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

WORKBOOK TITLE:

Allied Health: Respiratory Therapist Ambulatory



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***** 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

1



Activity 1.1 – Accessing Ambulatory Organizer

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

Mulatory Organizer button in the toolbar.

P PowerChart Organizer for TestUser, Onthopedic Technician-Ambulatory	- # x
Task Edit View Patient Chart Links Notifications Navigation Help	
🖞 Home 🖃 Message Centre 👫 Ambulatory Organizer 👷 Patient List 😩 Multi-Patient Task List Perioperative Tracking 🎬 Dynamic Worklist 🐂 LaamingLIVE 📄 🛍 CareConnect 🛱 PHSA PACS 🖏 VCH and PHC PACS 🖏 VCH and PHC PACS	
📲 Eak 猶 AdHoc 💷 Makication Administration 🔮 PM Conversation - 🔩 Communicate - 🗟 Medical Record Request 💠 Add - 🔚 Documents 🚔 Scheduling Appointment Book 🖨 Discern Reporting Portal 🥯 Patient Information Request 🖕	
🖓 Patient Health Education Materials 🕲 Policies and Guidelines 🕲 UpToDate 👙	
CSTDEMO, TRAINING 🗖	- Q
Ambulatory Organizer	* 1 minutes ago
Ambulatory Organizer	
Day View Calendar Open Items (0)	
 ↓ December 18, 2017 □ ▶ Patents for: No Resource Selected ~ 	
	۲

Activity 1.2 – Setting Resource Lists

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:

Home		🗇 Full screen 🛛 🖶 Print	🗞 3 minutes ago
Inbox Proxies Pools	A D A C A C A C A C A C A C A C A C A C		
Display: Last 90 Days 🔹 🛄	Ambulatory Organizer		≡•
Index Items (5) Results Documents General Messages (5/8) General Messages (5/8)	Day View Calendar Open Items (0) Calendar December 13, 2017 Patients for: No Resource Selected *		۲
Work Items (0) Saved Documents Reminders			
Indifications Sort Rens Train Notrly Receipts (1/2)	The Patients Found		

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

- 1. Select the drop down beside Patients for: No Resource Selected -
- 2. Click in the search field and begin typing *LGH*....



- 3. Scroll through the list and select the name from the "Add Other" section (for the purpose of this activity set your resource to: LGH 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

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

.≜ Time	Duration	Patient	Details	Status (as of 1:10)	Notes	0
8:00 AM Saunders, James MD	1 min	CSTSNDEMOMINOR, ONE 43 Years, Female	Biopsy Skin Torso	Checked In LGH Lions Gate LGH MTR LGHOR MTRA	4	
9:20 AM Confortin, Mary PT	2 hrs 40 mins	CSTSCHEMPI, PAUL-JOSEPH 67 Years, Male	Inpatient	Confirmed LGH RAN	Reason for Visit : Inpatient coming for an appointe	emnt



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

8:30 AM Douglas, Josh MD; LG. 15 mins	CSTSCHTEST, ROSEMARY 21 Years, Female O Name: CSTSCHTEM	T, ROSEMARY CS LIGH OCC MDC OCC MDC	Reason for Visit : Cellulitis / Abscess
	FIN: 70000001594 D08: 04/11/1996		

- 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



8:00 AM LGH JRAC/RASC RN 1;	2 hrs 15 mins		Appointment View	Î	up	Confirmed LGH JRAC	C2
8:30 AM Douglas, Josh MD; LG	15 mins	CSTSCHTEST, ROSEM 21 Years, Female	Ambulatory Nurse Summary Orders Single Patient Task List			Seen by Provider LGH OCC MDC OCC MDC	Reason for Visit : Cellulitis / Abscess
			MAR MAR Summary Interactive View and I&O Results Review Documentation Medication Request Histories Diagnoses and Problems Allergies	ш			

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

9:00 AM Douglas, Josh MD; LG	15 mins	CSTSCHTEST, DANIEL 38 Years, Male	Infusion - Antibiotics	Checked In LGH OCC MDC OCC MDC	Reason for Visit : Cellulitis / Abscess	
				LGH OCC MDC OCC MDC		

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

Re	source Group : WI I GH MDC Resource Group 🔻		1			
_	Comments					
tai	Add New Comment	1		Notes		۲
AC				æ		
fus	(0 / 255) Save	Cancel		Reaso	on for Visit : Cellulitis / Abscess	



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.

Ambulatory Organizer					/ ≡•	
Day View (3) Calendar Open Items (8) Image: Comparison of the state of the stat						
Time 3 Duration 4	Patient 5	Details 6	Status (as of 7:25)	Notes 8	۲	
9:15 AM 45 mins Baggoo, Alan MD	CSTPRODBCSN, MEREDITH 37 Years, Female	Tonsillectomy	Cancelled LGH Lions Gate LGH Main OR LGHOR WHS	Ģ		
11:00 AM Baggoo, Alan MD 25 mins	CSTPRODBCSN, ANESTHESIA 47 Years, Female	Arthrodesis Knee	Post-Op LGH Lions Gate LGH Main OR LGHOR GRV	4		
12:45 PM LGH JRAC/RASC RN 1; 2 hrs 15 mins		JRAC Rehab Class Group	Confirmed LGH JRAC	Ģ		
3:00 PM LGH Cast Tech 1; LGH 15 mins	CSTSCHTEST, CHARLIE 27 Years, Male	Cast F/Up	Checked In LGH Cast Clinic Location Not Defined	Reason for Visit : assessment		
Note Not Started Task List Complete 3 trs 2	SPIEGEL, SPIKE 19 Years, Male	Transfusion - Red Blood Cells	Seen By Nurse LGH OCC MDC OCC MDC	Reason for Visit : infusion		
9:00 AM Douglas, Josh MD; LG 15 mins	CSTSCHTEST, DANIEL 38 Years, Male	Infusion - Antibiotics	Checked In LGH OCC MDC OCC MDC	Reason for Visit : Cellulitis / Abscess		
			SH OCC MDC			
8:30 AM Douglas, Josh MD; LG 15 mins	CSTSCHTEST, ROSEMARY 21 Years, Female MRN: 70000791 FIN: 70000001	1TEST, ROSEMARY 6 5 5940 5	Seen by Provider LGH OCC MDC OCC MDC	Reason for Visit : Cellulitis / Abscess		

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

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

induatory O	iganizer @. @. 100% _ Ø . ● Ø		
mbulatory (raanizer		
Day View	Calendar Open Items	(0)	
Day We	January 15, 2018	Patients for: LGH PF Lab 1 *	
	Sun 1/14	Mon 1/15	Tue 1/16
3 am			
4 am			
5 am			
6 am			
7 am			
8 am Amb-RT PF Pulm	IPFLAB, Tom nonary Function Test and		LGH PF
9 am	ointment Time: 8:00 AM - 9:00 AM		
10 am App Stat	ne: Amb-RTPFLAB, Tom ointment Type: PF Pulmonary Function Test - us: Confirmed		
Reas 11 am	son for Visit: Lung cancer		-
12 pm		Lunch	Lunch
		LOU DE	LOUIDE
1 pm			
2 pm			
3 pm			
4 pm			



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
4	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
4	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



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Activity 2.1 – Message Centre Overview

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

Message Centre button in the toolbar.

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







The screenshot below shows the basic layout of your own Inbox



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 is to view.





Activity 2.2 – Creating a Message

Complete the following steps to create a new message:

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

Message Centre									
Inbox Summary 4	Abnormal ×								
Inbox Proxies Pools	🕒 Communicate 🗸 🚔 Dpen 📓 Message Journ	nal 🔭 Forwa							
Disalara II. I CO.D.	Message	Abnorma							
Display: Last 60 Days •	Reminder INCER	Critical: 0							
Inbox Items (2)	Consult								
 Results (0/1) 									
Abnormal (0/1)									
 Documents (2/4) 									
Sign (1/2)									
Review (1/2)									

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

Patient:	岡

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.

PHN:	VIP	Deceased	Alerts	BC PHN	MBN N	lame	DOB	Age	Gender	Address		Address (2)	Dity	Postal/Zip Code	Home Ph	none Historical I	4RN
	2			9876789696	5 700004976 S	COTT-LEARN, N	IARY 1945-Mar-07	72 Years	Female	1234 HEA	THER S	ST. N	VANCOVUER	V7H9N9	(604)688	91155	
IN:																	
st Naroe:																	
att-learn																	
Name:																	
3:																	
,888,88																	
der																	
▼																	
al/Zin Code:																	
anap coot.																	
Phone Number																	
	Facil	ity	Enco	ounter #	Visit #	Enc Type	Med Service	U	nit/Clinic	Room	Bed	Est Arrival Date	Reg Date	Disch Da	te .	Attending Provider	
ounter #:	SIL.	GH OCC MDC	7000	000008176	700000008212	Pre-Outpatient	Infectious Diseases	LC	H OCC MD	с		2017-Jul-31 8:00					
	3 1 L	GH OCC MDC	7000	000008178	700000008214	Pre-Outpatient	Infectious Diseases	LC	H OCC MD	С		2017-Aug-02 9:30					
#:		GH OCC MDC	7000	000008175	700000008211	Pre-Outpatient	Infectious Diseases	LC	H OCC MD	С		2017-Jul-28 10:00					
	3 L	GH OCC MDC	7000	000008179	700000008215	Pre-Outpatient	Infectious Diseases	LC	H OCC MD	С		2017-Aug-03 11:30					
prical MBN:	ᆀ니	GH OCC MDO	7000	000008177	700000008213	Pre-Outpatient	Infectious Diseases	LC	H OCC MD	С		2017-Aug-01 9:00					
	생님	GH OCC MDC	2000	000008173	700000008209	Outpatient	Infectious Diseases	LC	H OCC MD	C	~	2017-Jul-27 8:00	2017-Jul-27	11:04 2017-Jul-	27 23:59		
	2911	UH Lions Gat	e 7000	000007379	700000007413	Inpatient	General Internal Me	dicine LL	aH 3W	321	UIB		2017-Jul-10	15:39 2017-Jul	24 14:08	Lore Provider, Adm	it Internal Test, I
jearch <u>R</u> eset																	



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

🔍 New Me	essage	
Task Ed	dit	
📍 High	🕻 Notify 📓 Message Journal 🍒 Portal Options	Taunch Orders 🖀
Patient:	Caller:	Caller #:
To:		🛱 🗌 Include me
CC:	Pro	vider: To consumer Disable further replies
Subject:	General Message	Save to Chart As: Phone Message/Call

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.

Task Edit		
📍 High 🐧 Notify 📓 Message Journal 💁 Portal Options		launch Orders
Patient:	Caller:	Caller #:
To: test		🕅 🗌 Include me
CC: TestAMB, ClerkAdvanced-Scheduling2 TestAMB, ClerkAdvanced-Scheduling3	@č	Provider: To consumer Disable further replies
Subject		Save to Chart As: Phone Message/Call
Attac me		
Browse Documents Other Attachments		

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

Provider:			M
•	🔽 Save to Chart	As: Phone Message/Call	

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

Save to Chart	As:	Phone Message/Call 🔹
	-	General Message
		Phone Message/Call



8. From the message box compose the message.

Message																				
Arial	-	10	•	۲	۹ (۹	X 🖻	1	B	IJΖ	- 5)= :	≣ (L 6	a ∳*					
General Message:																				
																				Γ

9. Select any additional Actions (as appropriate)

Actions
Patient Needs Appointment
Needs Lab Before Refill
Please Call Patient with Results
Message Left for Patient to Return Call
Agree with Message
See Note In Chart

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.

Remind on:	···/**/****	
Due on:	•• /••/••••	

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.

😂 Multi-Patient Task List 🖃 Message Centre 🎬 CareCompass 👫 Clin	ical Leader Organizer	Ambulatory Organizer	🛊 Patient List 🛄 So
🛃 Exit 🎬 AdHoc 💵 Medication Administration 🍰 PM Conversation	Communicate 🗸	🕂 Add 👻 🖺 Scheduling	Appointment Book



Activity 2.3 – Replying to a Message

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

Complete the following steps to forward a message:

- 1. Open a message in the inbox
- 2. Click Forward
- 3. Click the **search** ^(h) 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**.

General Messages × General Messages: ×					
🚑 Reply	1 🙈 Reply All 🚘 Forward 🎦 Delete 🅞 Print 👚 🚸 🏰 Mark Unread 🛛 Inbox View Summary View 👘 Launch (
From:	Test, Amb Ambulatory - Nurse1				
Sent:	2017-Jun-21 15:36:38 PDT				
Subject	Subject: Pharmacy Communication				
To:	To: Test,Amb Ambulatory - Nurse1; LGH Breath Prgm Provider Pool				
Cc:					

- 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**

Message Centre					
Inbox Summary Proxies Pools General Messages X Inbox Proxies Pools Proxies Pools Proxies Pools Proxies Proxies Pools Proxies Proxies <t< th=""><th></th></t<>					
2. With the message open, click Delete Delete Delete					
Messages × General Messages: ×					
🙈 Reply 🙈 Reply All 🙈 Forward 🎦 Delete 🚭 Print 🞓 🐥 🍓 Mark Unread 🛛 Inbox View Summary View 👘 Launch Orders	_				



- 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

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

Grant All ->>

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

New Given Proxy					
User	Available Items	Granted Items			
Additional Users	Inboritems	>			
29-Dec-2017	Notifications Notifications Notify Receipts reach value				
		Accept & Next Cancel			
		OK Cancel			

7. Click OK



Remove

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.