WORKPACKAGE
CST Transformational Learning

CURRICULUM TRACK:

Provider: Ambulatory (Add-On)

Within this work package you will find:

- Self-Guided Practice Workbook
- Proficiency Assessment
- Competency Assessment Checklist

Last update: December 20, 2017

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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. - You will be allowed to take this workbook with you so feel free to make notes for your future reference.
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. - Each scenario will allow you to work through different learning activities at your own pace to ensure you are able to practice and consolidate the skills and competencies required throughout the session.
Proficiency Assessment	- At the end of the session, you will be required to complete a Proficiency Assessment. - This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios. - Your instructor will review and assess these with you. - Upon completion of the Proficiency Assessment, both you and your instructor will complete your Competency Assessment Checklist.
Learning Objectives	On completion of this workbook you will be able to: - Review lab results in Message Centre. - Organize your day using Ambulatory Organizer. - Work with patient's chart in ambulatory setting. - Manage referrals.

Learning Domain

You will use the learning domain to complete activities in this workbook. It is as close as possible to the actual Clinical Information System (CIS).

- Some tasks require input from other parties, for example the Registration and this affects our scenarios.
- Some scenario details might be clinically simplified to present the CIS functionality.
- Patients in the scenario are as realistic as possible with some limitations such as patient's names.
- Some screenshots used in this workbook might differ from your screen. Please disregard and follow the steps.
- This course is designed as an add-on and completion of inpatient or specialist provider education prior to this is necessary for the activities of this workbook.

PATIENT SCENARIO 1 – Reviewing Lab Results in Message Centre

Duration	Learning Objectives
20 minutes	At the end of this scenario, you will be able to: - Review lab results.

SCENARIO

The best way to start your day with the Message Centre. In the ambulatory setting, this is where you can check new lab results for your patients– either ordered by you are forwarded to you by other providers.

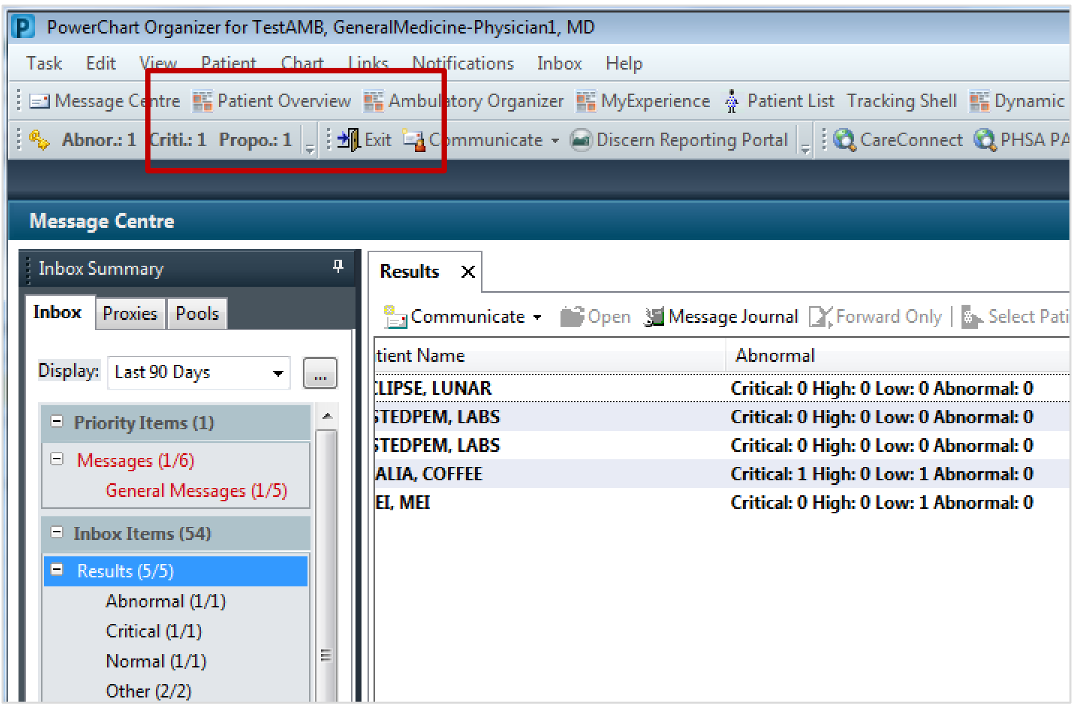
You will complete the following activity:

- Sign, forward, and reject lab results.

Activity 1.1 – Sign, Forward, and Reject Lab Results

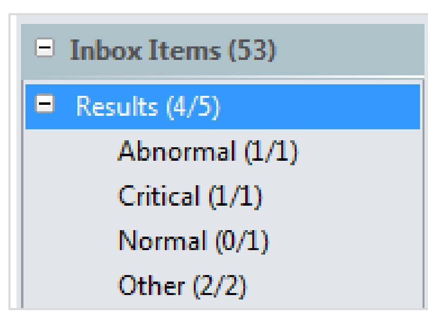
Duration: Estimated Completion Time - 10 min

The **Notification** toolbar shows the number of **critical and abnormal results** that has not been reviewed yet. Clicking an item on this toolbar opens the respective folder in the Message Centre. Alternatively, use the **Message Center** icon on the toolbar to check your Inbox.



In the Message Centre, you will find lab results sent to your Inbox and extracted into respective folders:

- Critical
- Abnormal
- Normal
- Other (imaging and diagnostic)



Digits in brackets indicate number of unseen results versus all results in the folder. In the screenshot above there are 5 results in the Inbox where 4 remain unseen.

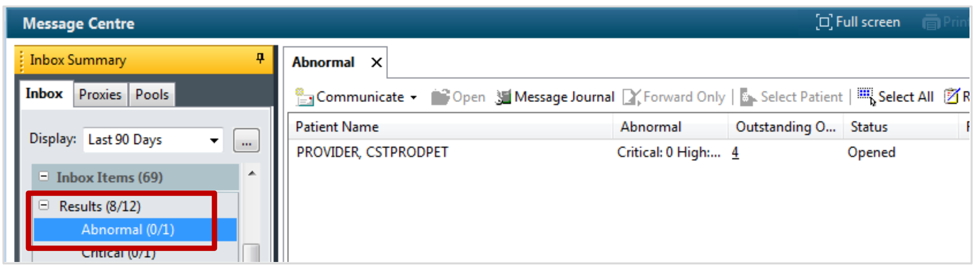
When you open the result, the numbers adjust but the result stays in your Inbox. When you sign the result, it will be removed from your Inbox. All results are visible in the patient's chart despite of any action taken in the Message Centre.

Note: Your clinic may use **Pools** and **Proxies** in the Message Centre. In this case, you will learn more about these functionalities later.

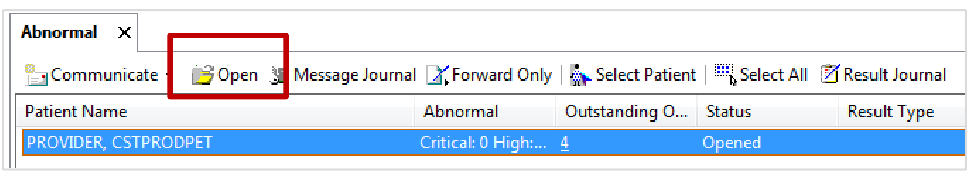
1 Log into PowerChart using provided instructions.

2 Select the **Abnormal** results folder under **Inbox Items**. Results are listed by patient name on the right.

Note: These results are also available in the patient's chart and can be managed from there.



3 Click **Open** on the toolbar to display the result.

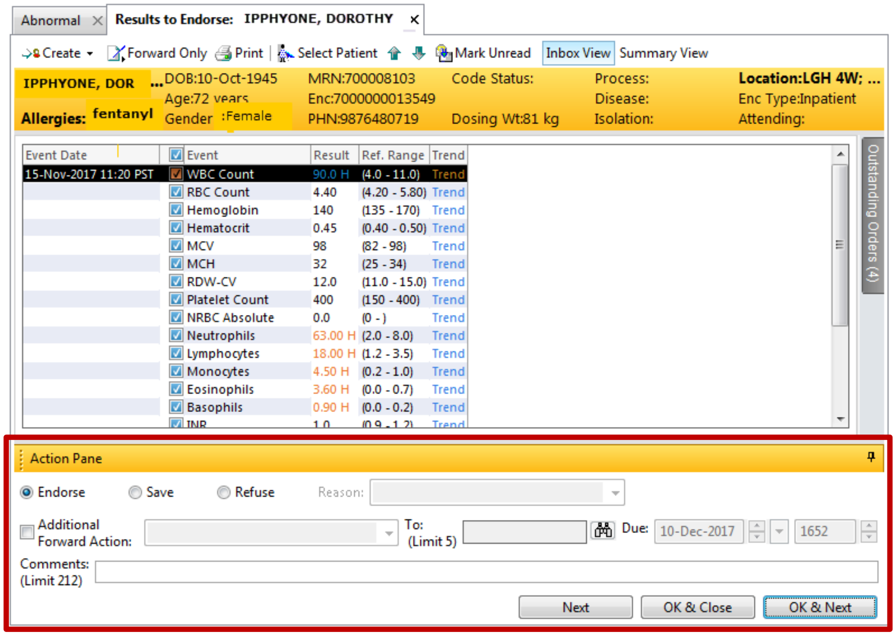


4 Results for the selected patient display. Use **Action Pane** at the bottom to manage results.

The **Endorse/Sign** option is preselected. Take one of the following actions:

- Click **OK & Next** to sign this result and to continue reviewing orders.
- Click **OK & Close** to sign this result and exit this view.

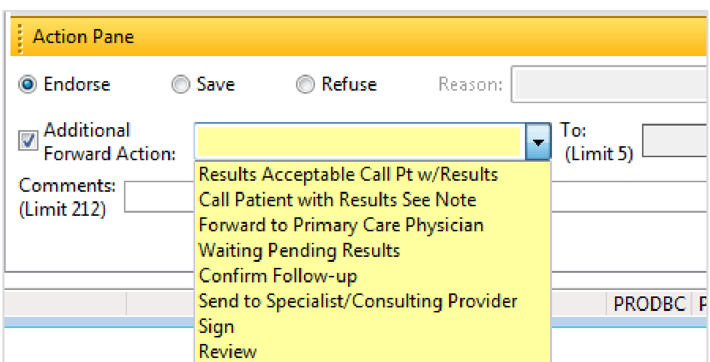
All signed result will be removed from the Message Center.



5 The Action Pane provides additional options for managing results. In the real CIS, you can **forward** the result to another provider:

Select another patient from the list and open the result.

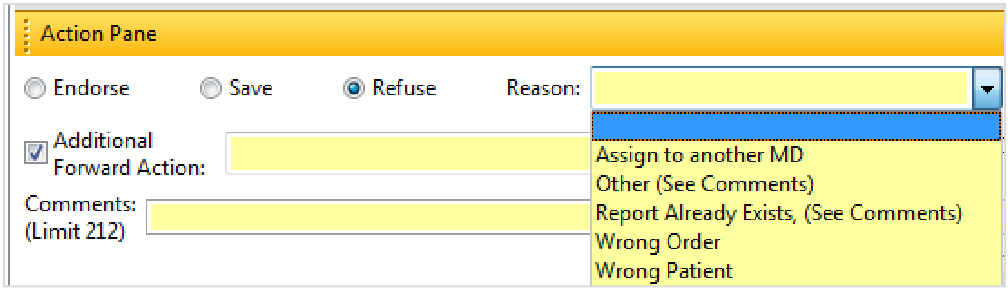
Check **Additional Forward Action** and display actions available in the drop-down list.



6 You can also refuse the result:

Ensure you have a result open, check **Refuse** and select a reason for the refusal.

You can type comments, if necessary.



Note: When the order is refused, it is:

- Sent to the clinic's **Refusal Inbox** to be managed by a designated individual.
- Removed from your Message Centre
- Remains in patient's chart.

Key Learning Points

- The **Notification** toolbar displays incoming critical and abnormal results for your patients.
- You can **forward the result** to other providers and select an appropriate action from the list.
- **Refused result** will be removed from your Message Center but will remain in the patient's chart.
- Each clinic maintains a **Refusal Inbox** for rejected results.

PATIENT SCENARIO 2 – Organizing Your Day Using Ambulatory Organizer

Duration	Learning Objectives
30 minutes	At the end of this scenario, you will be able to: ▪ Navigate your calendar of appointment. ▪ Manage visit-related actions in Ambulatory Organizer.

SCENARIO

After reviewing results received in your Message Centre Inbox, you are ready to retrieve a list of the day's patients.

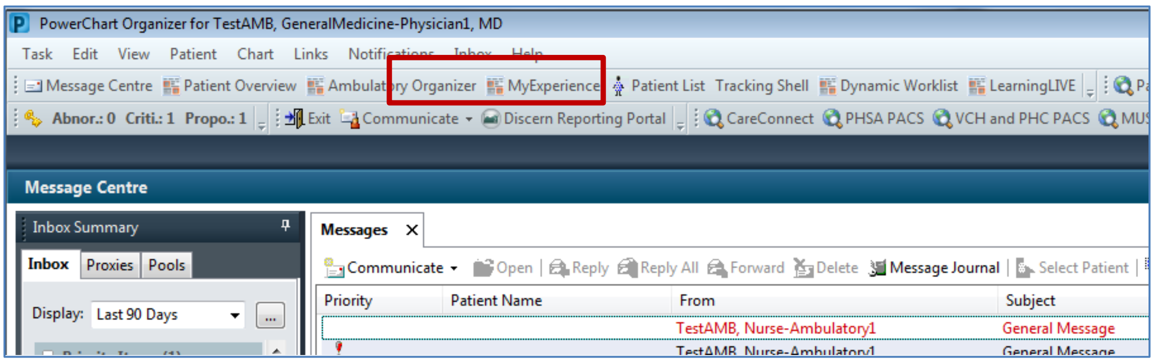
As a provider working in the ambulatory setting, you will be completing the following activity:

- Access and work with your schedule using different views in Ambulatory Organizer.

Activity 1.1 – Work with Your Appointments in The Ambulatory Organizer

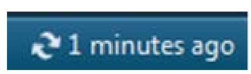
Duration: Estimated Completion Time - 15 min

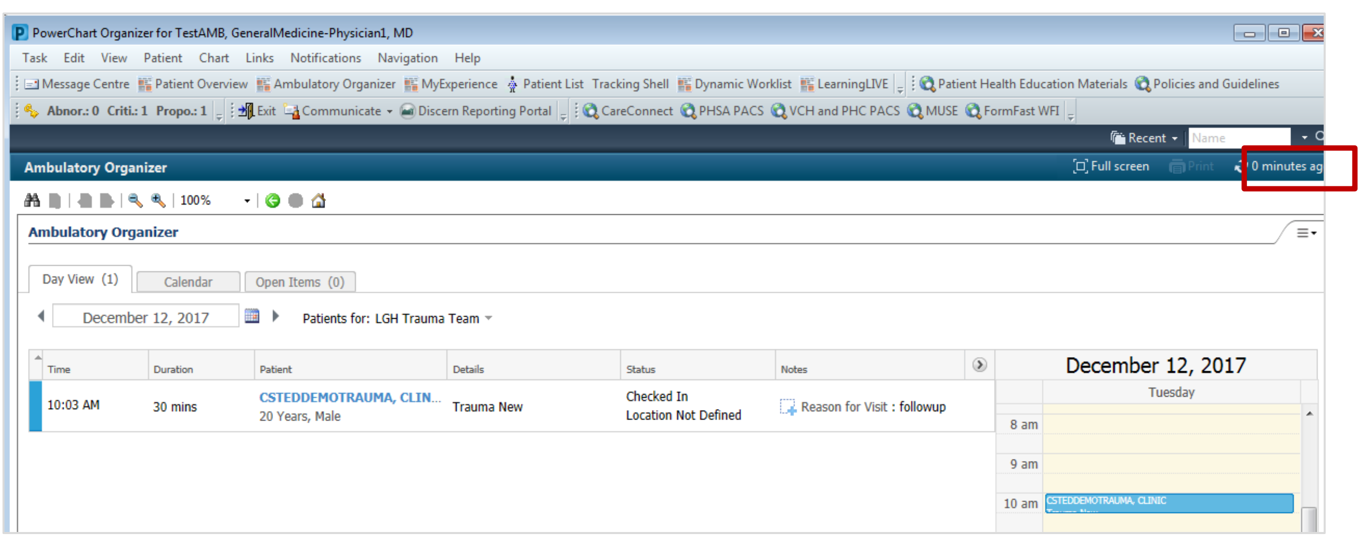
The **Ambulatory Organizer** can be accessed from the main menu.



The **Ambulatory Organizer** provides a simple and comprehensive view of the clinic's schedule and displays a snapshot of the day's appointments. The view is organized by appointment times. It also includes additional pertinent information such as

- Appointment times and details
- Patient information and status
- Outstanding items to be completed for each visit
- Patient care related reminders

Remember that clicking the **Refresh** button  often will ensure the patient list and appointment status is up-to-date for you to start seeing your patients.

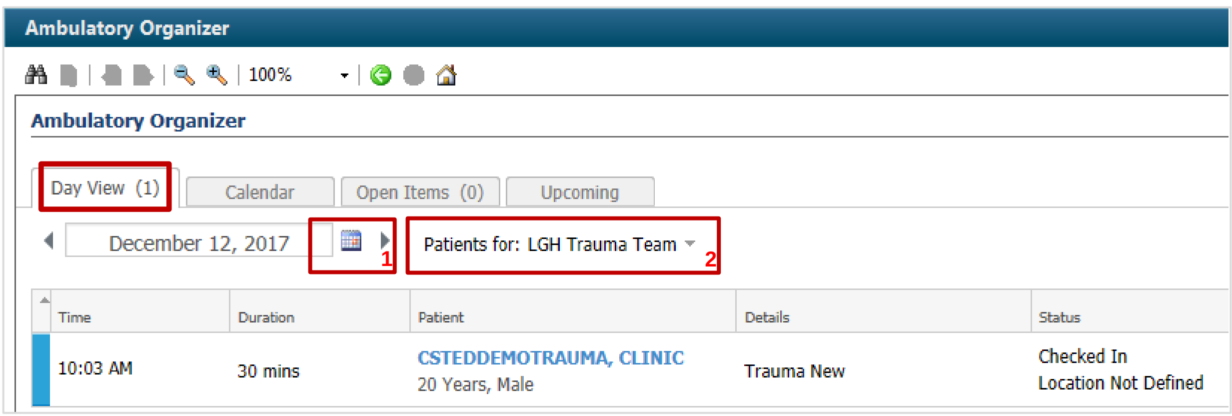


1 Ensure the **Ambulatory Organizer** is displayed.

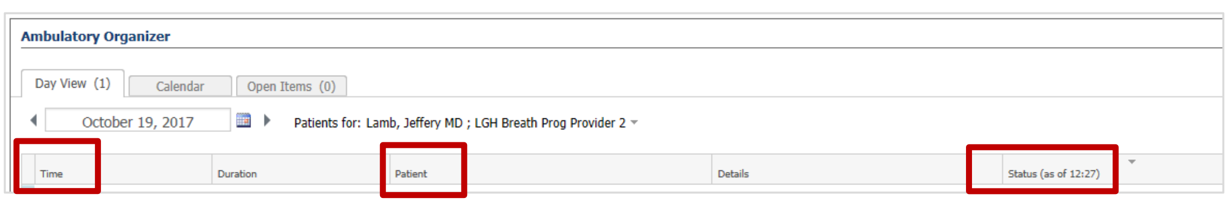
Day View Tab

2 The first tab – **Day View** – displays the appointments of all patients scheduled to your clinic for the day.

1. Select a different date by using the **calendar** icon.
2. The **Patients for:** box indicates your name and what facilities are inlcuded in your appointment list for the date. You can use this to filter your appointments to a particular facility.

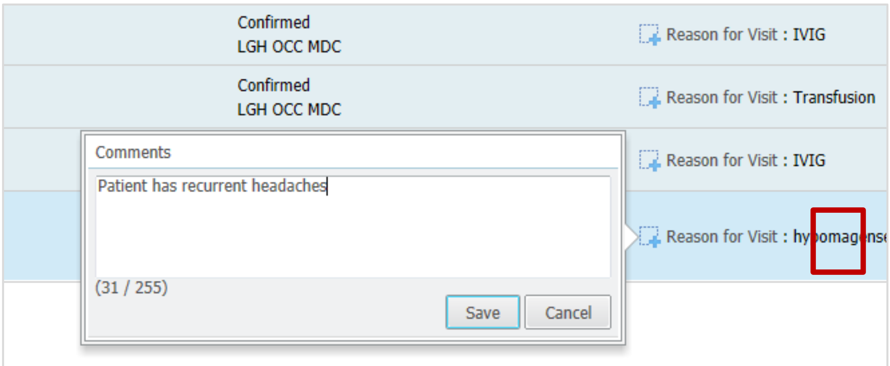


3 You can sort the appointment list by selecting one of the following column headings, for example **Time**, **Patient**, or **Status**.

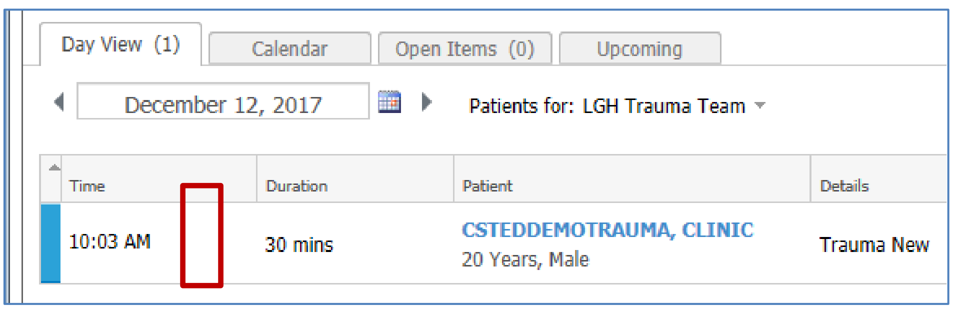


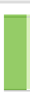
4 You can add an informal comment to an appointment to share information between providers and clinicians.

Click the icon to open the Comments box. Type the comment and click **Save**.



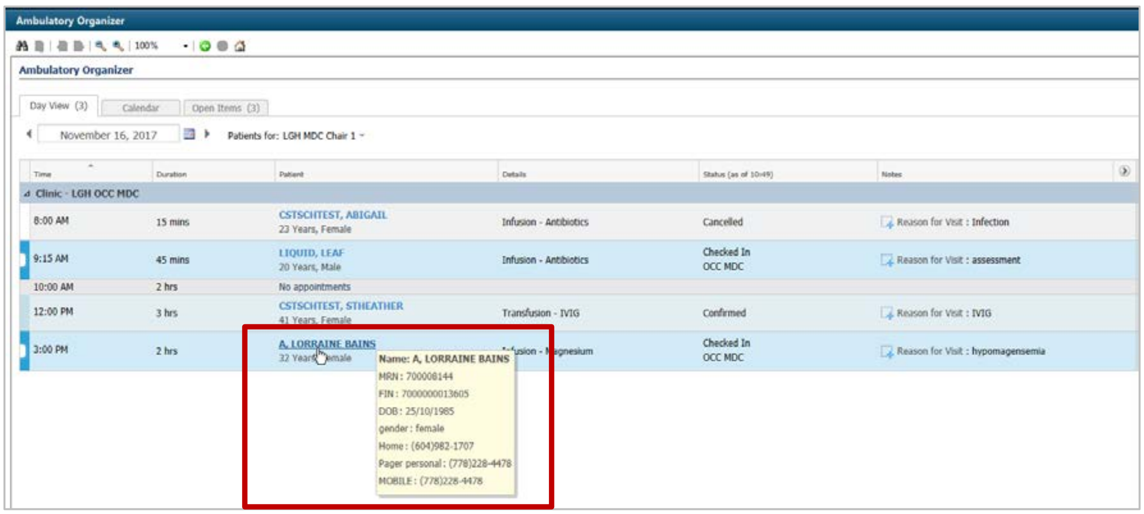
5 The color status on the left side of the booked appointment slot assists you to understand the flow of the clinic. The status of a patient will update based on documentation completed by a nurse or provider.



Color Status	Definition
	Light blue indicates a confirmed appointment.
	Medium blue indicates a checked in appointment.
	Green indicates a seen by nurse, medical student, Tech, Allied Health or custom status has taken place.
	Orange indicates a seen by physician, mid-level provider, resident, or custom status has taken place.

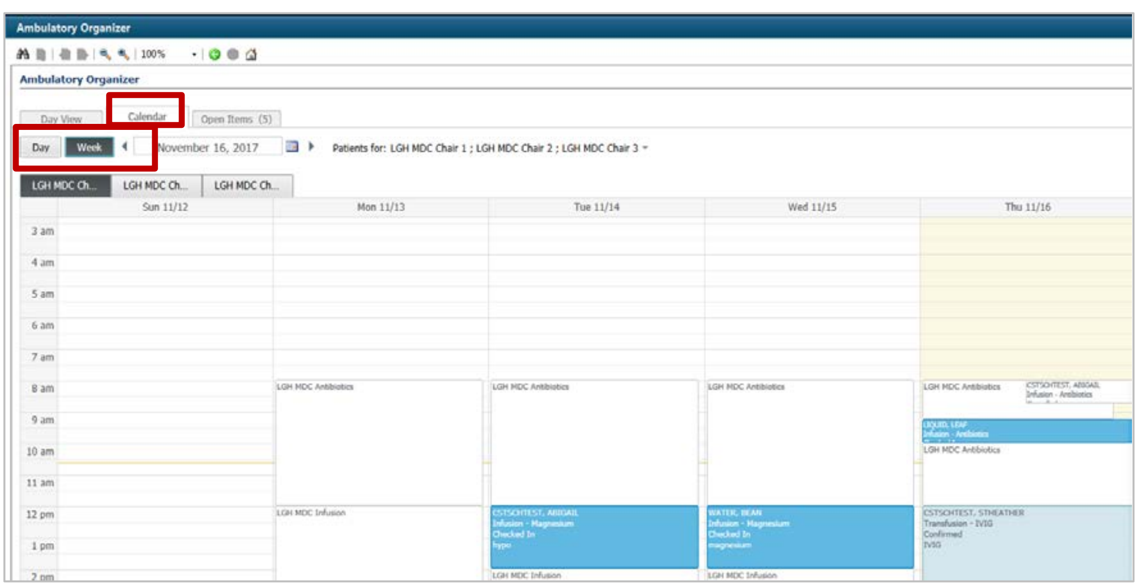
Color Status	Definition
	Dark grey indicates the appointment has been checked out.
	White indicates a no show, hold, or canceled appointment (these appointment types are displayed if the system administrator has configured them to display).

6 Place the cursor over the patient's name to display patient demographic information.



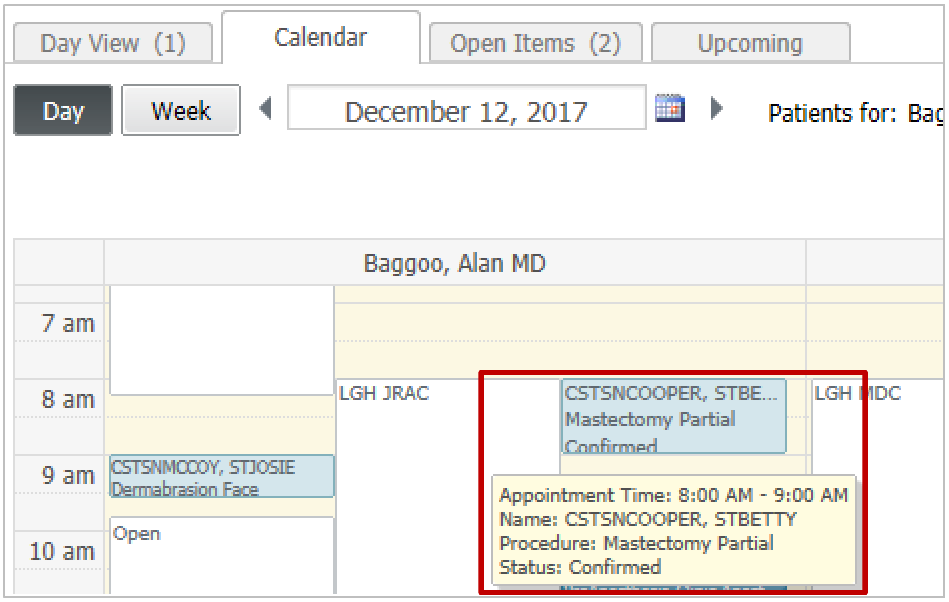
Calendar Tab

1 Click the next tab – **Calendar** – to display all patients scheduled to your clinic in a day or week format.



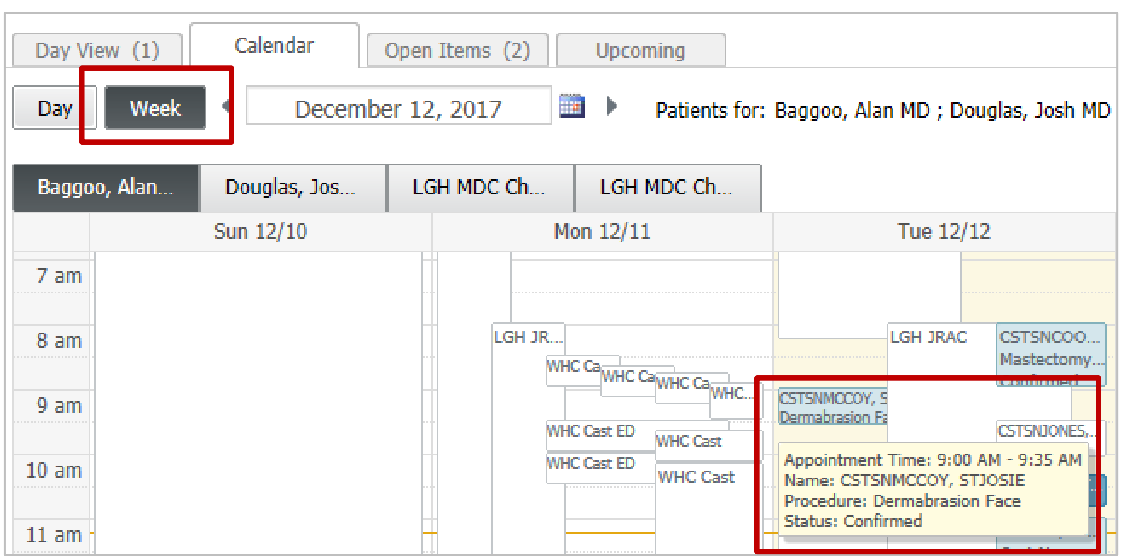
Note: Rescheduled, cancelled, hold, or no-show appointments are not displayed in the Calendar view.

2 With the Calendar displayed, hover over the colored blocks to view details for the scheduled patient.



3 To view the calendar in the week view, select the **Week** button located next to the date in the middle of the window.

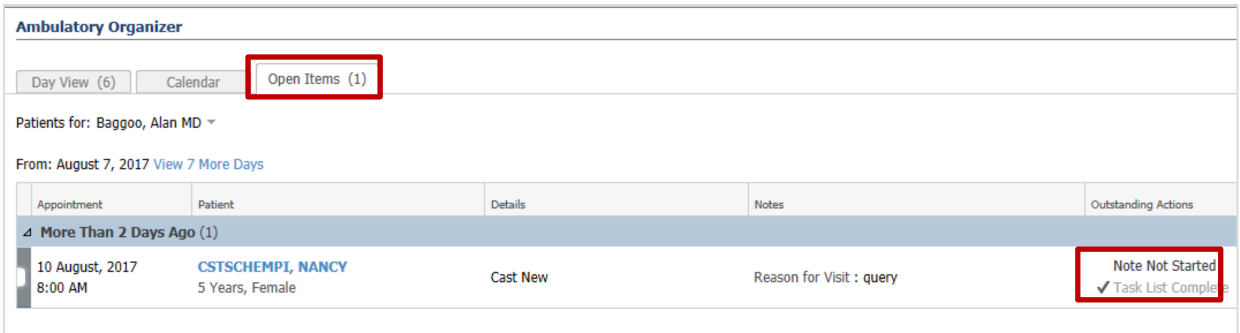
Hover over the colored blocks to view details for the scheduled patient.



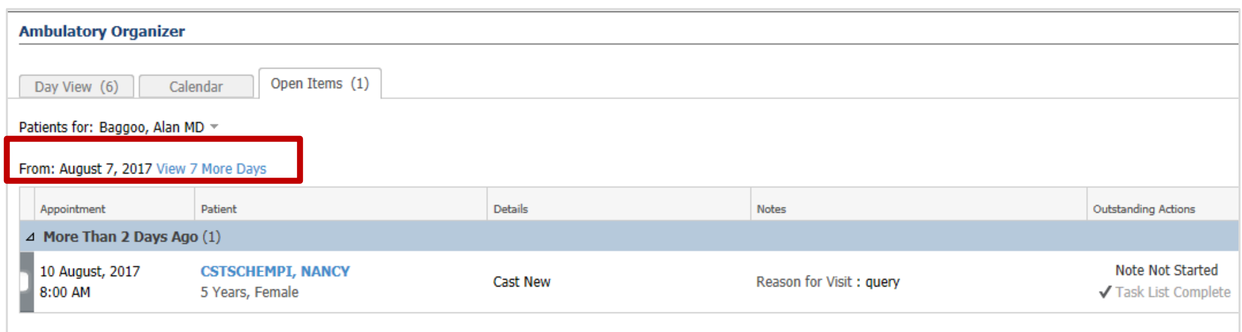
Open Items Tab

1 Click the **Open Items** tab to display a list of appointments that have any uncompleted actions for the patient, for example a missing consult note.

Note: The Task List feature is used by the nursing staff and grayed out (not available) for providers.



2 List displays next seven days from the date selected. To display tasks for more than seven days, click **View 7 More Days.** Observe how the date will adjust and display a time frame that is 7 days longer with each click.



3 Under the **Outstanding** column, you will be reminded that note for the visit has not been started in the real CIS.

To complete the action, click will click the reminder to open the proper location in a patient's chart. You will learn how to create notes later during this session.

Key Learning Points

- Ambulatory Organizer allows you to see your scheduled appointments and offers three different displays to help you prioritize your day:
- Day View tab lists your appointments scheduled for a selected date and facility and informs about appointment status and details.
- Calendar tab displays your appointments for a selected day or week.
- Open Items tab display unfinished tasks for a single provider. You can open patient's chart in specific location directly from that view.

PATIENT SCENARIO 3 – Working with Patient's Chart in Ambulatory Setting

Duration	Learning Objectives
30 minutes	At the end of this scenario, you will be able to: - Access and navigate a patient's chart in the ambulatory setting. - Document patient's visit.

SCENARIO

Patient is scheduled to the Medical Day Care Clinic for the follow-up appointment 1 month after her visit to Emergency Department. Since her discharge, patient complains about chest pain.

She requires a renewal prescription for her new blood pressure medication that was prescribed for 30 days by the ED provider. She also almost run out of Arthrotec for her osteoporosis.

Following up on patient's recent low magnesium levels you decide to place an order for an IV magnesium infusion.

As a provider working in the ambulatory setting, you will complete the following activities:

- Access patient's chart using the Ambulatory Organizer or Message Centre.
- Place future orders and a multi-day PowerPlan.
- Create prescriptions.
- Complete a note for an ambulatory visit.

Activity 3.1 – Access Patient’s Chart from The Ambulatory Organizer

Duration: Estimated Completion Time - 10 min

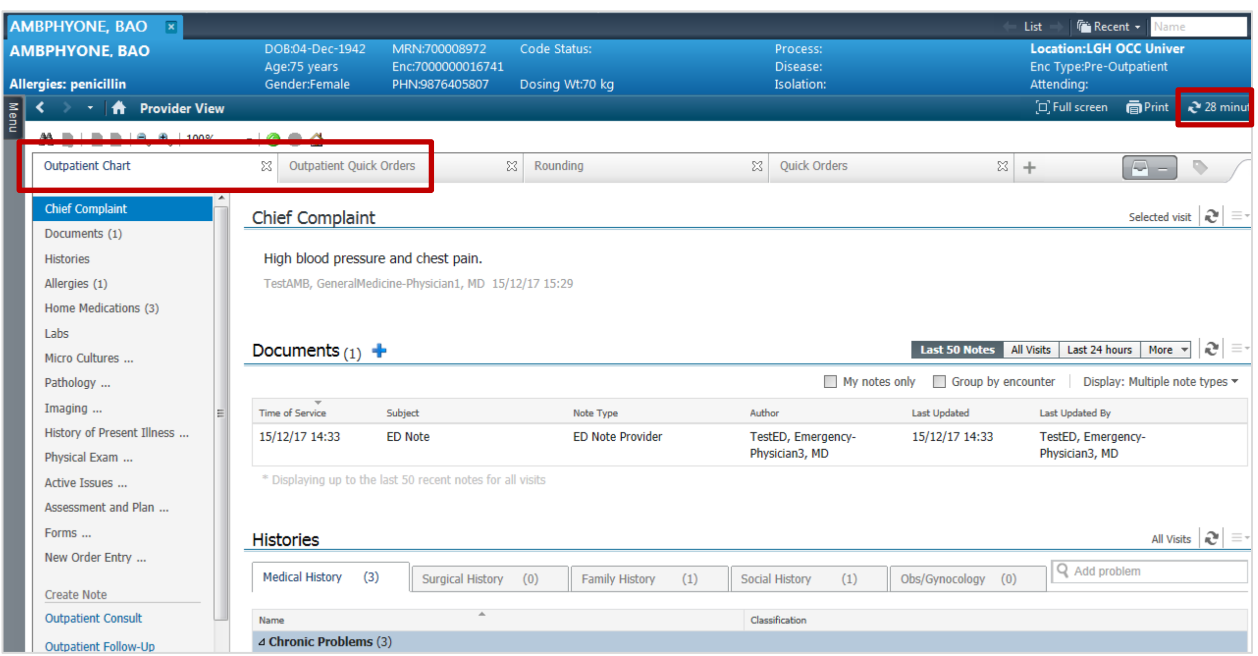
The **Ambulatory Organizer** displays your appointment in the Day View or in the Calendar windows. You can open a chart by clicking patient’s name. The CIS will track your actions and update the appointment status.

The patient’s chart opens to the **Provider View** which is your current default screen when you access a patient’s chart. In the ambulatory setting, the Provider View offers two tabs:

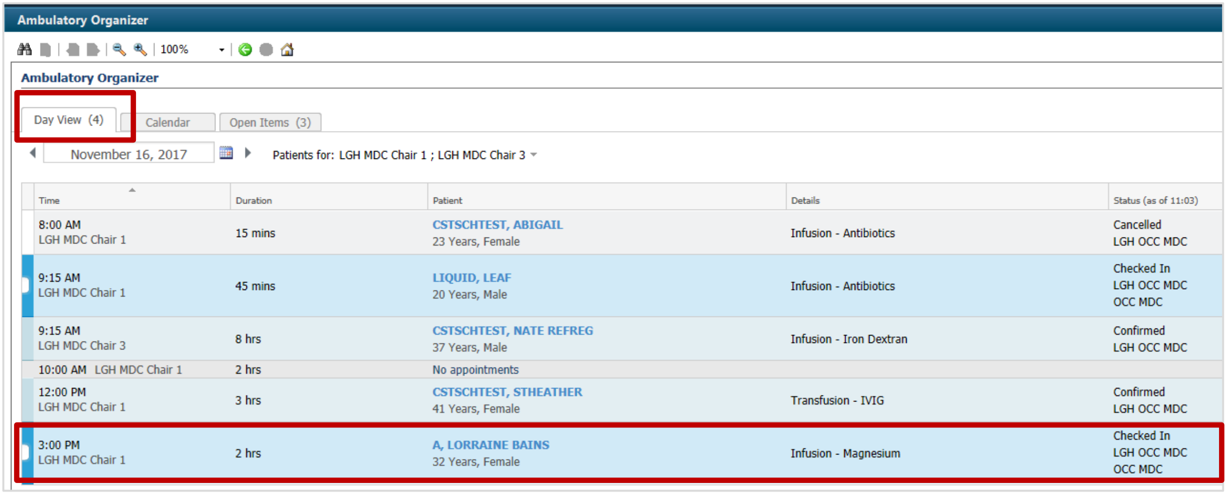
- **Outpatient Chart** displays patient’s electronic information organized in components that are specialty specific
- **Outpatient Quick Orders** displays a selection of the most frequently used orders. Different specialties will have a different selection of orders

Note: You might also have other tabs available depending on your role.

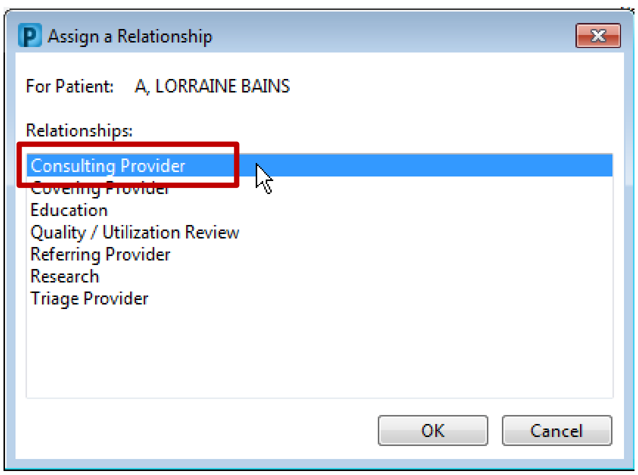
Remember to click the **Refresh** icon  to ensure that your display is up-to-date.



1 In the Day View, click a patient's name to open the chart.



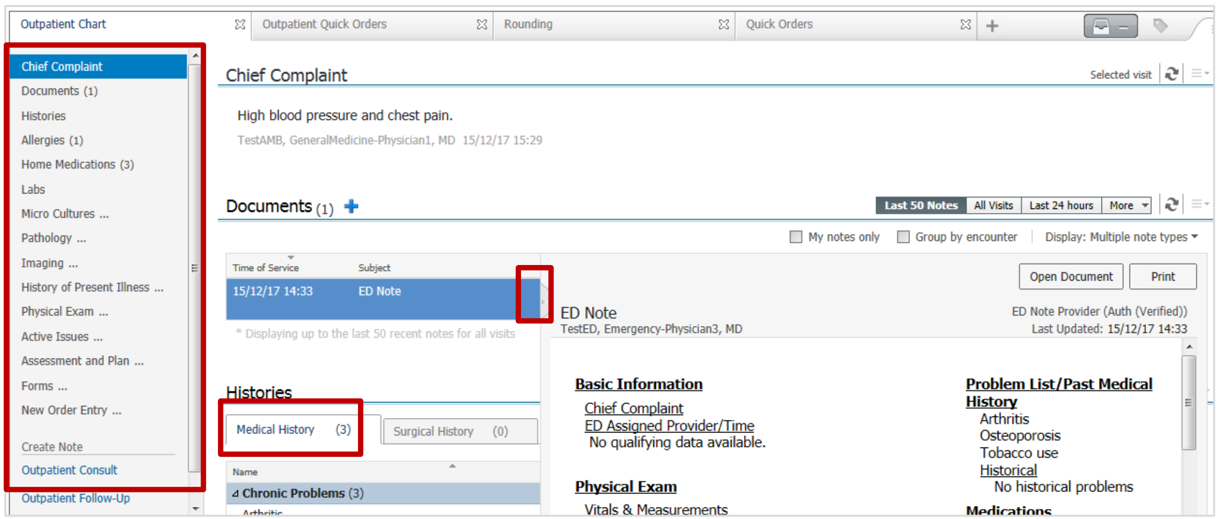
2 You may be prompted to **Assign a Relationship** with the patient.
Select the most appropriate option, for our scenario **Consulting Provider** and click **OK**.



3 The **Banner Bar** displays a snapshot of pertinent patient's information.

4 To update patient information:

- Ensure you are in the **Outpatient Chart** workflow tab.
- Follow the list of components for efficiency.
- Click the item from any list to display more details in the workflow tab.
- Click a component heading that is linked to a comprehensive window where more information is displayed, for example Documents.



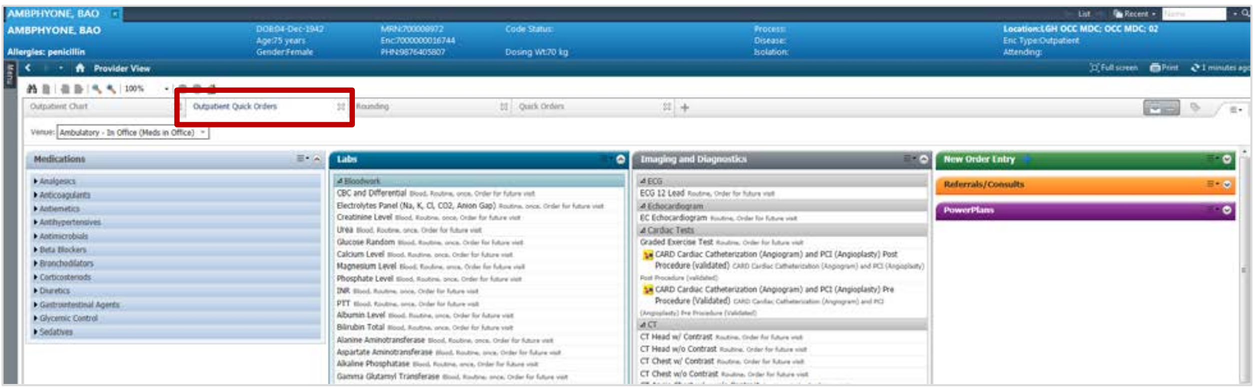
Key Learning Points

- Access patient's chart from the Ambulatory Organizer.
- When accessing patient's chart for the first time, you may be prompted to assign a relationship with the patient.
- Review the Banner Bar for patient's information.
- Remember to refresh your screen frequently.
- Follow the components list in the Outpatient Chart tab for efficiency.

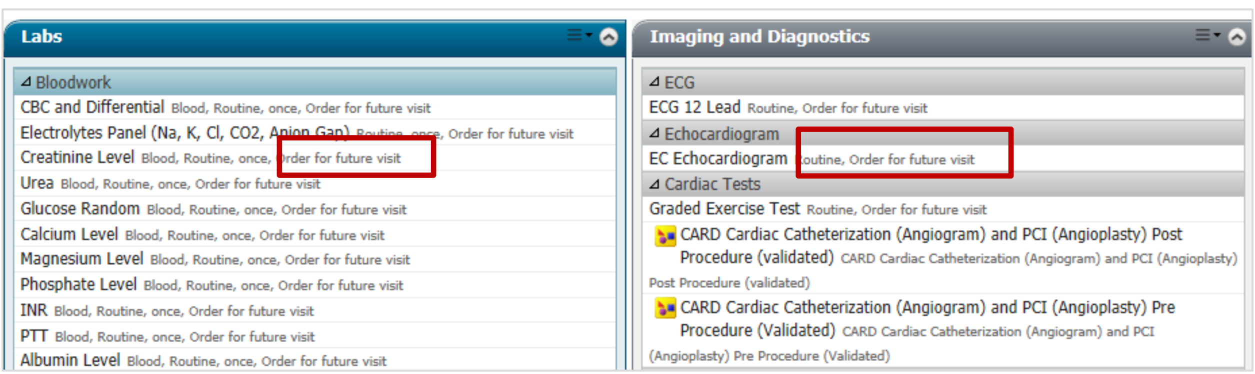
Activity 3.2 – Place Individual Orders

Duration: Estimated Completion Time - 10 min

The **Outpatient Quick Orders** tab is provided to place orders and PowerPlans specifically selected for the outpatient setting.



Many order sentences indicate that these orders are for future visits. Ensure you select the order sentence according to your intentions.



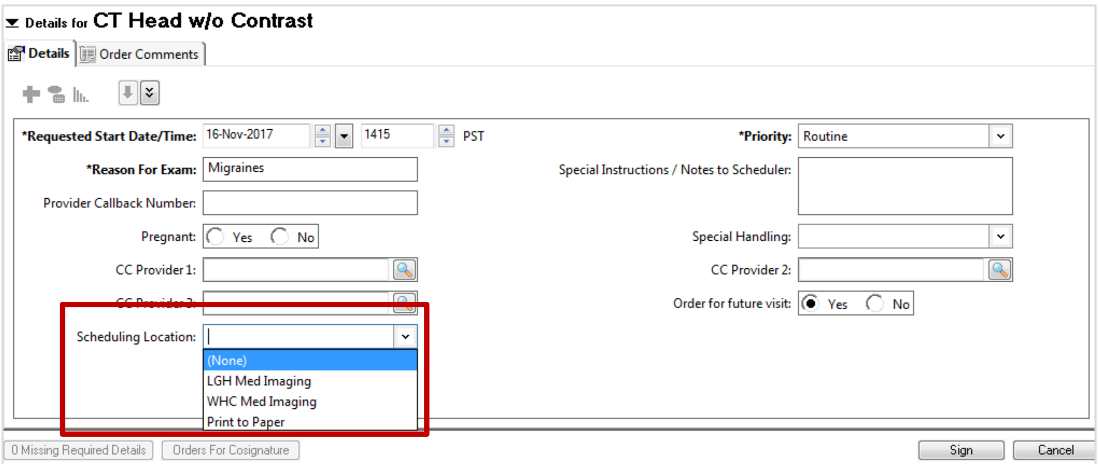
The following order types are typically placed in the outpatient setting:

- Laboratory and imaging including recurring orders
- Referral orders
- Orders for the follow-up visit
- Orders for a future procedure

When placing orders to **external facilities**, ensure that **Scheduling Location** is selected from the drop-down:

Selecting the specific facility means the order will be electronically routed to the facility. A scheduling task will be created and placed in the Orders to Scheduling queue to be processed. A scheduler receives the requests and schedules a patient according to the provider's requirements.

Selecting **Print to Paper** will print the requisition to be handed to the patient.

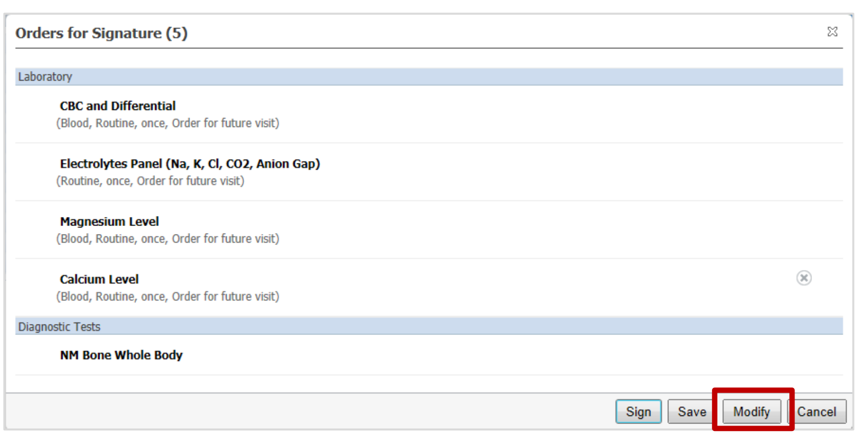


Laboratory and Imaging Orders

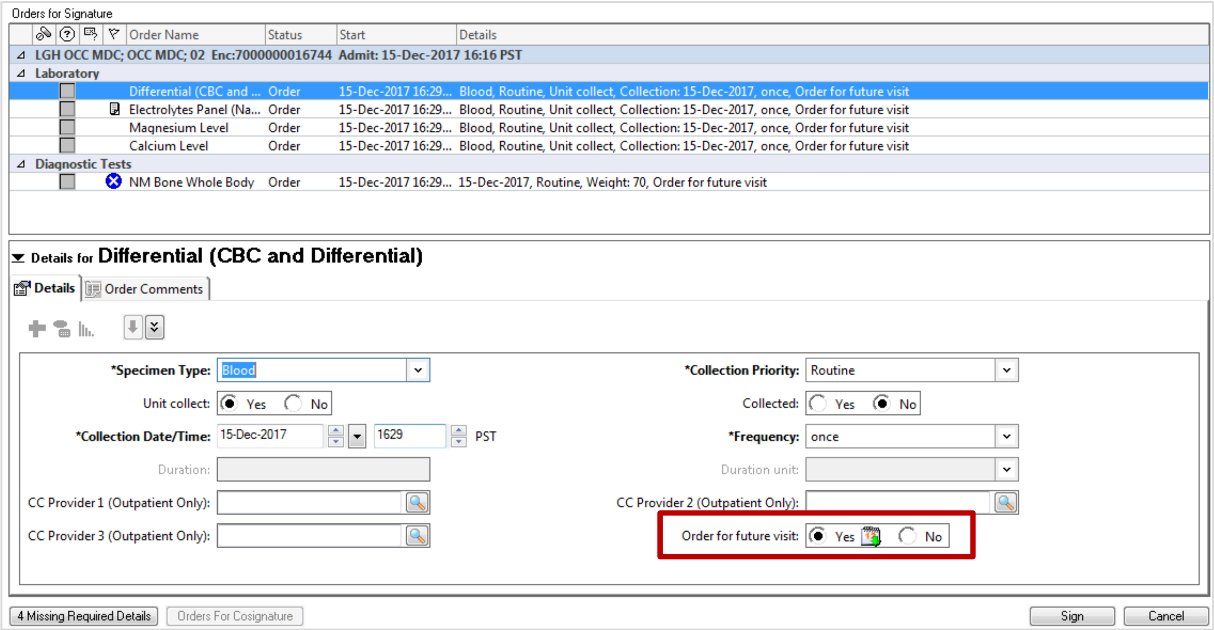
1 For your practice, place the following orders for the future visit:

- From **Outpatient Quick Orders** select future orders
  CBC and Differential
  Electrolyte Panel Outpatient
  Calcium level
  Magnesium level
- Search under **New Order Entry** for
  NM Bone Whole Body

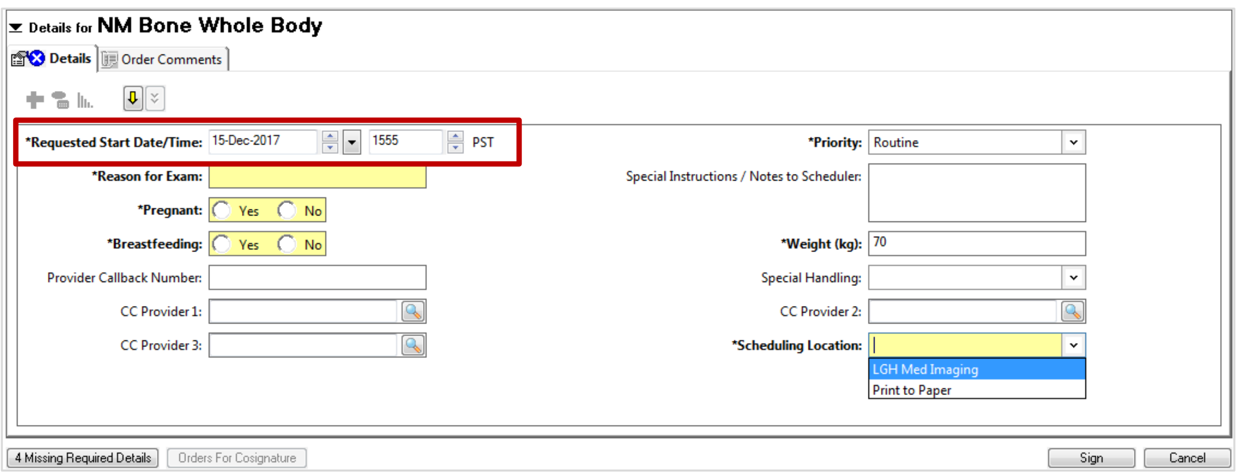
Click **Orders For Signature** , then click **Modify**.



2 Click the calendar to suggest a date in approximately 3 weeks from now. The CIS will calculate a date for you.



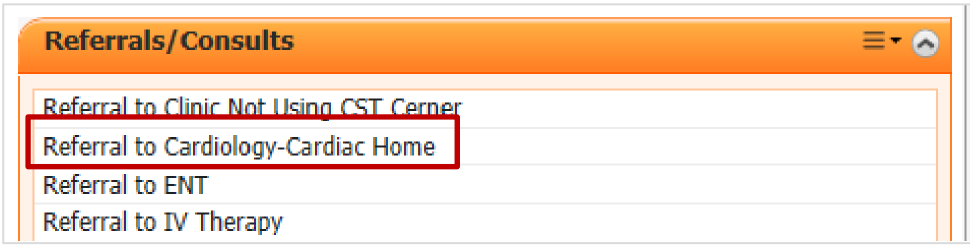
3 Request a date for the nuclear medicine. With all details added, click **Sign**.



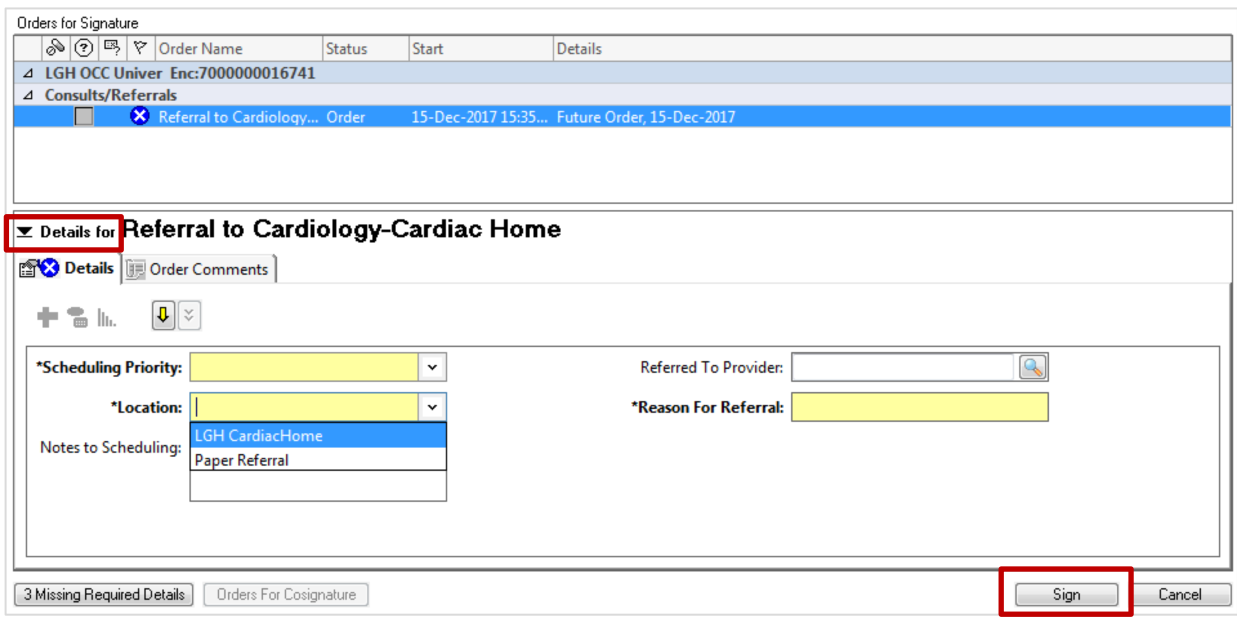
Referral Orders

1 In the **Outpatient Quick Orders** tab, expand **Referrals/Consults** folder.

Place a **Referral Order to Cardiology**.



2 Display **Details**, and add missing information to mandatory boxes, then click **Sign**.



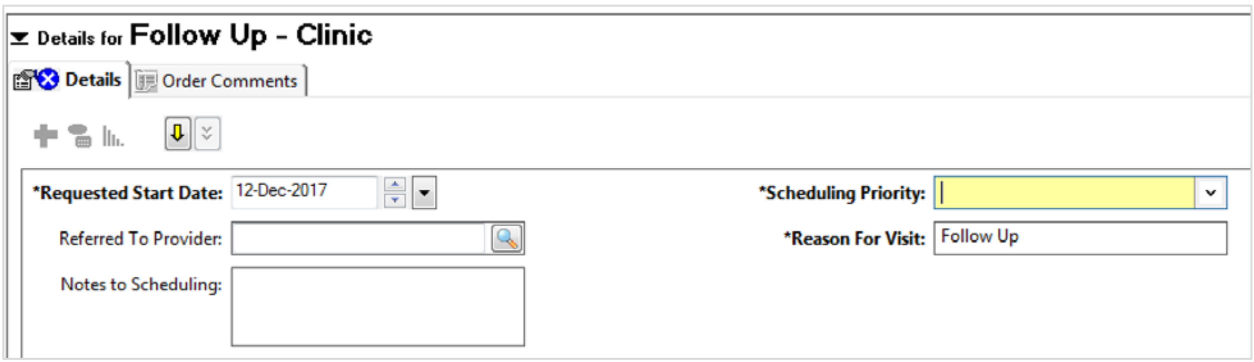
Note: Referral orders to different specialties have unique appointment types associated with the specific reason or the length of the visit.

Orders for Follow-up Appointments

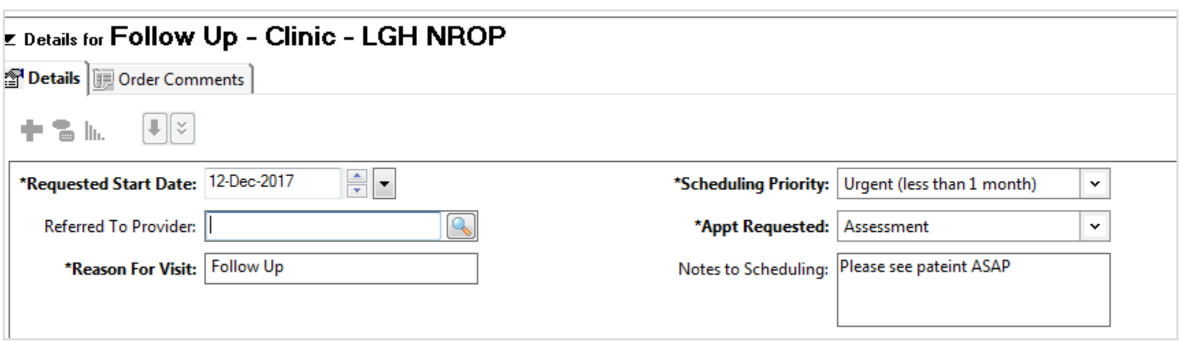
1 In the Outpatient Quick Orders tab, locate the **Follow-up Clinic** order under Referrals/Consults folder.

Note: Orders for follow-up visits are clinic specific and some clinics might have various types of appointments.

If your clinic has just one type of the follow-up appointment, you will see will see the generic “Follow up – Clinic” order:



2 If the clinic has multiple follow-up appointments, the order name will specify the clinic name and you need to select a specific appointment type from the drop-down:

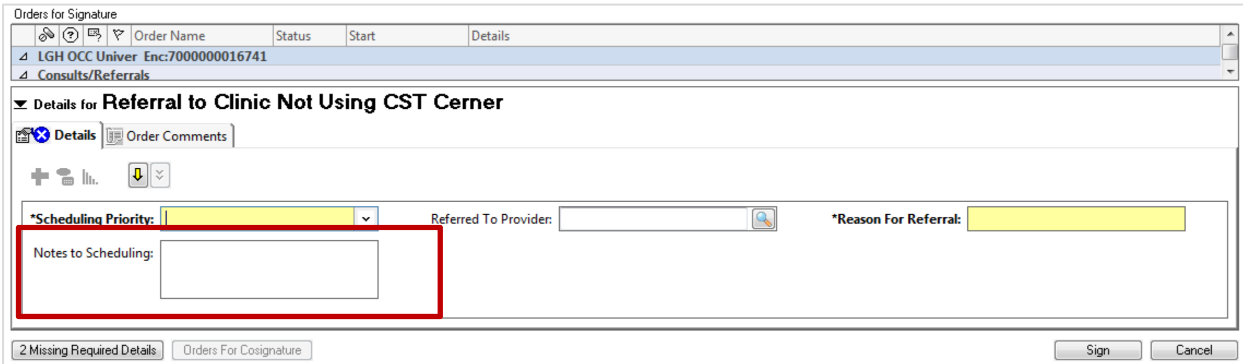


Note: You can save the repetitive orders with selections to favorites to optimize placing these orders in the future.

3

When referring your patient to a clinic that is not using the CIS, place the **Referral to Clinic Not Using CST Cerner** from Referrals/Consults.

A paper referral requisition will print. The referring location should be indicated in the notes to scheduling.



Key Learning Points

- The Outpatient Quick Orders tab lists the most frequently used orders and is recommended for placing orders efficiently
- Many outpatient orders are future orders as indicated by the order sentence
- When placing an order for the external facility, ensure to select a Scheduling Location
- When Scheduling Location is not available, select Print to Paper
- For clinics with multiple follow-up appointment types, the clinic name is part of the order name and appointment type can be selected

Activity 3.3 – Place a Multi-Day PowerPlan

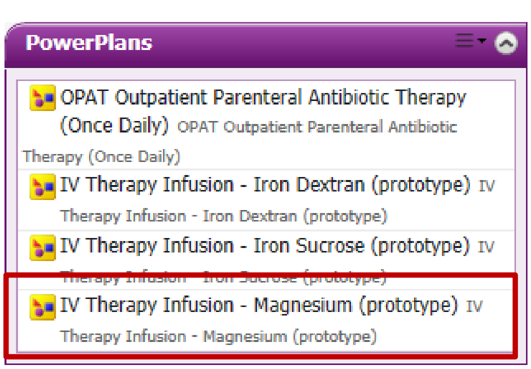
Duration: Estimated Completion Time - 10 min

Magnesium level for your patient has been low for last four weeks and you want to place an order for Magnesium IV Therapy Infusion – Magnesium 2 g. You will plan for two doses starting tomorrow due to availability in the IV therapy clinic.

The CIS allows for placing orders for a number of consecutive visits in one convenient plan. It is called a multi-day PowerPlan. It contains individual orders that are sent to the Scheduling to schedule patient's visits. Each order is a future order that will be activated on a day when patient comes to the clinic.

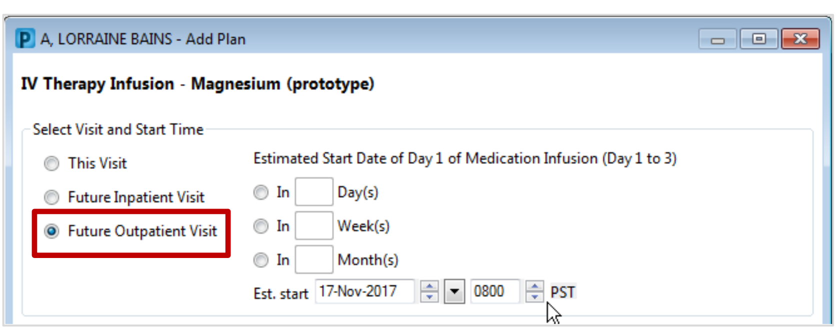
1 From the **Outpatient Quick Orders** tab, select the *IV Therapy Infusion – Magnesium* PowerPlan.

Click the **Orders for Signature**  icon, and then click **Modify**.

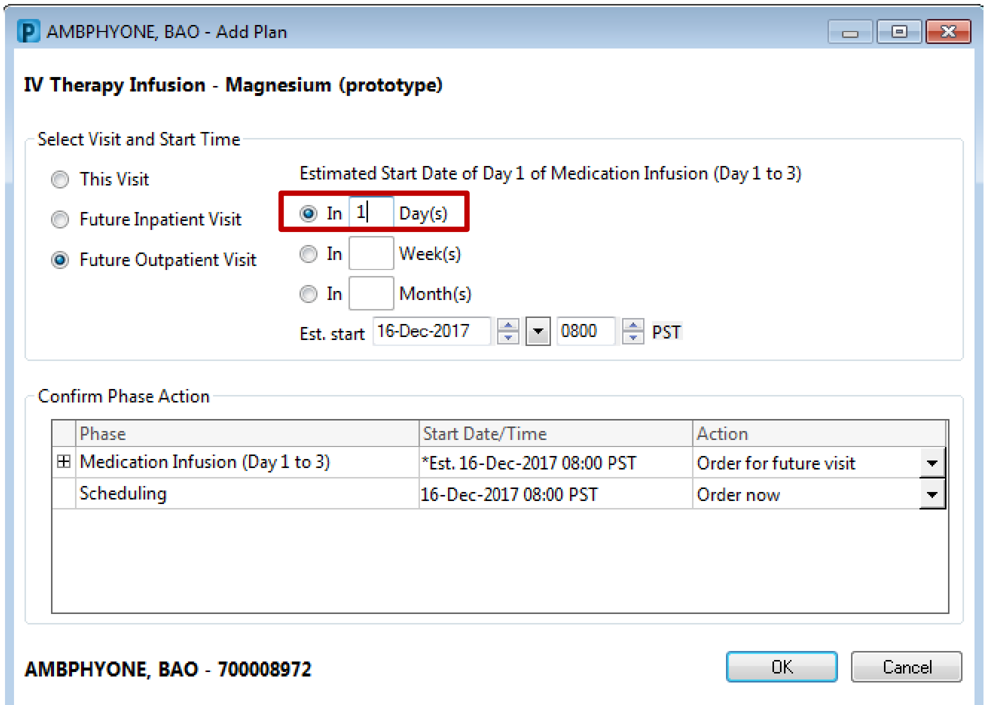


2 You can select one of the following options:

- This Visit
- Future Inpatient Visit
- **Future Outpatient Visit** – for this activity choose this option.

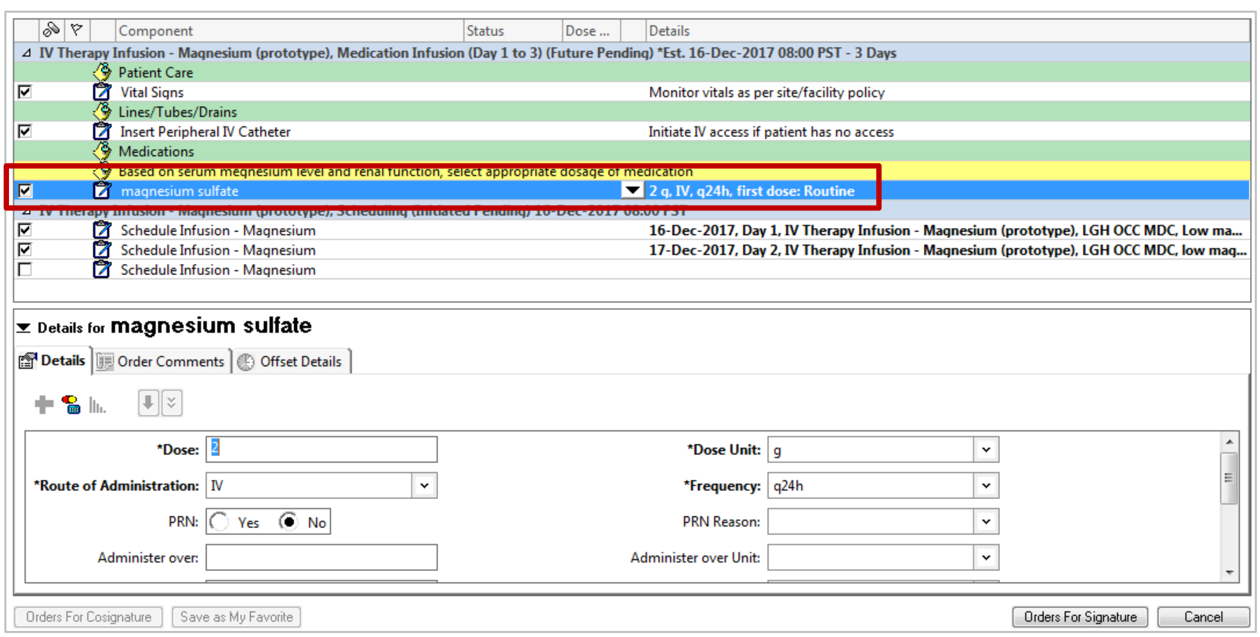


2 The **Start Date/Time** allows for immediate start of medication infusion or for planning the treatment in advance. Selec to possibly start the treatment next day.



3 The order for magnesium sulfate is preselected.

From the drop-down, select the order sentence 2 g, IV, q24h, first dose: Routine.

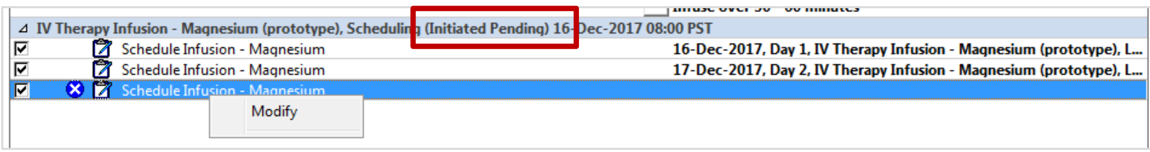


4

You may see the PowerPlan has a scheduling phase.

Select the individual order, then right-click and select **Modify** and add required details.

Each selected scheduling order will send the trigger to Scheduling for the infusion session. For our scenario, ensure two consecutive visits are requested.



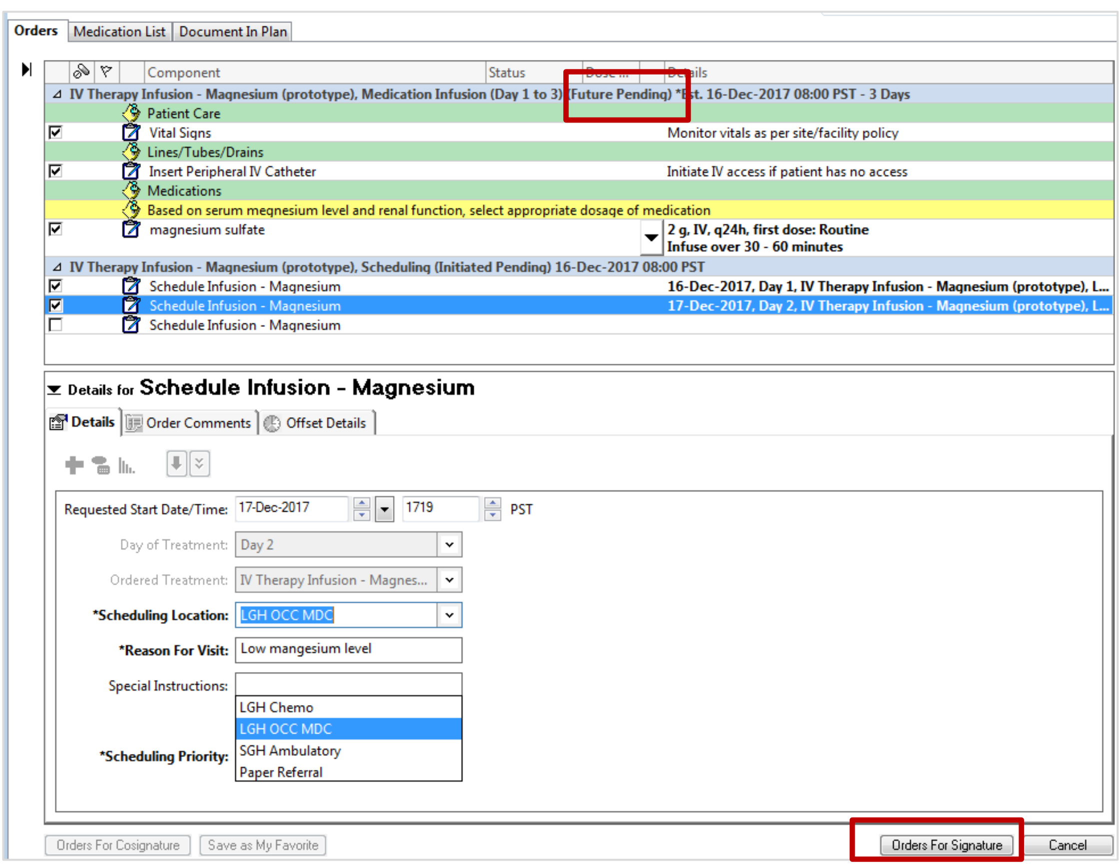
Note: Only selected orders will create a future scheduling request.

5

This PowerPlan is marked as (**Future Pending**) and will remain in this status until orders need to be activated on the day of treatment.

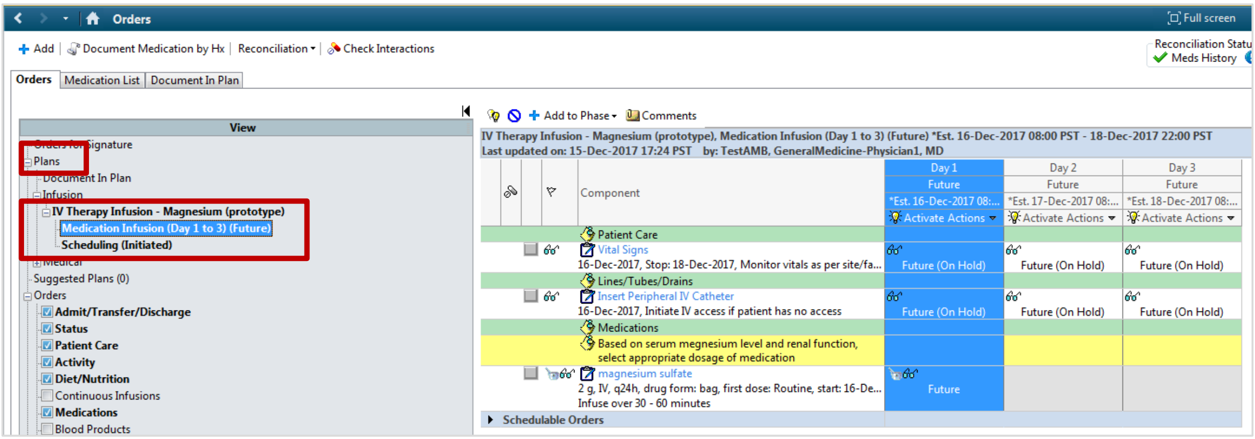
With all required information added, click **Orders for Signature** button [Orders For Signature] to display only selected orders. Then, click **Sign** to complete placing orders.

The PowerPlan for two consecutive visits for magnesium infusion are now placed and request to arrange for appointments has been sent to Scheduling.



6

In the Orders window, the plan is listed under Plans. Each day of treatment is listed separately. This type of PowerPlan is referred to as 'day of treatment' as it contains **multi-day treatment plan for recurring encounters**.



Key Learning Points

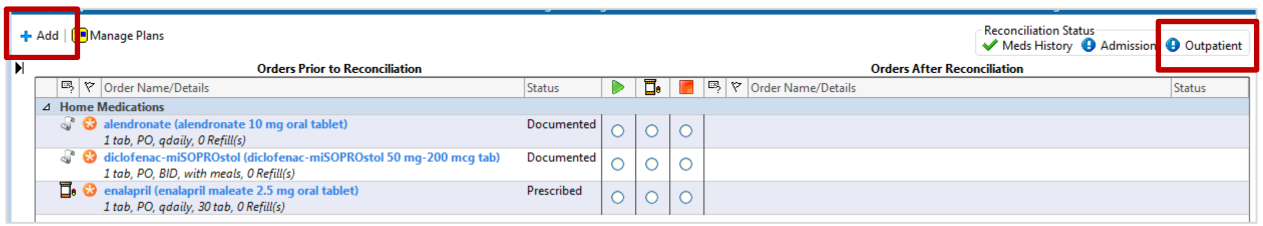
- IV infusion therapy PowerPlan allows you to plan treatment over several visits by using a **multi-day PowerPlan**.
- Each day of treatment must correspond with a **selected** scheduling order.
- Clicking Sign will place orders into a **future** state for activation at a future time.

Activity 3.4 – Create Prescriptions

Duration: Estimated Completion Time - 10 min

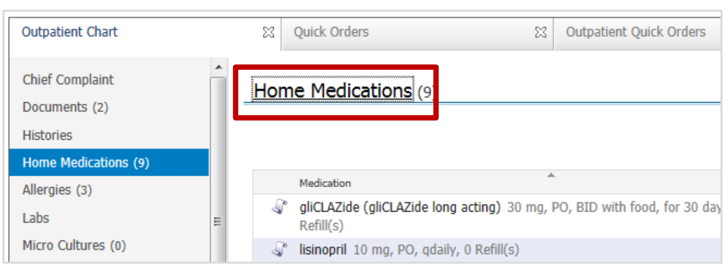
The Clinical Information System (CIS) allows few easy ways to create a prescription.

If you decide to perform **Outpatient Medication Reconciliation**, the window allows you to add new medication or create a prescription from any medication listed there by clicking the + Add icon.

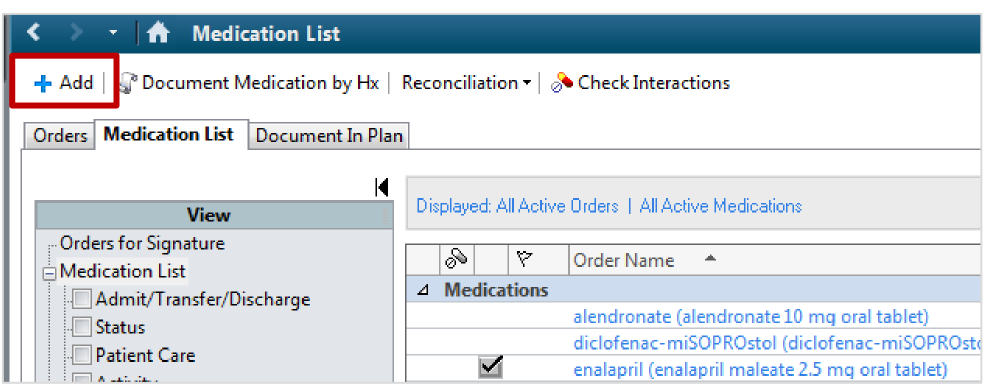


If you decide not to perform medication reconciliation, you can create a prescription **from the existing medication list** for your patient.

1 To create a prescription, click the **Home Medications** link.



2 Click the **+Add** icon on this window toolbar.



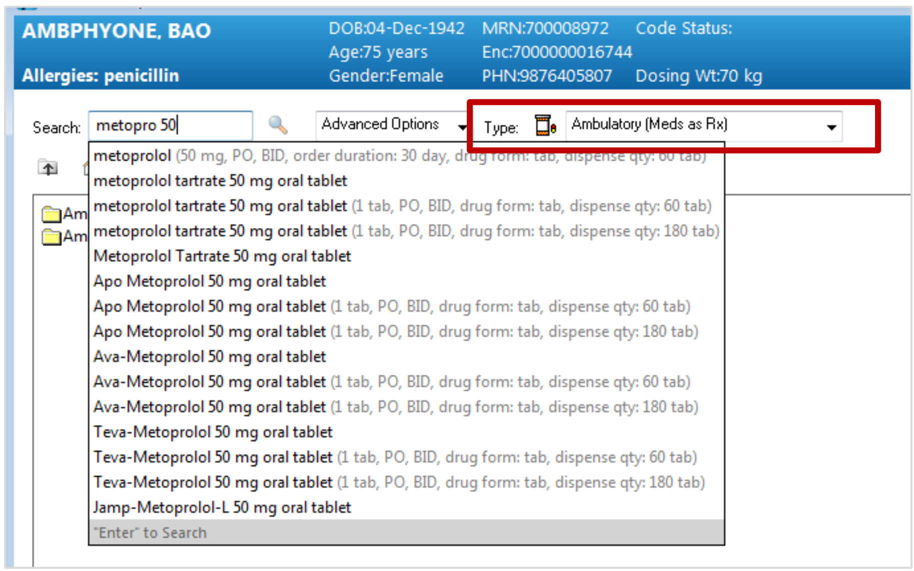
3

Search for orders window displays. Ensure the *Ambulatory (Meds as Rx)* is selected for the order **Type**.

Search for *metopropol.*

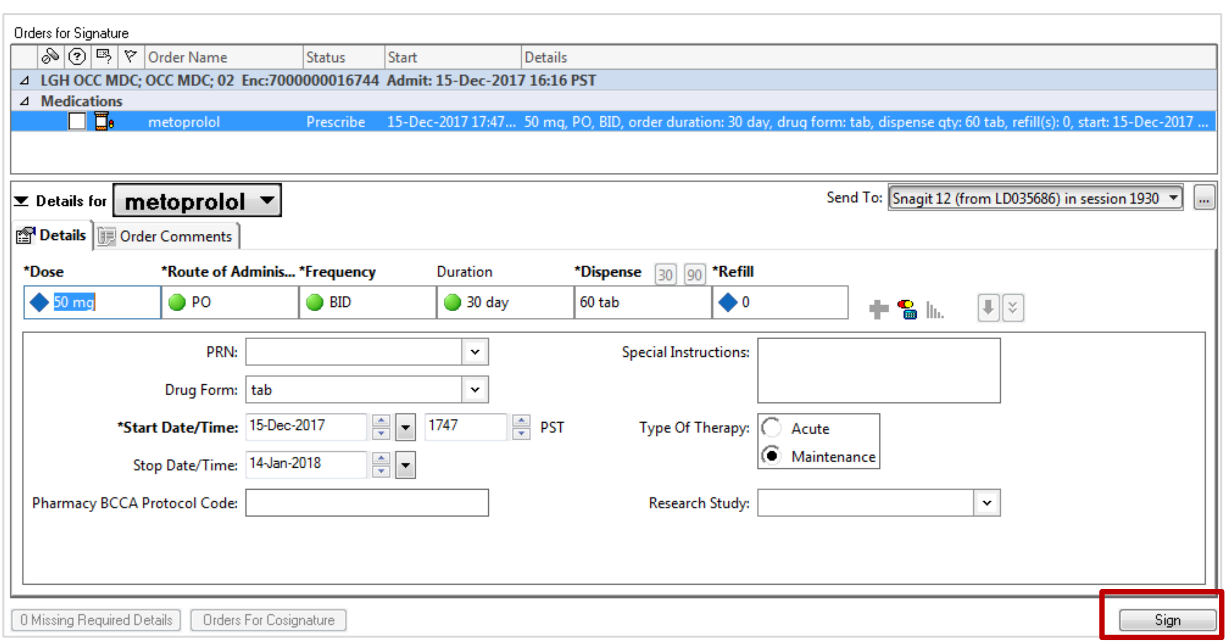
If you don't see the order sentence you want, select the most generic entry to display full list of options. Select 50 mg PO qdaily.

Click **Done**.



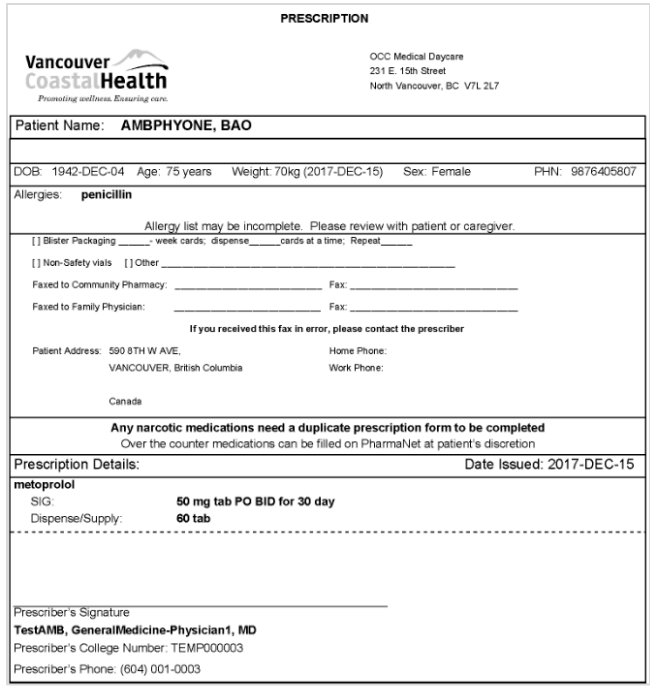
4

The **Orders for Signature** window displays allowing you to review details. Select the order sentence. Click **Sign** if no further changes are needed.



The following happens automatically:

- New medication is added to patient's Medication List.
- The prescription will be automatically created and printed for your signature.


PRESCRIPTION

Vancouver CoastalHealth
Promoting wellness. Ensuring care.

OCC Medical Daycare
231 E. 15th Street
North Vancouver, BC V7L 2L7

Patient Name: **AMBPHYONE, BAO**

DOB: 1942-DEC-04 Age: 75 years Weight: 70kg (2017-DEC-15) Sex: Female PHN: 9876405807

Allergies: **penicillin**

Allergy list may be incomplete. Please review with patient or caregiver.

[ ] Blister Packaging _____- week cards; dispense_____cards at a time; Repeat_____

[ ] Non-Safety vials [ ] Other ____________

Faxed to Community Pharmacy: ____________ Fax: ____________

Faxed to Family Physician: ____________ Fax: ____________

If you received this fax in error, please contact the prescriber

Patient Address: 590 8TH W AVE, VANCOUVER, British Columbia Canada
Home Phone:
Work Phone:

Any narcotic medications need a duplicate prescription form to be completed
Over the counter medications can be filled on PharmaNet at patient's discretion

Prescription Details: Date Issued: 2017-DEC-15

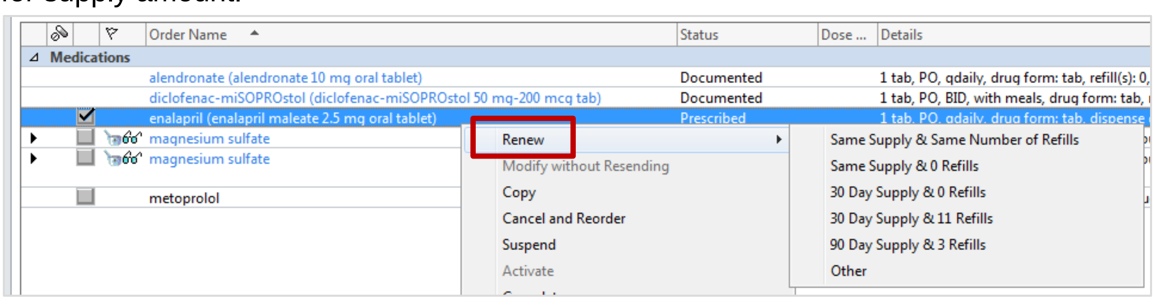
metoprolol
SIG: **50 mg tab PO BID for 30 day**
Dispense/Supply: **60 tab**

Prescriber's Signature
TestAMB, GeneralMedicine-Physician1, MD
Prescriber's College Number: TEMP000003
Prescriber's Phone: (604) 001-0003

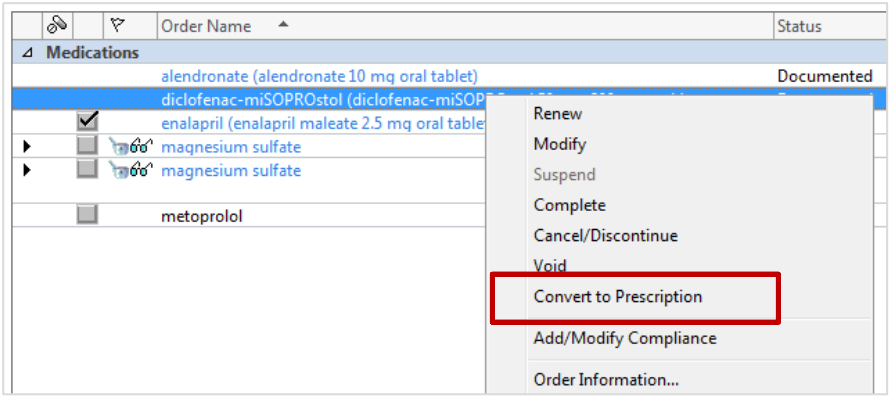
5

To renew the existing prescription:

1. Display patient's **Medication List** by clicking the Home Medications link in the Outpatient Chart tab.
2. Locate the medication on the list, right-click and select **Renew** and select one of the option for supply amount.



6 You can also create a prescription from any medication listed under patient's **Medication List**. Right-click the medication and select **Convert to Prescription**.



Key Learning Points

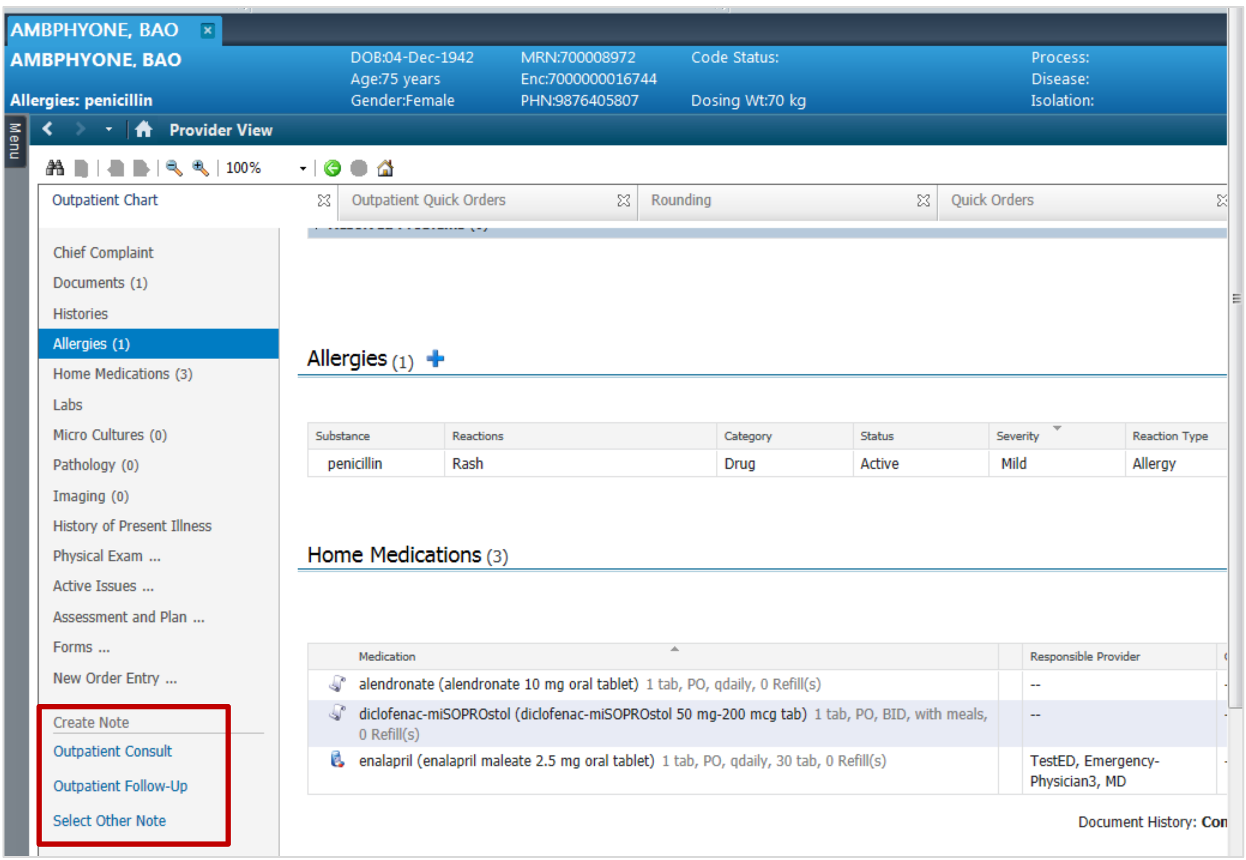
- You can add **a new prescription** or renew the existing one from the Medication List.
- The CIS will print the prescription automatically when you sign the electronic prescription.

Activity 3.6 – Complete a Visit Note

Duration: Estimated Completion Time - 10 min

The Outpatient Chart tab has the **Create Note** section. Clicking these items displays the relevant note types represented by links to make documentation easier. With one click on the desired note type link, the **Dynamic Documentation** generates a charting note.

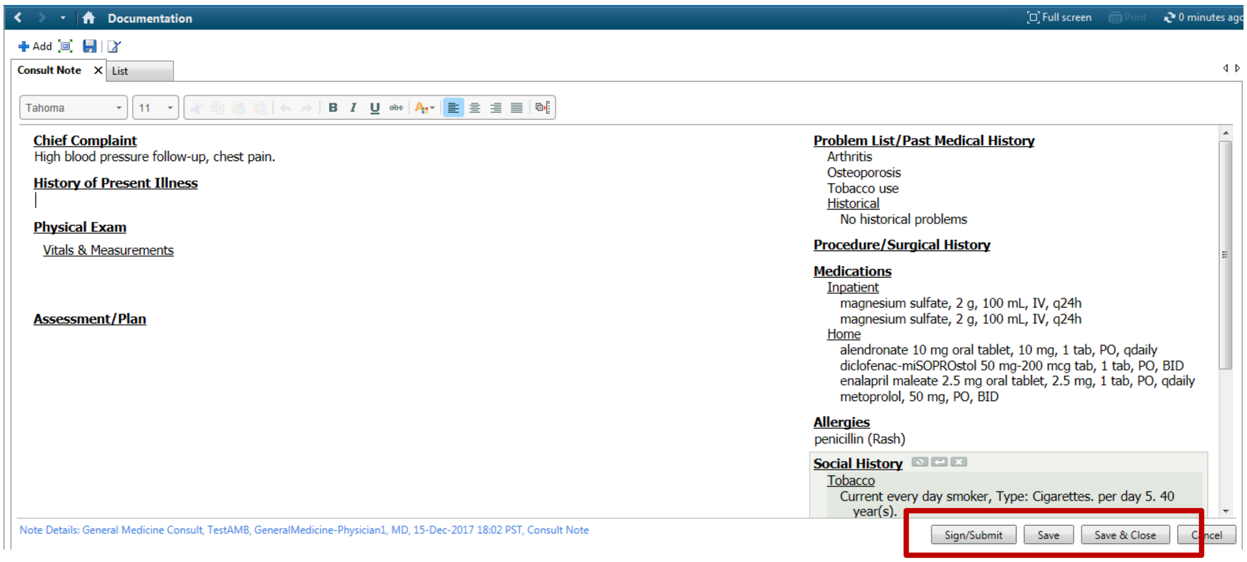
1 Navigate to the **Create Note** section. Depending on you specialty, you might see links to different note types here.
For our scenario, click **Outpatient Consult** note.



2 The note displays and pulls the information already entered.

Edit the note if necessary. You have previously learned how to make changes to the note. Remember to use auto text entries. Add below the explanation to the command buttons

- Click _______________ to complete the note and close this window.
- Click _______________ to save incremental work you have done and continue to work.
- Click _______________ to save the information and finish the note later.
- Click _______________ to discard changes and close this window.



Key Learning Points

- Use note type links under the **Create Note** section to create a typical consult note.

PATIENT SCENARIO 4 – Managing Referrals

Duration	Learning Objectives
30 minutes	At the end of this scenario, you will be able to: - Review and triage referrals.

SCENARIO

As provider working in the ambulatory setting, you will receive referrals. If a facility is not using Clinical Information System (CIS), the process will remain on paper. If a facility is using the CIS, referrals can be accepted, rejected, and scheduled electronically. In this scenario, you will review your referral queue and accept and reject referral examples provided. You will also request more information before making your decision.

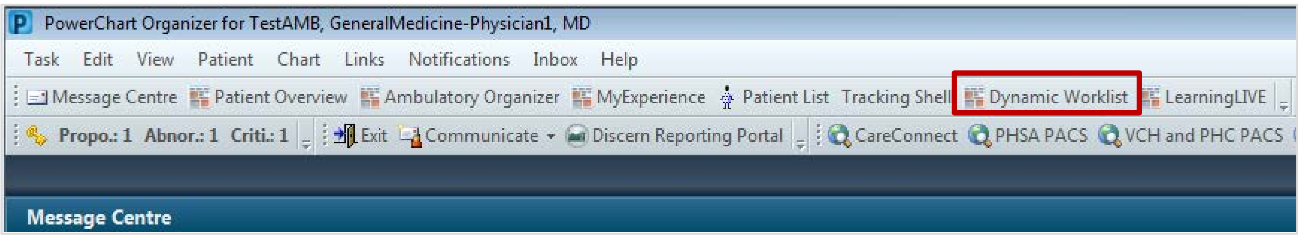
You will be completing the following activities:

- Access and navigate the list of referred patients.
- Accept or reject a referral or request more information.

Activity 4.1 – Access and Navigate The List of Referred Patients

Duration: Estimated Completion Time - 10 min

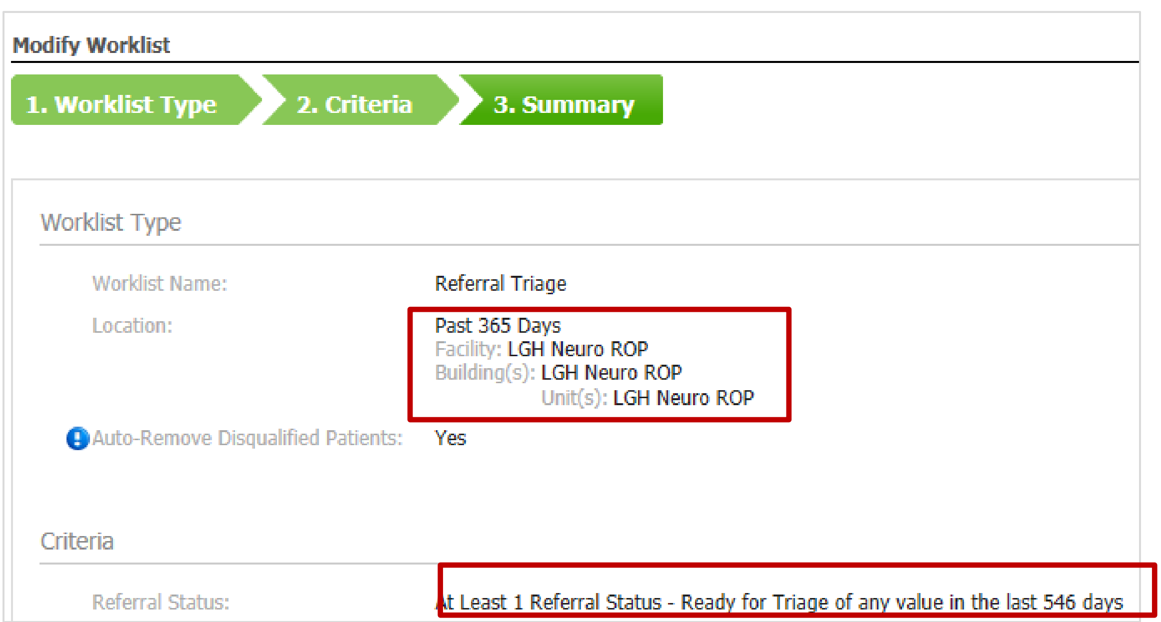
The CIS provides a list of referred patients using the **Dynamic Worklist** functionality that can be accessed from the main toolbar:



Dynamic Worklist allows users to create a subset of patients based on many different criteria, for example:

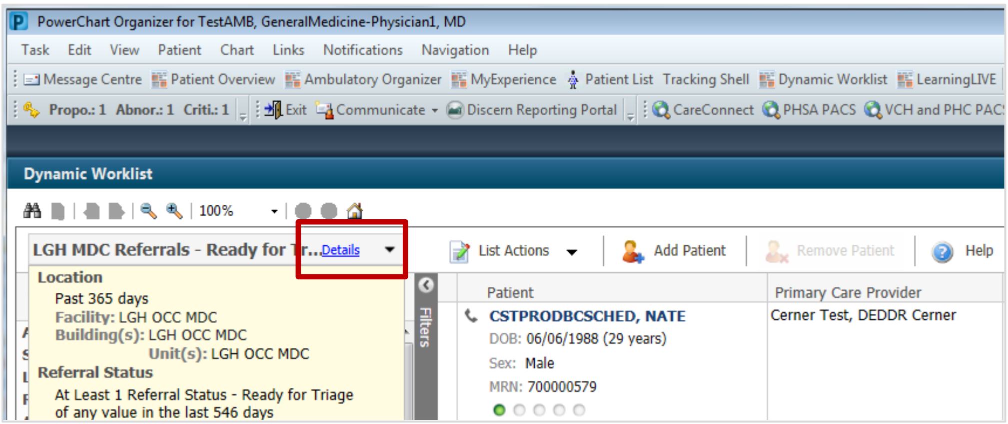
- Health conditions
- Results
- Orders
- Appointment types
- Demographics like age or sex

Below you see an example of criteria set for *Referrals coming to the LGH Neuro ROP Clinic* with a referral status of *Ready for Triage* in the last 546 days.



The Dynamic Worklist is vital for tracking and triaging patient referrals as they relate to your clinic. For example, one worklist can track patients that are **Ready for Triage** while other called **Booked** will group patients that already have an appointment.

It is important to name worklists properly to clearly reflect the selection criteria. Each list is set up once and then continuously used to monitor referrals. Hovering over the specific worklist **Details** will display its criteria to ensure that the right selection of patients is displayed.



Patient's chart can be open directly from the worklist assisting in making a decision to:

- Accept the referral
- Reject the referral
- Request more information

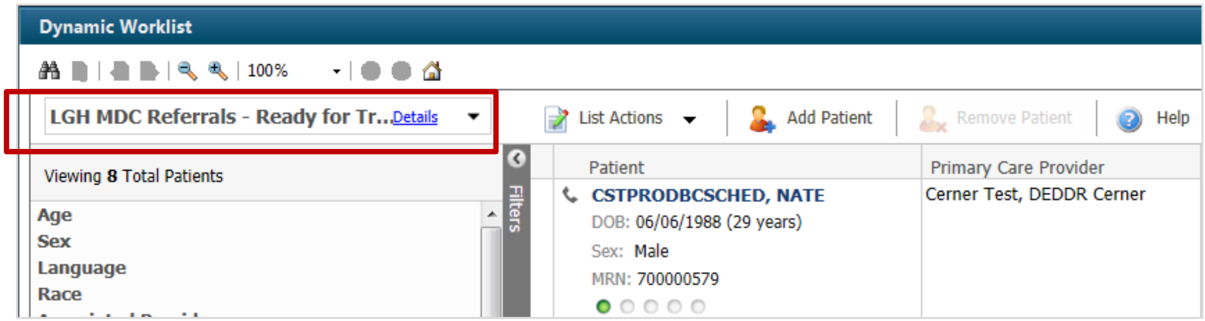
With patient's chart open, an order is placed that updates clinic's worklists:

- Placing the **Accept Referral** order will automatically update the referral status to A*ccepted.* Patient will drop from the *Ready for Triage* worklist and Scheduling will receive the order to book an appointment.
- Placing the **Reject Referral** order will automatically update the referral status to *Rejected*. Patient will drop from the worklist.
- Placing the **Referral Information Request** order will temporarily drop the patient from *Ready for Triage* worklist. The clerical staff receives the task to obtain information requested by a provider. Once the information is received, the nurse will change the referral status back to *Ready for Triage* and the provider will either accept or reject the referral.

Note: Oncology providers will be placing orders specific to the oncology.

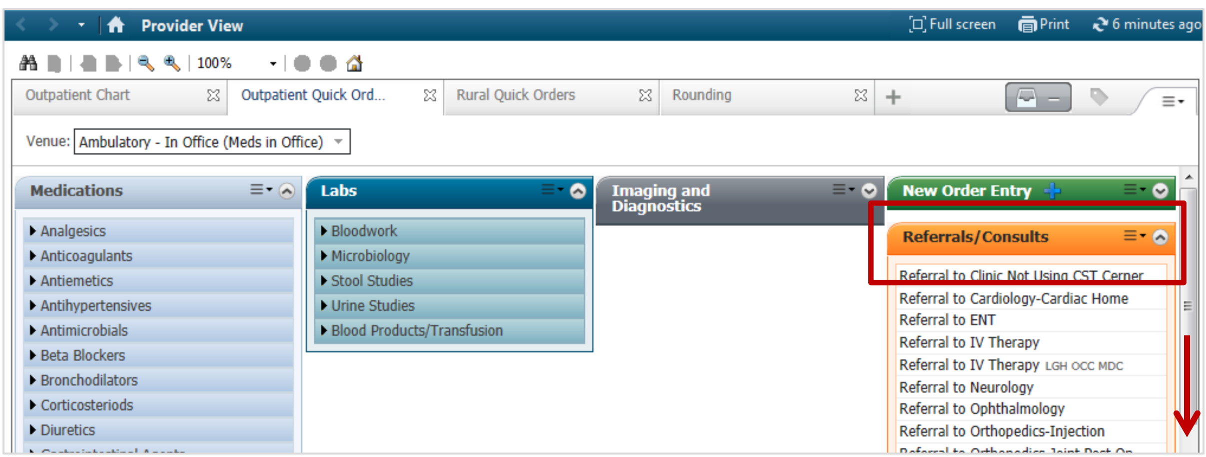
To Accept a Referral

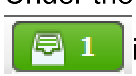
1 Click the  button on the toolbar to display worklists. Ensure the **LGH MDC Referrals - Ready for Triage** list is displayed.

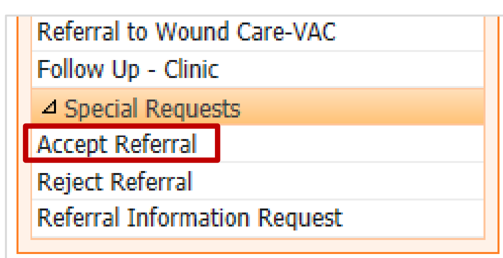


2 Click patient's name to open and review the chart.

1. To accept the referral, display Outpatient Quick Orders.
2. Expand **Referrals/Consults** and scroll down to locate the Special Requests folder.



3 Under the **Special Requests** folder, select **Accept Referral** and click Orders for Signature  icon.

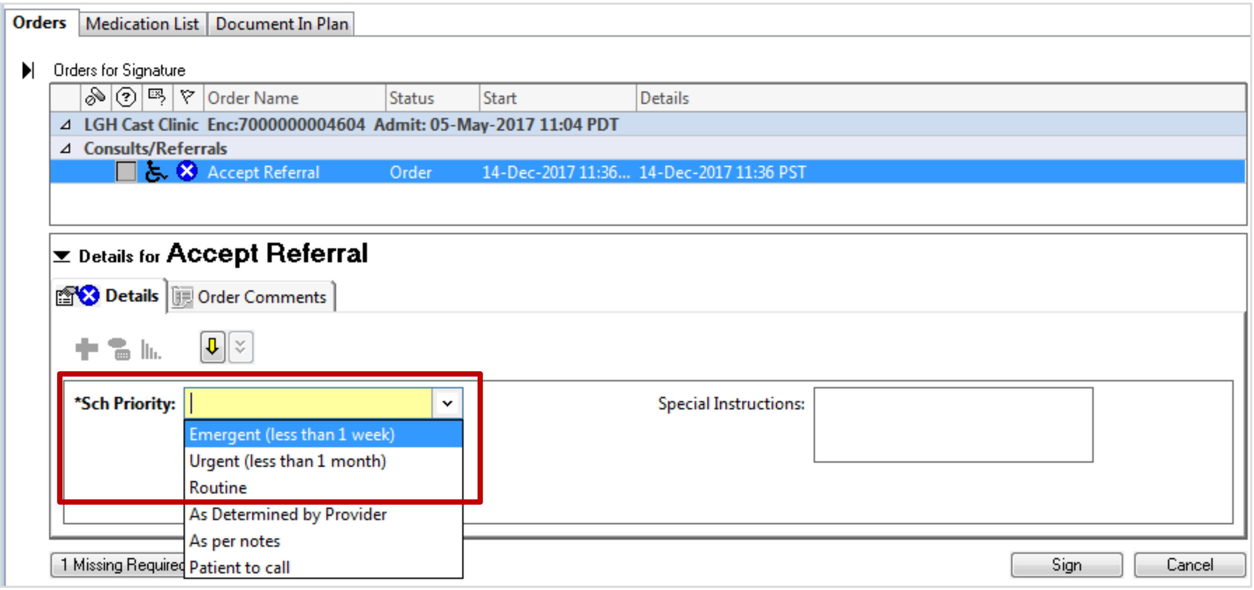


4

Click Modify to add required details and click the order to display **Details**.

Select one of the options for the **Sch Priority** for the Scheduling clerks. Special instructions are optional but might be helpful.

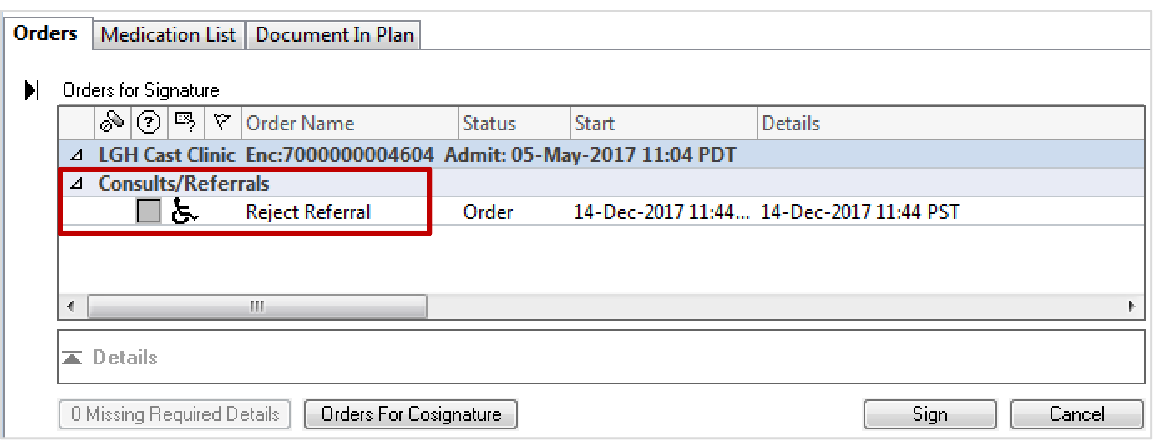
Click **Sign**. The referral is removed from the clinics Ready for Triage worklist.



To Reject a Referral

1

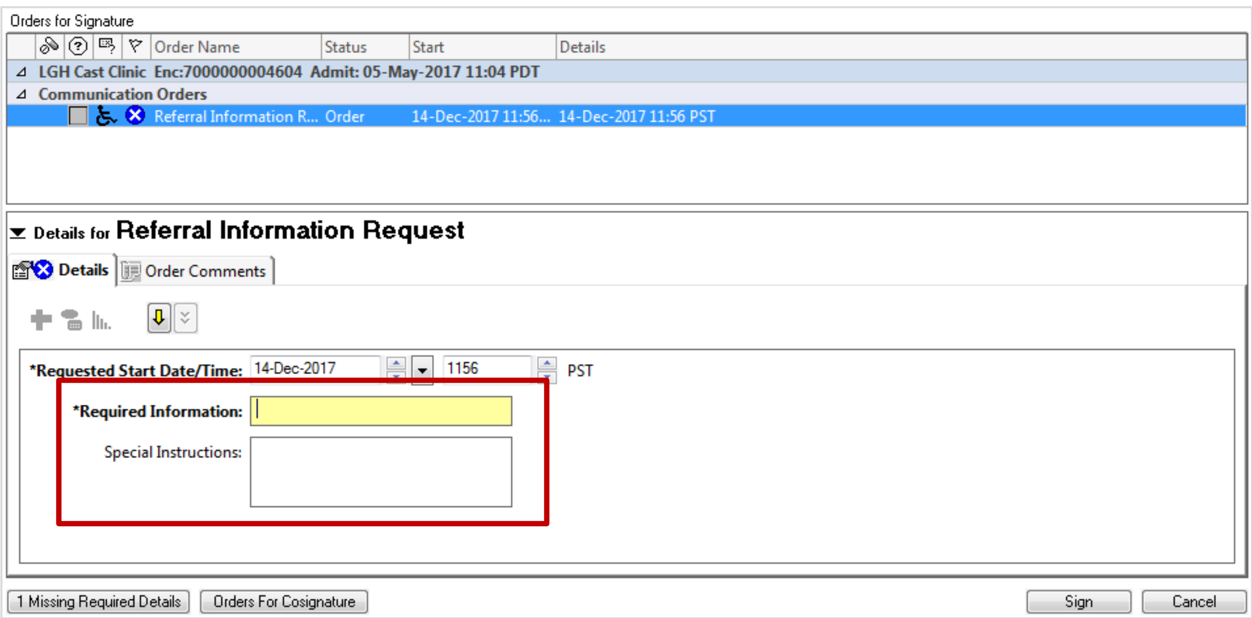
1. Return to the Dynamic Worklist screen to display the **LGH MDC Referrals - Ready for Triage** worklist.
2. Select the patient, and locate the **Reject Referral** order under Outpatient Quick Orders > Referrals/Consults > Special Requests.
3. Place the order and **Sign**. The referral is removed from the clinics Ready for Triage worklist.



To Request More Information

1

1. Return to the Dynamic Worklist screen to display the **LGH MDC Referrals - Ready for Triage** worklist.
2. Select the patient, and locate the **Request More Information** order under Outpatient Quick Orders > Referrals/Consults > Special Requests.
3. Place the order and click Modify.
4. Click the order to display **Details** and type what information is required under **Required Information**.
5. Add Special Instructions if necessary.
6. Place the order and **Sign**. The referral is temporarily removed from the clinics Ready for Triage worklist until request is completed.



Key Learning Points

- Use Dynamic Worklists to triage and manage referrals
- Placing a Special Request order will document your decision to:
- Accept Referral
- Reject Referral
- Place a Referral Information Request
- Special Request orders will update the appropriate Dynamic Worklist and trigger actions for designated team members

PROFICIENCY ASSESSMENT

SCENARIO

This is a typical day in the Medical Daycare Clinic. You have an appointment for the patient. You open patient's chart and you will:

- Place a future order for the chest x-ray and the follow-up visit in 6 weeks
- Place a referral to Neurology clinic in 4 weeks
- Place a multi-day order for the magnesium infusion
- Create a prescription for a new medication and renew the existing prescription
- Create a consult note.

Proficiency Assessment Checklist

Competency Area(s)	Demonstrate Tasks Completion
DOCUMENTING ON YOUR PATIENT	☐ Create a consult note
COMPUTERIZED ORDER ENTRY & ORDER MANAGEMENT	☐ Place a future order ☐ Place a referral ☐ Place a multi-day PowerPlan for the IV infusion
MEDICATION MANAGEMENT	☐ Create a new prescription ☐ Renew a prescription
MANAGING WORKFLOW	☐ Open patient's chart from Ambulatory Organizer & Dynamic Worklist ☐ Sign and reject a lab result in Message Centre ☐ Accept and reject a referral ☐ Request more information