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







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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.

PowerChart Organizer for TestAMB, GeneralMedicine-Physician1, MD								
Task Edit <u>View Patient Chart I</u>	inks Notifications Inbox Hel	D						
🖃 Message Centre 🎬 Patient Overview 🖷 Ambulatory Organizer 🎬 MyExperience 🎍 Patient List Tracking Shell 🎬 Dynamic								
Abnor : 1 Criti : 1 Prono : 1 : The Evit - 1 Communicate - Discorr Reporting Portal : CareConnect C DHSA DA								
Message Centre								
Inhox Summany	Pasulta X							
insex summary								
Inbox Proxies Pools	🎦 Communicate 👻 🕍 Open	💥 Message Journal 🔛 Forward Only 🔤 Select Pati						
	tient Name	Abnormal						
Display: Last 90 Days 👻	LIPSE, LUNAR	Critical: 0 High: 0 Low: 0 Abnormal: 0						
Priority Items (1)	STEDPEM, LABS	Critical: 0 High: 0 Low: 0 Abnormal: 0						
Messages (1/6)	TEDPEM, LABS	Critical: 0 High: 0 Low: 0 Abnormal: 0						
General Messages (1/5)	ALIA, COFFEE	Critical: 1 High: 0 Low: 1 Abnormal: 0						
	EI, MEI	Critical: 0 High: 0 Low: 1 Abnormal: 0						
Inbox Items (54)								
Results (5/5)								
Abnormal (1/1)								
Critical (1/1)								
Normal (1/1)								
Other (2/2)								

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.

Message Centre			🖸 Full screen 🛛 👼 Prim
Inbox Summary	Abnormal ×		
Inbox Proxies Pools	Communicate 👻 🚔 Open 💥 Message Jou	rnal 📑 Forward Only 🔤 Select Pat	tient 🌇 Select All 🛛 🕅 R
Display: Last 90 Days	Patient Name	Abnormal Outstanding	O Status I
Dispidy. Last 50 Days	PROVIDER, CSTPRODPET	Critical: 0 High: 4	Opened
Inbox Items (69)			
Results (8/12)			
Abnormal (0/1)			
Critical (0/1)			

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

Abnormal X						
En Communicate	💕 Open 👌	Message Journa	I 💦 Forward Only	Select Patient	t 🏬 Select All 👔	Result Journal
Patient Name			Abnormal	Outstanding O	Status	Result Type
PROVIDER, CSTPRO	DPET		Critical: 0 High:		Opened	

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.



Abnormal	× Resul	ts to Endorse: IPPHYC	NE, DOR	отнү х						
<mark>⇒</mark> ⊈Create →	For	ward Only 🍓 Print 🛼	Select Pat	ient 👚 🐥	🔁 Mar	k Unread	Inbox View	Summary View		
IPPHYONE Allergies:	E, DOR fentany	DOB:10-Oct-1945 Age:72 years Gender :Female	MRN:70 Enc:700 PHN:98	00008103 000001354 76480719	Cod 9 Dosi	e Status: ing Wt:81	Pro Dis ka Isol	ease: lation:	Location:LGH Enc Type:Inpati Attending:	4W; ient
						9			· · · · · · · · · · · · · · · · · · ·	
Event Date		🗹 Event	Result	Ref. Range	Trend					1 <u></u>
15-Nov-201	7 11:20 PS	T 🔣 WBC Count	90.0 H	(4.0 - 11.0)	Trend					sta
		RBC Count	4.40	(4.20 - 5.80)	Trend					đ
		🗹 Hemoglobin	140	(135 - 170)	Trend					6
		Hematocrit	0.45	(0.40 - 0.50)	Trend					9
		MCV	98	(82 - 98)	Trend					E e
		MCH	32	(25 - 34)	Trend) (m
		RDW-CV	12.0	(11.0 - 15.0)	Trend					- Ľ
		Platelet Count	400	(150 - 400)	Trend					
		NRBC Absolute	0.0	(0 -)	Trend				l	
		Neutrophils	63.00 H	(2.0 - 8.0)	Trend					
		Lymphocytes	18.00 H	(1.2 - 3.5)	Trend					
		Monocytes	4.50 H	(0.2 - 1.0)	Trend					
		Eosinophils	3.60 H	(0.0 - 0.7)	Trend					
		Basophils	0.90 H	(0.0 - 0.2)	Trend					-
		1NR	1.0	(0.9 - 1.2)	Trend					+
Action Par	ne									ą
Endorse	0	Save 🔘 Refuse	Reaso	18				-		
Additional Forward	al Action:			To: (Lir	nit 5)		楢	Due: 10-Dec-201	1652	×
Comments: (Limit 212)										
							Next	OK & Clos	e OK&N	lext

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.

Action Pane				
endorse	Save	Refuse	Reason:	
Action Pane Endorse Save Refuse Reason: Additional Forward Action: Comments: (Limit 212) Call Patient with Results See Note Forward to Primary Care Physician Waiting Pending Results Confirm Follow-up Send to Specialist/Consulting Provider Sign Review	To: (Limit 5) PRODBC F			

You can also refuse the result:

6

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

You can type comments, if necessary.



Action Pane				
Endorse	Save	Refuse	Reason:	
Additional Forward Acti Comments:	on:			Assign to another MD Other (See Comments) Report Already Exists, (See Comments) Wrong Order Wrong Patient

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.

PowerChart Organizer for TestAMB, Ge	neralMedicine-Physician1, MD		
Task Edit View Patient Chart L	inks Notifi <mark>cations Inhox Help</mark>		
🕴 🖃 Message Centre 📲 Patient Overview	🎬 Ambulatory Organizer 📲 MyExperience	🛓 Patient List Tracking Shell 🎬 Dynamic Work	dist 📲 LearningLIVE 🖕 🗄 🔍 Pa
🤅 🍫 Abnor.: 0 Criti.: 1 Propo.: 1 📮 🗄	Exit 🔄 Communicate 👻 🗃 Discern Report	ing Portal 🖕 🤅 😋 CareConnect 😋 PHSA PACS 🔇	💐 VCH and PHC PACS 🔇 MUS
Message Centre			
Inbox Summary 🛛 🕈	Messages X		
Inbox Proxies Pools	🢁 Communicate 👻 🚔 Open 🚑 Reply	y 🗃 Reply All 🙈 Forward 🎦 Delete 🔰 Messag	ge Journal 🔄 Select Patient 🗄
Display: Last 90 Dave	Priority Patient Name	From	Subject
Last 50 Days		TestAMB, Nurse-Ambulatory1	General Message
	· · · · · · · · · · · · · · · · · · ·	TestAMB Nurse-Ambulatory1	General Message

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 pertinenent 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 **21** minutes ago often will ensure the patient list and appointment status is up-to-date for you to start seeing your patients.

PowerChart Organi	zer for TestAMB,	GeneralMedicine-Physician1, MD							_ 0 🗾
Task Edit View	Patient Chart	Links Notifications Navigation	Help						
🖃 Message Centre	📲 Patient Overvi	ew 🎬 Ambulatory Organizer 📲 MyE	xperience 🔺 Patient List Tr	racking Shell 📲 Dynamic Wo	rklist 🏢 LearningLIVE 🖕 🗄 😋 Pati	ient He	ealth Education Materials 🧯	Policies and	Guidelines
🍫 Abnor.: 0 Criti.:	1 Propo.: 1 🝦	📲 Exit 📲 Communicate 👻 🗃 Disce	rn Reporting Portal 🖕 👯 🔇	CareConnect 🕄 PHSA PACS	🕄 VCH and PHC PACS 🕄 MUSE	🕄 Fo	ormFast WFI 🝦		
							👘 Re	cent - Name	+ C
Ambulatory Orga	nizer						[□] Full scree	n 🝙 Print	🗧 0 minutes ag
	🔍 🔍 100%	- I 🤤 🌑 🏠							
Ambulatory Orga	anizer								
Day View (1)	Calendar er 12, 2017	Open Items (0)	Team 🔻						
Time	Duration	Patient	Details	Status	Notes	۲	Decemb	er 12, 20	17
10:03 AM	20 mins	CSTEDDEMOTRAUMA, CLIN	Trauma New	Checked In	Boscon for Visit L followup			Tuesday	
10.05 AP	50 mms	20 Years, Male	Trauma New	Location Not Defined	Reason for visit . Tonowup		8 am		^
							9 am		
							10 am	LINIC	



Ensure the **Ambulatory Organizer** is displayed.

Day View Tab

1

- 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** in the calendar in the calendar is the term of term
 - 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.

Ambulatory Organizer								
🏦 🐚 🖣 🖿 🔍 🍕 100% 🛛 👻 🌍 🚮								
Ambulatory Organizer								
Day View (1) Calendar	Open Items (0) Upcoming							
 December 12, 2017 	Patients for: LGH Trauma Team 👻							
Time Duration	Patient	Details	Status					
10:03 AM 30 mins	CSTEDDEMOTRAUMA, CLINIC 20 Years, Male	Trauma New	Checked In Location Not Defined					

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

Ambulator	Ambulatory Organizer							
Day View	Day View (1) Calendar Open Items (0)							
4 0	October 19, 2017 Patients for: Lamb, Jeffery MD ; LGH Breath Prog Provider 2 -							
Time		Duration	Patient		Details	Status (as of 12:27)	*	



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**.

	Confirmed LGH OCC MDC		Reason for Visit : IVIG
	Confirmed LGH OCC MDC		Reason for Visit : Transfusion
[Comments		Reason for Visit : IVIG
	Patient has recurrent headaches		Reason for Visit : hypomag insi
	(31 / 255)	Save Cancel	

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.

Day View (1)	Calendar	Open I	tems (0) Upcoming	
December	12, 2017	•	Patients for: LGH Trauma Team 🔻	
Time	Duration		Patient	Details
10:03 AM	30 mins		CSTEDDEMOTRAUMA, CLINIC 20 Years, Male	Trauma New

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).

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

Ambulatory Organiz	er					
	 100% 100 (0) 	3				
Ambulatory Organi	izer					
Day May (2)	-					
bay new (a)	Carendar Open Item	5 (3)				
November :	16, 2017 🔄 🕨 Pa	tients for: LGH MDC Chair 1 ~				
Time	Duration	Patient	Details	Status (as of 10:49)	Notes	0
d Clinic - LGH OCC	MDC					
8:00 AM	15 mins	CSTSCHTEST, ABIGAIL 23 Years, Female	Infusion - Antibiotics	Cancelled	Reason for Visit : Infection	
9:15 AM	45 mins	LIQUID, LEAF 20 Years, Male	Infusion - Antibiotics	Checked In OCC MDC	2 Reason for Visit : assessment	
10:00 AM	2 hrs	No appointments				
12:00 PM	3 hrs	CSTSCHTEST, STHEATHER 41 Years, Female	Transfusion - IVIG	Confirmed	Reason for Visit : IVIG	
3:00 PM	2 hrs	A. LORRAINE BAINS 32 Years Demale Name: A, LO	ORRAINE BAINS	Checked In OCC MDC	Reason for Visit : hypomagensemia	
		MR4: 70000 FIN: 700000 DOB: 25/10/ gender: fam Home: (604) Pager person MOBILE: (77	0144 0013005 1985 Jale Bil: (778)228-4478 8)228-4478			

Calendar Tab

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

Ambulatory Organ	izer				
	م ا 100% 🔹 ا 😮 🕲 🖾				
Ambulatory Orga	nizer				
Davillar	Calendar	3			
Day View	Open Items (5)				
Day Week	November 16, 2017	Patients for: LGH MDC Cha	ir 1 ; LGH MDC Chair 2 ; LGH MDC Chair 3 =		
LGH MDC Ch	LGH MDC Ch LGH MDC Ch.				
	Sun 11/12	Mon 11/13	Tue 11/14	Wed 11/15	Thu 11/16
3 am					
4 am					
5 am					
6 am					
7 am					
8 am		LGH MDC Antibiotics	LGH MDC Antibiotics	LGH NDC Antibiotics	LGH MDG Antibiobos CSTSO/ITEST, ANIGAR, Infusion - Antibiotics
9 am					ingino, une
10 am					LGH MDC Antibiotics
11 am					
12 pm		LGH MDC Infusion	CSTSCHTEST, AURAIL Infusion - Magnesium	WATER, III.AN Driving - Hagneslum	CSTSCHTEST, STHEATHER Transfusion - IVIG
1 pm			Checked In hype	Decked In magnetium	Confirmed TVSG
2 pm			LGH MDC Infusion	LGN MDC Infusion	



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.

Day View	(1) Calen	dar Op	en Items (2)	Upcor	ming	
Day	Week	December	12, 2017	•	Patients	for: Ba <u>c</u>
		Baggoo, Al	an MD			
7 am						
8 am		LGH JRAC	CSTSNC0 Mastecto Confirme	DOPER, STBE my Partial d	E LGH I	IDC
9 am Den	mabrasion Face		Appointment Tir Name: CSTSNC0 Procedure: Masl Status: Confirme	ne: 8:00 AM DOPER, STBE tectomy Parti ed	- 9:00 AM ETTY ial	

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.

Ambulatory Organizer							
Day View (6) Calendar Open Items (1)							
Patients for: Baggoo, Alar	n MD 👻						
From: August 7, 2017 Vie	w 7 More Days						
Appointment	Patient	Details	Notes	Outstanding Actions			
△ More Than 2 Days	Ago (1)						
10 August, 2017 8:00 AM	CSTSCHEMPI, NANCY 5 Years, Female	Cast New	Reason for Visit : query	Note Not Started ✓ Task List Complete			

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.

Ambulatory Organizer							
Day View (6) Calendar Open Items (1)							
Patients for: Baggoo, Ala	n MD 🔻						
From: August 7, 2017 Vie	w 7 More Days						
Appointment	Patient	Details	Notes	Outstanding Actions			
⊿ More Than 2 Days Ago (1)							
10 August, 2017 8:00 AM	CSTSCHEMPI, NANCY 5 Years, Female	Cast New	Reason for Visit : query	Note Not Started ✓ Task List Complete			



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.

Ambulatory Organizer				[□] Full screen	🖷 Print	ntes ago 🎝 🎝	
A	100% 🔹 🌍 🌑 🕍						
Ambulatory Organiz	er						
Day View Patients for: Baggoo, Ala From: August 8, 2017 Vie	Day View Calendar Open Items (1) Patients for: Baggoo, Alan MD ~ From: August 8, 2017 View 7 More Days						
Appointment	Patient	Details	Notes	Outstanding Actions			
△ More Than 2 Days	Ago (1)						
10 August, 2017 8:00 AM	CSTSCHEMPI, NANCY 5 Years, Female	Cast New	Reason for Visit : query	Note Not Started ✓ Task List Complete			

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 **refresh** to ensure that your display is up-to-date.

AMBPHYONE, BAO 🛛						List 🔿 🛛 🎢 Recent 👻 🛛 Name	
AMBPHYONE, BAO	DOB:04-Dec-1942 Age:75 years	MRN:700008972 Enc:700000016741	Code Status:	Process: Disease:		Location:LGH OCC Univer Enc Type:Pre-Outpatient	
Allergies: penicillin	Gender:Female	PHN:9876405807	Dosing Wt:70 kg	Isolation:		Attending:	
S Your Street St						ر الم Full screen 👘 Print 💐 28 n	ninul
A	- @ = 4	_					
Outpatient Chart	Stream Outpatient Quick	Orders 5	3 Rounding	2 Quick Orders	X	+ 🗁 🖻	
Chief Complaint	Chief Complaint					Selected visit 🤰	≡-
Histories	High blood pressure	e and chest pain.					
Allergies (1)	TestAMB, GeneralMedi	cine-Physician1, MD 15/	12/17 15:29				
Home Medications (3)							
Labs	Documento (a)	_			Last 50 Notes	Il Visite Jact 24 hours More x	=-
Micro Cultures		-					_
Pathology				My no	otes only 🔲 Group by en	counter Display: Multiple note types	s 🔻
Imaging	Time of Service	Subject	Note Type	Author	Last Updated	Last Updated By	
History of Present Illness	15/12/17 14:33	ED Note	ED Note Provider	TestED, Emergency- Physician3, MD	15/12/17 14:33	TestED, Emergency- Physician3, MD	
	* Displaying up to the	ast 50 recent notes for a	II vicite			,,	
Active Issues	pipping up to the		1 1010				
Assessment and Plan							
Forms	Histories					All Visits 🤁	=-
New Order Entry	Modical History (2)	Consideral Ulistana	(0) Family History	(1) (1)	0h-/0(0)	Q Add problem	
Create Note	(3)	Surgical History	(U) Family History	(1) Social History (1)	UDS/Gyriocology (U)		
Outpatient Consult	Name	*		Classification			
Outpatient Follow-Up	△ Chronic Problems (3)					



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

mbulatory Organizer				
Day View (4) Calendar	Open Items (3)			
 November 16, 2017 	Patients for: LGH	H MDC Chair 1 ; LGH MDC Chair 3 👻		
Time	Duration	Patient	Details	Status (as of 1:
8:00 AM LGH MDC Chair 1	15 mins	CSTSCHTEST, ABIGAIL 23 Years, Female	Infusion - Antibiotics	Cancelled LGH OCC ME
9:15 AM LGH MDC Chair 1	45 mins	LIQUID, LEAF 20 Years, Male	Infusion - Antibiotics	Checked In LGH OCC ME OCC MDC
9:15 AM LGH MDC Chair 3	8 hrs	CSTSCHTEST, NATE REFREG 37 Years, Male	Infusion - Iron Dextran	Confirmed LGH OCC M
10:00 AM LGH MDC Chair 1	2 hrs	No appointments		
12:00 PM LGH MDC Chair 1	3 hrs	CSTSCHTEST, STHEATHER 41 Years, Female	Transfusion - IVIG	Confirmed LGH OCC MI
3:00 PM	2 hrs	A, LORRAINE BAINS	Infusion - Magnesium	Checked In LGH OCC MI

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.

AMBPHYONE, BAO 🔳					List Recent + Marrie + Q
AMBPHYONE, BAO	DO8:04-Dec-1942	MRN:700008972	Code Status:	Process:	Location:LGH OCC Univer
	Age:75 years	Enc:/000000016741		Disease:	Enc Type Outpatient
Allergies: penicillin	Gender:Female	PHN:9876405807	Dosing Wt:70 kg	Isolation:	Attending
🗧 < 🔹 - 👘 Provider View					🖸 Full screen 🛛 👼 Print 💸 1 minutes ago



- 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.

Outpatient Chart	23 Outpatient Quick Orders 23 Round	ling 없 Quick Or	ders 🛛 🕇 🕞 🗕 🗞 🦷
Chief Complaint Documents (1)	Chief Complaint		Selected visit $ oldsymbol{arepsilon} $ \equiv -
Histories	High blood pressure and chest pain.		
Allergies (1)	TestAMB, GeneralMedicine-Physician1, MD 15/12/17 15:2	9	
Home Medications (3)			
Labs			
Micro Cultures	Documents (1)		Last 50 Notes All Visits Last 24 hours More V
Pathology			My notes only Group by encounter Display: Multiple note types 🔻
Imaging	Time of Service Subject	-	Open Document Print
History of Present Illness	15/12/17 14:33 ED Note		
Physical Exam		ED Note	ED Note Provider (Auth (Verified))
Active Issues	* Displaying up to the last 50 recent notes for all visits	TestED, Emergency-Physician3, MD	Last Opdated: 15/12/17 14:33
Assessment and Plan			
Forms	Histories	Basic Information	Problem List/Past Medical
New Order Entry		Chief Complaint ED Assigned Provider/Time	Arthritis
Create Note	Surgical History (3)	No qualifying data available.	Osteoporosis
Outpatient Consult	Name		Historical
Outpatient Follow-Up	△ Chronic Problems (3)	Physical Exam	No historical problems
	Arthritic	Vitals & Measurements	Medications

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.

IBPHYONE, BAO	and the second second				List 👘 Recent + Vizma	E
IBPHYONE, BAO	DORS4-Dec-1942 Ape/75 years	Enc/200000016744		Process	ExcettonCLGH OCC MDC: OCC MDC: 02 End Type Outputient	
rgles: penicillin	GenderFemale	PH/N9876405807	Dosing Wt70 kg	Isolation:	Attending	
C • A Provider View					(2) Full screen 👼 Print 🔹	1 minutes
#1 8 8 8 4 4 100% ·						
Outpatient Ourt	Outpablent Quick Orders 3	(† Rounding	[1] Quark Orders	22 +		1. 1. 1
Venue: Ambulatory - In Office (Meds in Off	ice) =	-				
Medications	=- > 🗖	labs	3	Emaging and Diagnostics	New Order Entry 👳	
► Analgesics	1	A Eloodwork		4ECG	Referrals/Consults	
 Anticoagulanta 	9	OC and Differential Bood, Routers, once, C	Inder für future visit	ECG 12 Lead Routine, Order for future visit	and the second	
Antiemetics	5	Sectrolytes Panel (Na, K, Cl, CO2, Anion	Gap) Routine, orce. Order for future visit	A Echocardogram	PowerPlans	- 0
 Anthypertensives 	19	Treatinine Level Blood, Routine, sece, Ordan	for future visit	EC EchoCardiogram Routine, Order for Future unit		-
 Antimicrobials 		Fea Blood, Routine, once. Order for future ve		A Cardial Testing Testing		
 Beta Blockers 		"alriant level must have one order to	A first starte start	CARD Cardiar Catheterization (Anniorram) and PCI (Anniorlasty) Post		
▶ Branchadilators		Constium Level Rivel Routing, and, Cole	er fan fadaren vinil	Procedure (validated) CARD Cardiac Catheterization (Angogram) and PCI (Angogram)		
Corticosteriods	p	hosphate Level slood. Rooten, proc. Order	for future with	Part Procedure (velidated)		
Diarebos	1	NR Blood, Routine, price, Order for luture visit	6	CARD Cardiac Catheterization (Angiogram) and PCI (Angioplasty) Pre		
Gastroartestinal Agents	P	TT Blood, Roubne, once, Order for future wat	6	Procedure (Validated) cxHD Cantac Catheterization (Angrogram) and PCI		
Glyceroic Control	A	Abursin Level Bood, Routine, since, Order Io	r future visit.	(Argrighter) the thiosthere (Validated)		
Sedatives	8	Silinubin Total Bood, Routine, once, Order fo	r future visit	Of Mand will Control to some distance and		
		Vanine Aminotransferase Blood, Routine, o	prca. Order für future vielt	CT Head w/o Contrast Burden Color for future and		
		opartate Ammourard/erase must have	e, once, Critter for fullyris with	CT Chest w/ Costrast Routes, Order for Adure with		
		Samma Oktarny Transferace must sure	the same facilies for future unit	CT Chest w/o Costrast Routes. Order for future visit		
	1.4	And the second second second second	and the second second second second			

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

Labs = · 📀	Imaging and Diagnostics 🛛 🔤 - 🔊
▲ Bloodwork CBC and Differential Blood, Routine, once, Order for future visit Electrolytes Panel (Na, K, Cl, CO2, Anion Gan), Boutine, once, Order for future visit Creatinine Level Blood, Routine, once, order for future visit Urea Blood, Routine, once, Order for future visit Glucose Random Blood, Routine, once, Order for future visit	
Calcium Level Blood, Routine, once, Order for future visit	CARD Cardiac Catheterization (Angiogram) and PCI (Angioplasty) Post
Magnesium Level Blood, Routine, once, Order for future visit	Procedure (validated) CARD Cardiac Catheterization (Angiogram) and PCI (Angioplasty)
Phosphate Level Blood, Routine, once, Order for future visit	Post Procedure (validated)
INR Blood, Routine, once, Order for future visit	CARD Cardiac Catheterization (Angiogram) and PCI (Angioplasty) Pre
PTT Blood, Routine, once, Order for future visit	Procedure (Validated) CARD Cardiac Catheterization (Angiogram) and PCI
Albumin Level Blood, Routine, once, Order for future visit	(Angioplasty) Pre Procedure (Validated)

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.

■ Details for CT Head	w/o Contrast			
Details Order Commer	its			
+ * lh. 🖡 💐				
*Requested Start Date/Tim	e: 16-Nov-2017 🚔 💌 1415	► PST *Priority:	Routine	~
*Reason For Exar	n: Migraines	Special Instructions / Notes to Scheduler:		
Provider Callback Numbe	r:			
Pregnar	nt: 🔿 Yes 🔿 No	Special Handling:		~
CC Provider	1:	CC Provider 2:		
CG Punidar	2.	Order for future visit:	🖲 Yes 🔿 No	
Scheduling Locatio	n: 📔 👻			
	(None)			
	LGH Med Imaging			
	WHC Med Imaging			
	Print to Paper			
0 Missing Required Details 0r	ders For Cosignature	-		Sign Cancel

Laboratory and Imaging Orders



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 6, then click Modify.

ders for Signature (5)		
oratory		
CBC and Differential (Blood, Routine, once, Order for future visit)		
Electrolytes Panel (Na, K, Cl, CO2, Anion Gap) (Routine, once, Order for future visit)		
Magnesium Level (Blood, Routine, once, Order for future visit)		
Calcium Level (Blood, Routine, once, Order for future visit)		×
nostic Tests		
NM Bone Whole Body		
	Sign Save Modify	Са



3

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

Orders for Signature				
	Status Start	Details		
△ LGH OCC MDC; OCC MDC; 02 Enc:700	0000016744 Admit: 15-Dec-201	17 16:16 PST		
△ Laboratory				
Differential (CBC and	. Order 15-Dec-2017 16:29	Blood, Routine, Unit collect, Collection: 15-Dec-2017, once, O	rder for future visit	
Electrolytes Panel (Na	. Order 15-Dec-2017 16:29	Blood, Routine, Unit collect, Collection: 15-Dec-2017, once, O	rder for future visit	
Magnesium Level	Order 15-Dec-2017 16:29	Blood, Routine, Unit collect, Collection: 15-Dec-2017, once, O	rder for future visit	
Calcium Level	Order 15-Dec-2017 16:29	 Blood, Routine, Unit collect, Collection: 15-Dec-2017, once, O 	rder for future visit	
⊿ Diagnostic Tests				
NM Bone Whole Body	Order 15-Dec-2017 16:29	. 15-Dec-2017, Routine, Weight: 70, Order for future visit		
Details for Differential (CBC Details) Order Comments	and Differential)			
*Specimen Type: Blood	v	*Collection Priority:	Routine	×
Unit collect: 💽 Ye	es 🔿 No	Collected:	🔿 Yes 💿 No	
*Collection Date/Time: 15-Dec-	-2017 🔹 💌 1629	PST *Frequency:	once	•
Duration:		Duration unit:		•
CC Provider 1 (Outpatient Only):		CC Provider 2 (Outpatient Only):		
CC Provider 3 (Outpatient Only):		Order for future visit:	💽 Yes 🛐 🔿 No	
4 Missing Required Details Orders For Cosig	gnature			Sign Cancel

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

≖ Details for NM Bone Whole Body	
Details 📴 Order Comments	
+ 2 lh. ↓×	_
*Requested Start Date/Time: 15-Dec-2017	*Priority: Routine 🗸
*Reason for Exam:	Special Instructions / Notes to Scheduler:
*Pregnant: Yes No	
*Breastfeeding: Yes No	*Weight (kg): 70
Provider Callback Number:	Special Handling:
CC Provider 1:	CC Provider 2:
CC Provider 3:	*Scheduling Location:
	LGH Med Imaging Print to Paner
	THICK TOPA
4 Missing Required Details Orders For Cosignature	Sign Cancel



Referral Orders

2

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

Place a Referral Order to Cardiology.

Referrals/Consults	≣∙⊘
Referral to Clinic Not Using CST Cerner	
Referral to Cardiology-Cardiac Home	
Referral to ENT	
Referral to IV Therapy	

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

Orders for Signature					
🔊 💿 🖳 Ϋ Order N	ame Status	Start	Details		
△ LGH OCC Univer Enc:70	00000016741				
⊿ Consults/Referrals					
📃 😣 Referral	to Cardiology Order	15-Dec-2017 15:35	Future Order, 15-Dec-2017		
Details for Referra	to Cardiology-C	Cardiac Hom	e		
Details 🔢 Order Co	mments				
+ * h. \$ *					
*Scheduling Priority:		*	Referred To Provider:		
*Location:		~	*Reason For Referral:		
LG	H CardiacHome				
Pa	per Referral				
3 Missing Required Details	Orders For Cosignature			Sign	Cancel

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

	4	
	1	
	н	

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:

	z Details for Follow Up - Clinic					
6	🖀 🐼 Details 🔠 Order Comments					
	+ ™ Ih. ♥≥					
	*Requested Start Date:	12-Dec-2017	*Scheduling Priority:	v		
	Referred To Provider:		*Reason For Visit:	Follow Up		
	Notes to Scheduling:					

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:

z Details for Follow Up - Clinic - LGH NROP	
🖀 Details 📴 Order Comments	
+ € III. ↓×	
*Requested Start Date: 12-Dec-2017	*Scheduling Priority: Urgent (less than 1 month) v
Referred To Provider:	*Appt Requested: Assessment 🗸
*Reason For Visit: Follow Up	Notes to Scheduling: Please see pateint ASAP

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



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.

Orders for Signature						
🔊 🕐 🥙 Order Name	Status	Start	Details			~
△ LGH OCC Univer Enc:7000000016741						
∠ Consults/Referrals						-
■ Details for Referral to Clinic	Not Usi	na CST Ce	erner			
😭 🗙 Details 📴 Order Comments		Ŭ				
🕇 🖬 lh. 🔍 🗵						
*Scheduling Priority:		✓ Refer	rred To Provider:	*Reason For Referral:		
Notes to Scheduling:				_		
Contract Contrac	nature				Sign	Cancel

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.



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

Click the Orders for Signature eiton, 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.

P A, LORRAINE BAINS - Add Pla	A, LORRAINE BAINS - Add Plan					
IV Therapy Infusion - Magnesium (prototype)						
Select Visit and Start Time						
This Visit	This Visit Estimated Start Date of Day 1 of Medication Infusion (Day 1 to 3)					
Future Inpatient Visit	In Day(s)					
Future Outpatient Visit	In Week(s)					
	In Month(s)					
	Est. start 17-Nov-2017 🔄 🔍 0800 🚔 PST					



3

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.

	AMBPHYONE, BAO - Add Plan						
' Therapy Infusion - Magnesium (prototype)							
Estimated State In 1 D In V In V Est. start 16-D	t Date of Day 1 of Medication Inf ay(s) Veek(s) Month(s) Vec-2017	usion (Day 1 to 3) ST					
	Start Date/Time	Action					
1 to 3)	*Est. 16-Dec-2017 08:00 PST	Order for future visit 🔹					
	16-Dec-2017 08:00 PST	Order now 👻					
	Estimated Star In 1 D In V In N Est. start 16-D (1 to 3) 8972	Estimated Start Date of Day 1 of Medication Inf In In In Week(s) In Month(s) Est. start 16-Dec-2017 In Start Date/Time (1 to 3) *Est. 16-Dec-2017 08:00 PST 16-Dec-2017 08:00 PST					

The order for magnesium sulfate is preselected.

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

	Status	Dose	Details		
⊿ IV Therapy Infusion - Magnesium (prototype), Medication Infusio	n (Day 1 to 3) (Future Pendir	g) *Est. 16-Dec-201	7 08:00 PST - 3 Days	
Section Care					
Vital Signs			Monitor vitals as pe	r site/facility policy	
Lines/Tubes/Drains					
Insert Peripheral IV Catheter			Initiate IV access if	patient has no access	
Medications					
Based on serum megnesium level and renal function, se	elect appropriate	e dosage of m	edication	descu Reutine	
		_	2 g, 1v, q24n, first	dose: Routine	
Schedule Infusion - Magnesium	currenaing) 10	Dec 2017 00	16-Dec-2017. Day	1. IV Therapy Infusion - Magne	sium (prototype), LGH OCC MDC, Low ma
Schedule Infusion - Magnesium			17-Dec-2017, Day	2, IV Therapy Infusion - Magne	sium (prototype), LGH OCC MDC, low mag
Schedule Infusion - Magnesium					
Details for magnesium suitate					
🖀 Details 📴 Order Comments 🕅 🕼 Offset Details					
+ 🔓 lh. 🕨 🗵					
*Dose: 2			*Dose Unit:	g	▼
*Route of Administration:			*Frequency:	q24h	•
PRN: 🜔 Yes 💿 No			PRN Reason:		•
Administer over:		A	dminister over Unit:		v
Orders For Cosignature Save as My Favorite Cancel					



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.

П		
	⊿ IV Therapy Infusion - Magnesium (prototype), Schedulin	g (Initiated Pending) 16-Dec-2017 08:00 PST
	Schedule Infusion - Magnesium	16-Dec-2017, Day 1, IV Therapy Infusion - Magnesium (prototype), L
	Schedule Infusion - Magnesium	17-Dec-2017, Day 2, IV Therapy Infusion - Magnesium (prototype), L
	🗹 🛛 🔀 🔽 Schedule Infusion - Magnesium	
	Modify	

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

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.

)rders	Me	dication List	Document In Plan			
	0			-		
	0,0	Cor	nponent	Status Dose	Belails	
4	IVT	herapy Infu	sion - Magnesium (prototype), Medication Infus	ion (Day 1 to 3) (Future Pending) *Est. 16-Dec-2017 08:00 PST	- 3 Days
_	-	🍚 父 Pati	ient Care			
M	1	🛛 🖉 Vita	al Signs		Monitor vitals as per site/facility	y policy
	-	🕜 Line	es/Tubes/Drains			
	·	Inse A	ert Peripheral IV Catheter		Initiate IV access if patient has n	10 access
		Mei Mei	dications		P	
	5	Bas	ed on serum megnesium level and renal function,	select appropriate dosage of me	dication	
M		⊿ ma	gnesium sulfate	-	2 g, IV, q24h, first dose: Koutil	ne
		horany Infu	rian Magnorium (prototypo) Schoduling (Initia	ated Pending) 16 Dec 2017 094	Indse over 50 - 00 minutes	
		Sch	sion - Magnesium (prototype), Scheduling (mitta	ated Fending) 10-Dec-2017 08.	16-Dec-2017 Day 1 IV Thera	ny Infusion - Magnesium (prototype)
	 7		edule Infusion - Magnesium		17-Dec-2017, Day 1, IV Thera	py Infusion - Magnesium (prototype),
	1	Sch	edule Infusion - Magnesium		17 Dec 2017, Day 2, 19 Illela	py magnesium (prototype),
-		2 30	edule infusion - Magnesium			
	+ 1	t III. [ŧ.			
	Requ	iested Start D	ate/Time: 17-Dec-2017	PST		
		Day of T	reatment: Day 2			
		Ordered T	reatment: IV Therapy Infusion - Magnes 💌			
		*Scheduling	Location: LGH OCC MDC V			
		*Reason	For Visit: Low mangesium level			
		Special Ins	structions:			
			LGH Chemo			
			LGH OCC MDC			
			SGH Ambulatony			
		*Schedulin	Priority: Danar Paterral			
			Paper Referral			
	Orders	For Cosignatu	re Save as My Favorite			Orders For Signature Cancel



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 multiday 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.

+	Add 🕒 Manage Plans		-						Reconciliation Status Meds History	Outpatient
M	Orders Prior to Reconciliation							Orders After Reco	onciliation	L
	🕾 🕅 Order Name/Details	Status		۵.		B 🖗	Order Name/Details			Status
	⊿ Home Medications									
	alendronate (alendronate 10 mg oral tablet) 1 tab, PO, qdaily, 0 Refill(s)	Documented	0	0	0					
	diclofenac-miSOPROstol (diclofenac-miSOPROstol 50 mg-200 mcg tab) 1 tab, PO, BID, with meals, 0 Refill(s)	Documented	0	0	0					
	enalapril (enalapril maleate 2.5 mg oral tablet) 1 tab, PO, qdaily, 30 tab, 0 Refill(s)	Prescribed	0	0	0					

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



To create a prescription, click the Home Medications link.



2

Click the +Add icon on this window toolbar.

< 🔉 👻 👫 Medication List					
🕂 Add 🎧 Document Medication by Hx Reconciliation 🕶 🚴 Check Interactions					
Orders Medication List Document In Plan					
View	Displayed: All Active Orders All Active Medications				
Orders for Signature	Order Name A Medications				
Admit/Transfer/Discharge Status Patient Care	alendronate (alendronate 10 mg oral tablet) diclofenac-miSOPROstol (diclofenac-miSOPROstol enalapril (enalapril maleate 2.5 mg oral tablet)				



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.

Orders for Signature										
		Status Start		Details						
△ LGH OCC MDC; OCC MDC; 0	2 Enc:70000	000016744 Admit:	15-Dec-201	7 16:16	PST					
⊿ Medications										
📃 🚺 e metoprolol		Prescribe 15-Dec	-2017 17:47	50 mg,	PO, BID, order d	uration	: 30 day, drug form	: tab, dispense qty	: 60 tab, refill(s): 0, sta	t: 15-Dec-2017
■ Details for metoprol	ol ▼						Se	nd To: Snagit 12 ((from LD035686) in ses	sion 1930 🔻 📖
Petails	1									
*Dose *Route of	Adminis *I	Frequency	Duration		*Dispense 30	90]*	Refill	-		
🔶 50 mg 🧼 PO		BID	🔵 30 day		60 tab	- I·	• 0	🛨 😪 h.		
PRI	b		~		Special I	nstruct	ions:			
Drug Forr	tab		~							
							-			
*Start Date/Tim	15-Dec-20	017 📮 🖌 1	747	PST	Туре	Of The	rapy: 🔿 Acute			
Stop Date/Tim	14-Jan-20	18 🚔 👻					Mainter	nance		
Pharmacy BCCA Protocol Cod	8				Rese	arch St	tudy:		*	
O Missing Beguired Details	rs For Cosian	ature								Sign
Contrasting moduled Dotalis	ra non obalghi									Jign



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 Coastal Health Promoting weilineus, Eusuring cure.	000 231 Nort	: Medical Daycare E. 15th Street h Vancouver, BC V7L 2L7		
Patient Name: AMBPHYONI	E, BAO			
DOB: 1942-DEC-04 Age: 75 year	s Weight: 70kg (2017-DEC-15)	Sex: Female	PHN:	9876405807
Allergies: penicillin	nav he incomplete. Diesse review	with patient or caregive	or	
[] Blister Packaging week cards;	dispensecards at a time; Repeat_		er.	
[] Non-Safety vials [] Other				
Faxed to Community Pharmacy:	Fax:			
Faxed to Family Physician:	Fax:			
lfvo	u received this fax in error, please conta	ct the prescriber		
Patient Address: 590 8TH W AVE	Home Phone:			
VANCOUVER, British C	olumbia Work Phone:			
Canada				
Any narcotic med	lications need a duplicate prescr	iption form to be cor	npleted	
Over the counter	medications can be filled on Phar	naNet at patient's disc	retion	
Prescription Details:		Date I	ssued: 20	17-DEC-15
metoprolol				
SIG: 50 mg Dispense/Supply: 60 tal	i tab PO BID for 30 day			
Frescriber's Signature	ian1 MD			
Prescriber's College Number: TEMPO	00003			
Prescriber's Phone: (604) 001-0003				
10001001010101010000				

- 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.

lrug form: tab, refill(s): 0
h meals, drug form: tab,
lrua form: tab. dispense
nber of Refills
þ
,
h



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**.

8 7	Order Name 🔺		Status
⊿ Medications			
	alendronate (alendronate 10 mg oral tablet)		Documented
▶ ` @66' ▶ ` @66'	diclofenac-miSOPROstol (diclofenac-miSOP enalapril (enalapril maleate 2.5 mg oral table magnesium sulfate magnesium sulfate metoprolol	Renew Modify Suspend Complete	
		Cancel/Discontinue Void Convert to Prescription]
		Add/Modify Compliance Order Information	

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.

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.

	DOB:04-D	ec-1942	MRN:700008972	Code Status:			Process	
MIDPHTOINE, BAO	Age:75 ye	ars	Enc:70000000167	44			Disease	
llergies: penicillin	Gender:Fe	emale	PHN:9876405807	Dosing Wt:70 kg			Isolatio	
< 👻 🕆 者 Provider View								
A 🗎 🖌 🛋 🗎 🔍 🔍 100%	- 🎯 🌑 🏠							
Outpatient Chart	S Outpatient	Quick Orders	X	Rounding	X	Quick Ord	lers	
Chief Complaint		(-/						
Documents (1)								
Histories								
Allergies (1)								
Home Medications (3)	Allergies (1)	+						
Labs								
Micro Cultures (0)	Substance	Reactions		Category	Status	Se	verity	Reaction Type
Pathology (0)	penicillin	Rash		Drug	Active	м	ild	Allergy
Imaging (0)								
History of Present Illness								
Physical Exam	Home Media	cations (3)						
Active Issues								
Assessment and Plan								
Forms	Medication			<u>ـ</u>			Responsib	le Provider
New Order Entry	alendrona	ate (alendronat	te 10 mg oral tablet)	1 tab, PO, qdaily, 0 Refill	(s)			
Create Note	diclofenad	c-miSOPROstol	l (diclofenac-miSOPR	Ostol 50 mg-200 mcg tab)	1 tab, PO, BID, with	n meals,		
Outpatient Consult	💪 enalapril ((enalapril male	eate 2.5 mg oral table	et) 1 tab, PO, qdaily, 30 ta	ab, 0 Refill(s)		TestED, Physiciar	Emergency- n3, MD
Select Other Note							C	Document History: Co



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.

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Tahoma • 11 • • ■ ■ ■ ● ■ ● ■ ● ■ ■ ● ■ ■ ● ■ ■ ● ■ ■ ● ■ ■ ■ ■ ■ ● ■<	
Chief Complaint High blood pressure follow-up, chest pain. History of Present Illness	Problem List/Past Medical History Arthrits Osteoporosis Tobacco use Historical No historical problems
Vitals & Measurements	Procedure/Surgical History <u>Medications</u> <u>Inpatient</u> magnesium sulfate 2 g. 100 ml. IV, 624b
Assessment/Plan	magnesium sulfate, 2 g, 100 mL, IV, q24h magnesium sulfate, 2 g, 100 mL, IV, q24h <u>Home</u> alendronate 10 mg oral tablet, 10 mg, 1 tab, PO, qdaily diclofenac-miSOPROstol 50 mg-200 mcg tab, 1 tab, PO, BID enalapril maleate 2.5 mg oral tablet, 2.5 mg, 1 tab, PO, qdaily metoprolol, 50 mg, PO, BID
	Allergies penicillin (Rash)
	Social History Control
Note Details: General Medicine Consult, TestAMB, GeneralMedicine-Physician1, MD, 15-Dec-2017 18:02 PST, Consult Note	Sign/Submit Save Save & Close C ncel

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:

PowerChart Organizer for TestAMB, GeneralMedicine-Physician1, MD	
Task Edit View Patient Chart Links Notifications Inbox Help	
🗄 🖃 Message Centre 🎬 Patient Overview 📲 Ambulatory Organizer 🎬 MyExperience 🛔 Patient List Tracking Shell	🎬 Dynamic Worklist 👫 LearningLIVE 🍦
🕴 🍫 Propo.: 1 Abnor.: 1 Criti.: 1 🝦 🗄 Exit 🕞 Communicate 🗸 🍙 Discern Reporting Portal 🝦 🗟 CareConnect	R PHSA PACS R VCH and PHC PACS
Message Centre	

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.

a 3. Summary	
Referral Triage	
Past 365 Days Facility: LGH Neuro ROP Building(s): LGH Neuro ROP Unit(s): LGH Neuro ROP	
Yes	•
	a 3. Summary Referral Triage Past 365 Days Facility: LGH Neuro ROP Building(s): LGH Neuro ROP Unit(s): LGH Neuro ROP Yes



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

Dynamic Worklist		
👬 🗎 🖶 🗎 🔍 🔍 100% 🛛 - 🌑 🖷 🟠		
LGH MDC Referrals - Ready for Tr <u>Details</u> •	📝 List Actions 👻 🔒 Add Patient	💫 Remove Patient 🛛 👩 Help
Viewing 8 Total Patients	Patient	Primary Care Provider Cerner Test, DEDDR Cerner
Age	DOB: 06/06/1988 (29 years) Sex: Male MRN: 700000579	

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.

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Outpatient Chart	Outpatient	: Quick Ord 🔀 Rural Quick O	rders 🔀 F	Rounding 🛛	+		
Venue: Ambulatory - In Office (M	4eds in Offi	ce) 🔻					
Medications	≣∙⊗	Labs	Imaging	and =- 📀	New Order Er	itry 🕂	_ • ∈
► Analgesics		Bloodwork			Referrals/Cor	sults	≡• ⋒
Anticoagulants		Microbiology					
Antiemetics		Stool Studies		L	Referral to Clinic	Not Usina C	ST Cerner
Antihypertensives		► Urine Studies			Referral to Cardio	ology-Cardiac	Home =
Antimicrobials		▶ Blood Products/Transfusion			Referral to ENT		
Bata Blackers		· Bioda Hodaces, Halislasion			Referral to IV The	erapy	
Beta blockers					Referral to IV The	е <mark>гару</mark> LGH ос	C MDC
 Bronchodilators 					Referral to Neuro	logy	
 Corticosteriods 					Referral to Ophth	almology	
Diuretics					Referral to Ortho	pedics-Inject	tion 🔻
 Contractational Assesses 					Deferral to Ortho	nodice loint	Doct On

3

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



Follow Up - Clinic Special Requests Accept Referral Reject Referral		Referral to Wound Care-VAC
		Follow Up - Clinic
Accept Referral Reject Referral		⊿ Special Requests
Reject Referral		Accept Referral
itejett iteren an	Ī	Reject Referral
Referral Information Request		Referral Information Request



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.

Orde	rs Medication List	Document In Plan					
M	Orders for Signature						
[l 🔊 🖓 🖳 🕅	Order Name	Status	Start	Details		
	△ LGH Cast Clinic Enc:700000004604 Admit: 05-May-2017 11:04 PDT						
	∠ Consults/Refe	rrals					
	<u>ک جا 🗌</u>	Accept Referral	Order	14-Dec-2017 11:36	14-Dec-2017 11:36 PST		
							4
	🛨 Details for 🗛	cept Referral					
	Details 🗓 Order Comments						
	+ ≅ lh. ₽≥						
	*Sch Priority:	mergent (less than 1 wee	v k)		Special Instructions:		
	Urgent (less than 1 month))				
	F	loutine					
	A	As Determined by Provide	r				
	A	s per notes	H				_
	1 Missing Required P	atient to call				Sign Cancel	

To Reject a Referral

1

- Return to the Dynamic Worklist screen to display the LGH MDC Referrals Ready for Triage worklist.
 - 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.

Orde	Orders Medication List Document In Plan							
M	Orders for Signature							
		۵ 🤊 🖻 ۲	Order Name	Status	Start	Details		
	△ LGH Cast Clinic Enc:700000004604 Admit: 05-May-2017 11:04 PDT							
	⊿ Consults/Referrals							
		⊷ځ 🔲	Reject Referral	Order	14-Dec-2017 11:44	14-Dec-2017 11:44 PST		
	•		III				4	
ĺ								
	▲ Details							
	O Missing Required Details Orders For Cosignature Sign Cancel							



To Request More Information

4

- 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.

Orders for Signature							
🔊 🕐 🥙 Order Name	Status	Start	Details				
△ LGH Cast Clinic Enc:700000004604 A	dmit: 05-Ma	y-2017 11:04 PDT					
⊿ Communication Orders							
🔜 😓 😣 Referral Information R	Order	14-Dec-2017 11:56	14-Dec-2017 11:56 PST				
■ Details for Referral Informat	ion Req	uest					
🕂 Details 📃 Order Comments							
+ 2 III. ₽ ≥							
*Requested Start Date/Time: 14-Dec-20	17 🚔	▼ 1156	PST				
*Required Information:							
Consideration of Construction							
Special Instructions:							
1 Missing Required Details Orders For Cosignature Sign Cancel							

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 		