SELF-GUIDED PRACTICE WORKBOOK [N52-B]
CST Transformational Learning

WORKBOOK TITLE:

Allied Health: Respiratory Therapist Ambulatory

Last update: February 8, 2018 (v2)

TABLE OF CONTENTS

SELF-GUIDED PRACTICE WORKBOOK

Duration	60 minutes
Before getting started	- Sign the attendance roster (this will ensure you get paid to attend the session). - Put your cell phones on silent mode.
Session Expectations	- This is a self-paced learning session. - A 15 min break time will be provided. You can take this break at any time during the session. - The workbook provides a compilation of different scenarios that are applicable to your work setting. - Work through different learning activities at your own pace
Proficiency Assessment	- At the end of the session, you will be required to complete a Key Learning Review - This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.

Using Train Domain

You will be using the train domain to complete activities in this workbook. It has been designed to match the actual Clinical Information System (CIS) as closely as possible.

Please note:

- Scenarios and their activities demonstrate the CIS functionality not the actual workflow
- An attempt has been made to ensure scenarios are as clinically accurate as possible
- Some clinical scenario details have been simplified for training purposes
- Some screenshots may not be identical to what is seen on your screen and should be used for reference purposes only
- Follow all steps to be able to complete activities
- If you have trouble to follow the steps, immediately raise your hand for assistance to use classroom time efficiently
- Ask for assistance whenever needed

PATIENT SCENARIO 1 – Ambulatory Organizer

Learning Objectives
At the end of this Scenario, you will be able to: - Set-up a resource list - Recall the functions of Day View, Calendar View and Open Items View in Ambulatory Organizer

SCENARIO

The Ambulatory Organizer provides a comprehensive display of scheduled appointments. It provides a snapshot of the current day's appointments, including appointment gaps, appointment times and details, patient information and status, and outstanding items to be completed at each visit. The Ambulatory Organizer will help to organize the clinic workflow at the day, week, or month level.

Upon arrival to the Ambulatory clinic, you look to retrieve a list of the day's patients. To start, log into the Clinical Information System (CIS) with your provided username and password.

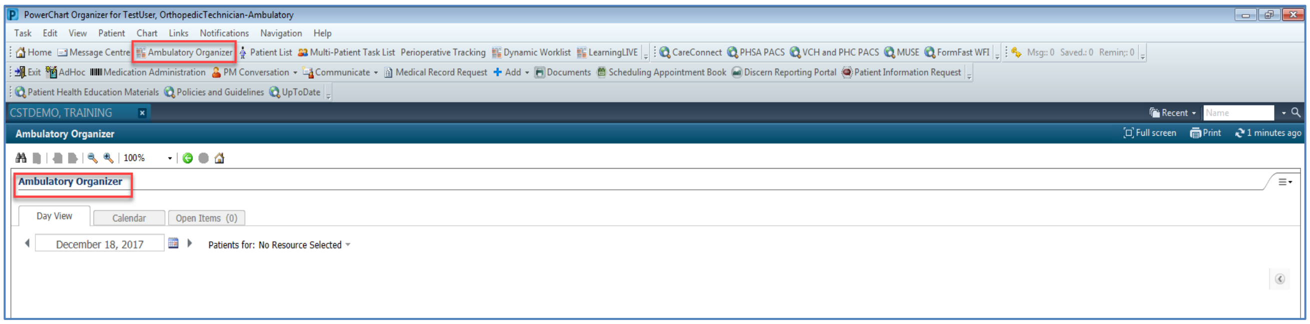
As an Respiratory Therapist you will complete the following activities:

- Set-up a resource list
- Review the functions of Day View
- Review the functions of Calendar View
- Review the Open Items view

Activity 1.1 – Accessing Ambulatory Organizer

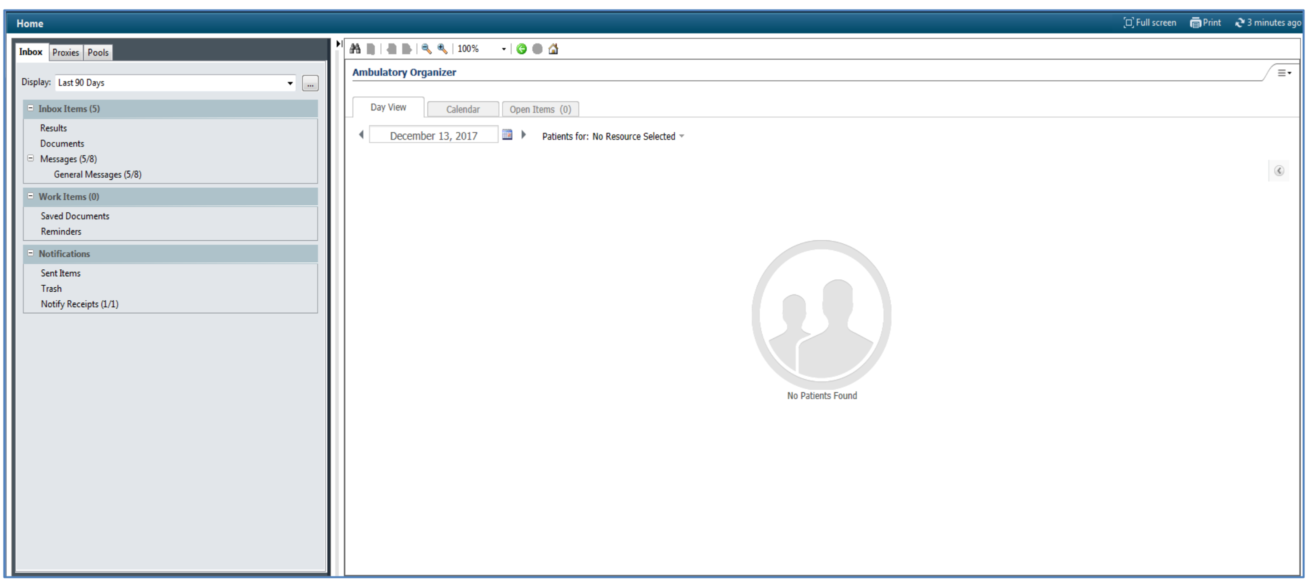
1 The Ambulatory Organizer can be accessed from any screen within PowerChart by selecting the 

button in the toolbar.

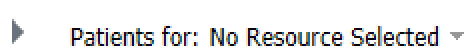


Activity 1.2 – Setting Resource Lists

1 Since this is the first time the Ambulatory Organizer has been used, no patient information will be presented until you select a provider or resource location. The screen will look similar to this:

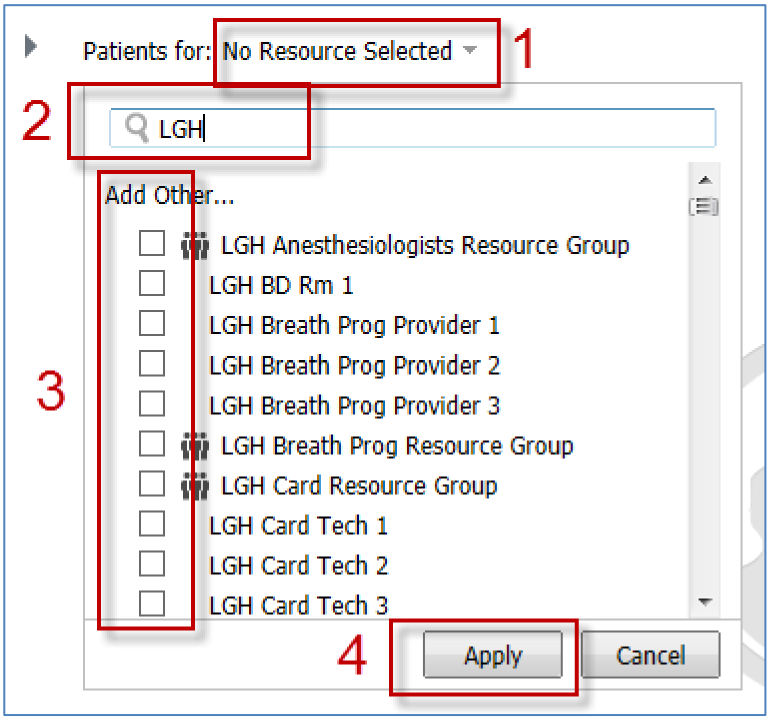


To view the schedule of one or several providers/locations,

1. Select the drop down beside 

2. Click in the search field and begin typing ***LGH….***

3. Scroll through the list and select the name from the “Add Other” section (for the purpose of this activity set your resource to: **LGH PF Lab 1**)
4. Select **Apply** to display the schedule.



Key Learning Points

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

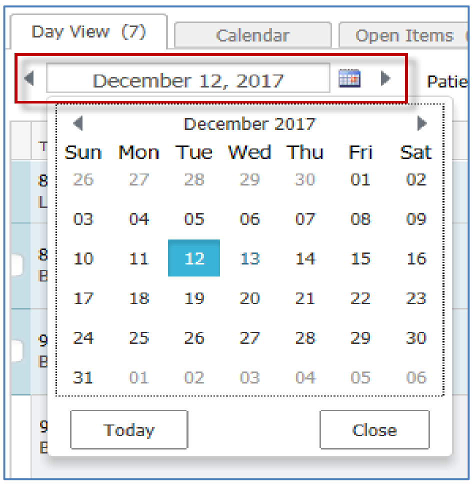
Activity 1.3 – Overview of Day View

1

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

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

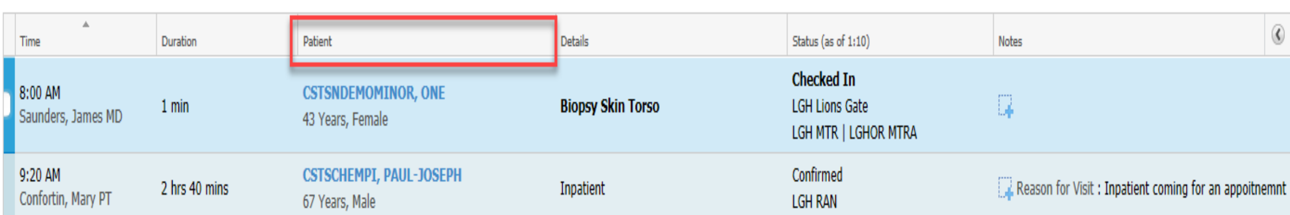
The date of the schedule on the Day View tab can be adjusted by using the left and right arrows next to the date field. The date can also be adjusted by selecting the calendar icon to the right of the date field and choosing a date from the calendar.



2

Appointment details are displayed in columns that can be sorted by selecting the column header.

1. Select the patient column heading and see how the list is sorted

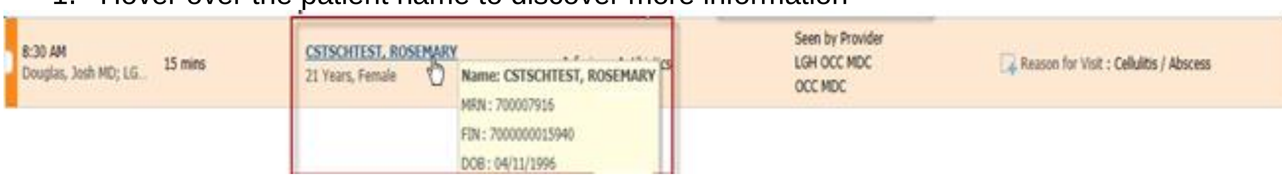


Appointments are colour coded based on the following (for the purpose of training all patients are colour coded the same):

Color Status	Definition
	Light blue indicates a confirmed appointment.
	Medium blue indicates a checked in appointment.
	Green indicates a seen by nurse, medical student, or custom status has taken place.
	Orange indicates a seen by physician, mid-level provider, resident, or custom status has taken place.
	Dark grey indicates the appointment has been checked out.
	White indicates a no show, hold, or canceled appointment (these appointment types are displayed if the system administrator has configured them to display).

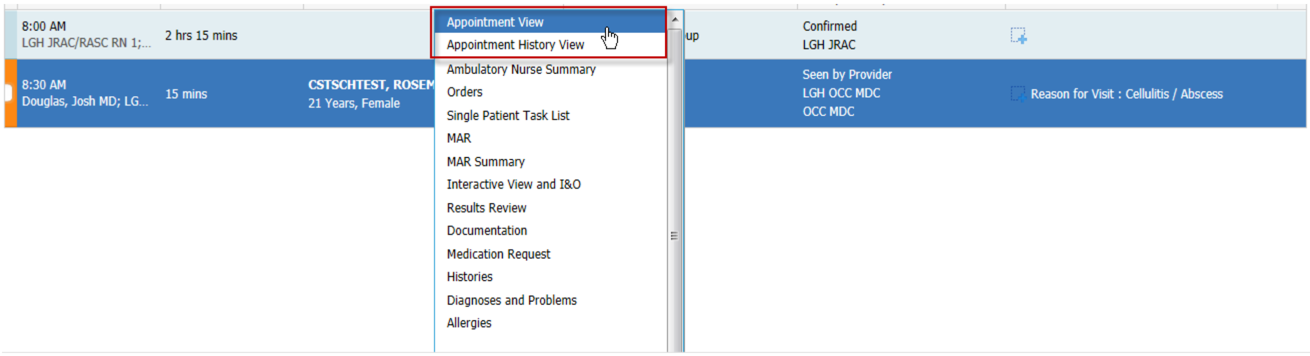
3 Go to the patient column:

1. Hover over the patient name to discover more information

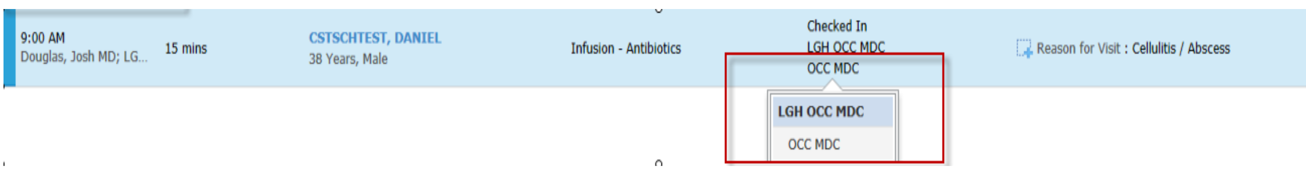


2. You can navigate directly to the patient chart by clicking on the patient's name or right clicking the patient's name and selecting the appropriate tab in the chart

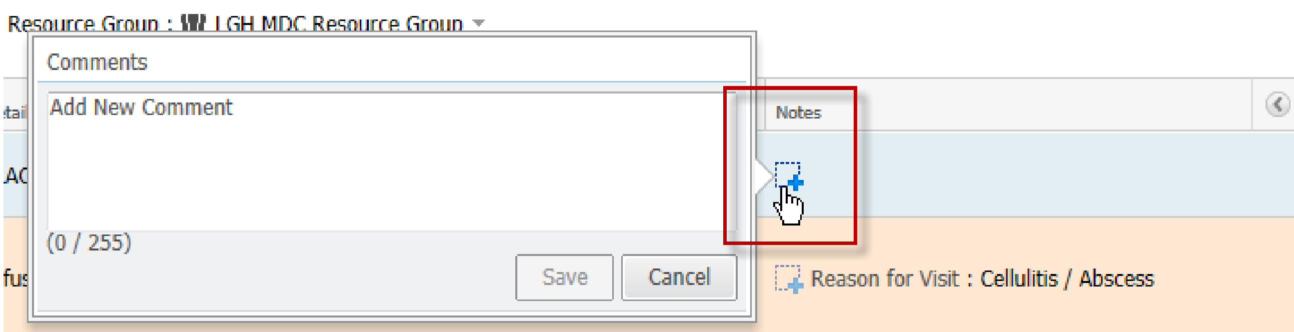
3. You can also view appointment history by right clicking on the patient's name



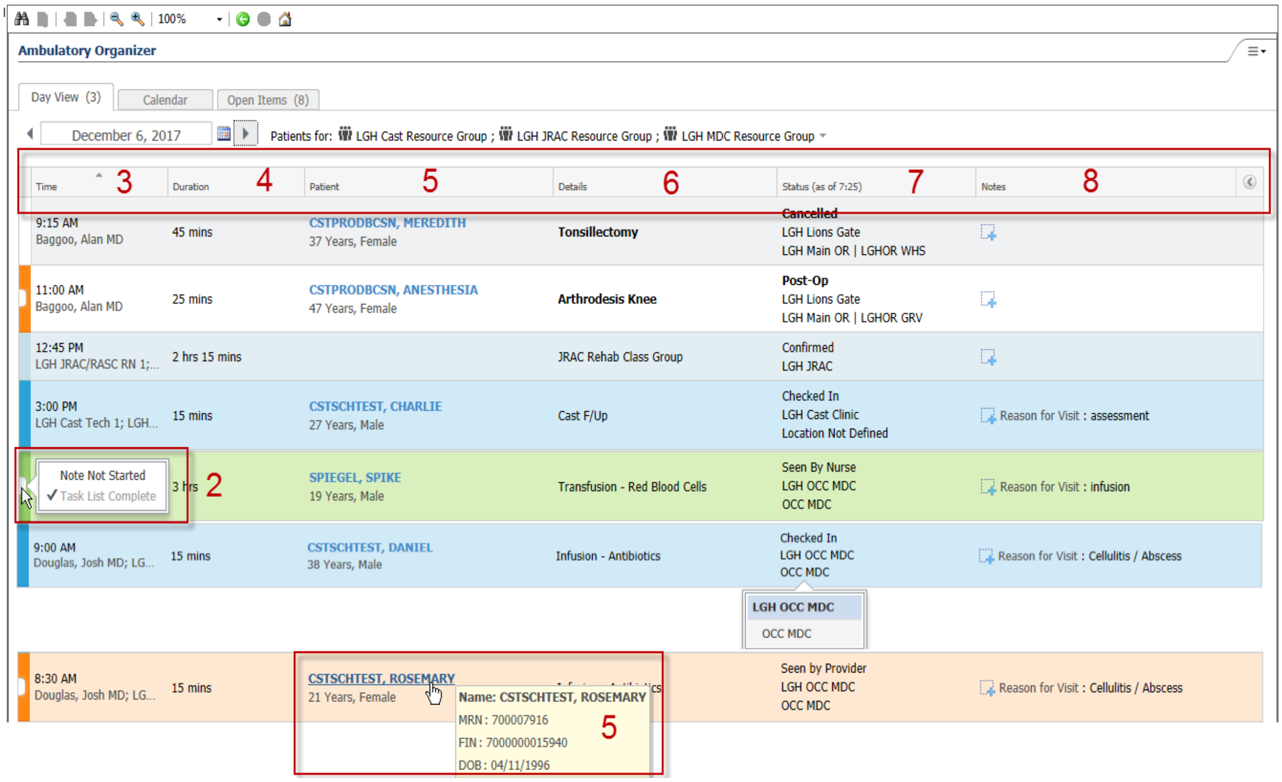
4 Once the patient has been checked in, exam room locations can be selected in the Status column.



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



Note: The screenshot below is provided as an example of what a fully operational Day View might look like. Please ignore the numbers in the screenshot.



Key Learning Points

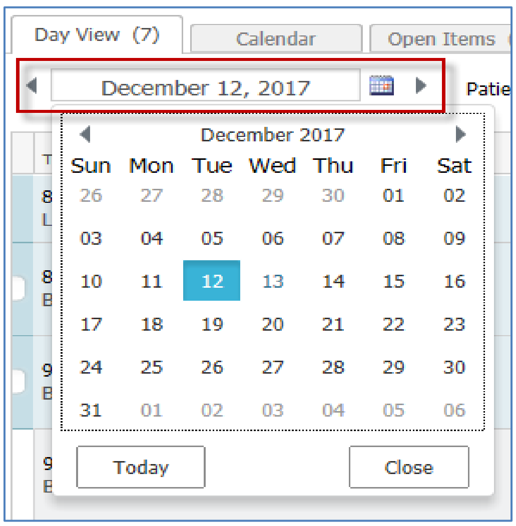
- You can navigate to your patient's chart from ambulatory organizer
- You must set resources to be able to view the appointments

Activity 1.4 – Overview of Calendar View

1 The Calendar View can display the schedule for a day or a week interval for multiple providers.

1. Click on the Day or Week tab to see the different views

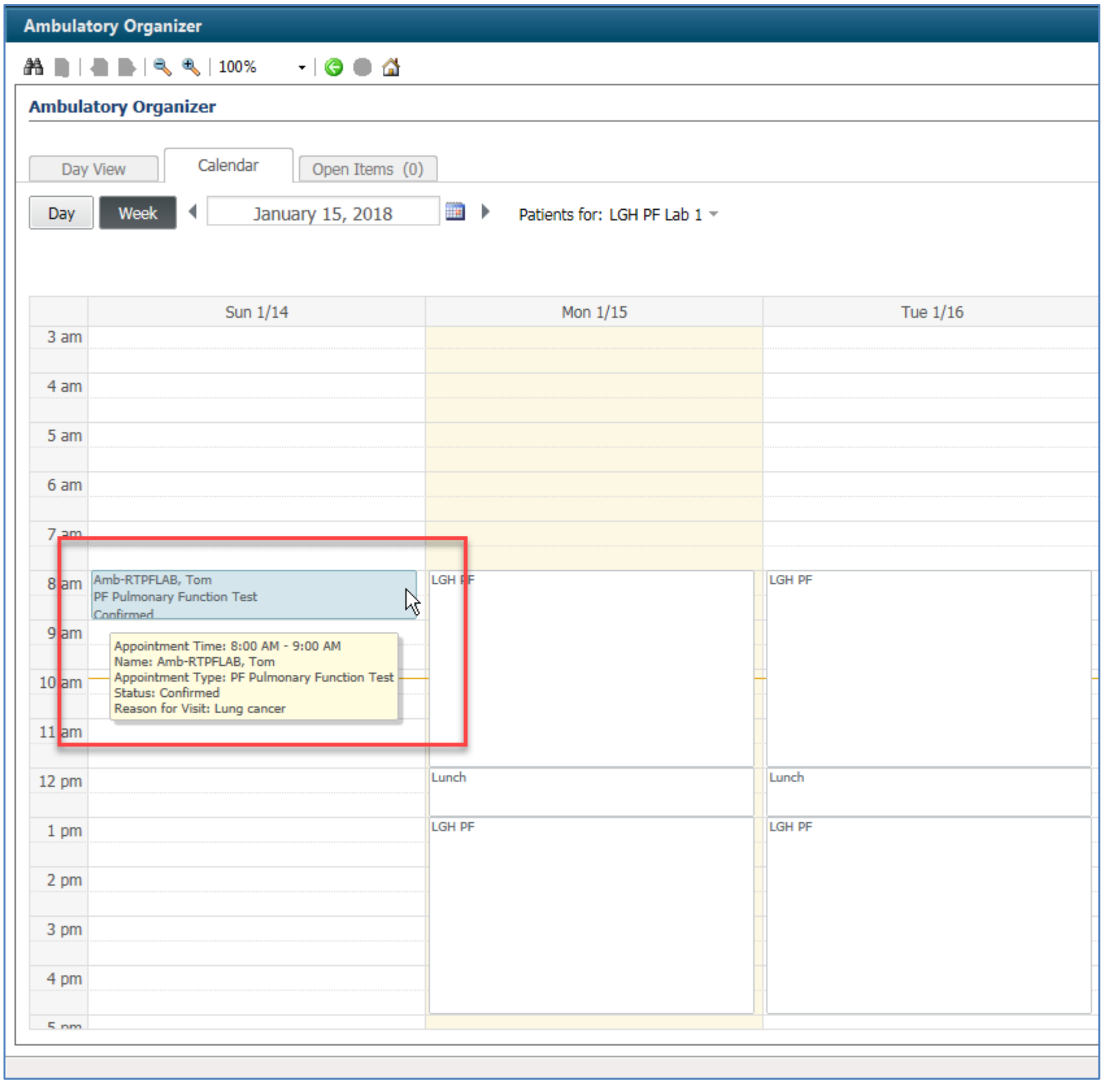
The date of the Calendar tab can be adjusted similar to the way the date on the Day View tab is adjusted.



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

1. Set your resource to: **LGH PF Lab 1**

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



Activity 1.5 – Overview of Open Items View

1 The Open Items view will display patients with outstanding items who have been seen in the last seven days. **Note: For training purposes you will not have any outstanding items available to view. Please read the following information for your learning.**

You will need to set your resource as you did with the Day and Calendar Views

1. Set your resource to: **LGH PF Lab 1**

Similar to the Day View, Open Items provides specific summaries concerning the patient including appointment details, notes, and outstanding actions.

Appointment	Patient	Details	Notes	Outstanding Actions
More Than 2 Days Ago (1)				
06 December, 2017 3:00 PM	CSTSCHTEST, CHARLIE 27 Years, Male	Cast F/Up	Reason for Visit : assessment	Note Not Started ✓ Task List Complete
Yesterday (3)				
12 December, 2017 9:00 AM	CSTDEMOALEXANDER, DONOTUSE 47 Years, Male	Cast New	Reason for Visit : Cast Chief Complaint: CAST APPLICATION FOR RIGHT ARM	Note Not Started ✓ Task List Complete
12 December, 2017 11:00 AM	CSTDEMOCHRIS, DONOTUSE 57 Years, Male	Cast New	Reason for Visit : Cast	Note Not Started ✓ Task List Complete
12 December, 2017 1:00 PM	CSTDEMOELAINE, DONOTDISCHARGE 57 Years, Female	Cast New	Reason for Visit : Cast	Note Not Started ✓ Task List Complete

Selecting the View 7 More Days button will display outstanding items for the selected providers for an additional seven days. The date will update accordingly.

In the **Outstanding Actions** column, certain items concerning the status of the patient can be viewed, including notes and task list.

You can click on any of the **Outstanding Actions** to navigate to that particular page where the patient's information can be created and edited.

Key Learning Points

- You must set resources to be able to view appointments and items in the Calendar and Open Items View

PATIENT SCENARIO 2 – Message Centre

Learning Objectives

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

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

SCENARIO OVERVIEW

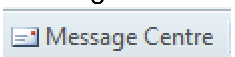
Message Centre is an internal messaging component within the Clinical Information System (CIS) that is used in the outpatient clinical spaces. It is used to address patient related documents, results and messages that are sent from the lab system, forwarded results from other clinicians or general messages. Message Centre will be utilized between Outpatient providers, clinical nursing, clinic clerical and Allied Health. **NOTE: The Message Centre is a part of the legal medical record and communication should pertain to patient chart**.

As an Respiratory Therapist you will complete the following activities:

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

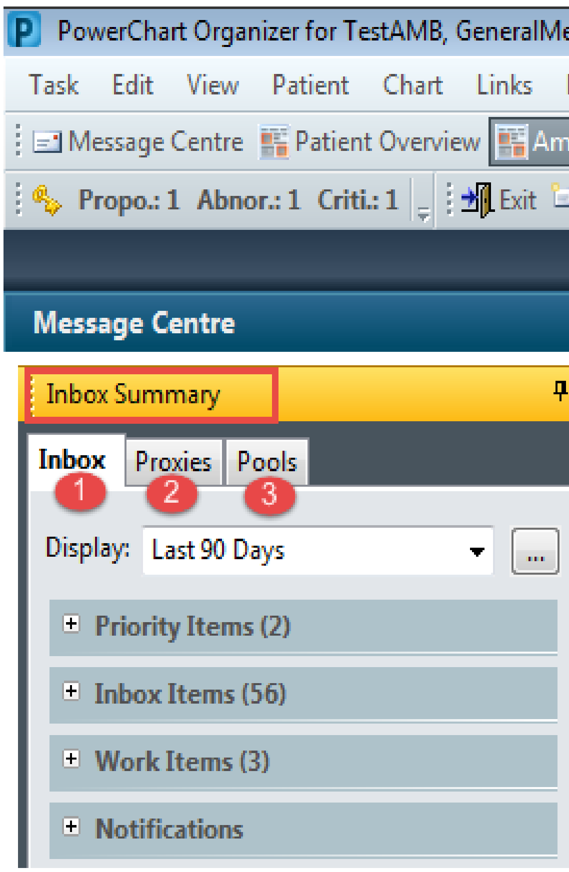
Activity 2.1 – Message Centre Overview

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

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

button in the toolbar.

The screenshot below shows the basic layout of **Inbox Summary**.



Inbox Summary
The Inbox Summary provides you with a quick view of all of the items in your Inbox.

The Inbox Summary consists of 3 separate tabs:

1. Inbox
2. Proxies
3. Pools

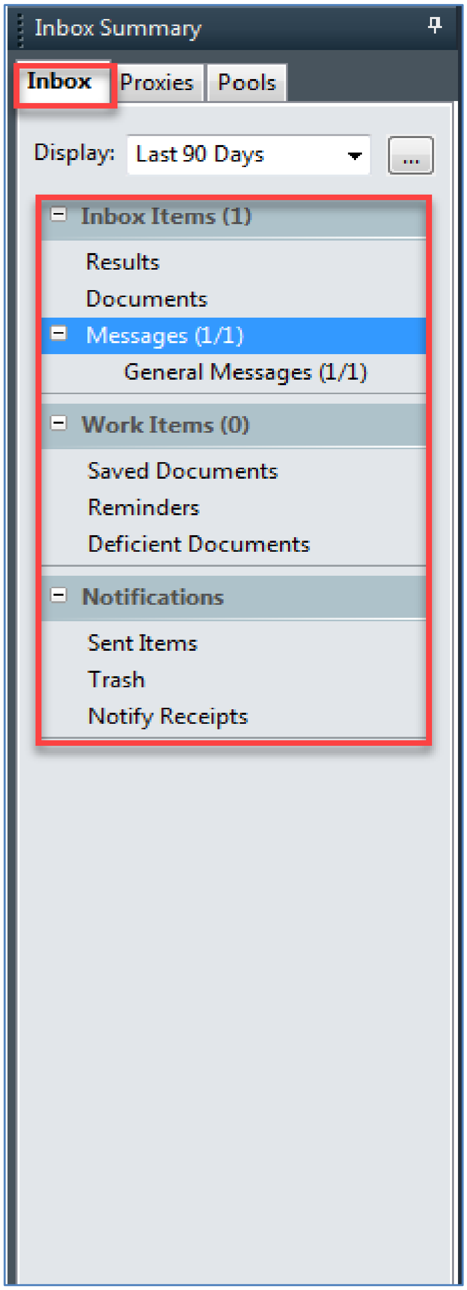
What do these tabs mean?

Inbox: Your own Inbox

Proxies: Inboxes for which you have proxy rights

Pools: Pool Inboxes

The screenshot below shows the basic layout of your own **Inbox**



The Inbox tab contains items that the clinician can complete within Message Centre.

Some examples of items within the inbox tab include (**these vary based on profession**):

- Results (outpatient only)
- Documents for review
- Messages pertaining to patients

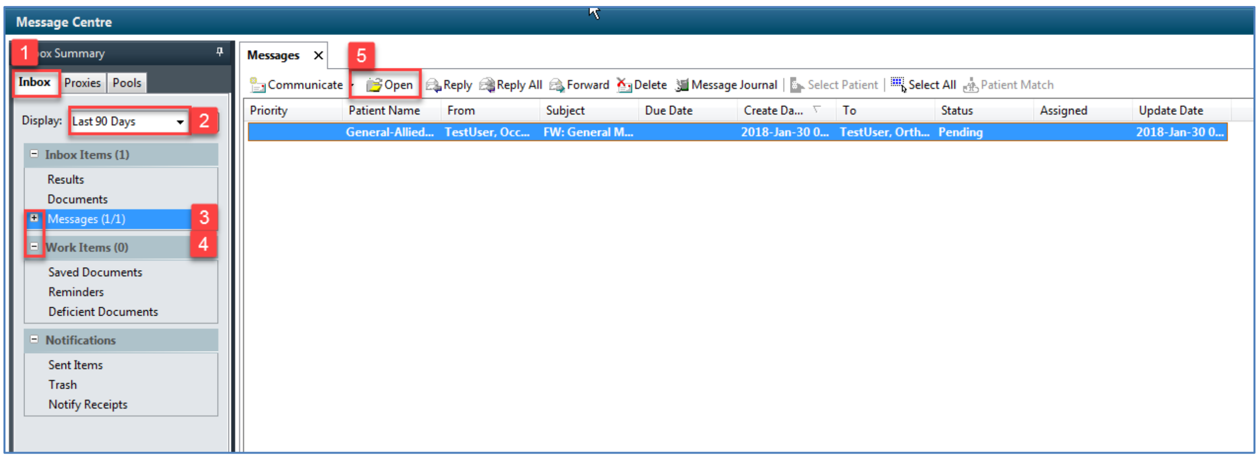
The Work Items section includes (**these vary based on profession**):

- Saved documents- documents that have not been signed during the documentation process, you can access them here and sign them
- Reminders-If you send a message with a reminder, it will be saved here for access later.
- Deficient Documents-Health Records will send you a deficient documents notification if a required document has not been created on your patient's chart.

2 The Inbox tab allows you to access any message in the Inbox. Inbox notifications are divided into **categories, folders and sub-folders**; the number displayed next to the category name, indicates the number unread.

Complete the following steps to access results, documents, messages and other notifications:

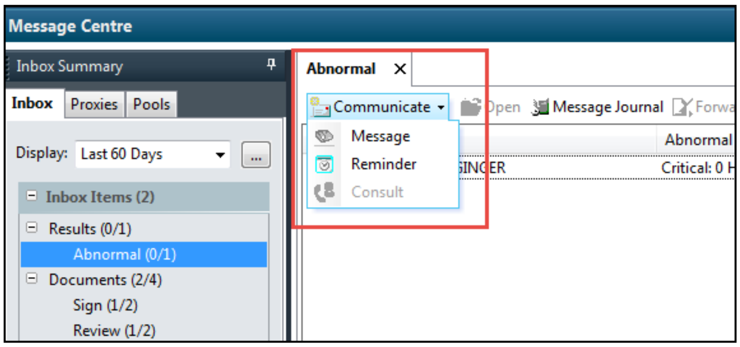
1. Click to select the corresponding tab you would like to work (i.e Inbox tab as shown below)
2. Click **display** drop down to change the date range
3. Click **plus sign** (**+**) next to the category to expand it
4. Click **minus sign** (**-**) next to the category to collapse it.
5. Double-click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



Activity 2.2 – Creating a Message

1 Complete the following steps to create a new message:

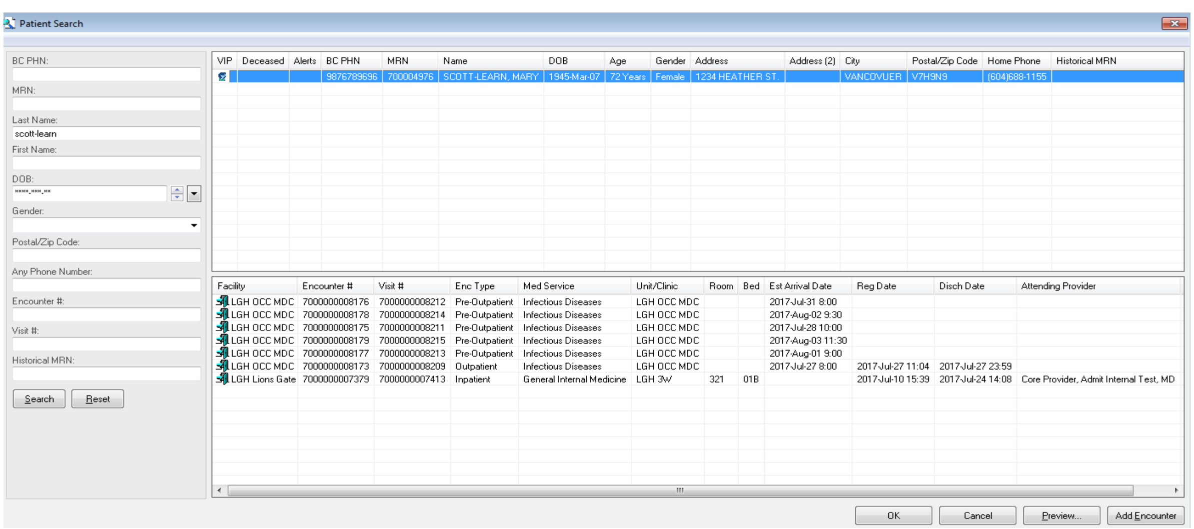
1. From the toolbar, click the **Communicate** drop down menu and select **Message**



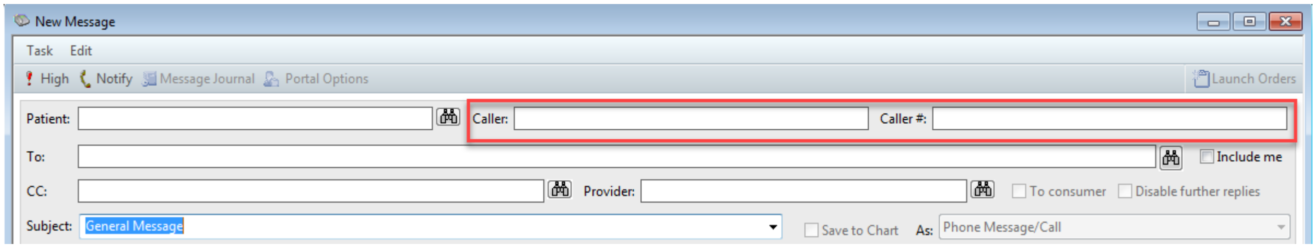
2. From the Patient box, enter the patient's name and click **search** . For this activity use Your Patient.

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

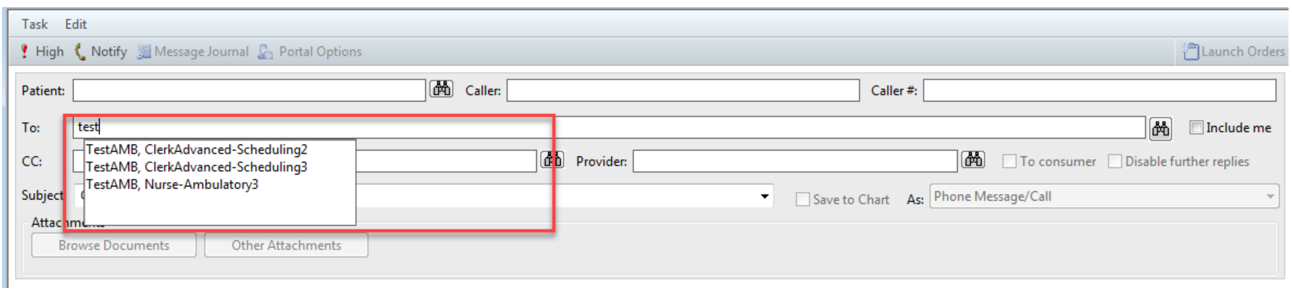
Note: If the message is not related to an existing encounter, you will need to create a new phone message encounter. To create a new phone message encounter refer to the Quick Reference Guide: PM Conversation-Phone Message Encounter.



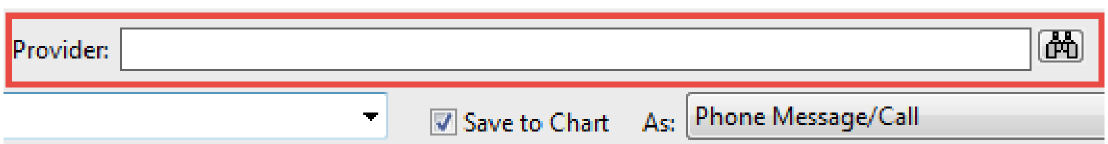
4. The patient's name is automatically entered in the Caller box.



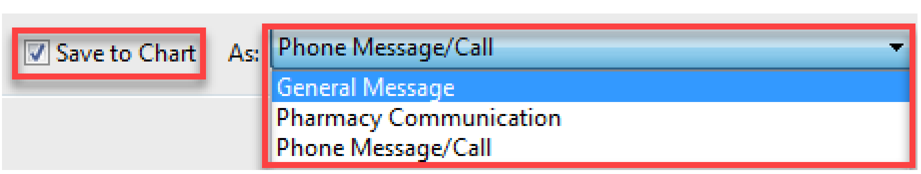
5. From the **'To'** and **'CC'** boxes, enter the **first few letters** of the recipient's last name click **search** or press **ENTER**. For this activity ask your class instructor who to send the message to.



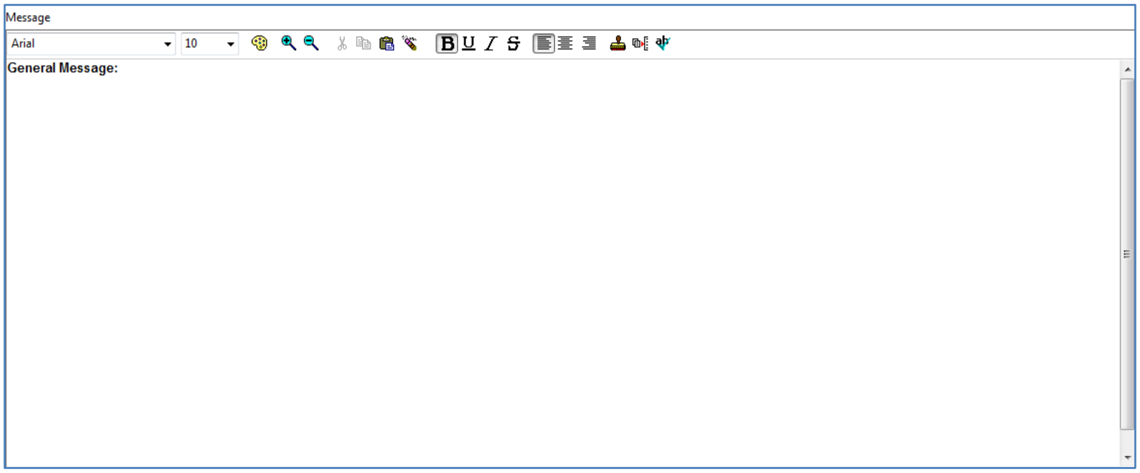
6. In the provider box**,** Search for the Attending Provider



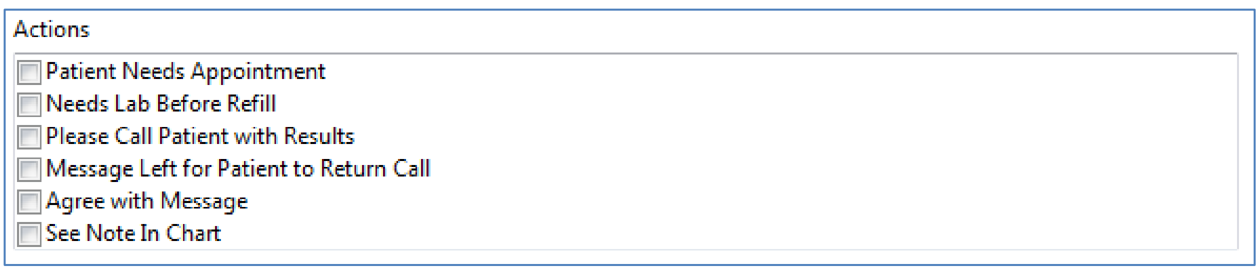
7. Click **save to chart** and select **General Message** from the drop down menu



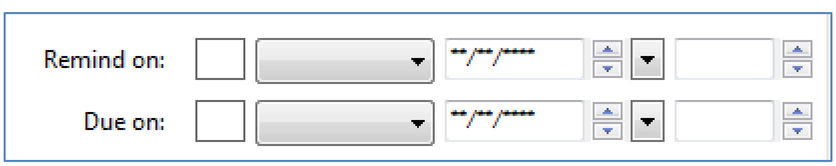
8. From the message box compose the message.



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

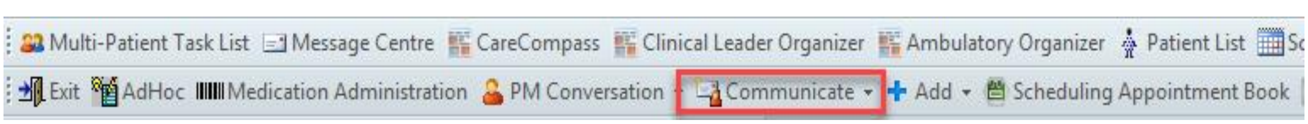


10. To set a reminder to follow up on a message, enter the appropriate time parameters in the **remind on** field. Reminders help ensure that patient care activities for a specified patient are carried out at a later time.



11. Click **Send** to complete the message

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

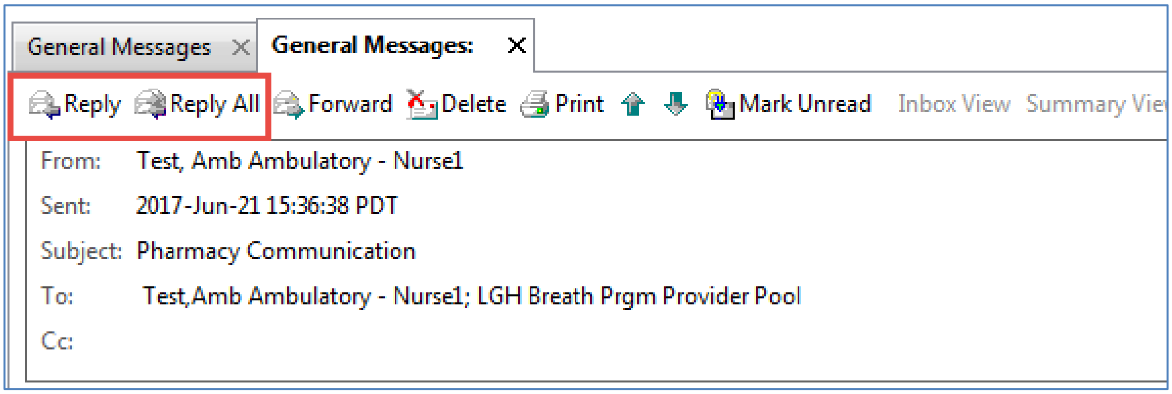


Activity 2.3 – Replying to a Message

1

Complete the following steps to reply to a message:

1. Open and read any message in the inbox.
2. Click either **Reply (one recipient)** or **Reply All (all recipients)**



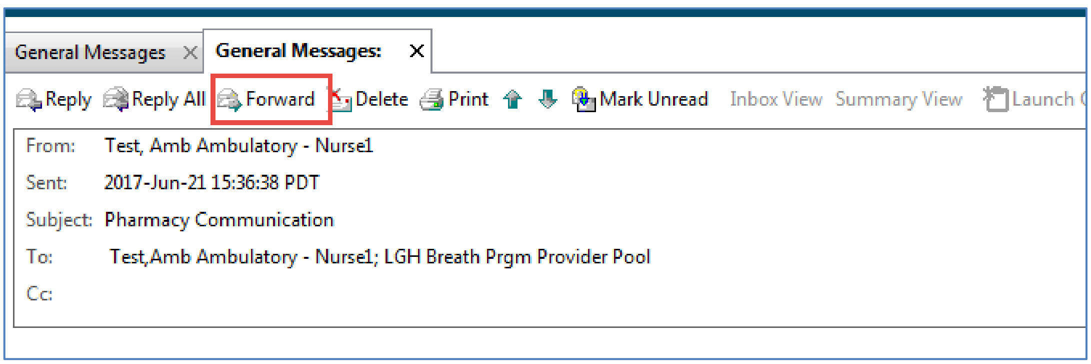
3. Compose your message. Choose a typical message you may write to a colleague.
4. Click **Send**

Activity 2.4 – Forwarding a Message

1

Complete the following steps to forward a message:

1. Open a message in the inbox
2. Click **Forward**
3. Click the **search**  button next to the '**To**' box.
4. Select a recipient, for this activity, ask your class instructor who to forward the message to and click **OK**.



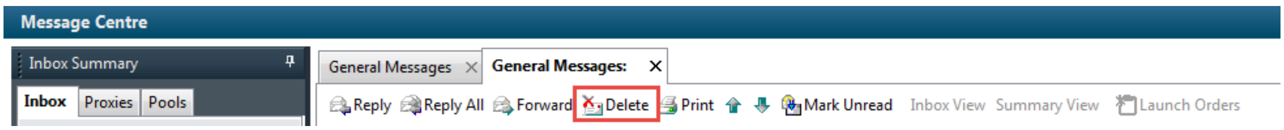
5. Compose the message. Choose a typical message that you would send to a colleague.
6. Save a copy of the message to the patient's chart. Click **Save to Chart**
7. Click **Send**.

Note: You can also forward a message directly from the list of messages displayed in the Inbox workspace without opening it by selecting the message in the notification list and clicking **forward**.

Activity 2.5 – Deleting a Message

1 Messages can be deleted in one of two ways:

1. Select a message you want to delete from the message list in the Message Centre and click **Delete**



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

Key Learning Points

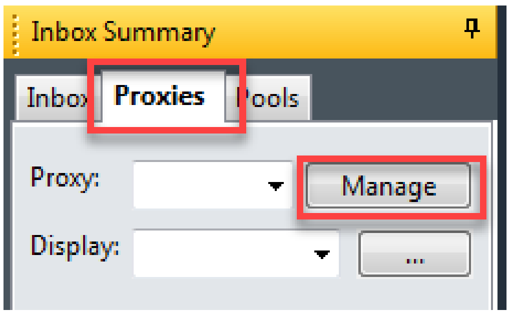
- You can create, reply to, forward and delete messages in Message Centre
- Messages sent in Message Centre are part of the legal medical record and communication should pertain to the patient chart

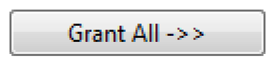
Activity 2.6 – Creating and Removing a Proxy Inbox

1 Proxy inboxes can be used to view messages in a colleague's inbox when they are away. You need to grant proxy rights for a colleague to view your inbox.

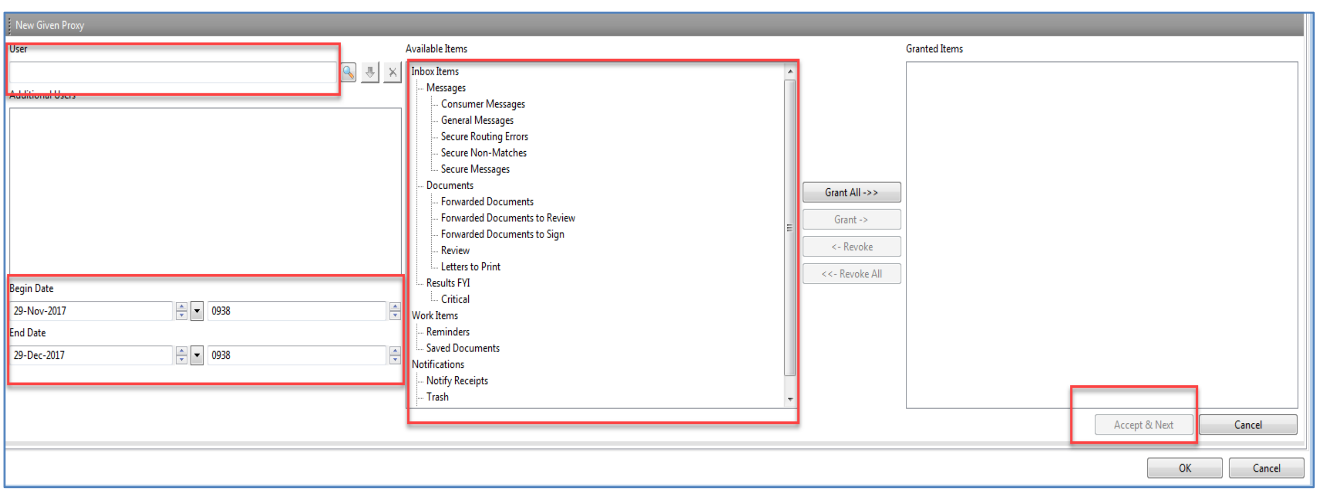
Creating a Proxy Inbox:

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



2. When the window opens click the **Add** button
3. Search for the user you want to assign as a proxy (ask your class instructor)
4. Select the items you want to grant proxy rights to view or select the  button

5. Select a begin date and end date
6. Click **Accept & Next**



7. Click **OK**

Removing a Proxy Inbox:

1. Click the **Proxies** tab and click the **Manage** button
2. When the window opens select the user you want to remove and click the 

button
3. Click **OK**

Key Learning Points

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

End Book

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