

**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

## TABLE OF CONTENTS

- SELF-GUIDED PRACTICE WORKBOOK .....3
- Learning Domain.....4
- PATIENT SCENARIO 1 – Reviewing Lab Results in Message Centre .....5
  - Activity 1.1 – Sign, Forward, and Reject Lab Results.....6
- PATIENT SCENARIO 2 – Organizing Your Day Using Ambulatory Organizer ..... 10
  - Activity 1.1 – Work with Your Appointments in The Ambulatory Organizer ..... 11
- PATIENT SCENARIO 3 – Working with Patient’s Chart in Ambulatory Setting ..... 18
  - Activity 3.1 – Access Patient’s Chart from The Ambulatory Organizer ..... 19
  - Activity 3.2 – Place Individual Orders ..... 22
  - Activity 3.3 – Place a Multi-Day PowerPlan ..... 28
  - Activity 3.4 – Create Prescriptions ..... 32
  - Activity 3.6 – Complete a Visit Note ..... 36
- PATIENT SCENARIO 4 – Managing Referrals ..... 38
  - Activity 4.1 – Access and Navigate The List of Referred Patients ..... 39
- PROFICIENCY ASSESSMENT ..... 44
  - Proficiency Assessment Checklist..... 45

## # SELF-GUIDED PRACTICE WORKBOOK

<b>Duration</b>	2 hours
<b>Before getting started</b>	<ul style="list-style-type: none"> <li>■ Sign the attendance roster (this will ensure you get paid to attend the session).</li> <li>■ Put your cell phones on silent mode.</li> <li>■ You will be allowed to take this workbook with you so feel free to make notes for your future reference.</li> </ul>
<b>Session Expectations</b>	<ul style="list-style-type: none"> <li>■ This is a self-paced learning session.</li> <li>■ A 15 min break time will be provided. You can take this break at any time during the session.</li> <li>■ The workbook provides a compilation of different scenarios that are applicable to your work setting.</li> <li>■ 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.</li> </ul>
<b>Proficiency Assessment</b>	<ul style="list-style-type: none"> <li>■ At the end of the session, you will be required to complete a Proficiency Assessment.</li> <li>■ This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.</li> <li>■ Your instructor will review and assess these with you.</li> <li>■ Upon completion of the Proficiency Assessment, both you and your instructor will complete your Competency Assessment Checklist.</li> </ul>
<b>Learning Objectives</b>	<p>On completion of this workbook you will be able to:</p> <ul style="list-style-type: none"> <li>■ Review lab results in Message Centre.</li> <li>■ Organize your day using Ambulatory Organizer.</li> <li>■ Work with patient's chart in ambulatory setting.</li> <li>■ Manage referrals.</li> </ul>

## 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: <ul style="list-style-type: none"><li data-bbox="565 411 857 447">■ Review lab results.</li></ul>

### **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 or forwarded to you by other providers.

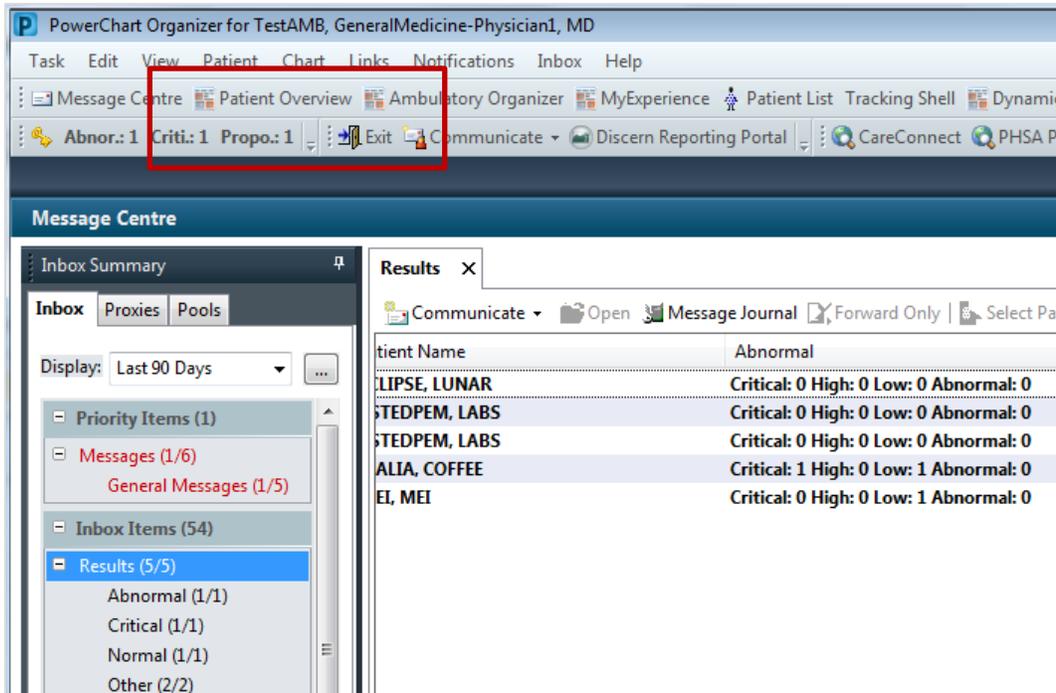
You will complete the following activity:

- Sign, forward, and reject lab results.

## Activity 1.1 – Sign, Forward, and Reject Lab Results

**Duration:** Estimated Completion Time - 10 min

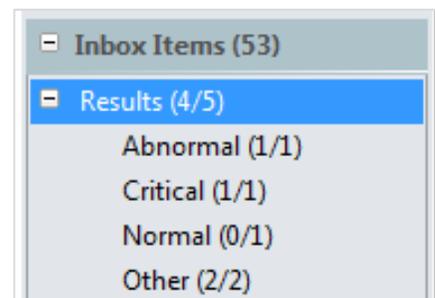
The **Notification** toolbar shows the number of **critical and abnormal results** that has not been reviewed yet. Clicking an item on this toolbar opens the respective folder in the Message Centre. Alternatively, use the **Message Center** icon on the toolbar to check your Inbox.



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.



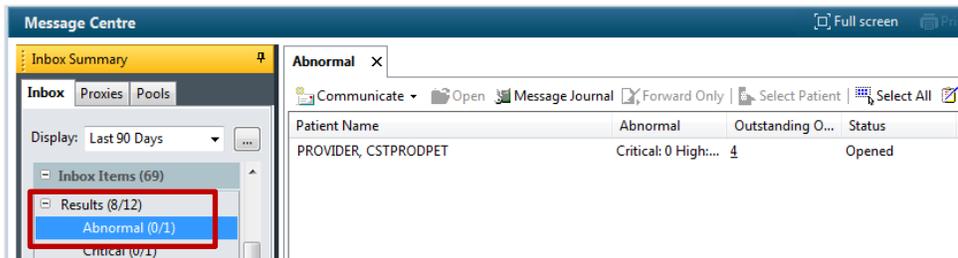
When you open the result, the numbers adjust but the result stays in your Inbox. When you sign the result, it will be removed from your Inbox. All results are visible in the patient’s chart despite of any action taken in the Message Centre.

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

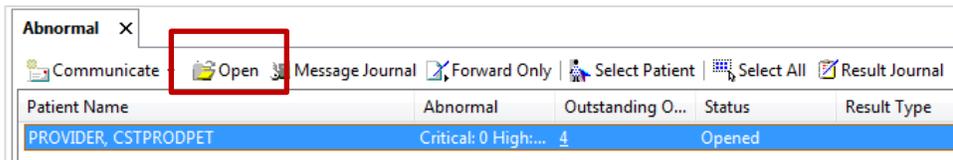
1 Log into PowerChart using provided instructions.

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.

Abnormal x Results to Endorse: IPPHYONE, DOROTHY x

Create Forward Only Print Select Patient Mark Unread Inbox View Summary View

IPPHYONE, DOR ... DOB:10-Oct-1945 MRN:700008103 Code Status: Process: Location:LGH 4W: ...  
 Age:72 years Enc:700000013549 Disease: Enc Type:Inpatient  
 Allergies: fentanyl Gender :Female PHN:9876480719 Dosing Wt:81 kg Isolation: Attending:

Event Date	Event	Result	Ref. Range	Trend
15-Nov-2017 11:20 PST	WBC Count	90.0 H	(4.0 - 11.0)	Trend
	RBC Count	4.40	(4.20 - 5.80)	Trend
	Hemoglobin	140	(135 - 170)	Trend
	Hematocrit	0.45	(0.40 - 0.50)	Trend
	MCV	98	(82 - 98)	Trend
	MCH	32	(25 - 34)	Trend
	RDW-CV	12.0	(11.0 - 15.0)	Trend
	Platelet Count	400	(150 - 400)	Trend
	NRBC Absolute	0.0	(0 - )	Trend
	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
	INR	1.0	(0.9 - 1.2)	Trend

Action Pane

Endorse  Save  Refuse Reason: [Dropdown]

Additional Forward Action: [Dropdown] To: [Text] (Limit 5) Due: 10-Dec-2017 1652

Comments: (Limit 212) [Text Area]

Next OK & Close OK & Next

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: [Text]

Additional Forward Action: [Dropdown] To: [Text] (Limit 5)

Comments: (Limit 212) [Text Area]

- Results Acceptable Call Pt w/Results
- Call Patient with Results See Note
- Forward to Primary Care Physician
- Waiting Pending Results
- Confirm Follow-up
- Send to Specialist/Consulting Provider
- Sign
- Review

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.

**Action Pane**

Endorse    Save    Refuse   Reason: ▼

Additional Forward Action:  

Comments: (Limit 212)  

- 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**

<b>Duration</b>	<b>Learning Objectives</b>
30 minutes	At the end of this scenario, you will be able to: <ul style="list-style-type: none"><li data-bbox="581 474 1138 510">■ Navigate your calendar of appointment.</li><li data-bbox="581 543 1325 579">■ Manage visit-related actions in Ambulatory Organizer.</li></ul>

### **SCENARIO**

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

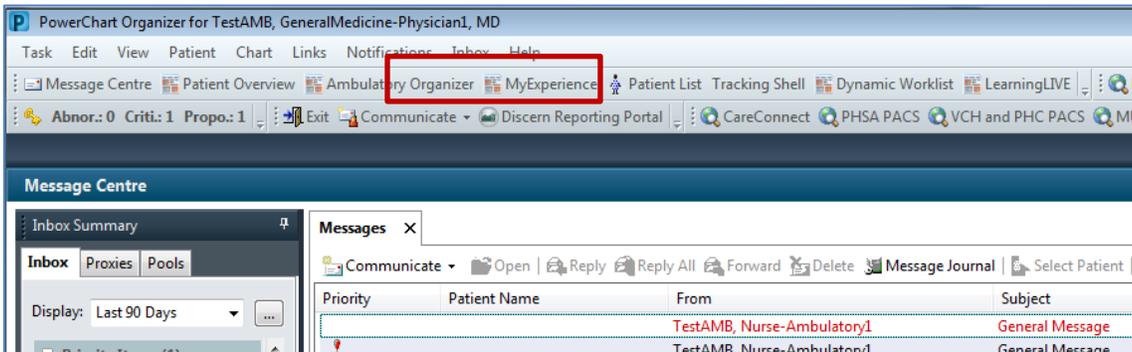
As a provider working in the ambulatory setting, you will be completing the following activity:

- 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

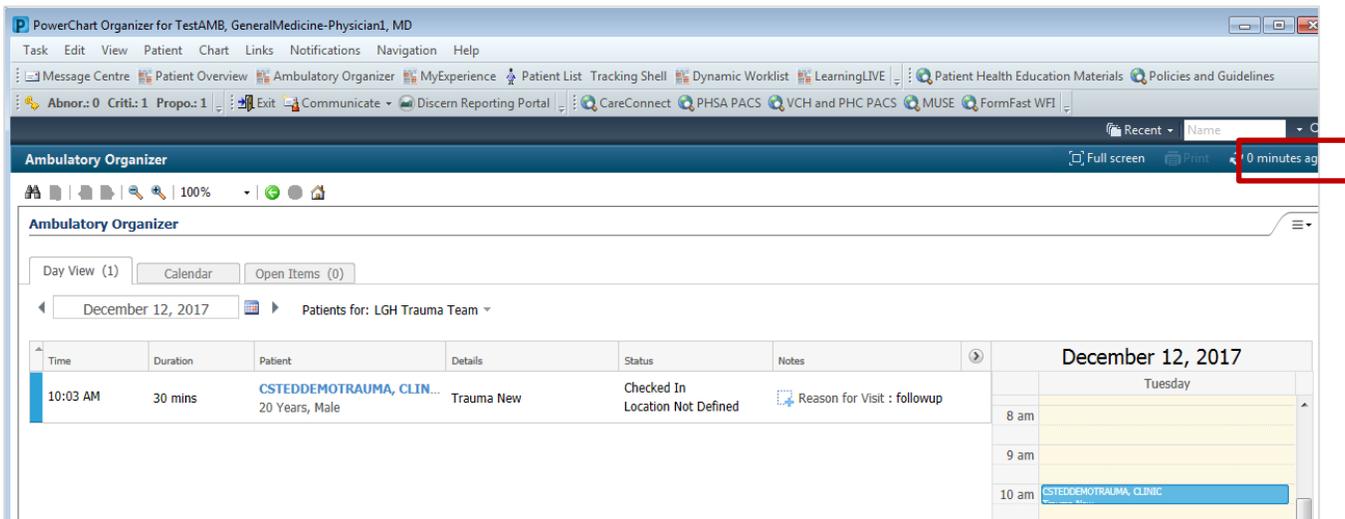
The **Ambulatory Organizer** can be accessed from the main menu.



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

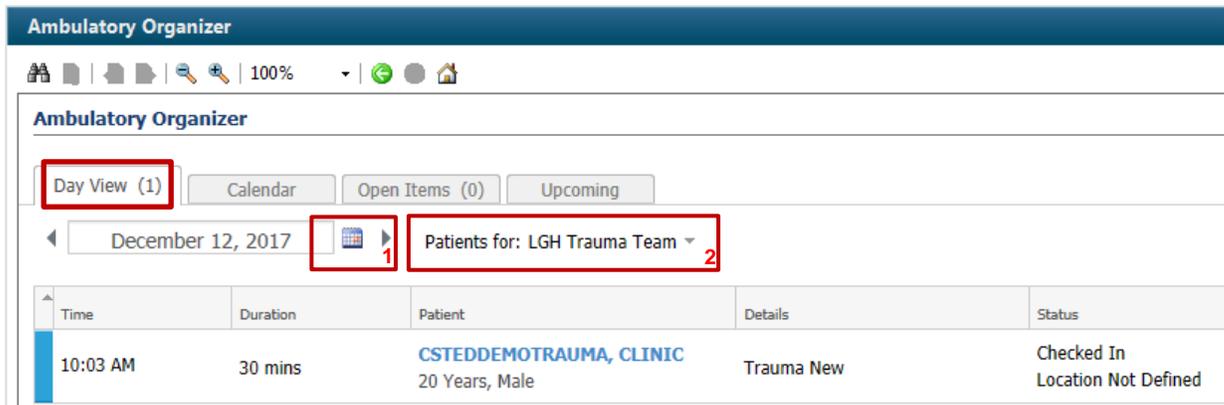


- 1 Ensure the **Ambulatory Organizer** is displayed.

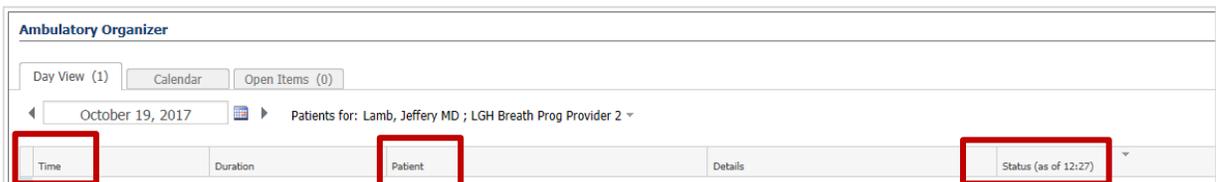
### Day View Tab

- 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 included in your appointment list for the date. You can use this to filter your appointments to a particular facility.



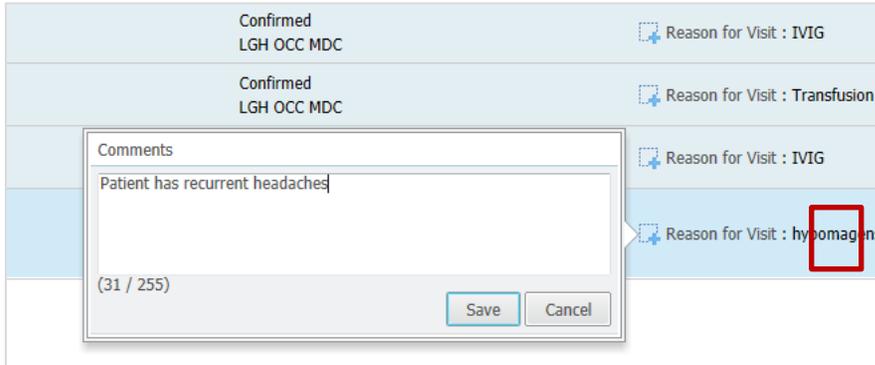
- 3 You can sort the appointment list by selecting one of the following column headings, for example **Time**, **Patient**, or **Status**.



4

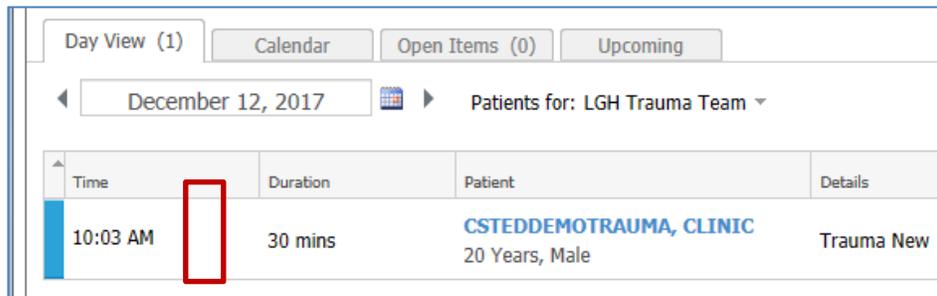
You can add an informal comment to an appointment to share information between providers and clinicians.

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



5

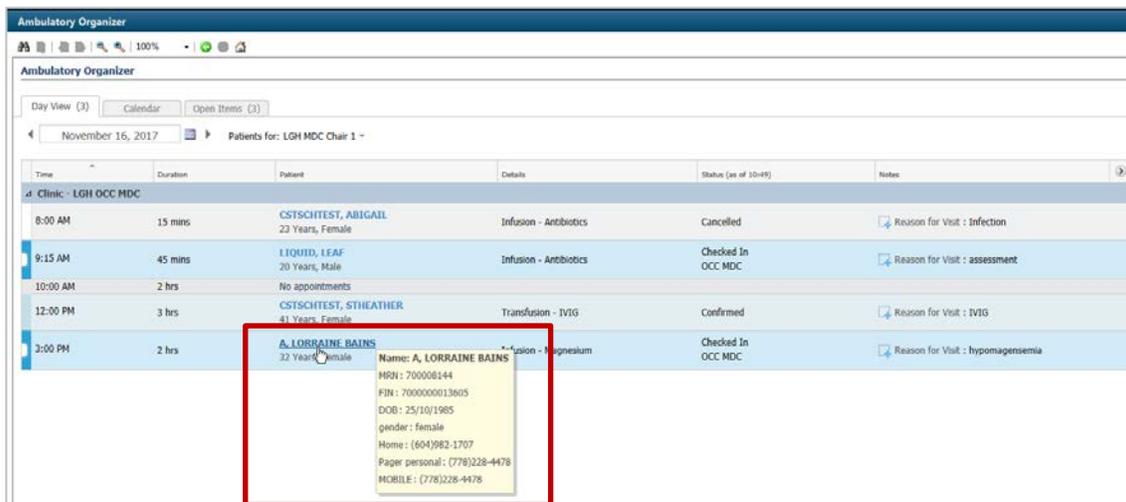
The color status on the left side of the booked appointment slot assists you to understand the flow of the clinic. The status of a patient will update based on documentation completed by a nurse or provider.



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.

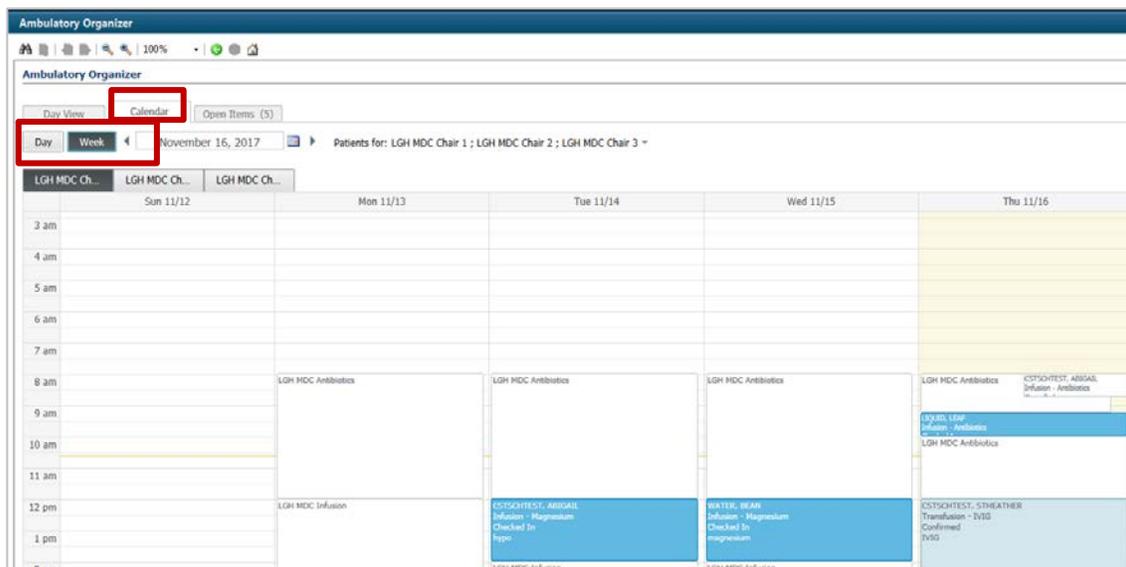
Color Status	Definition
	Dark grey indicates the appointment has been checked out.
	White indicates a no show, hold, or canceled appointment (these appointment types are displayed if the system administrator has configured them to display).

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



### Calendar Tab

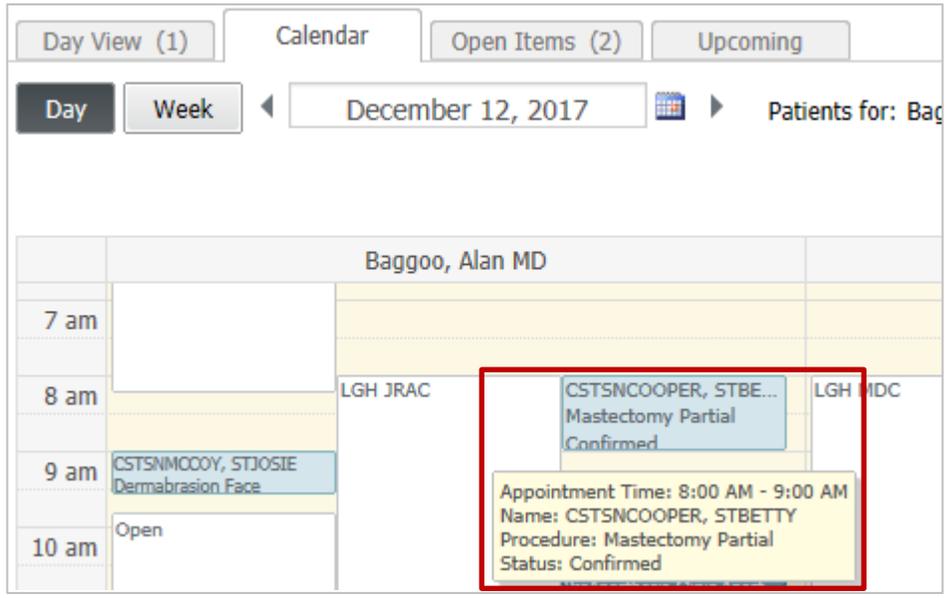
1 Click the next tab – **Calendar** – to display all patients scheduled to your clinic in a day or week format.



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

2

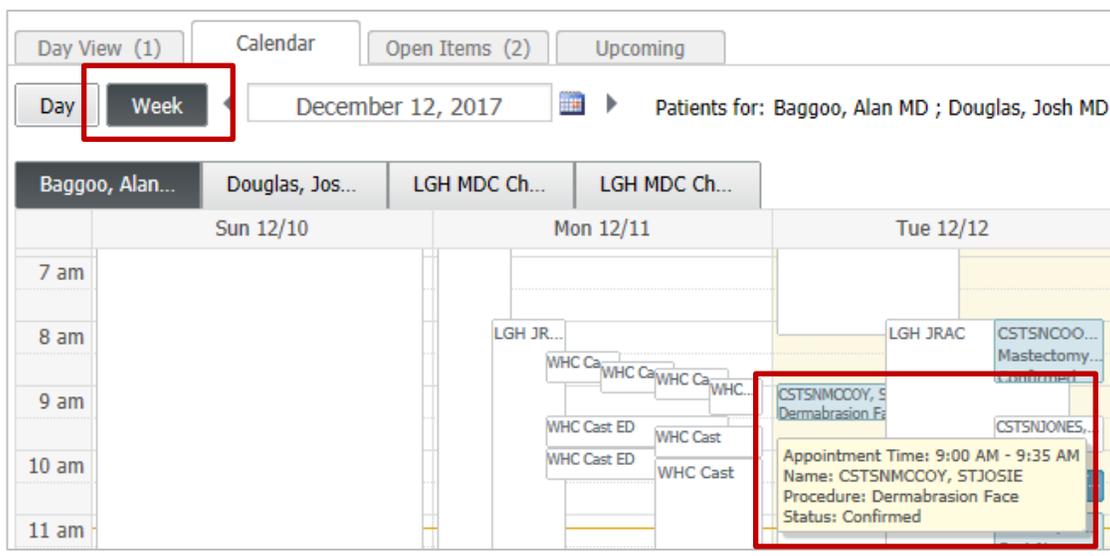
With the Calendar displayed, hover over the colored blocks to view details for the scheduled patient.



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.

Ambulatory Organizer				
Day View (6)		Calendar		Open Items (1)
Patients for: Baggoo, Alan MD ▾				
From: August 7, 2017 <a href="#">View 7 More Days</a>				
Appointment	Patient	Details	Notes	Outstanding Actions
More Than 2 Days Ago (1)				
10 August, 2017 8:00 AM	<b>CSTSCHEMPI, NANCY</b> 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, Alan MD ▾				
From: August 7, 2017 <a href="#">View 7 More Days</a>				
Appointment	Patient	Details	Notes	Outstanding Actions
More Than 2 Days Ago (1)				
10 August, 2017 8:00 AM	<b>CSTSCHEMPI, NANCY</b> 5 Years, Female	Cast New	Reason for Visit : query	Note Not Started ✓ Task List Complete

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: <ul style="list-style-type: none"> <li>■ Access and navigate a patient’s chart in the ambulatory setting.</li> <li>■ Document patient’s visit.</li> </ul>

### **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

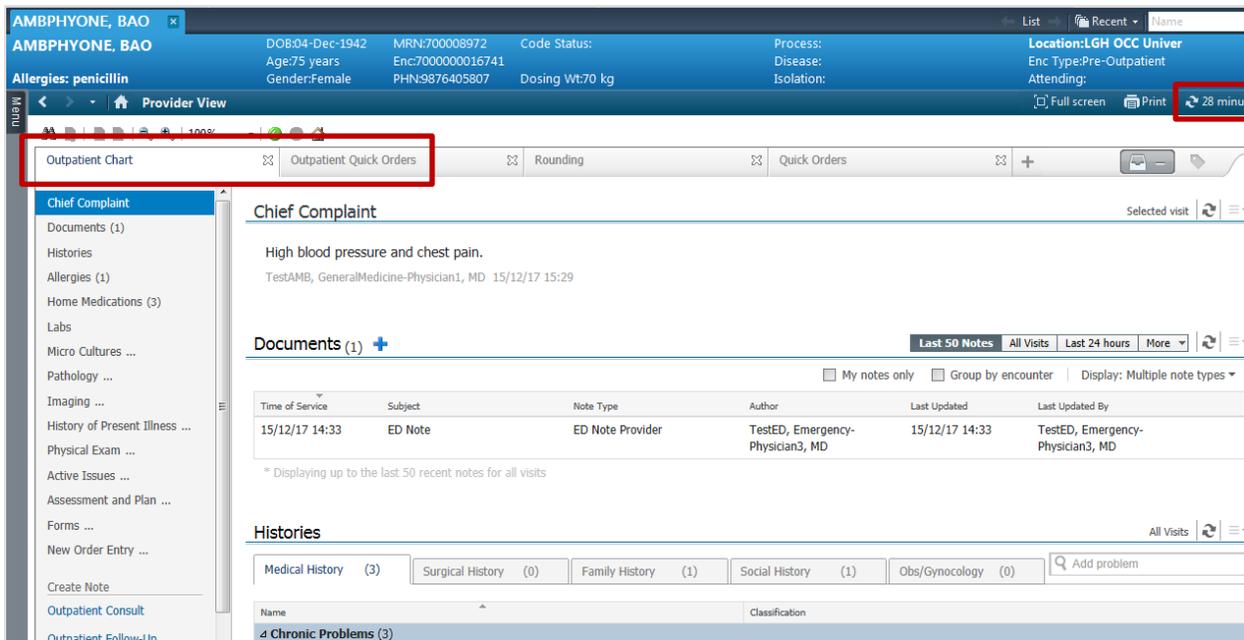
The **Ambulatory Organizer** displays your appointment in the Day View or in the Calendar windows. You can open a chart by clicking patient’s name. The CIS will track your actions and update the appointment status.

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.



**Patient Information:** AMBPHYONE, BAO | DOB: 04-Dec-1942 | MRN: 700008972 | Code Status: | Process: | Location: LGH OCC Univer  
Age: 75 years | Enc: 7000000016741 | Disease: | Enc Type: Pre-Outpatient  
Allergies: penicillin | Gender: Female | PHN: 9876405807 | Dosing Wt: 70 kg | Isolation: | Attending: | 28 min

**Navigation:** Outpatient Chart, Outpatient Quick Orders, Rounding, Quick Orders

**Chief Complaint:** High blood pressure and chest pain.  
TestAMB, GeneralMedicine-Physician1, MD 15/12/17 15:29

**Documents (1):** Last 50 Notes | All Visits | Last 24 hours | More

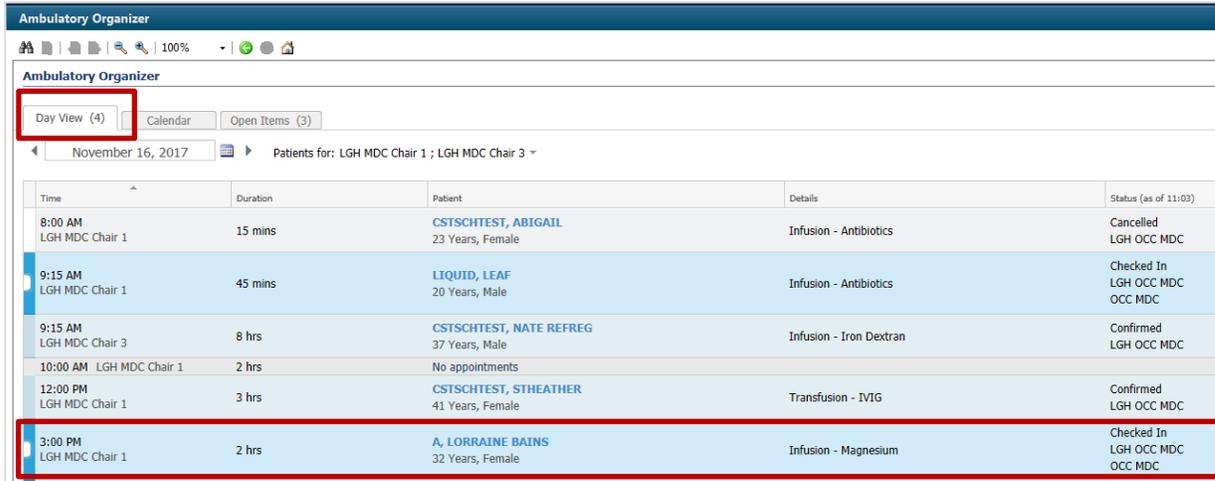
Time of Service	Subject	Note Type	Author	Last Updated	Last Updated By
15/12/17 14:33	ED Note	ED Note Provider	TestED, Emergency-Physician3, MD	15/12/17 14:33	TestED, Emergency-Physician3, MD

\* Displaying up to the last 50 recent notes for all visits

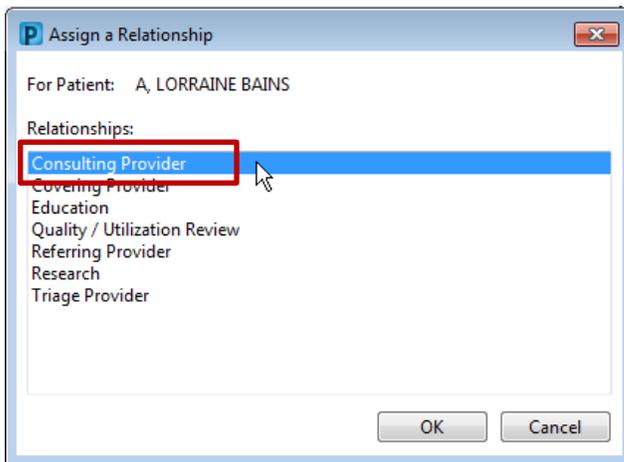
**Histories:** Medical History (3) | Surgical History (0) | Family History (1) | Social History (1) | Obs/Gynecology (0) | Add problem

**Chronic Problems (3):**

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**.



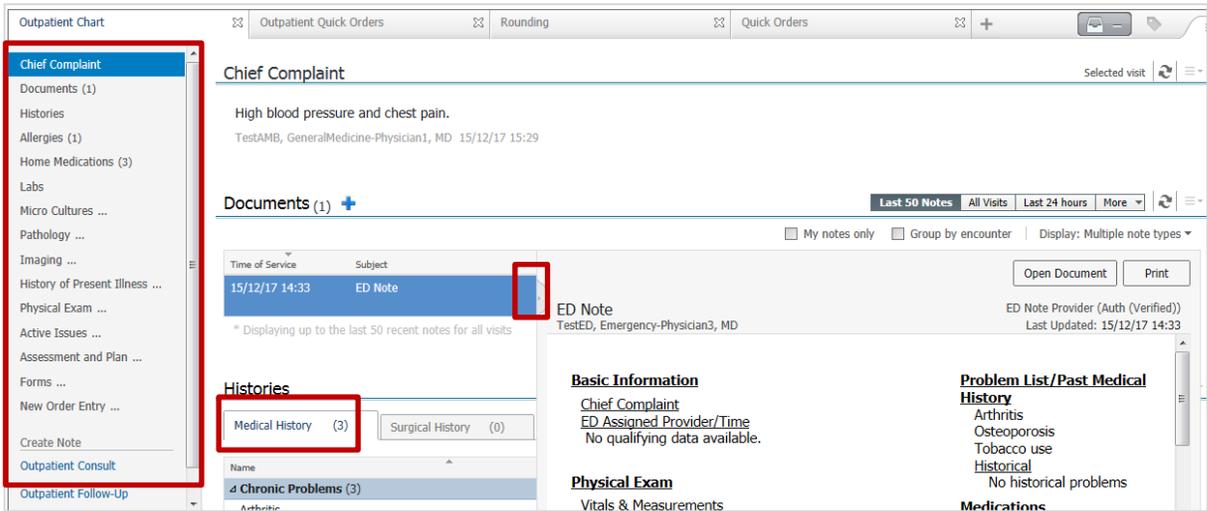
3 The **Banner Bar** displays a snapshot of pertinent patient's information.



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.



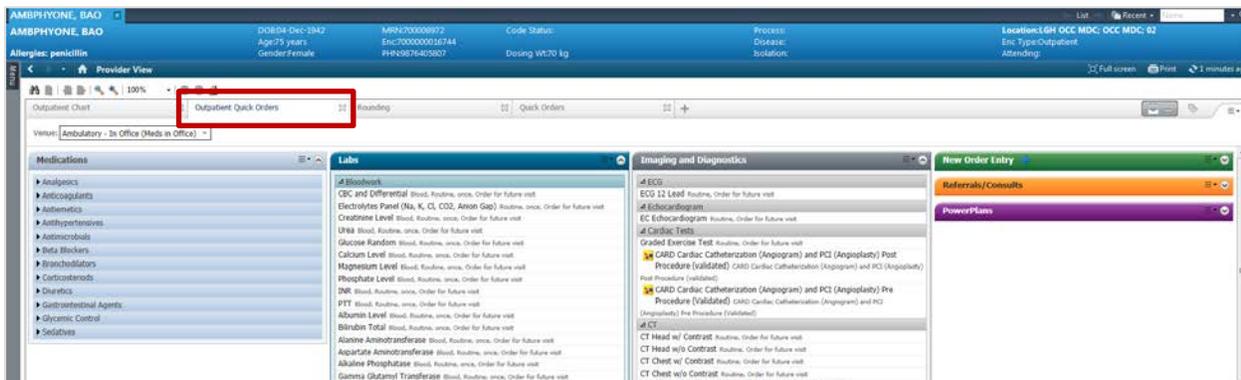
 **Key Learning Points**

- 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.

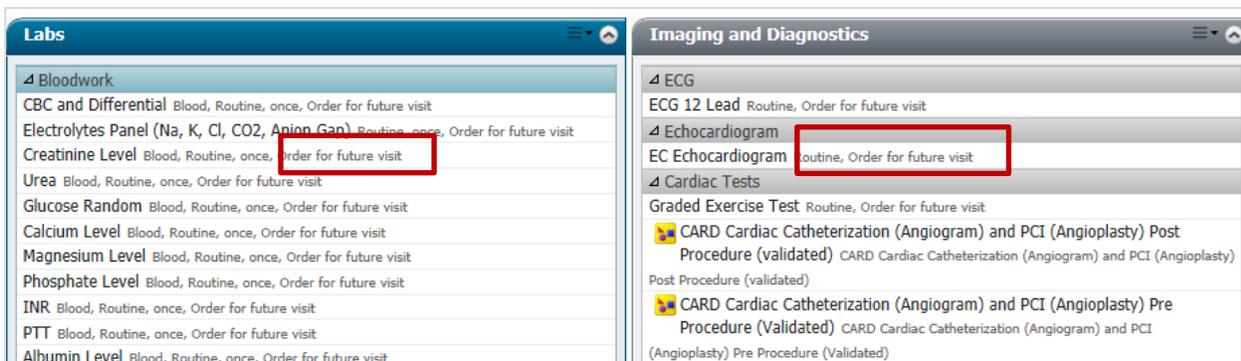
## Activity 3.2 – Place Individual Orders

**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.



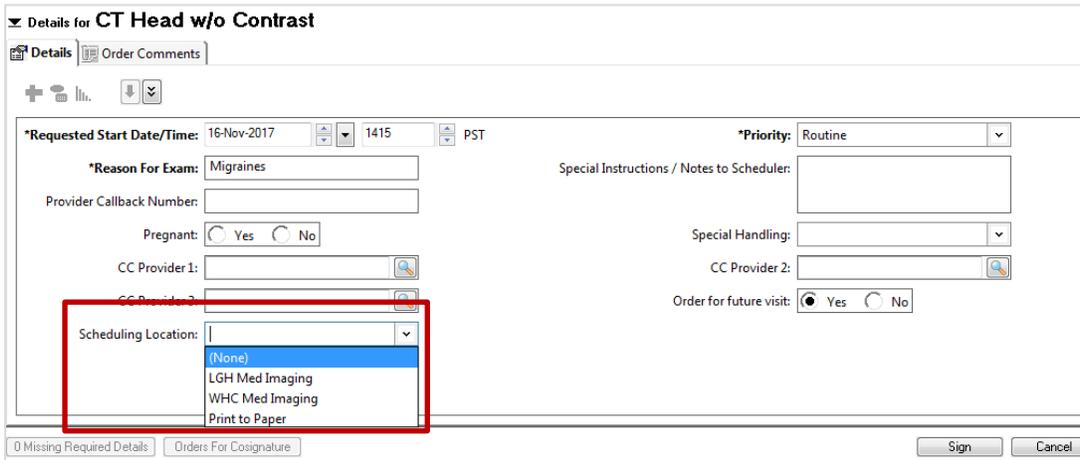
The following order types are typically placed in the outpatient setting:

- 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.



**Details for CT Head w/o Contrast**

Details | Order Comments

\*Requested Start Date/Time: 16-Nov-2017 1415 PST \*Priority: Routine

\*Reason For Exam: Migraines Special Instructions / Notes to Scheduler:

Provider Callback Number: Pregnant: Yes No

CC Provider 1: CC Provider 2: Special Handling: CC Provider 2:

Order for future visit: Yes No

Scheduling Location: (None) LGH Med Imaging WHC Med Imaging **Print to Paper**

0 Missing Required Details | Orders For Cosignature | Sign | Cancel

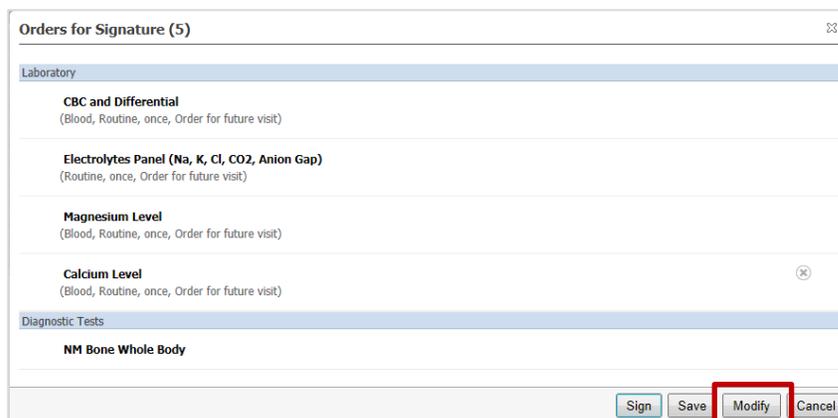
## Laboratory and Imaging Orders

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**  6, then click **Modify**.



Orders for Signature (5)

Laboratory

**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)

Diagnostic Tests

**NM Bone Whole Body**

Sign Save **Modify** Cancel

2

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

Orders for Signature

Order Name	Status	Start	Details
LGH OCC MDC; OCC MDC; 02 Enc:7000000016744 Admit: 15-Dec-2017 16:16 PST			
<b>Laboratory</b>			
Differential (CBC and ...	Order	15-Dec-2017 16:29...	Blood, Routine, Unit collect, Collection: 15-Dec-2017, once, Order for future visit
Electrolytes Panel (Na...	Order	15-Dec-2017 16:29...	Blood, Routine, Unit collect, Collection: 15-Dec-2017, once, Order for future visit
Magnesium Level	Order	15-Dec-2017 16:29...	Blood, Routine, Unit collect, Collection: 15-Dec-2017, once, Order for future visit
Calcium Level	Order	15-Dec-2017 16:29...	Blood, Routine, Unit collect, Collection: 15-Dec-2017, once, Order for future visit
<b>Diagnostic Tests</b>			
NM Bone Whole Body	Order	15-Dec-2017 16:29...	15-Dec-2017, Routine, Weight: 70, Order for future visit

---

**Details for Differential (CBC and Differential)**

Details | Order Comments

\*Specimen Type: 
 \*Collection Priority:

Unit collect:  Yes  No
 Collected:  Yes  No

\*Collection Date/Time: 15-Dec-2017 1629 PST
 \*Frequency:

Duration: 
 Duration unit:

CC Provider 1 (Outpatient Only): 
 CC Provider 2 (Outpatient Only):

Order for future visit:  Yes  No

4 Missing Required Details | Orders For Cosignature | Sign | Cancel

3

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

**Details for NM Bone Whole Body**

Details | Order Comments

\*Requested Start Date/Time: 15-Dec-2017 1555 PST

\*Reason for Exam: 
 \*Priority:

\*Pregnant:  Yes  No
 Special Instructions / Notes to Scheduler:

\*Breastfeeding:  Yes  No
 \*Weight (kg):

Provider Callback Number: 
 Special Handling:

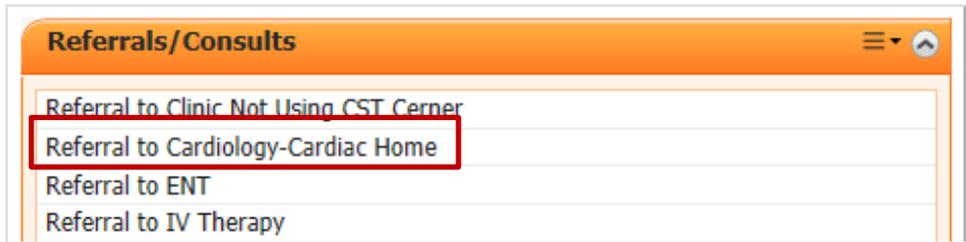
CC Provider 1: 
 CC Provider 2:

CC Provider 3: 
 \*Scheduling Location:

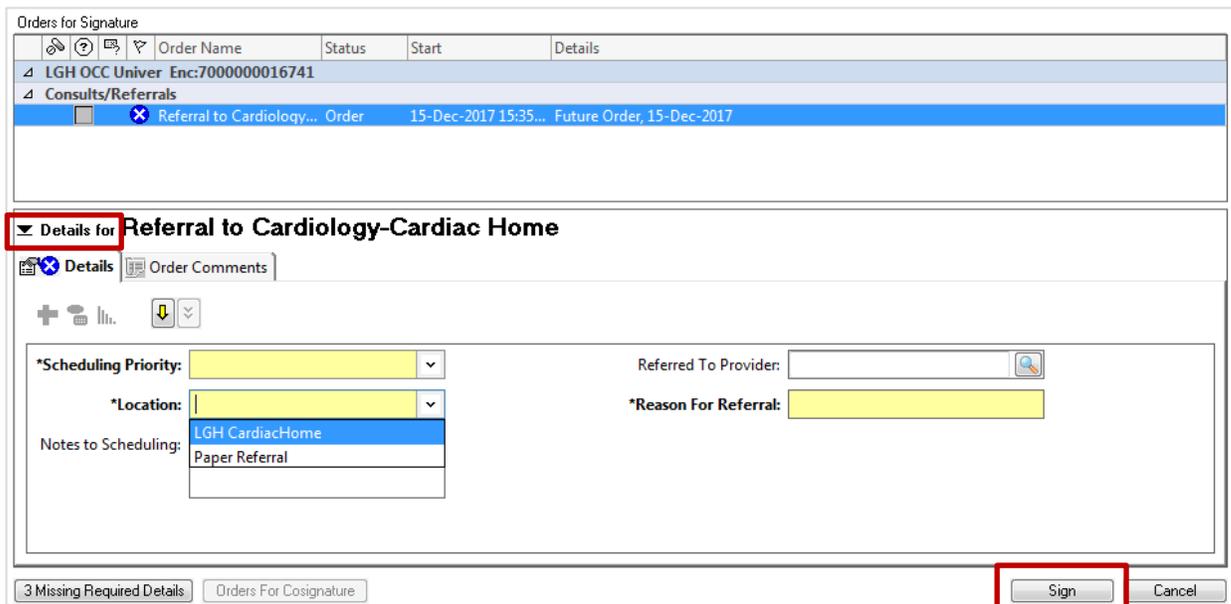
4 Missing Required Details | Orders For Cosignature | Sign | Cancel

## 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**.



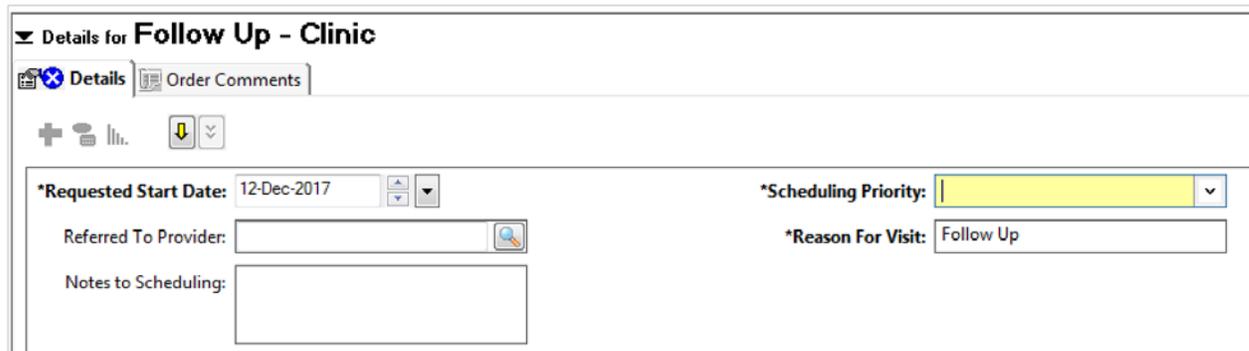
**Note:** Referral orders to different specialties have unique appointment types associated with the specific reason or the length of the visit.

## Orders for Follow-up Appointments

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

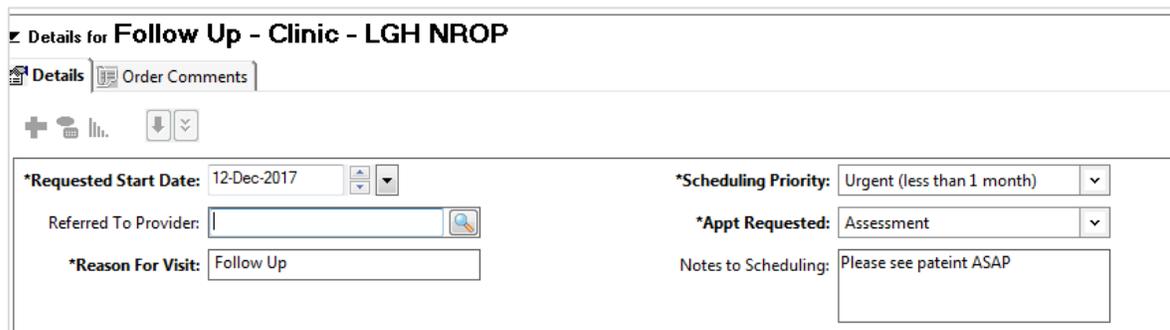
**Note:** Orders for follow-up visits are clinic specific and some clinics might have various types of appointments.

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



The screenshot shows a web form titled "Details for Follow Up - Clinic". It has two tabs: "Details" (selected) and "Order Comments". Below the tabs are icons for adding, deleting, and saving. The form contains several fields: "\*Requested Start Date" with a date picker set to "12-Dec-2017"; "Referred To Provider" with a search icon; "Notes to Scheduling" with a text area; "\*Scheduling Priority" with a dropdown menu; and "\*Reason For Visit" with a dropdown menu set to "Follow Up".

- 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:



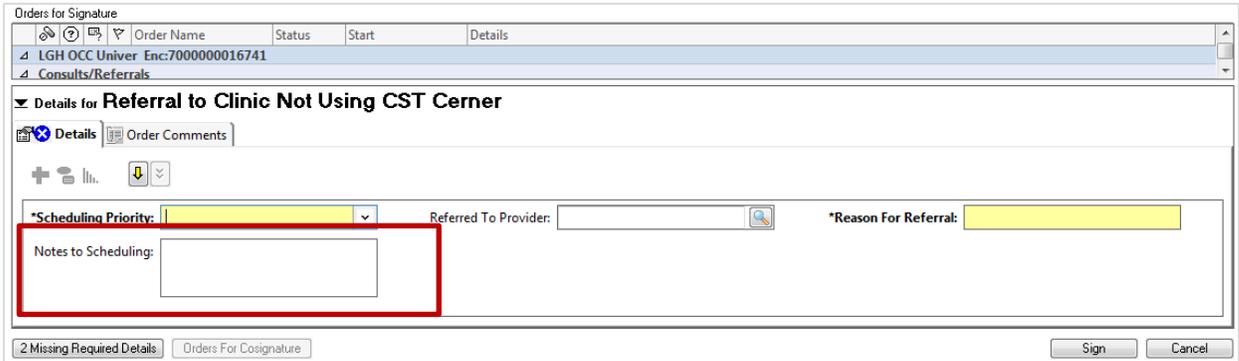
The screenshot shows a web form titled "Details for Follow Up - Clinic - LGH NROP". It has two tabs: "Details" (selected) and "Order Comments". Below the tabs are icons for adding, deleting, and saving. The form contains several fields: "\*Requested Start Date" with a date picker set to "12-Dec-2017"; "Referred To Provider" with a search icon; "\*Reason For Visit" with a dropdown menu set to "Follow Up"; "\*Scheduling Priority" with a dropdown menu set to "Urgent (less than 1 month)"; "\*Appt Requested" with a dropdown menu set to "Assessment"; and "Notes to Scheduling" with a text area containing "Please see pateint ASAP".

**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 Center** from Referrals/Consults.

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



The screenshot shows a software interface for managing orders. At the top, there's a table with columns for Order Name, Status, Start, and Details. Below this, the 'Details for Referral to Clinic Not Using CST Center' section is visible. It includes tabs for 'Details' and 'Order Comments'. There are several input fields: '\*Scheduling Priority:' (a dropdown menu), 'Referred To Provider:' (a text field with a search icon), and '\*Reason For Referral:' (a text field). A 'Notes to Scheduling:' text area is highlighted with a red rectangular box. At the bottom, there are buttons for 'Sign' and 'Cancel', and a status indicator that says '2 Missing Required Details'.

### 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

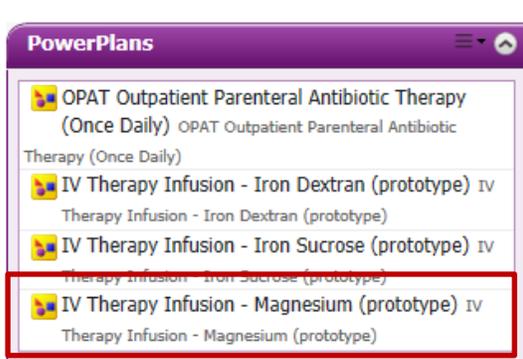
**Duration:** Estimated Completion Time - 10 min

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.

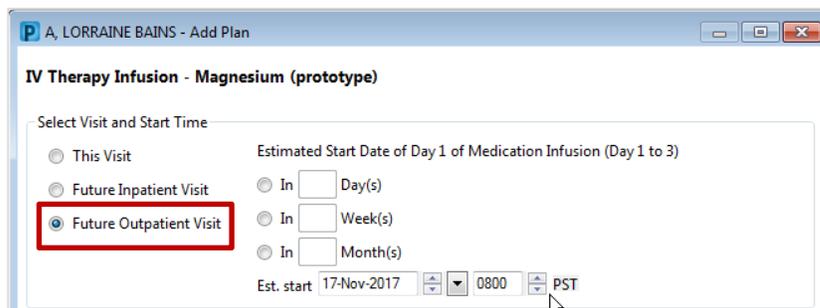
- 1 From the **Outpatient Quick Orders** tab, select the *IV Therapy Infusion – Magnesium* PowerPlan.

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. Select to possibly start the treatment next day.

Phase	Start Date/Time	Action
Medication Infusion (Day 1 to 3)	*Est. 16-Dec-2017 08:00 PST	Order for future visit
Scheduling	16-Dec-2017 08:00 PST	Order now

- 3 The order for magnesium sulfate is preselected. From the drop-down, select the order sentence 2 g, IV, q24h, first dose: Routine.

**Details for magnesium sulfate**

\*Dose:  \*Dose Unit:

\*Route of Administration:  \*Frequency:

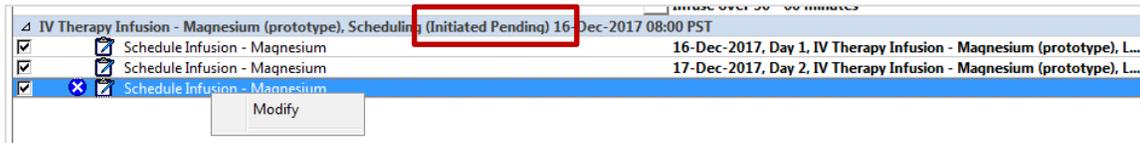
PRN:  Yes  No PRN Reason:

Administer over:  Administer over Unit:

4 You may see the PowerPlan has a scheduling phase.

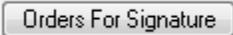
Select the individual order, then right-click and select **Modify** and add required details.

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

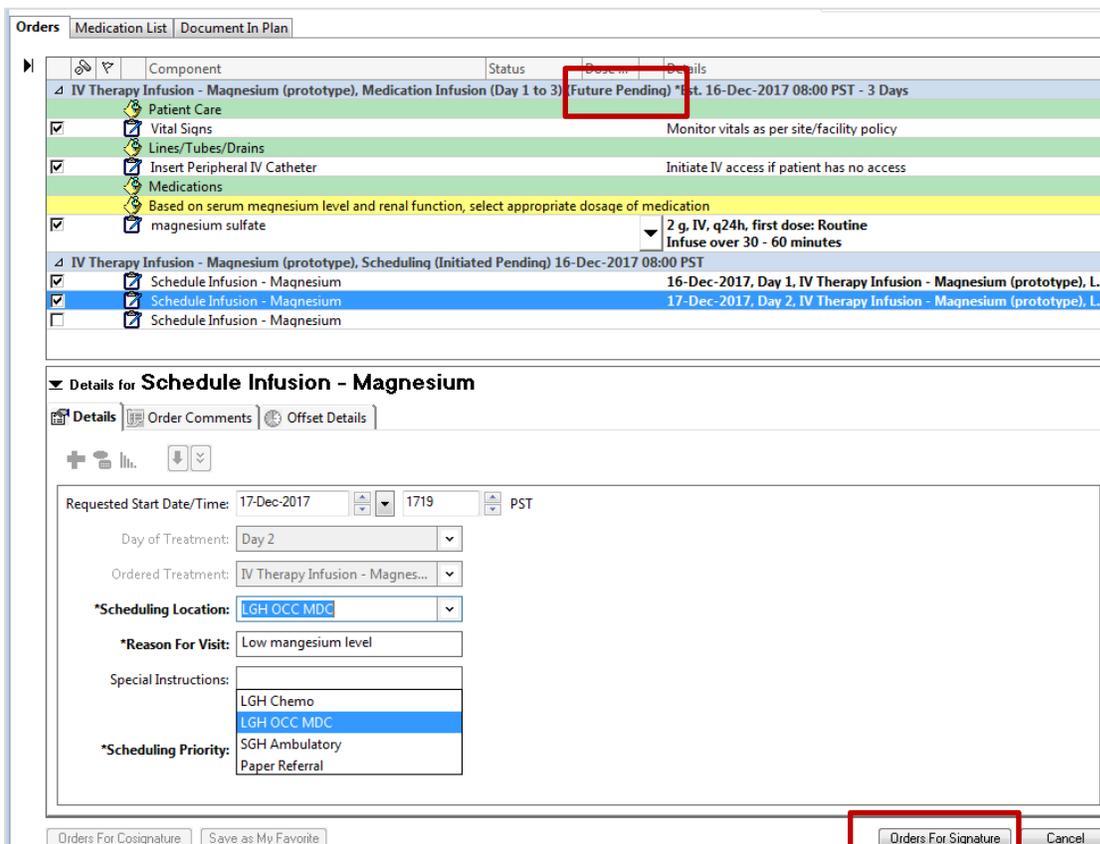


**Note:** Only selected orders will create a future scheduling request.

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.

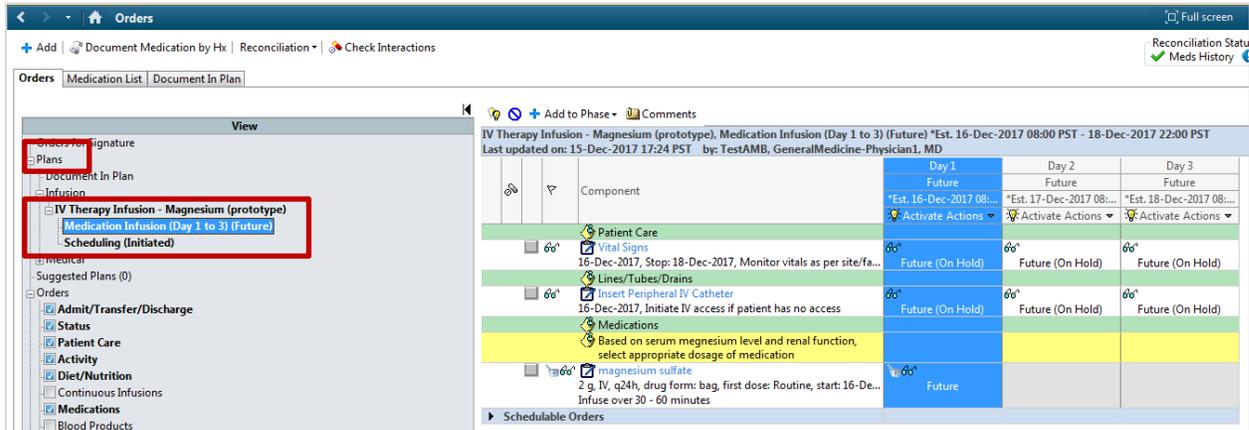
With all required information added, click **Orders for Signature** button  to display only selected orders. Then, click **Sign** to complete placing orders.

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

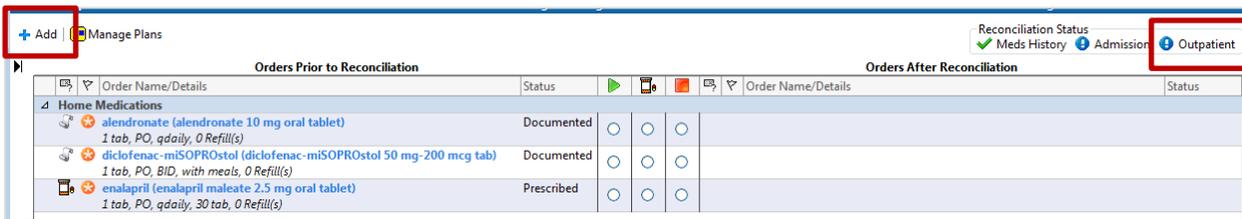
- IV infusion therapy PowerPlan allows you to plan treatment over several visits by using a **multi-day PowerPlan**.
- Each day of treatment must correspond with a **selected** scheduling order.
- Clicking Sign will place orders into a **future** state for activation at a future time.

## Activity 3.4 – Create Prescriptions

**Duration:** Estimated Completion Time - 10 min

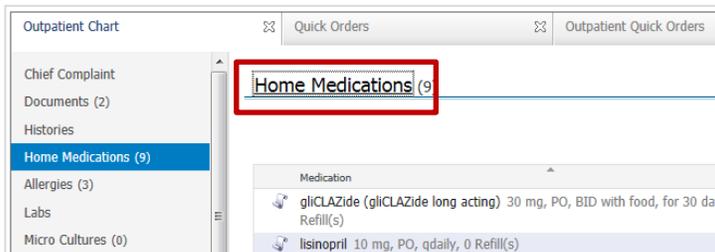
The Clinical Information System (CIS) allows few easy ways to create a prescription.

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.

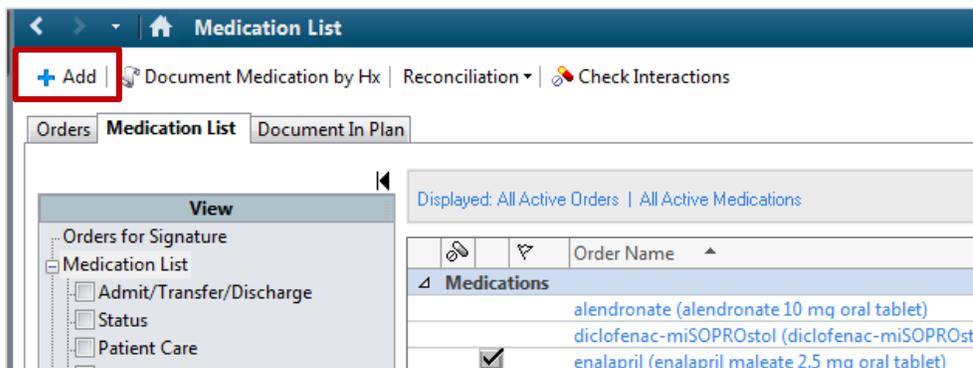


If you decide not to perform medication reconciliation, you can create a prescription **from the existing medication list** for your patient.

- 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 *metoprolol*.

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:

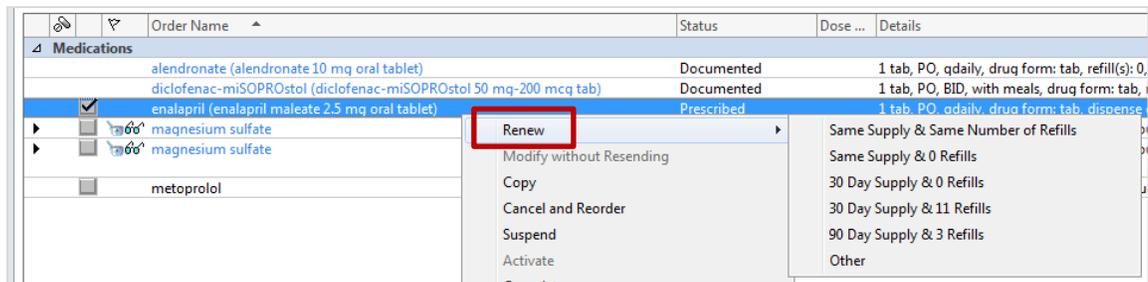
- New medication is added to patient's Medication List.
- The prescription will be automatically created and printed for your signature.

PRESCRIPTION	
	
OCC Medical Daycare 231 E. 15th Street North Vancouver, BC V7L 2L7	
<b>Patient Name: AMBPHYONE, BAO</b>	
DOB: 1942-DEC-04    Age: 75 years    Weight: 70kg (2017-DEC-15)    Sex: Female    PHN: 9876405807	
Allergies: <b>penicillin</b>	
Allergy list may be incomplete. Please review with patient or caregiver.	
<input type="checkbox"/> Blister Packaging _____ week cards, dispense _____ cards at a time. Repeat _____	
<input type="checkbox"/> Non-Safety vials <input type="checkbox"/> 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.    Home Phone: _____ VANCOUVER, British Columbia    Work Phone: _____ Canada	
<b>Any narcotic medications need a duplicate prescription form to be completed</b> Over the counter medications can be filled on PharmaNet at patient's discretion	
Prescription Details:	Date Issued: 2017-DEC-15
<b>metoprolol</b> SIG: <b>50 mg tab PO BID for 30 day</b> Dispense/Supply: <b>60 tab</b>	
Prescriber's Signature <b>TestAMB, GeneralMedicine-Physician1, MD</b> Prescriber's College Number: TEMPO00003 Prescriber's Phone: (604) 001-0003	

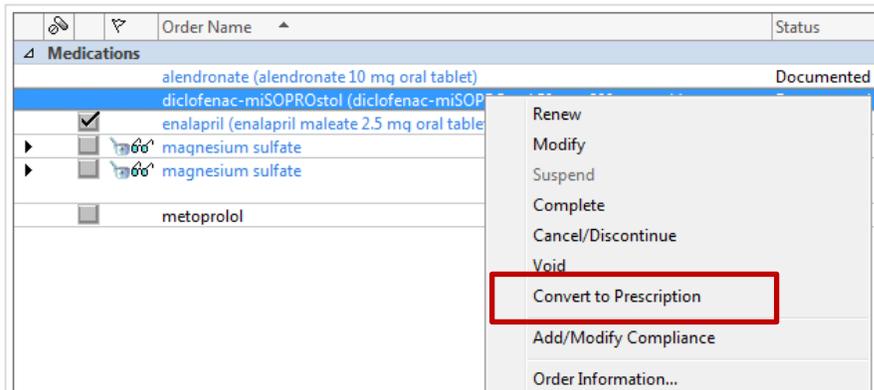
5

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

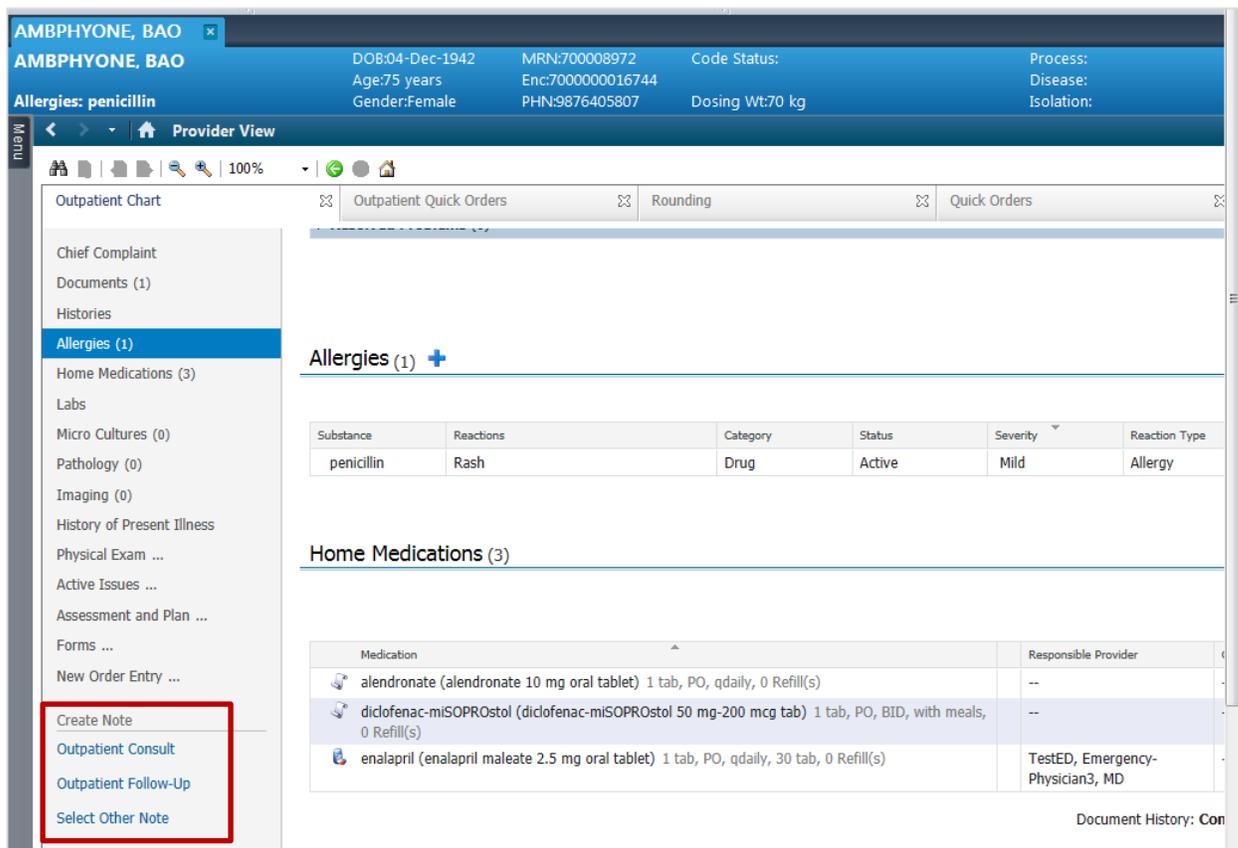
**Duration:** Estimated Completion Time - 10 min

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 your specialty, you might see links to different note types here.

For our scenario, click **Outpatient Consult** note.



**AMBPHYONE, BAO** | DOB:04-Dec-1942 | MRN:700008972 | Code Status: | Process: | Age:75 years | Enc:700000016744 | Disease: | Gender:Female | PHN:9876405807 | Dosing Wt:70 kg | Isolation:

Allergies: penicillin

Provider View

Outpatient Chart | Outpatient Quick Orders | Rounding | Quick Orders

Chief Complaint  
Documents (1)  
Histories  
**Allergies (1)**  
Home Medications (3)  
Labs  
Micro Cultures (0)  
Pathology (0)  
Imaging (0)  
History of Present Illness  
Physical Exam ...  
Active Issues ...  
Assessment and Plan ...  
Forms ...  
New Order Entry ...

**Create Note**  
Outpatient Consult  
Outpatient Follow-Up  
Select Other Note

**Allergies (1) +**

Substance	Reactions	Category	Status	Severity	Reaction Type
penicillin	Rash	Drug	Active	Mild	Allergy

**Home Medications (3)**

Medication	Responsible Provider
alendronate (alendronate 10 mg oral tablet) 1 tab, PO, qdaily, 0 Refill(s)	--
diclofenac-miSOPROstol (diclofenac-miSOPROstol 50 mg-200 mcg tab) 1 tab, PO, BID, with meals, 0 Refill(s)	--
enalapril (enalapril maleate 2.5 mg oral tablet) 1 tab, PO, qdaily, 30 tab, 0 Refill(s)	TestED, Emergency-Physician3, MD

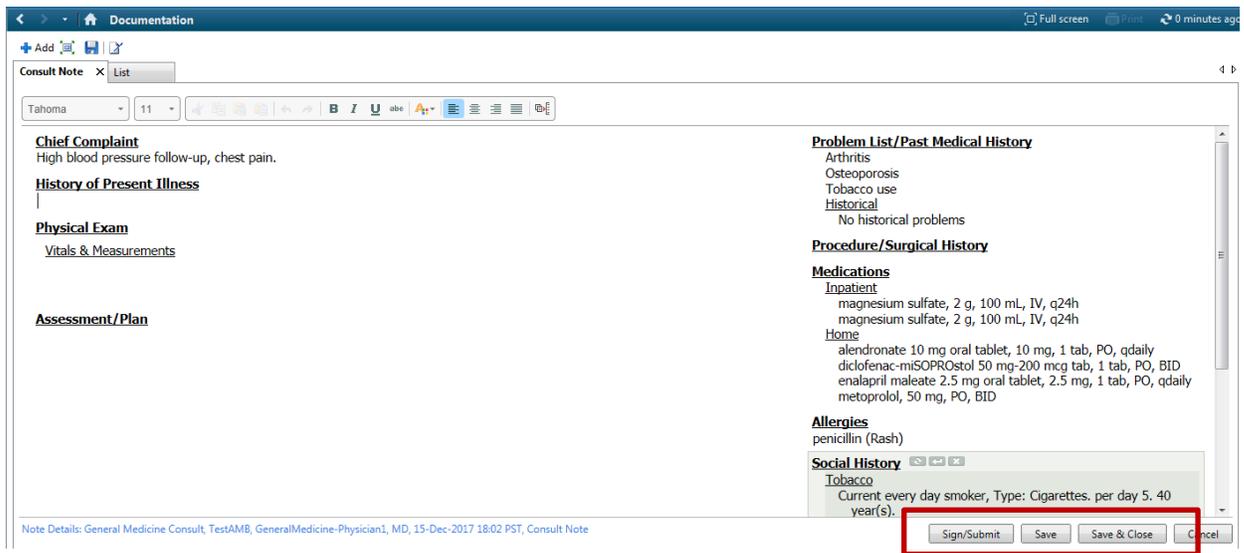
Document History: Con

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: <ul style="list-style-type: none"><li data-bbox="581 411 987 447">■ Review and triage referrals.</li></ul>

### 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.

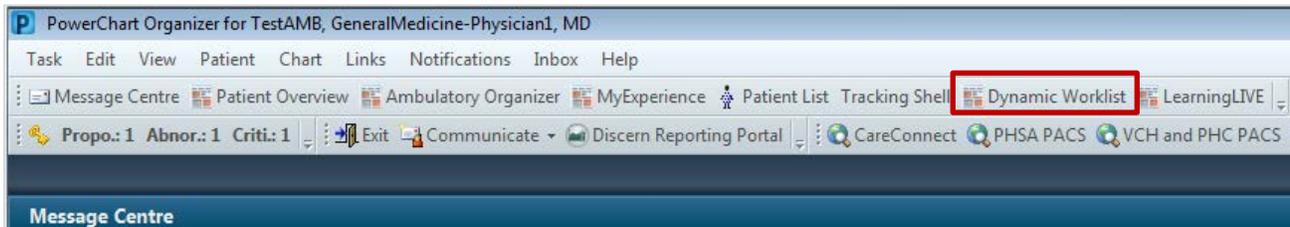
You will be completing the following activities:

- 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

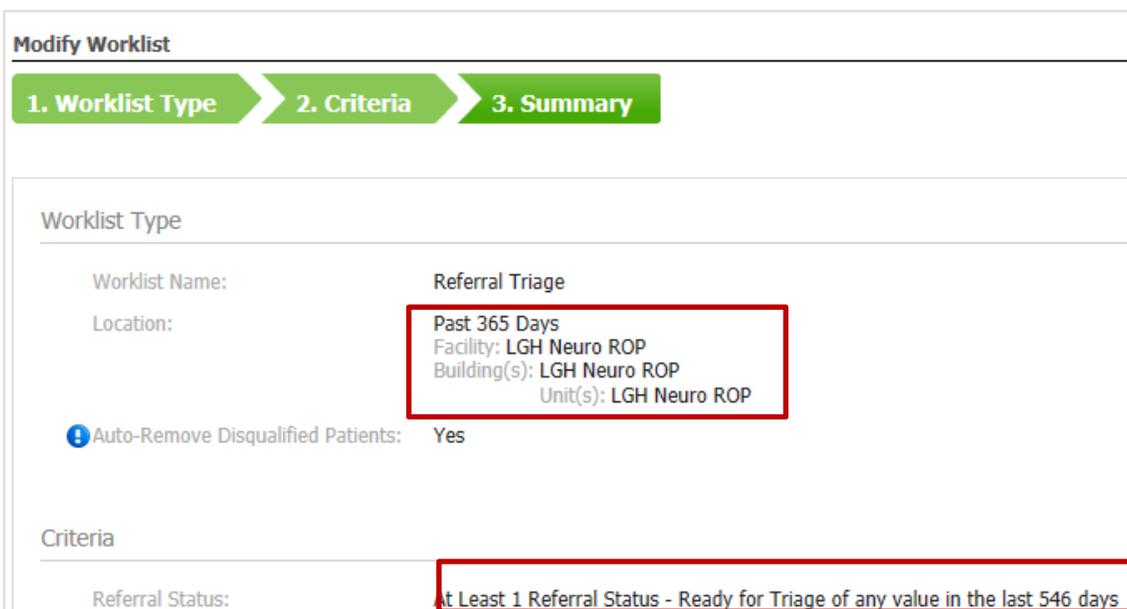
The CIS provides a list of referred patients using the **Dynamic Worklist** functionality that can be accessed from the main toolbar:



**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

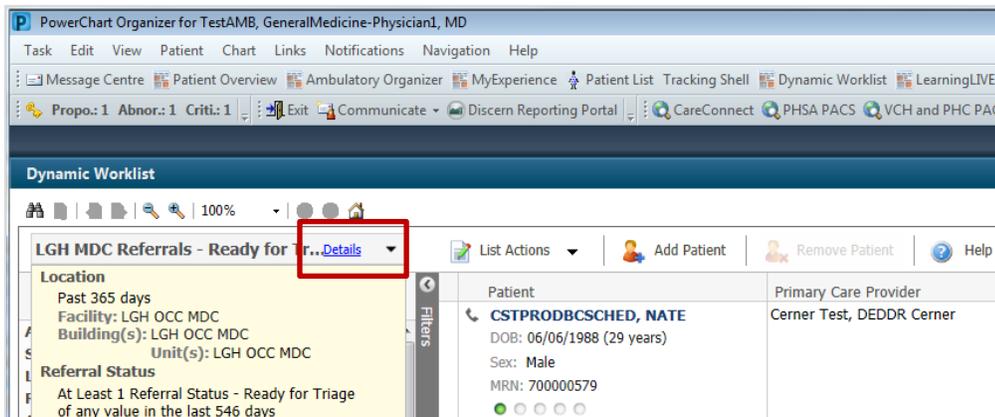
Below you see an example of criteria set for *Referrals coming to the LGH Neuro ROP Clinic* with a referral status of *Ready for Triage* in the last 546 days.



The 'Modify Worklist' screen shows a three-step process: 1. Worklist Type, 2. Criteria, and 3. Summary. Under 'Worklist Type', the 'Worklist Name' is 'Referral Triage'. The 'Location' is set to 'Past 365 Days', 'Facility: LGH Neuro ROP', 'Building(s): LGH Neuro ROP', and 'Unit(s): LGH Neuro ROP'. The 'Auto-Remove Disqualified Patients' option is checked. Under 'Criteria', the 'Referral Status' is set to 'At Least 1 Referral Status - Ready for Triage of any value in the last 546 days'. Red boxes highlight the location and criteria fields.

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

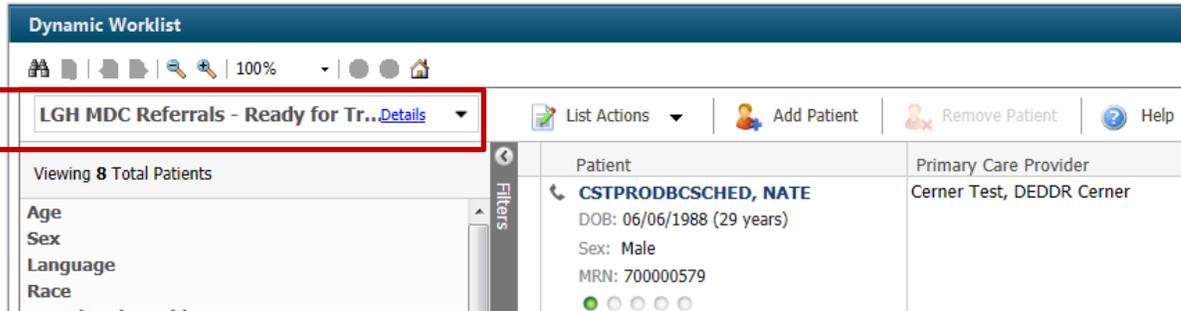
With patient's chart open, an order is placed that updates clinic's worklists:

- 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.

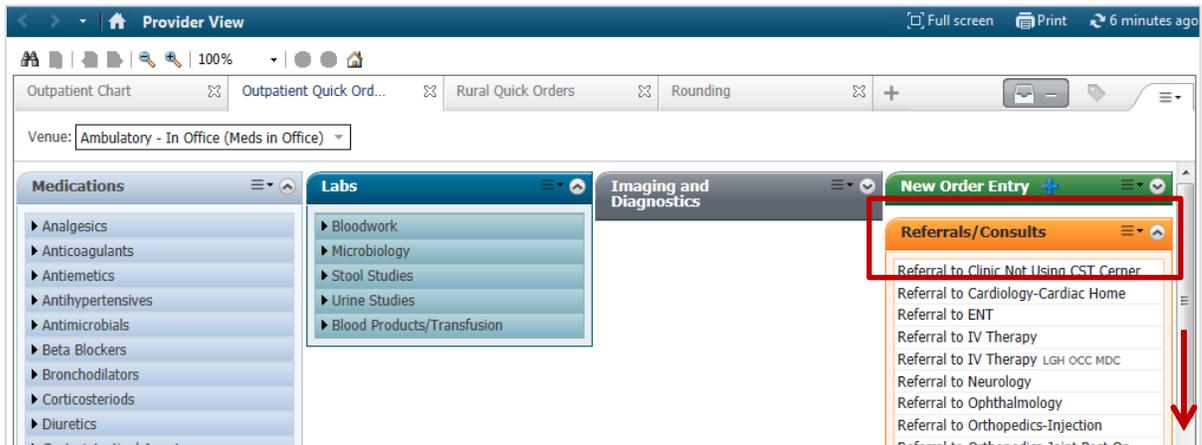
**Note: Oncology providers** will be placing orders specific to the oncology.

## To Accept a Referral

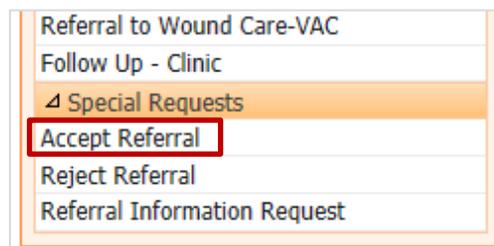
- 1 Click the  **Dynamic Worklist** button on the toolbar to display worklists. Ensure the **LGH MDC Referrals - Ready for Triage** list is displayed.



- 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.



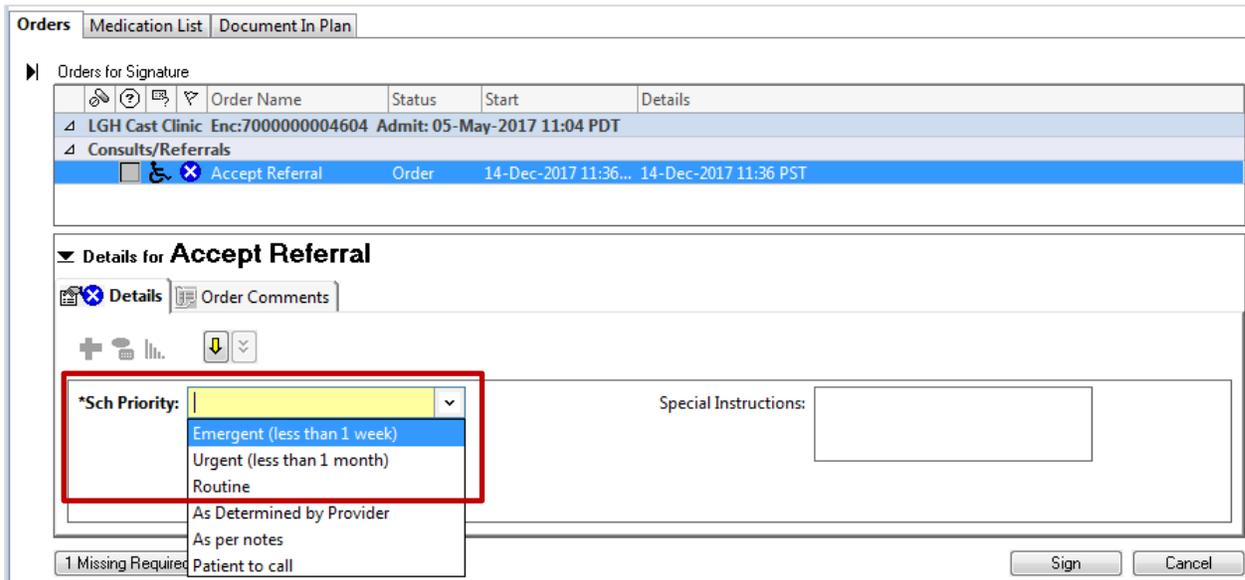
- 3 Under the **Special Requests** folder, select **Accept Referral** and click Orders for Signature  icon.



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

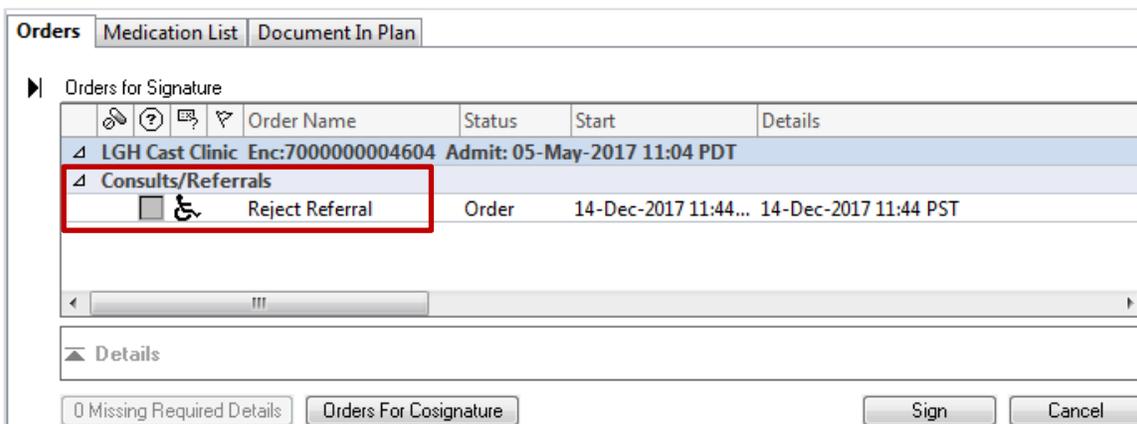
Select one of the options for the **Sch Priority** for the Scheduling clerks. Special instructions are optional but might be helpful.

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



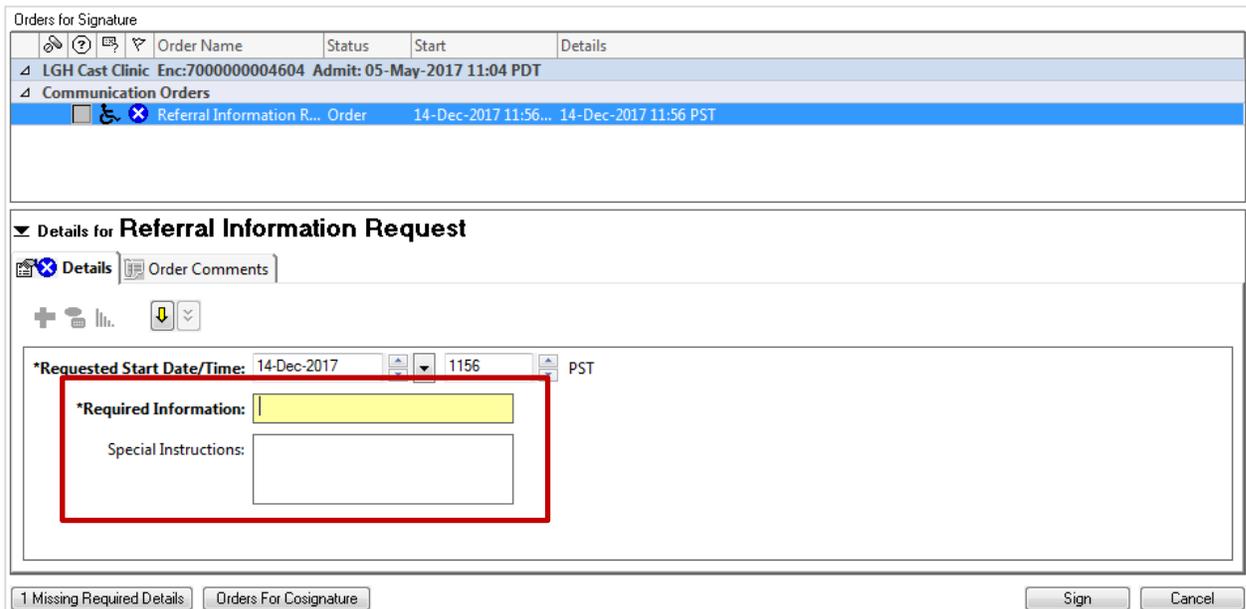
### To Reject a Referral

- 1
  - 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.
  - Place the order and **Sign**. The referral is removed from the clinics Ready for Triage worklist.



## To Request More Information

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:7000000004604 Admit: 05-May-2017 11:04 PDT			
Communication Orders			
Referral Information R... Order		14-Dec-2017 11:56...	14-Dec-2017 11:56 PST

**Details for Referral Information Request**

Details | Order Comments

\*Requested Start Date/Time: 14-Dec-2017 1156 PST

**\*Required Information:**

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
<b>DOCUMENTING ON YOUR PATIENT</b>	<input type="checkbox"/> Create a consult note
<b>COMPUTERIZED ORDER ENTRY &amp; ORDER MANAGEMENT</b>	<input type="checkbox"/> Place a future order <input type="checkbox"/> Place a referral <input type="checkbox"/> Place a multi-day PowerPlan for the IV infusion
<b>MEDICATION MANAGEMENT</b>	<input type="checkbox"/> Create a new prescription <input type="checkbox"/> Renew a prescription
<b>MANAGING WORKFLOW</b>	<input type="checkbox"/> Open patient's chart from Ambulatory Organizer & Dynamic Worklist <input type="checkbox"/> Sign and reject a lab result in Message Centre <input type="checkbox"/> Accept and reject a referral <input type="checkbox"/> Request more information