SELF-GUIDED PRACTICE WORKBOOK [N24]
CST Transformational Learning

WORKBOOK TITLE:

Ambulatory: Orthopedic Technician

Last update: February 6, 2018 (V2)

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 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.

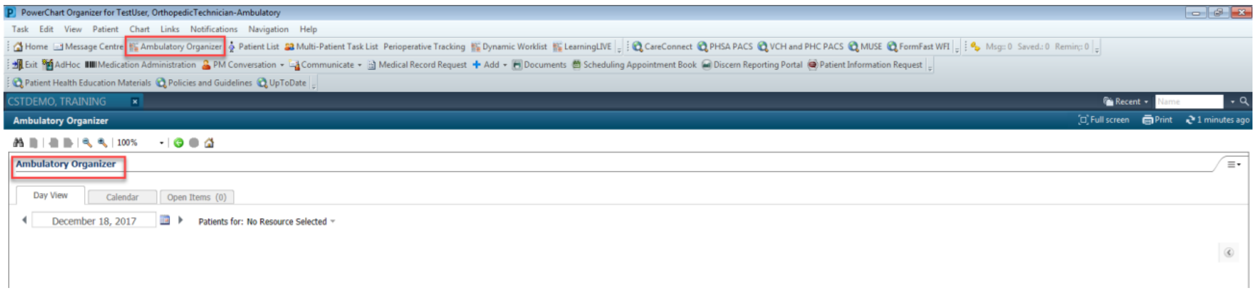
As an Orthopedic Technician you will complete the following activities:

- 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

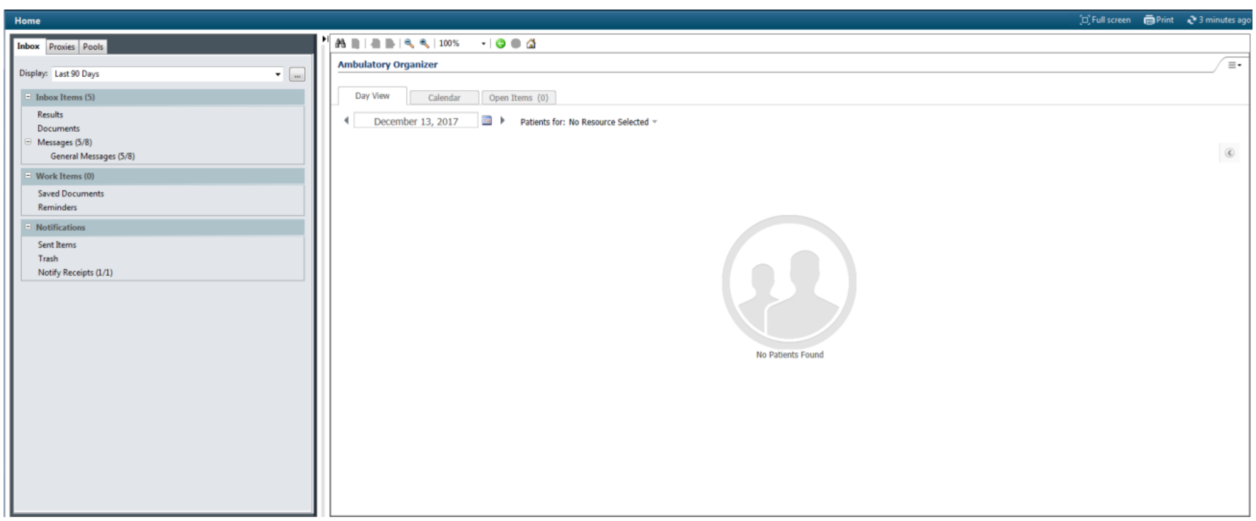
1 The Ambulatory Organizer is the landing page (split screen with Message Centre) for the Orthopedic Technician

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



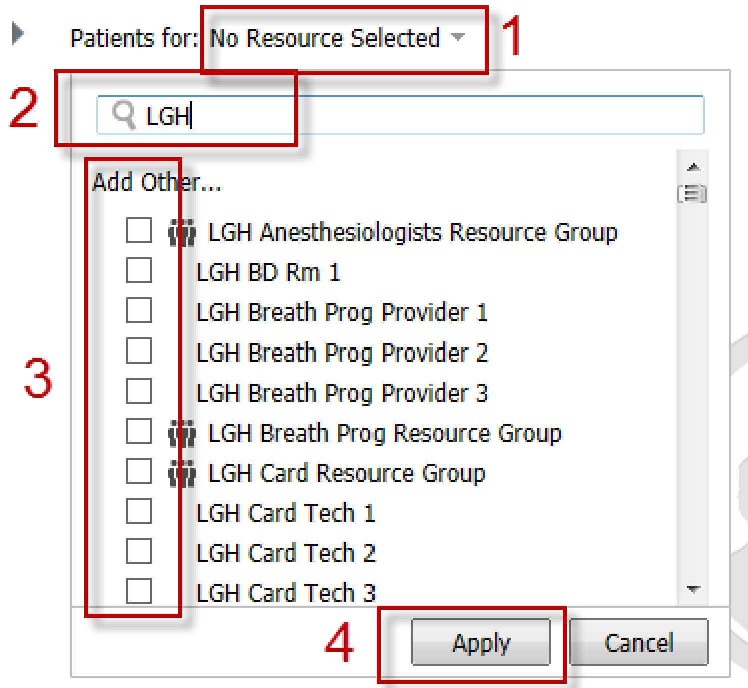
Activity 1.2 – Setting Resource Lists

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 Cast Tech 1**)
4. Select Apply to display the schedule.



Key Learning Points

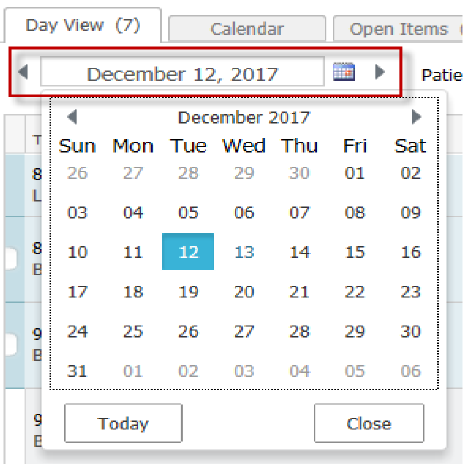
- When you first login you must set resources to be able to view the calendar

Activity 1.3 – Overview of Day View

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

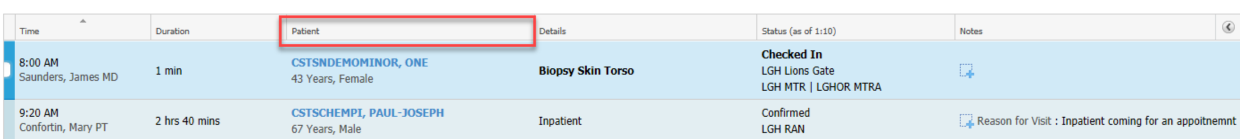
Note: The Day View is the default view if you have not previously logged into the Ambulatory Organizer. After that, whichever view you last select will display first when opening Ambulatory Organizer.

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



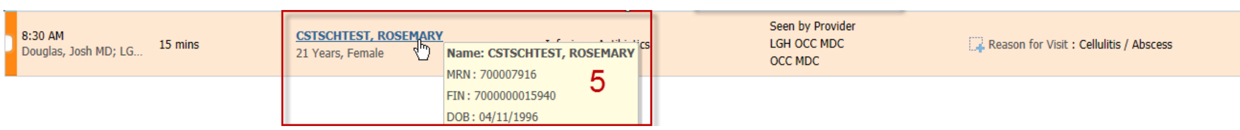
Appointments are colour coded based on the following (for the purpose of training all patients are colour coded the same):

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).

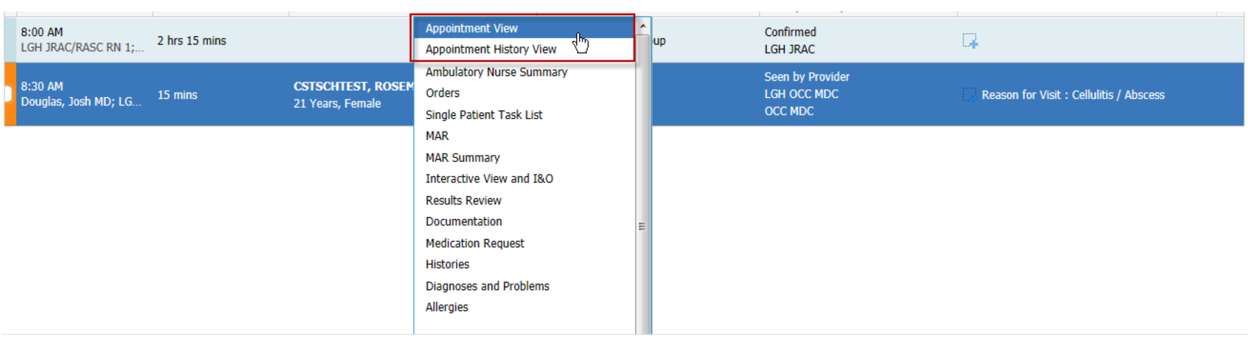
3 Go to the patient column:

1. Hover over the patient name to discover more information

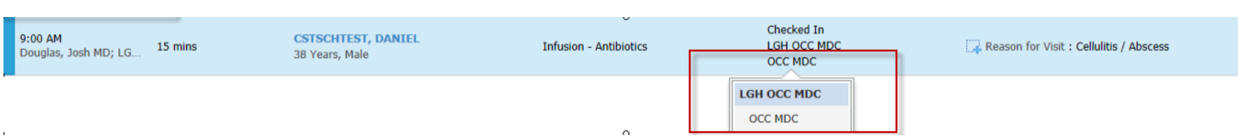


2. You can navigate directly to the patient chart by clicking on the patient’s name or right clicking the patient’s name and selecting the appropriate tab in the chart

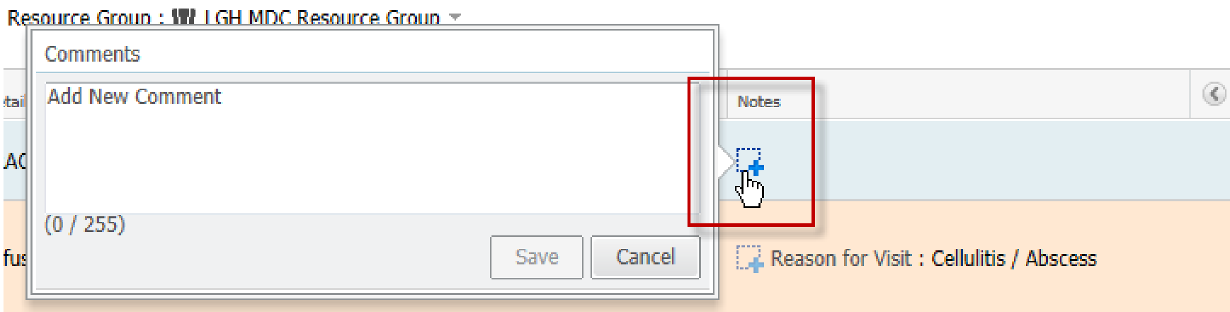
3. You can also view appointment history by right clicking on the patient’s name



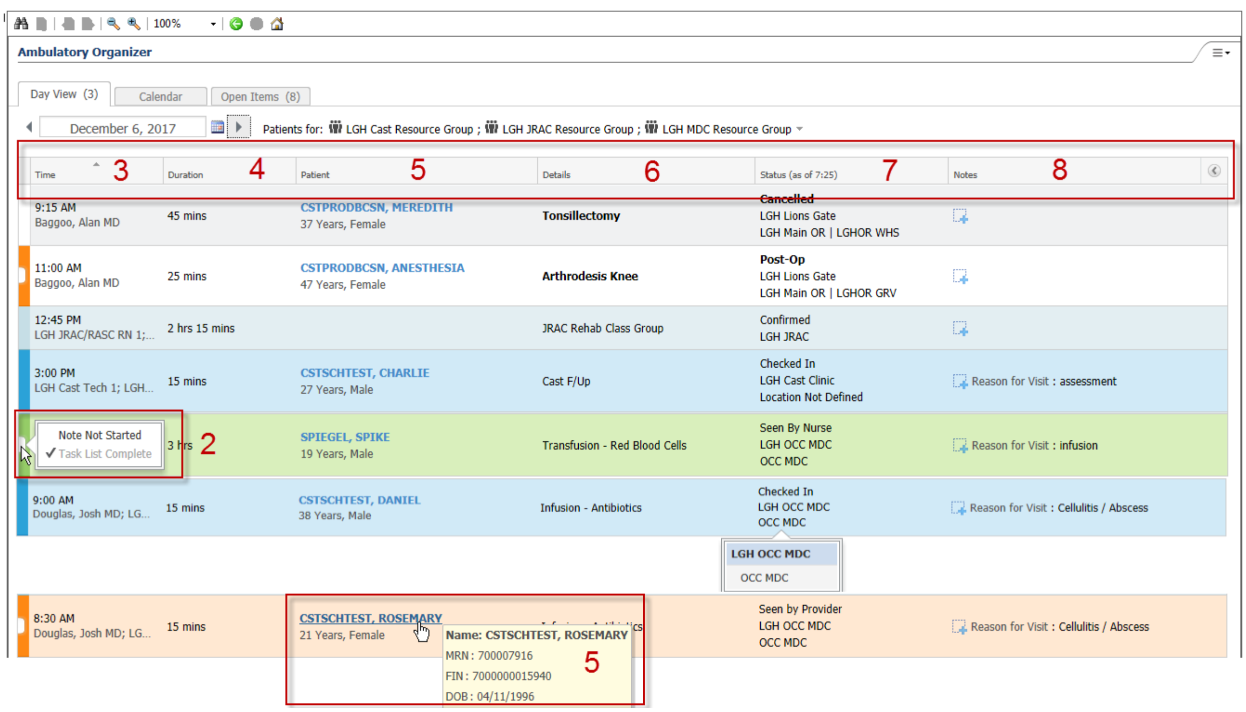
4 Once the patient has been checked in, exam room locations can be selected in the Status column.



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

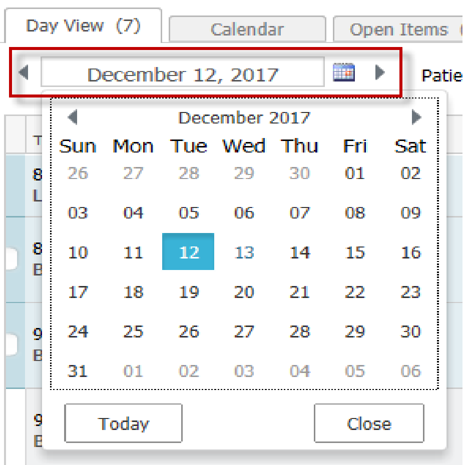
Activity 1.4 – Overview of Calendar View

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

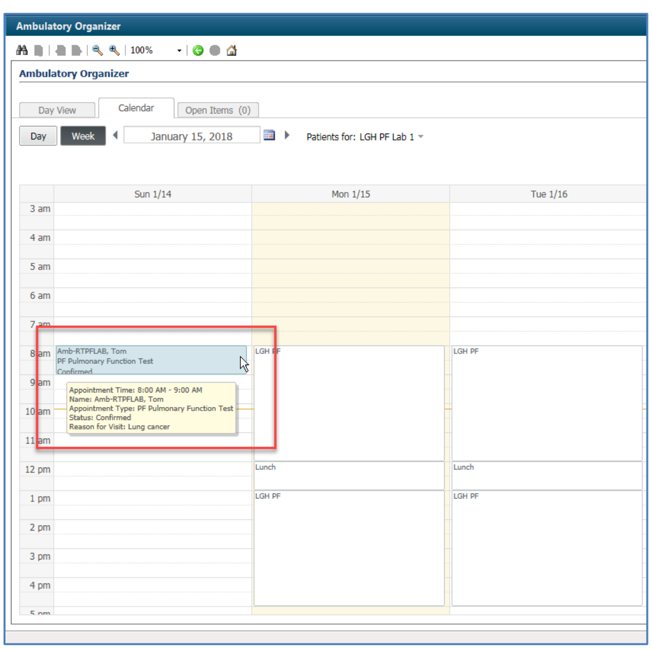
The date of the Calendar tab can be adjusted similar to the way the date on the Day View tab is adjusted.



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

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

You can 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 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 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 – 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

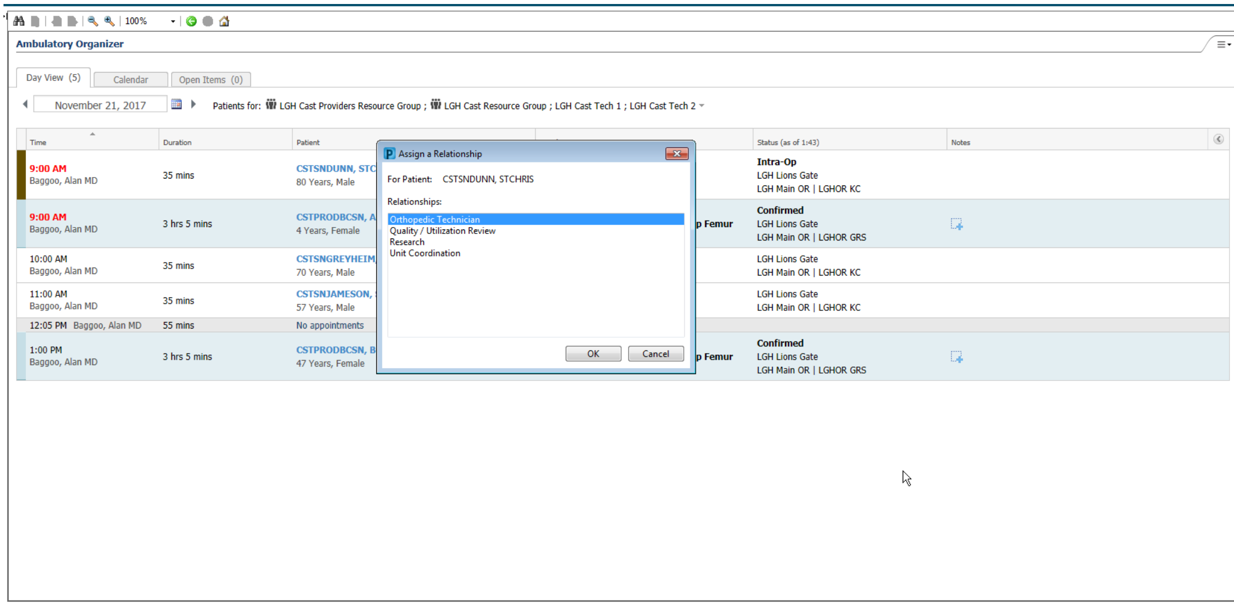
In this scenario, Your Patient is a 49 year old man who was on his way to the gym and missed the last step on a set of stairs. He fell and sustained a fractured left talus and a left Colles' fracture. Your Patient has been registered and checked in by the clerk and by clicking on the comments section 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

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 **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.

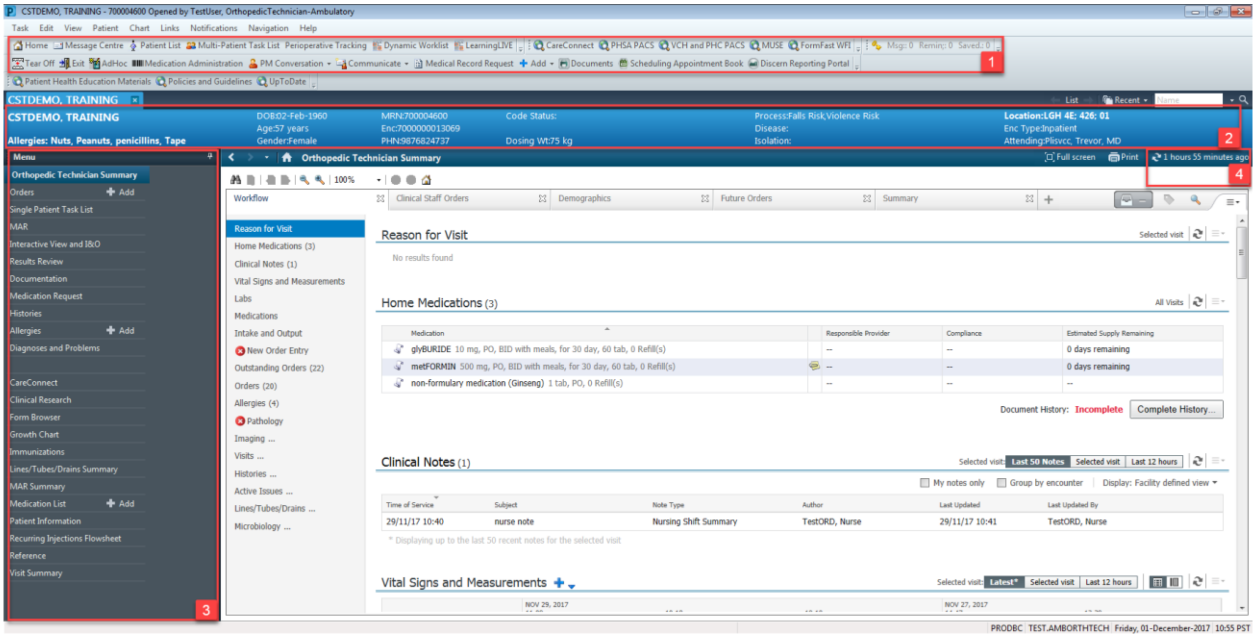
2. The **Banner Bar** displays patient demographics and important information that is visible to anyone accessing the patient's chart. Information displayed includes:
   - Name
   - Allergies
   - Age, date of birth, etc.
   - Encounter type and number
   - Code status
   - Weight
   - Process, disease 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 

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.

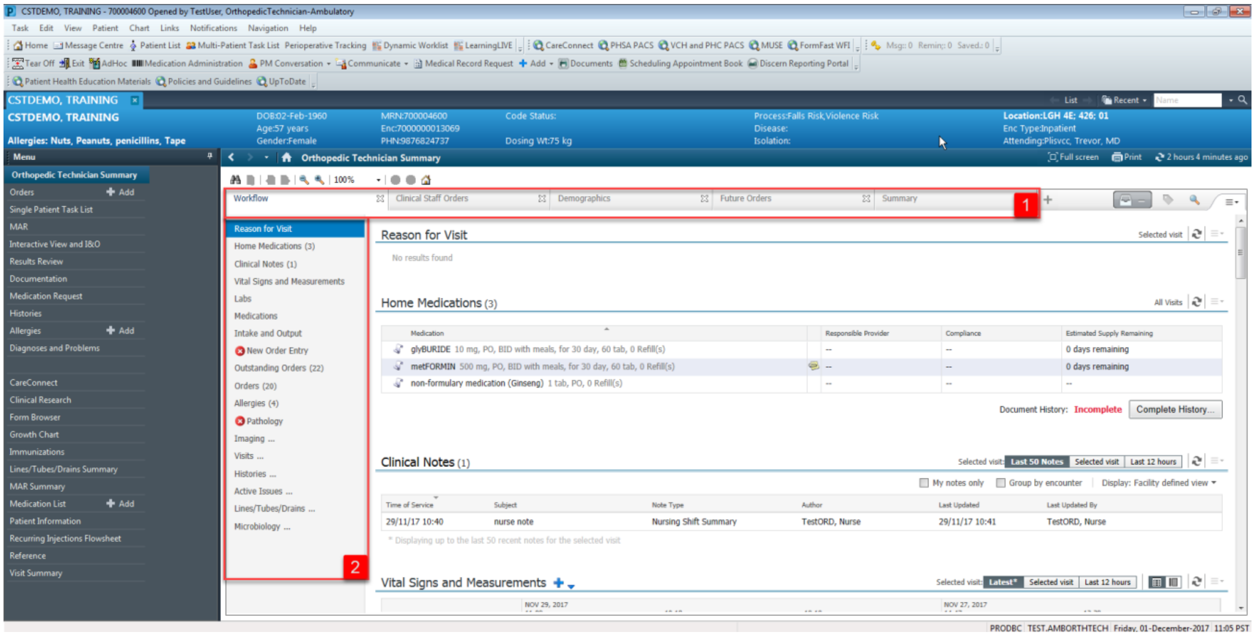


Note: The chart does not automatically refresh! When in doubt, click Refresh 

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

1. 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.



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

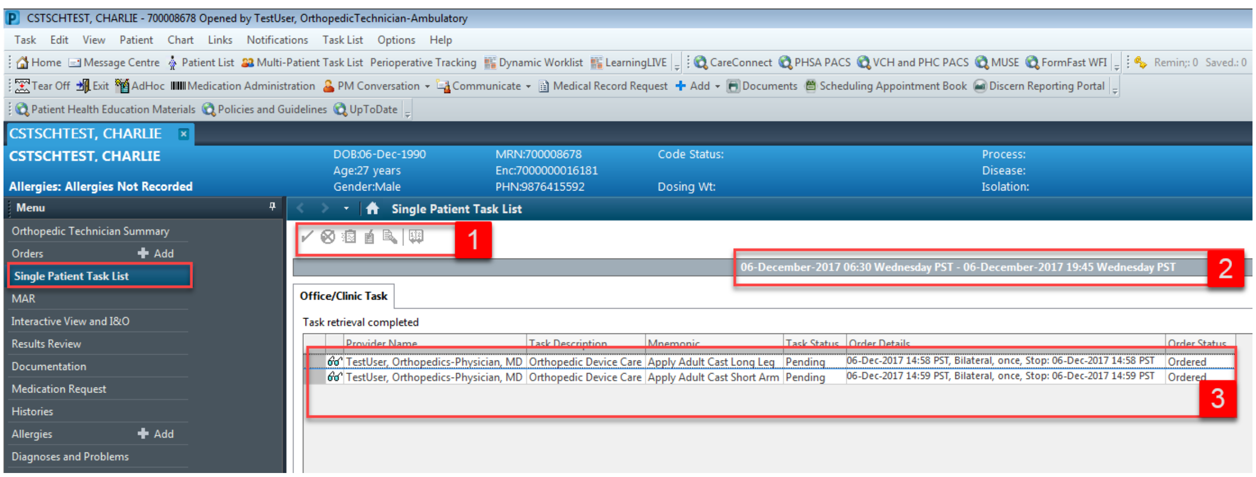
Activity 2.2 – Single Patient Task List (SPTL)

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.

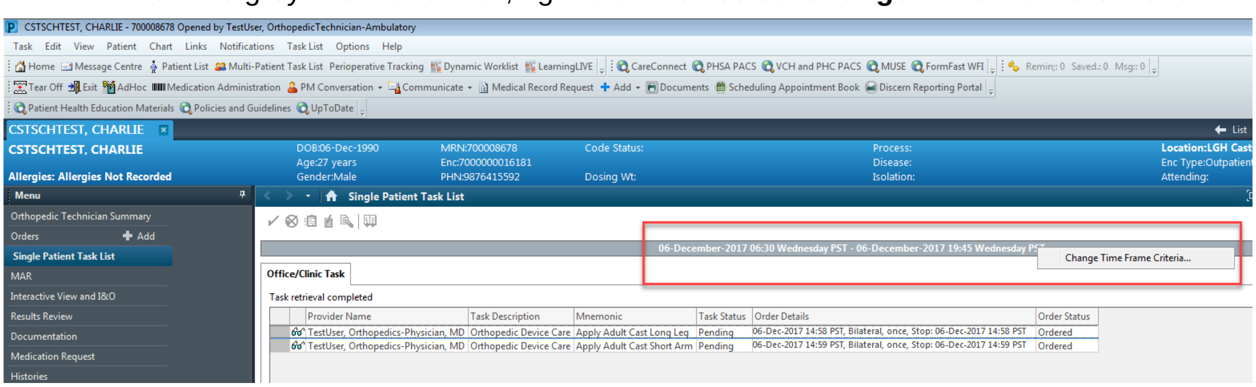
Click on the **Single Patient Task List** in the **Menu.** You will see:

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



2 The **Time Frame** can be changed to the appropriate date.

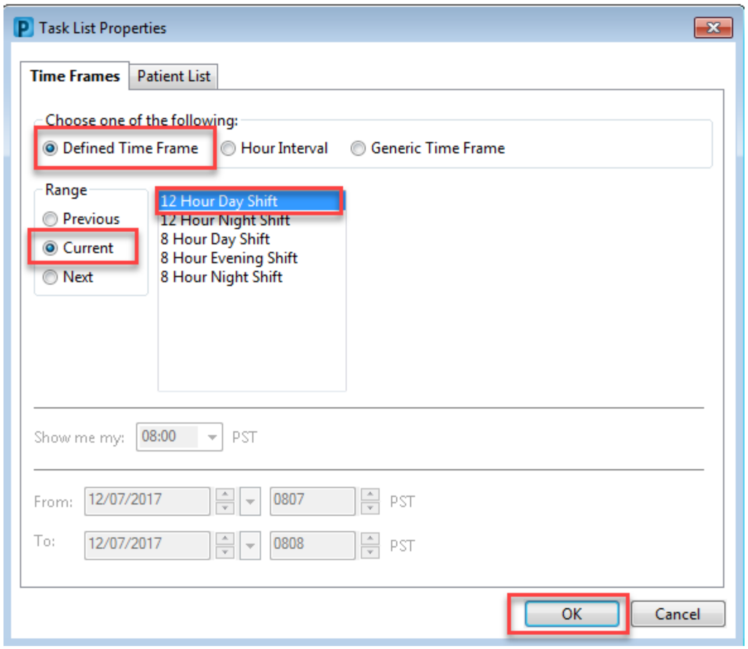
1. On the grey information bar, right click then select **Change Time Frame Criteria**.



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.



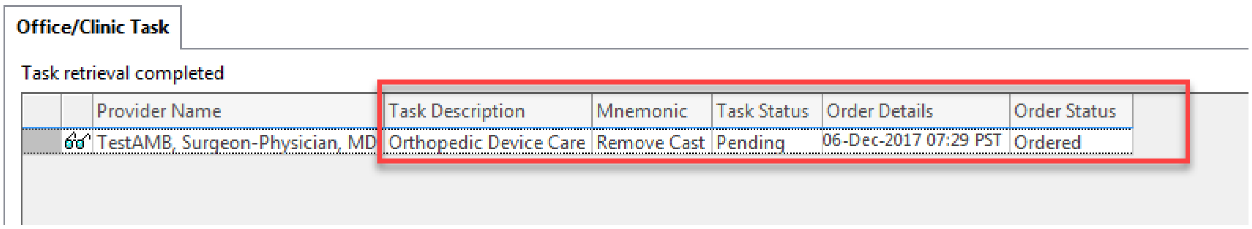
Key Learning Points

- 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

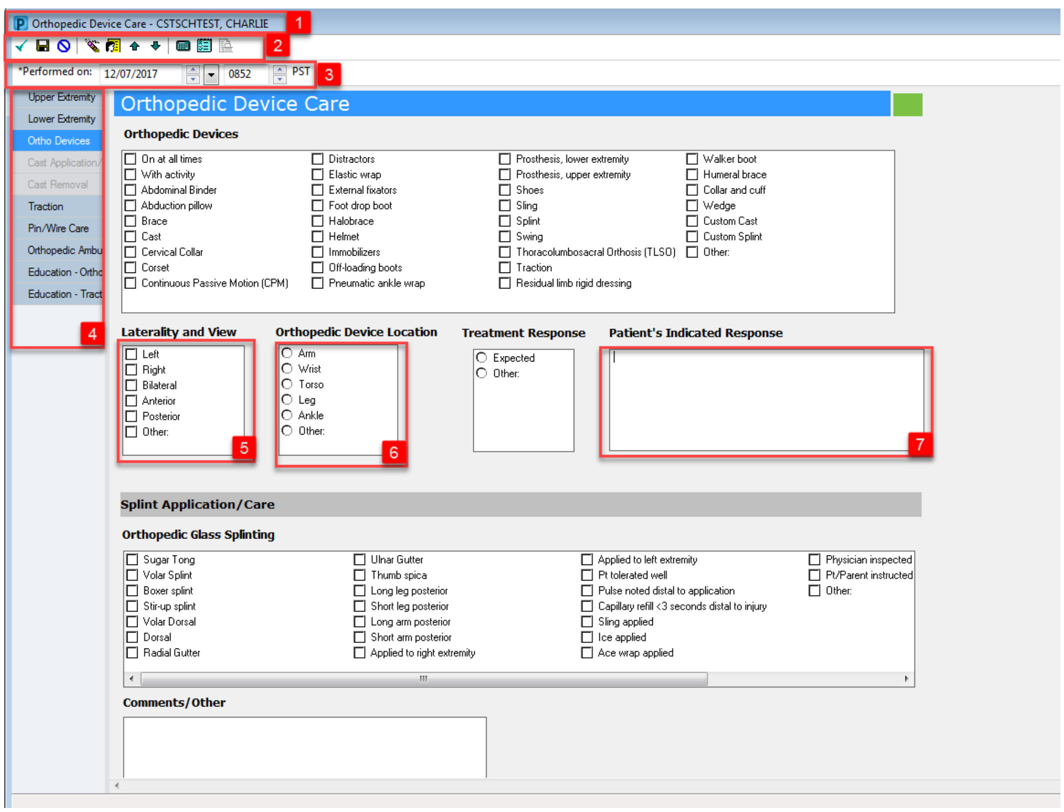
Activity 2.3 –Completing Tasks in SPTL and Documenting in an Electronic Form (PowerForm)

1 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)**



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:

Icon	Action
	Sign Form. Charting entries are recorded and are displayed on the patient's chart. Results are accessible immediately to others.
	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.
	Cancel. This button cancels your entries and returns you to the previous window.
	Clear. This button clears your entries and allows you to begin again.
	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.
	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** .
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 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 .

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)

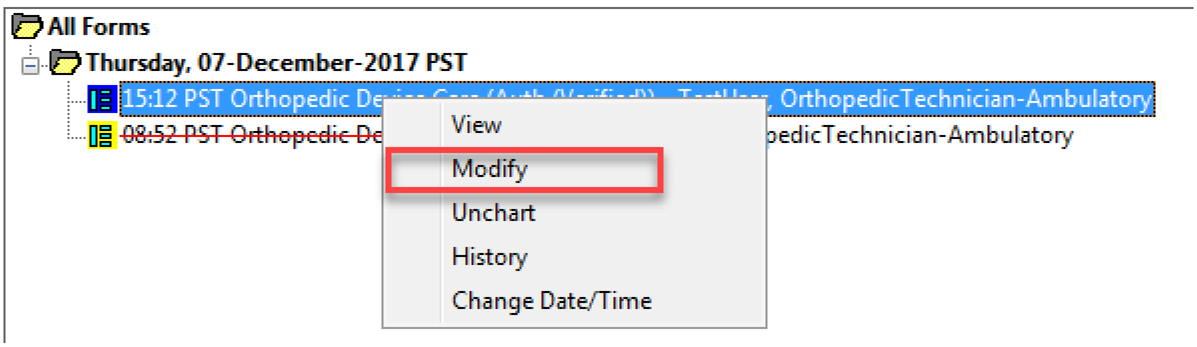
Activity 2.4 – Modifying Existing PowerForms

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.**

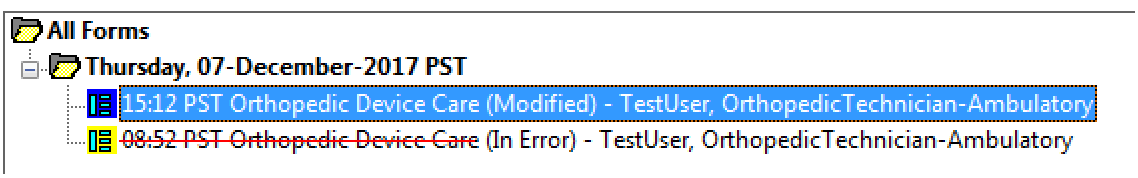
To modify an existing PowerForm:

1. Select 

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

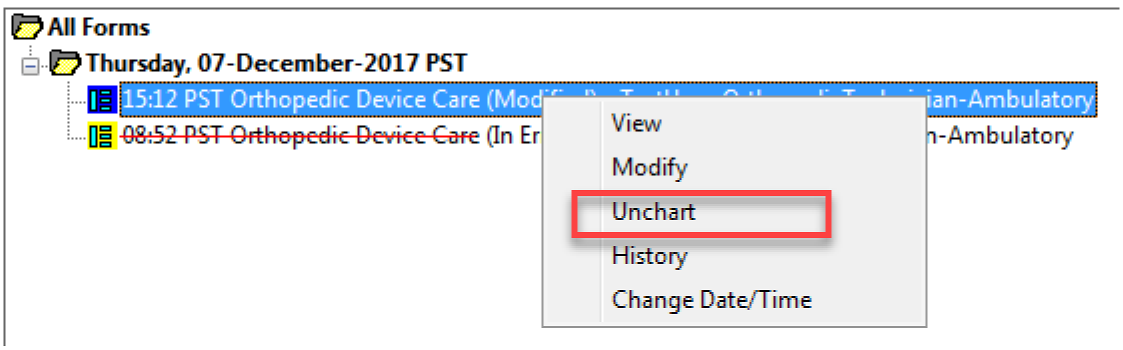
- A document can be modified if needed
- A modified document will show up as (Modified) in the Form Browser

Activity 2.5 – Uncharting Existing PowerForms

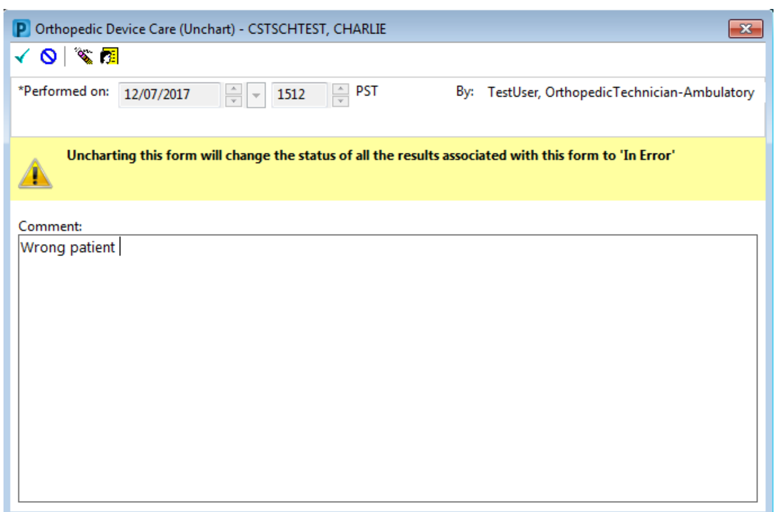
1 It may be necessary to unchart an existing PowerForm if, for example, the PowerForm was completed on the wrong patient or it was the wrong PowerForm.

To unchart an existing PowerForm:

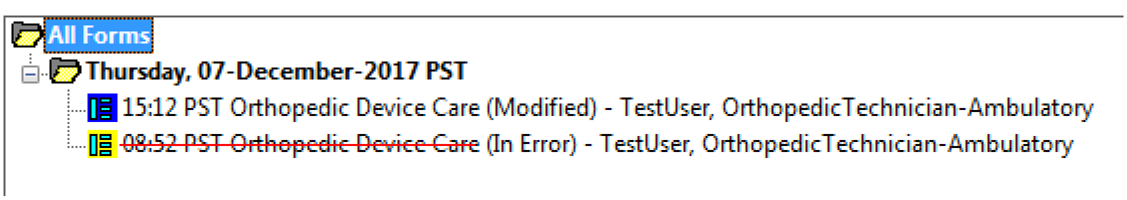
1. Select Form Browser in the **Menu**
2. Right click on the PowerForm you just signed and select **unchart**



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



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:

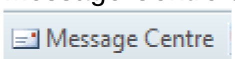
- Review the functions of Message Centre
- Send a message
- Reply to a message
- Forward a message
- Delete a message
- Set-up a proxy inbox

Activity 3.1 – Message Centre Overview

1 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).*

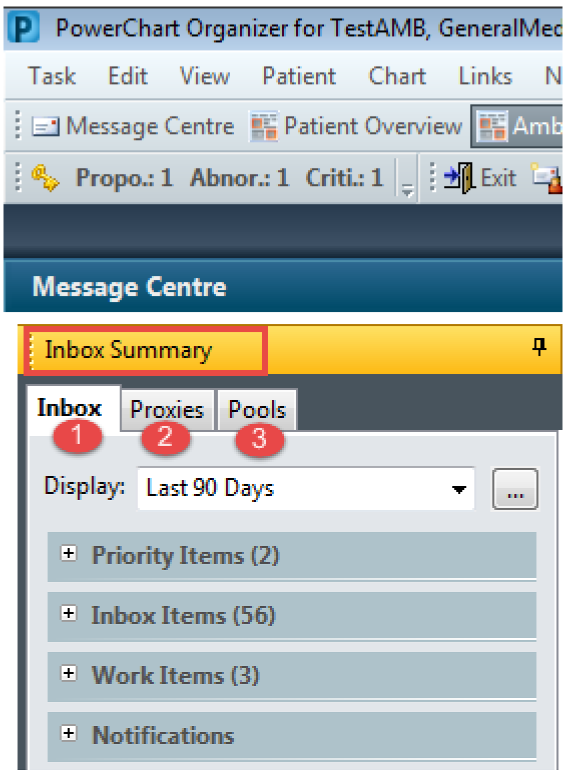
Message Centre allows you to communicate with other health care professionals, forward information and results and also allows you to receive colleague's messages when they are away via the **proxy** function.

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



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

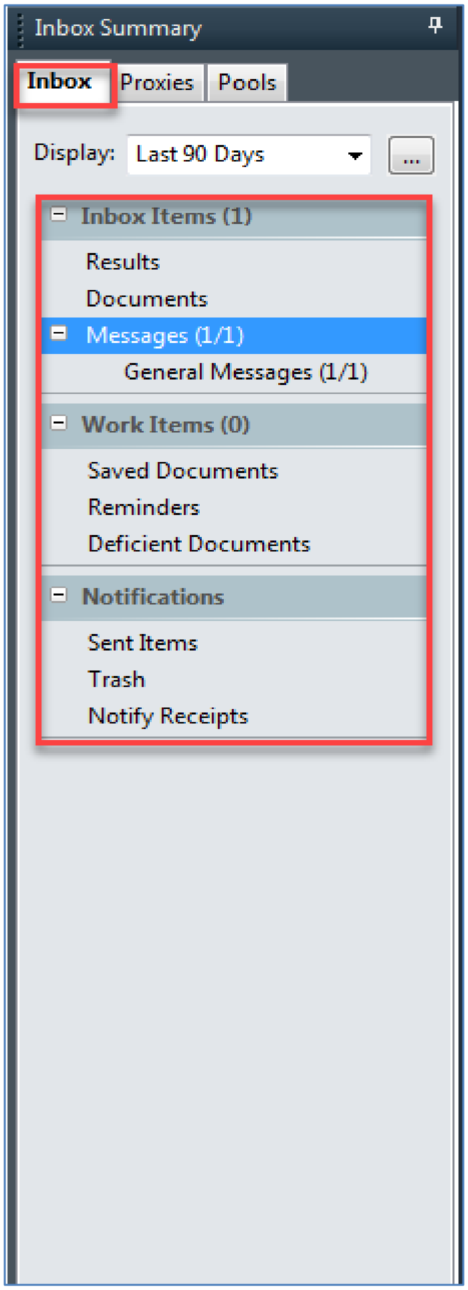
What do these tabs mean?

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

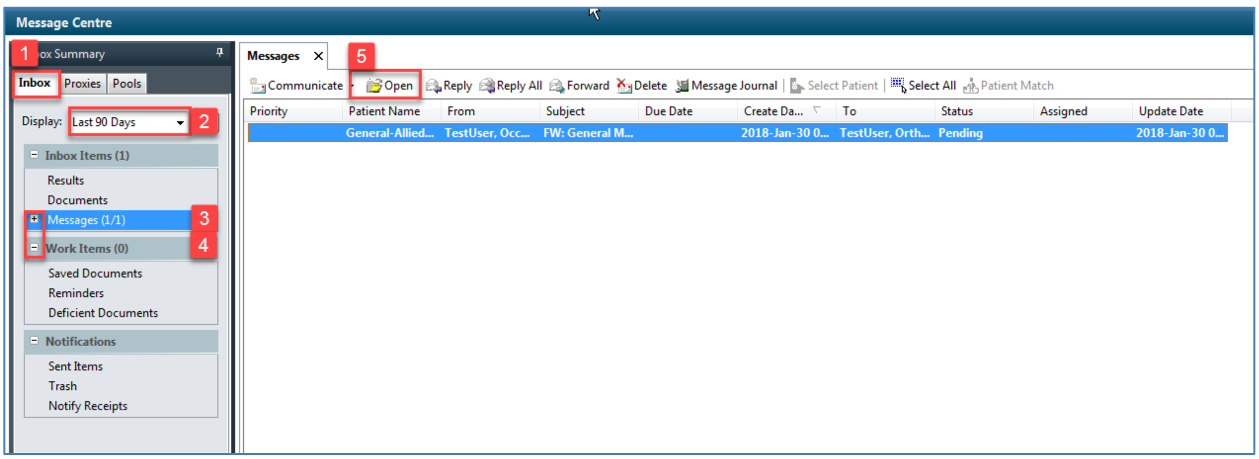
The Work Items section includes (**these vary based on profession**):

- 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:

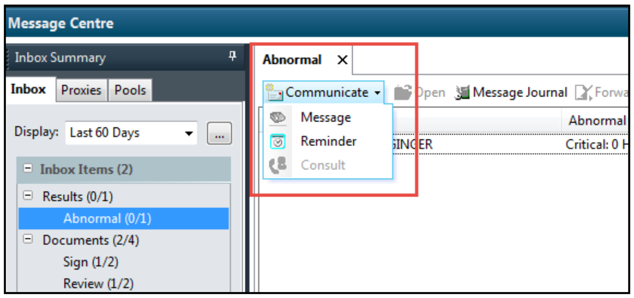
1. Click to select the corresponding tab you would like to work (i.e Inbox tab as shown below)
2. Click **display** drop down to change the date range
3. Click **plus sign** (**+**) next to the category to expand it
4. Click **minus sign** (**-**) next to the category to collapse it.
5. Double-click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



Activity 3.2 – Creating a Message

1 Complete the following steps to create a new message:

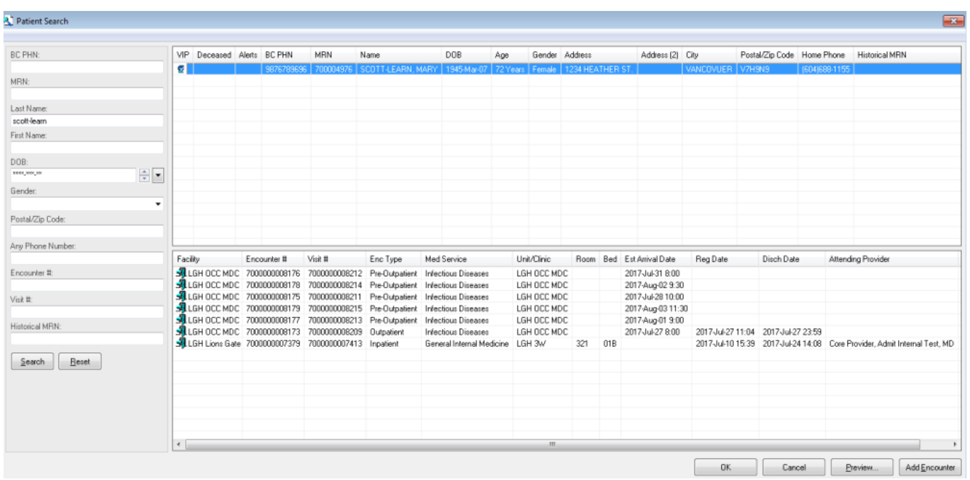
1. From the toolbar, click the **Communicate** drop down menu and select **Message**



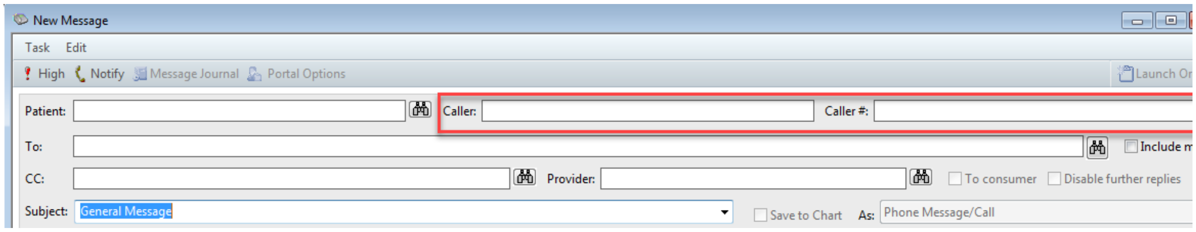
2. From the Patient box, enter the patient's name and click **search** . For this activity use Your Patient.

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

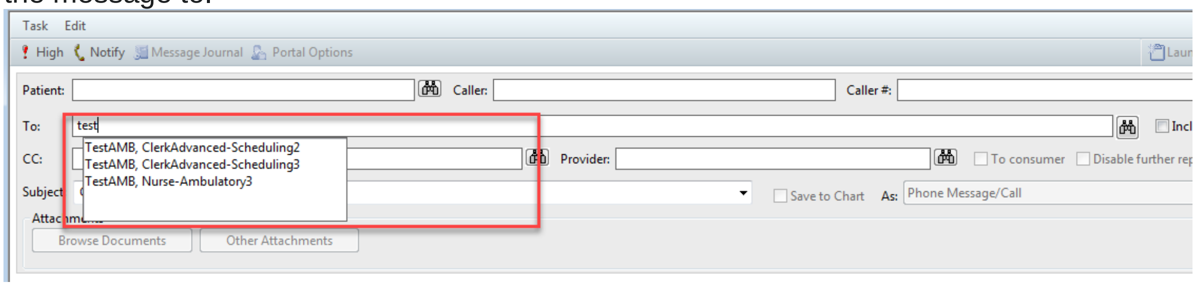
   Note: If the message is not related to an existing encounter, you will need to create a new phone message encounter. To create a new phone message encounter refer to the Quick Reference Guide: PM Conversation-Phone Message Encounter



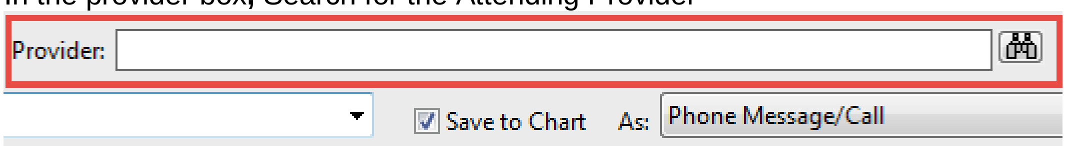
4. The patient's name is automatically entered in the Caller box.



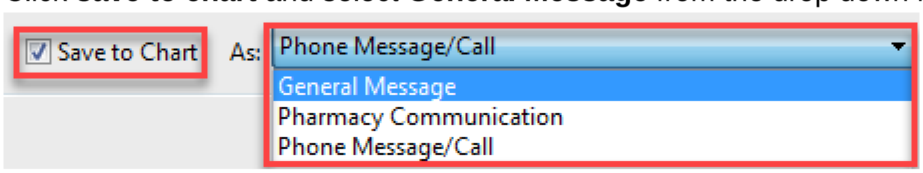
5. From the ‘**To**’ and ‘**CC**’ boxes, enter the **first few letters** of the recipient's last name click **search**  or press **ENTER**. For this activity ask you class instructor who to send the message to.



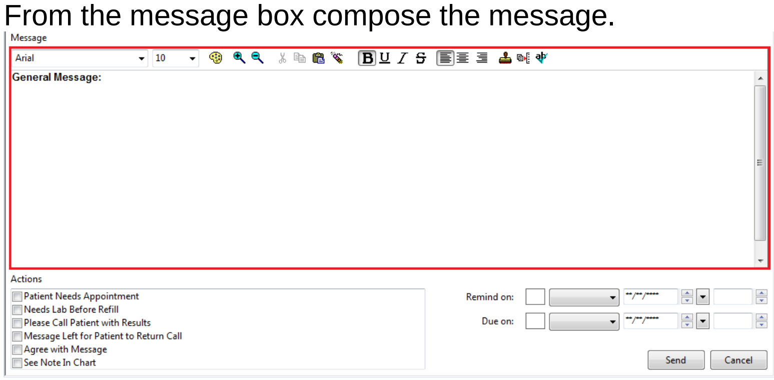
6. In the provider box**,** Search for the Attending Provider



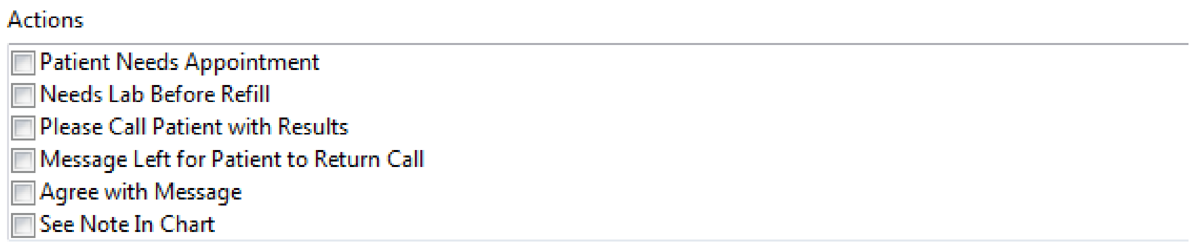
7. Click **save to chart** and select **General Message** from the drop down menu



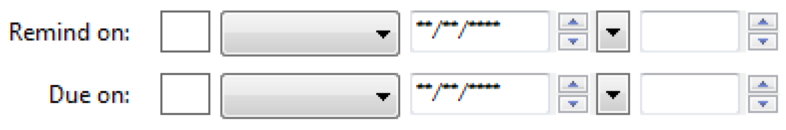
8. From the message box compose the message.



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

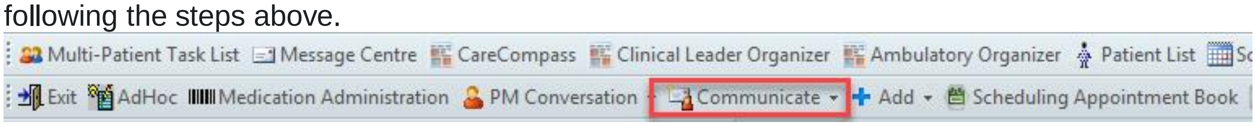


10. To set a reminder to follow up on a message, enter the appropriate time parameters in the **remind on** field. Reminders help ensure that patient care activities for a specified patient are carried out at a later time.



11. Click  to complete the message

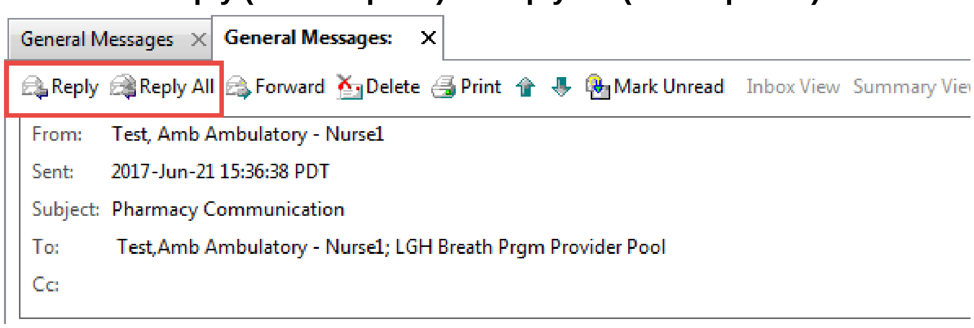
Note: you can also create a message by clicking the communicate button in the toolbar and following the steps above.



Activity 3.3 – 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)**

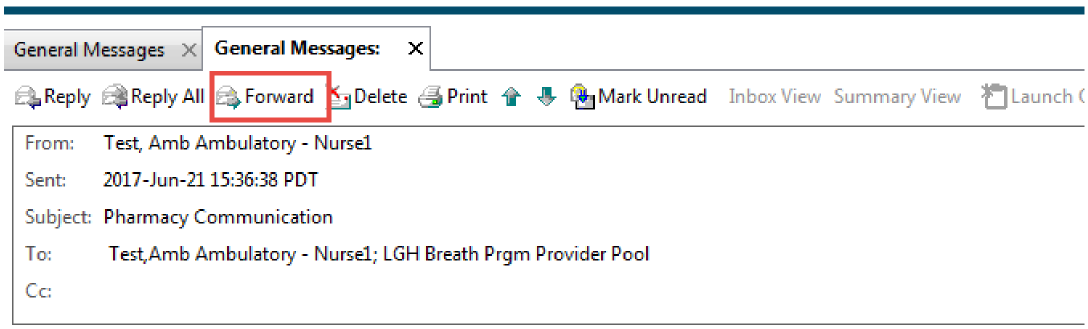


3. Compose your message. Choose a typical message you may write to a colleague.
4. Click **Send**

Activity 3.4 – 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**.



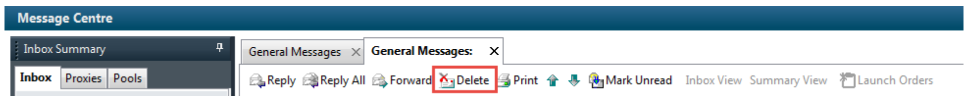
5. Compose the message. Choose a typical message that you would send to a colleague.
6. Save a copy of the message to the patient's chart. Click **Save to Chart**
7. Click **Send**.

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 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**



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

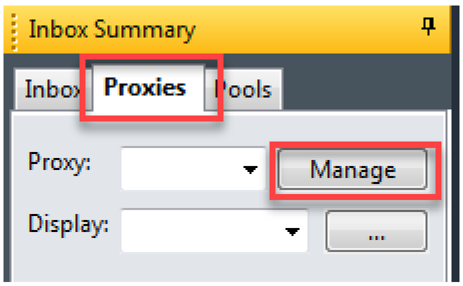
Activity 3.6 – Creating and Removing a Proxy Inbox

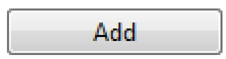
1

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.

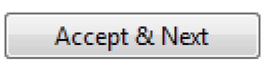
Creating a Proxy Inbox:

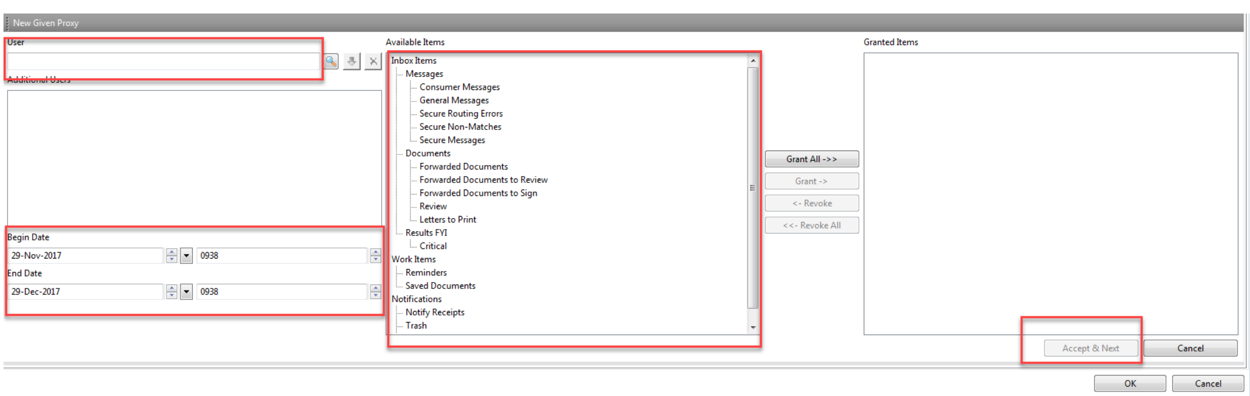
1. Click the **Proxies** tab and click the **Manage** button



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.