OCC MD	70000000	179 7000000082	15 Pre-Outpatient	Infectious Diseases	LGH OC	CMDC			2017-Aug-03 11:30					
storical MRN:	- - 3 1	LGH OCC MD	20000000	177 7000000082	13 Pre-Outpatient	Infectious Diseases	LGH OC	CMDC			2017-Aug-01 9:00					
	3	LGH UCC MDI LGH Lions Gai	e 700000000	379 70000000074	13 Inpatient	General Internal Medicir	e LGH 3w	LMDC	321	01B	2017/30/27 8:00	2017-Jul-10 15	39 2017-Jul-2	414:08 (Core Provider	Admit Internal Test, N
Search Reset	1															

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

💿 New M	essage					
Task E	dit					
📍 High	🕻 Notify 📓 Message Journal 🍒 Portal Options					aunch Or
Patient:	[]@	Caller:	(Caller #:		
To:						📩 💏 🔲 Include m
CC:		Provider:		M	To consumer	Disable further replies
Subject:	General Message		Save to Ch	art As: Phone Me	ssage/Call	

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 you class instructor who to send the message to.

Task E	Edit			
📍 High	🕻 Notify 🔚 Message Journal 🧏 Portal Option	15		Laur
Patient:		Caller:	Caller #:	
To: CC:	test TestAMB, ClerkAdvanced-Scheduling2 TestAMB, ClerkAdvanced-Scheduling3](å	ゆ Provider:	lnc Inc
Subject Attac	I I ESTAMB, Nurse-Ambulatorys		Save to Chart As: Phone Message/Call	
	ouse bocuments Other Attachments			

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

Provider:] 🕅
•	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.

wessage												
Arial 👻	10	•	🎨 🔍	्ष	3 🖻 🛍 🕷	B ⊻.	7 5	E = 3 4	⊾ ® [🕸			
General Message:												*
												ш
Actions												
Patient Needs Appointment								Remind or	n:		-	*
Needs Lab Before Refill												
Please Call Patient with Result	s							Due o	n:		T	
Message Left for Patient to Re	turn Cal											
See Note In Chart											Send	Cancel

9. Select any additional Actions (as appropriate)

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:	▼ **/**/**** ▲ ▼	*

11. Click Send to complete the message

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

🚨 Multi-Patient Task List 🖃 Message Centre 🎬 CareCompass 🎬	Clinical Leader Organizer	Ambulatory Organizer	🔆 Patient List 🛄 So
📲 Exit 🎬 AdHoc 💵 Medication Administration 🍰 PM Conversati	on 🕂 🔄 Communicate 🗸	🕂 🕂 Add 👻 🛗 Scheduling	Appointment Book

Activity 3.3 – Replying 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

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 3.5 – 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 煔

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

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 3.6 – 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 Inbox Summary Inbox Proxies Pools Proxy: Manag Display: .	click the Manage button	
2. When the window opens click the Add button		
3. Search for the user you want to assign as a proxy (ask your class instructor)		
 Select the items you want to grant proxy rights to view or select the Grant All ->> button 		
5. Select a begin date and end date		
6. Click Accept & Next		
New Given Proxy		
User	Available Items	Granted Items
Additional Users	- Messages - Consumer Messages	
	- General Messages - Secure Routing Errors - Secure Non-Matches	
	- Secure Messages - Documents	Grant All ->>
	- Forwarded Documents - Forwarded Documents to Review	E Grant ->
	- rowardea Documents to Sign - Review	<- Revoke
Begin Date	Results FVI	< Revoke All
29-Nov-2017 🔍 💌 0938	Work Items	

7. Click OK

🔶 💌 0938

nd Date 29-Dec-2017

Cance OK Cancel

Accept & Next

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 Remove
 - button,
- 3. Click OK

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

h End Book

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