

**SELF-GUIDED PRACTICE WORKBOOK [N47]**  
CST Transformational Learning

WORKBOOK TITLE:

**Unit Clerk: Emergency**

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## SELF-GUIDED PRACTICE WORKBOOK

<b>Duration</b>	4 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> </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> Work through different learning activities at your own pace.</li> </ul>
<b>Key Learning Review</b>	<ul style="list-style-type: none"> <li> At the end of the session, you will be required to complete a Key Learning Review.</li> <li> This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.</li> </ul>

## 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 following the steps, immediately raise your hand for assistance to use classroom time efficiently
-  Ask for assistance whenever needed

## PATIENT SCENARIO 1 – Logging in and accessing Tracking Shell

### Learning Objectives

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

- Successfully log in with your user name and password
- Understand how to read the tracker
- Identify critical areas of the tracker

### SCENARIO

You work as an Emergency Department unit clerk at Lions Gate Hospital. Before you begin your shift, you will need to set up your workstation and understand how to navigate through the tracking shell and understand what each icon means.

You will be completing the following activities:

- Logging in with your user name and password
- Navigating through the Tracking Shell
- Review the meanings of icons and colors as they affect the proper reading of the screen

Activity 1.1 – Logging into Tracking Shell

**Activity 1.1 – Logging into Tracking Shell**

- 1 Click on the FirstNet icon on your desktop. Enter your given user name and password. You will then land on the Tracking Shell page:

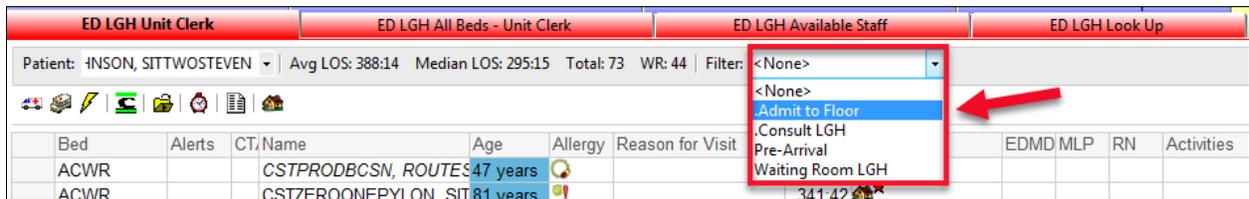
The screenshot displays the 'Tracking Shell' application window. At the top, there are navigation tabs for 'Tracking Shell', 'LearningLIVE', 'PACS', and 'FormFast WFI'. Below the tabs, there are several status bars for different units: ED SGH Unit Clerk, ED LGH Unit Clerk, ED WHC Unit Clerk, ED PIM Unit Clerk, ED SGH All Beds - Unit Clerk, ED LGH All Beds - Unit Clerk, ED WHC All Beds - Unit Clerk, ED PIM All Beds - Unit Clerk, ED SGH Available Staff, ED LGH Available Staff, ED WHC Available Staff, and ED PIM Available Staff. The main area shows a patient list table with the following columns: Bed, Alerts, CT Name, Age, Allergy, Reason for Visit, LOS, Disposition, ED/MD/MLP, RN, Activities, Events, Lab, Rad, ECG, OOD, Comment, and BA. The table contains multiple rows of patient data, including names like 'SUJ PRACTICE, ONE', 'LGH DEMO, ORTHOTWO', 'CST DEMOCHRIS, DONOT', etc. The bottom right corner of the window shows the date and time: 'PRODC: TEST.EDUNITCLERK: Wednesday, 22-November-2017 13:48 PST'.

## Activity 1.2 Navigating through Tracking Shell

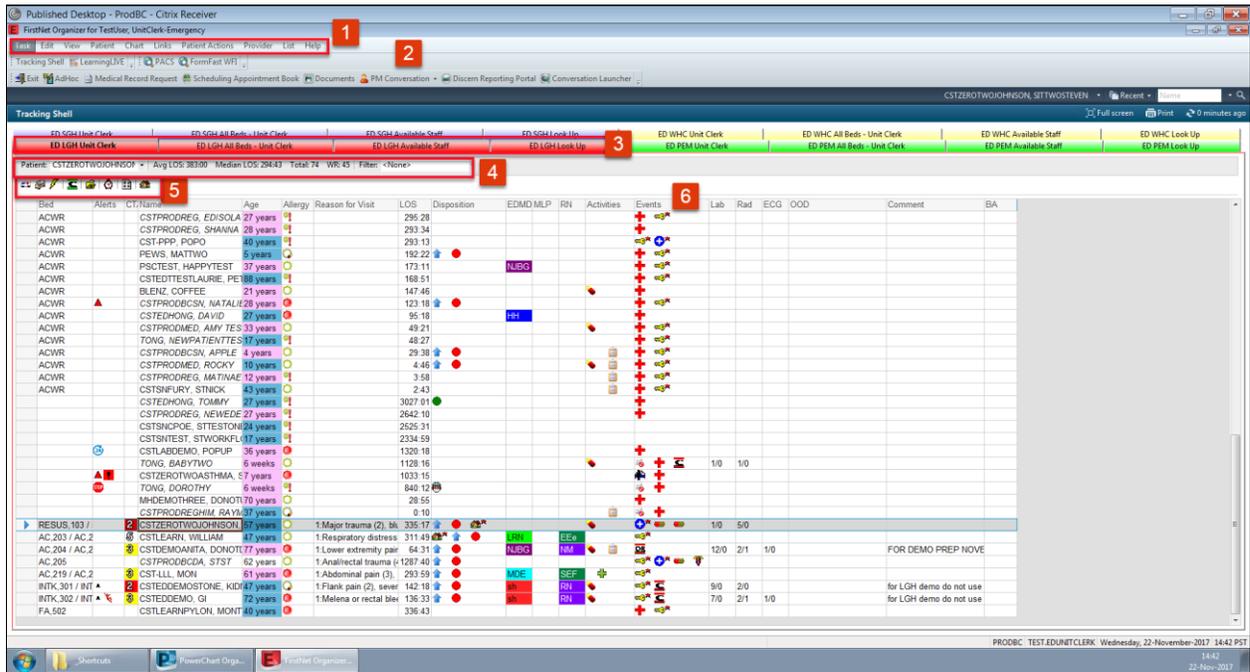
- 1 Depending on the location (hospital) of where you work, the ED tabs will already be set to your location.

You can click on each tab to change your filters:

Within the **ED LGH Unit Clerk**, **ED LGH All Beds-Unit Clerk**, and **ED LGH Look up** tabs, you can additionally change your filters by using the drop down box. **The ED LGH Look Up** tab allows you to see discharged patients or patients that were transferred to inpatient beds within a given timeframe.



2



**Note:** There is a **Refresh**  icon on the top right hand corner. For this Tracking Shell screen only, this page updates automatically every 60 seconds. Therefore, you do not have to click this **Refresh** icon each time.

1. **Menus:** Different functions can be carried out through these menus
2. **Toolbars:** Customizable toolbars (AdHoc, Medical Record Request, Documents, PM

PATIENT SCENARIO 1 – Logging in and accessing Tracking Shell



Toolbars: Customizable toolbars (AdHoc, Medical Record Request, Documents, PM conversation, Scheduling Appointment Book, FormFast WFI)

conversation, Scheduling Appointment Book, FormFast WFI)

3. **Tracking List:** Click on the different tabs to view different groups of patients in the Tracking List
4. **Metrics:** Includes the patient's name, number of patient's in the waiting room, total number of patient's checked in the ED, and average length of stay.
5. **FirstNet Toolbar:** Most common functions can be performed by selecting a patient from the Tracking List (left-clicking their name) and clicking the appropriate button from this toolbar.  Hover your mouse over each icon to discover the functions of each.
6. **Tracking List columns:** Specific columns on the Tracking List to display relevant information for ED Unit Clerks.

- 3 Most of these **Tracking List Columns** are self-explanatory. However, there are a few acronyms that are not as obvious such as:
- MLP** (Mid-Level Provider)-Medical students, NPs, Residents
  - OOD** (Out of Department)-There is a drop down menu to choose from when you click on the individual cell. This is to indicate the patient's location when out of the ED
  - **BA** (Bed Assign)-This is the inpatient bed assigned. This is free text that you can enter.



- 4 The Tracking Shell is the main working area for unit clerks in the Emergency Department. There are many icons to familiarize yourself with, and, as well, their changing colors signify different things.

**Standard Icons and their Meanings**

Triage		Inpt Bed Request	
Dr Exam		Inpt Bed Ready	
RN Exam		Inpt Bed Assigned	
Registration		Consult	

PATIENT SCENARIO 1 – Logging in and accessing Tracking Shell

Tracking List columns: Specific columns on the Tracking List to display relevant information for ED Unit Clerks.

Discharge		Transfer	
No Visitors		Suicide Precautions	<b>S</b>
RT	<b>R</b>	Confidential	
Disaster		Document Home Meds	
Isolation		Readmission Risk	
Certified		Falls Risk	
ADE Risk Positive		Medically Cleared	
Interdisciplinary Activities		Urine collection	
	Admit to Day Surgery		Familiar Faces Shared Care Plan

Other Icons by Column	Screen Tips that appear when you hover over the icon						
Alerts Column 	<table border="1"> <thead> <tr> <th>Time</th> <th>Event</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2017-Aug-28 11:34</td> <td>72 Hour Return</td> <td>Request</td> </tr> </tbody> </table>	Time	Event	Status	2017-Aug-28 11:34	72 Hour Return	Request
Time	Event	Status					
2017-Aug-28 11:34	72 Hour Return	Request					
CTAs indicators 	Acuity: 4 - Less Urgent						
EDMD column	Grafstein, Eric - EG						
Alerts Column 	<table border="1"> <thead> <tr> <th>Time</th> <th>Event</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2017-Aug-25 13:39</td> <td>Hosp High Utilizer</td> <td>Request</td> </tr> </tbody> </table>	Time	Event	Status	2017-Aug-25 13:39	Hosp High Utilizer	Request
Time	Event	Status					
2017-Aug-25 13:39	Hosp High Utilizer	Request					

PATIENT SCENARIO 1 – Logging in and accessing Tracking Shell

Tracking List columns: Specific columns on the Tracking List to display relevant information for ED Unit Clerks.

Other Icons by Column	Screen Tips that appear when you hover over the icon						
Alerts Column <b>A</b>	<table border="1"> <thead> <tr> <th>Time</th> <th>Event</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2017-Aug-25 13:44</td> <td>ADE Risk Positive</td> <td>Request</td> </tr> </tbody> </table>	Time	Event	Status	2017-Aug-25 13:44	ADE Risk Positive	Request
Time	Event	Status					
2017-Aug-25 13:44	ADE Risk Positive	Request					
Disposition column 	<table border="1"> <thead> <tr> <th>Time</th> <th>Event</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2017-Aug-25 14:11</td> <td>Admit</td> <td>Request</td> </tr> </tbody> </table>	Time	Event	Status	2017-Aug-25 14:11	Admit	Request
Time	Event	Status					
2017-Aug-25 14:11	Admit	Request					
Disposition column 	<table border="1"> <thead> <tr> <th>Time</th> <th>Event</th> </tr> </thead> <tbody> <tr> <td>2017-Aug-25 14:11</td> <td>Inpt Bed Request</td> </tr> </tbody> </table>	Time	Event	2017-Aug-25 14:11	Inpt Bed Request		
Time	Event						
2017-Aug-25 14:11	Inpt Bed Request						
Events column 	<table border="1"> <thead> <tr> <th>Event</th> </tr> </thead> <tbody> <tr> <td>Consult Request</td> </tr> </tbody> </table>	Event	Consult Request				
Event							
Consult Request							
Events column 	<table border="1"> <thead> <tr> <th>Time</th> <th>Event</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2017-Jul-04 15:08</td> <td>Consult Psych Reques</td> <td>Request</td> </tr> </tbody> </table>	Time	Event	Status	2017-Jul-04 15:08	Consult Psych Reques	Request
Time	Event	Status					
2017-Jul-04 15:08	Consult Psych Reques	Request					
Events column 	Registration overdue by 30 minutes						
Events column 	Registration overdue by 15 minutes						
Events Column 	<table border="1"> <thead> <tr> <th>Time</th> <th>Event</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2017-Aug-25 14:11</td> <td>Perform BPMH</td> <td>Request</td> </tr> </tbody> </table>	Time	Event	Status	2017-Aug-25 14:11	Perform BPMH	Request
Time	Event	Status					
2017-Aug-25 14:11	Perform BPMH	Request					
Events Column 	RN Exam overdue by 30 minutes						
Allergy column 	<table border="1"> <thead> <tr> <th>Allergy</th> <th>Update</th> </tr> </thead> <tbody> <tr> <td>PENICILLIN</td> <td>2017-Jun-28 12:49</td> </tr> </tbody> </table>	Allergy	Update	PENICILLIN	2017-Jun-28 12:49		
Allergy	Update						
PENICILLIN	2017-Jun-28 12:49						
Allergy column 	No Known Allergies						
Bed Column 	Dirty bed						
Bed column 	Held bed						
Age Column 46 years	Blue background indicates Male.						

## PATIENT SCENARIO 1 – Logging in and accessing Tracking Shell

Tracking List columns: Specific columns on the Tracking List to display relevant information for ED Unit Clerks.

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### Key Learning Points

- You can always check the bottom right hand corner of your screen to verify your login name and role.
- Not all icons are listed in the table above but you can hover your mouse over each icon to find out what their functions or their meanings are (Hover to discover).
- There is a Refresh  icon on the top right hand corner. For this Tracking Shell screen only, this page updates automatically every 60 seconds. Therefore, you do not have to click this Refresh icon each time.

## PATIENT SCENARIO 2 – New Patients arrive to ED

### Learning Objectives

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

- Pre-arrive a patient
- Assign a patient to a bed
- Request Event/Complete Event (For example: isolation alert, falls risk)
- Print patient's labels (arm band, specimen labels)
- Record ED Phone Call for Consults
- Complete AdHoc PowerForm (Trauma Initiate/Upgrade)
- Complete a Medical Record Request
- Complete a Medical Equipment request
- Search for a patient then complete a Quick Registration for a deceased patient

### SCENARIO

Patient [You select first name, You select last name] is a 41 year old male with chest pain. You are notified of his pre-arrival.

Since it is not the role of the Unit Clerk to complete an ED Quick Registration (done after a pre-arrival), we will use another patient: **ED-UC-B, Kelly/Sonia/Gladys** (who has been already ED Quick Registered) for all of the following activities other than pre-arrive a patient.

You will be completing the following activities:

- Pre-arrive a patient
- Assign a patient to a bed
- Request Event/Complete Event (For example: isolation alert, falls risk)
- Print patient's labels (arm band, specimen labels)
- Record ED Phone Call for Consults
- Complete AdHoc PowerForm (Trauma Initiate/Upgrade)
- Complete a Medical Record Request

PATIENT SCENARIO 2 – New Patients arrive to ED  
Tracking List columns: Specific columns on the Tracking List to display relevant information for ED Unit Clerks.

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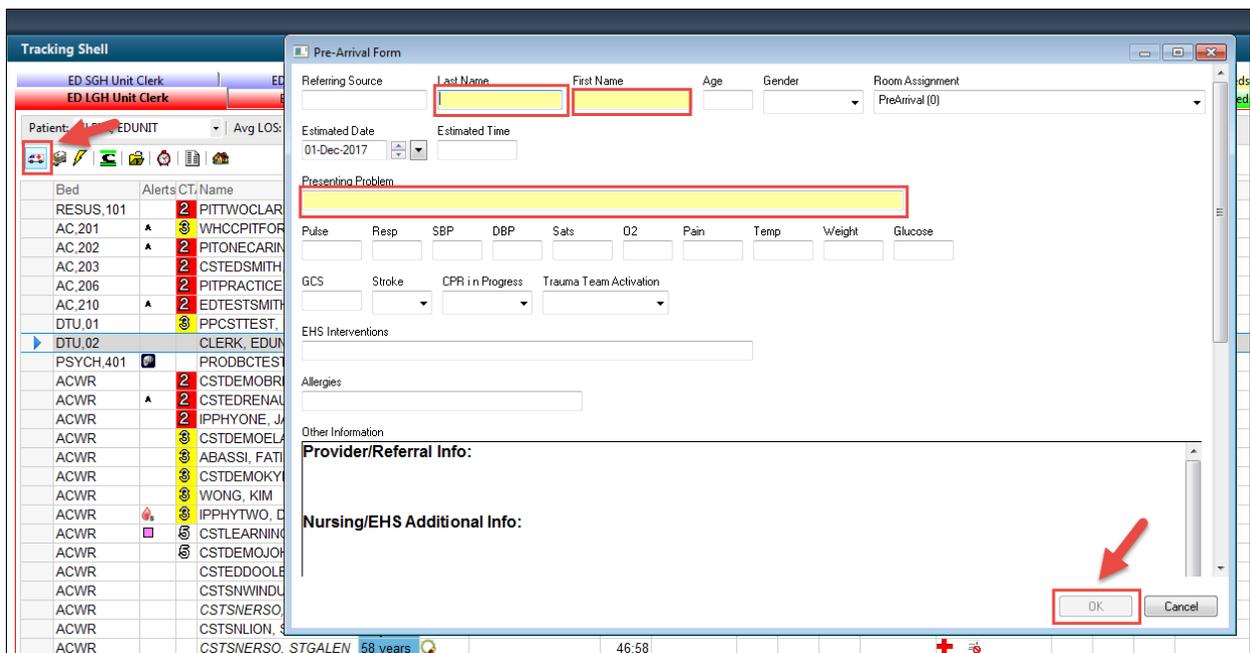
- Complete a Medical Equipment request
- Search for a patient then complete a Quick Registration for a deceased patient

## Activity 2.1 Pre-arrive a patient

1

Click on the ambulance icon  on the FirstNet Toolbar. The Pre-arrival Form will open. **Note:** the yellow fields means it is mandatory and it needs to be filled out. Fill in any other relevant information then click **OK**. You have now pre-arrived your patient and he/she will appear on the patient list. **Note:** nurses also pre-arrive patients as well.

Fill in [Any last name, Any first name] and Presenting Problem: **Chest Pain**



The screenshot shows the 'Tracking Shell' interface on the left and the 'Pre-Arrival Form' on the right. The 'Pre-Arrival Form' has several fields, some highlighted in yellow to indicate they are mandatory. The 'Presenting Problem' field is highlighted in yellow and contains the text 'Chest Pain'. The 'OK' button is highlighted with a red arrow.

Bed	Alerts	CT/Name
RESUS_101	2	PITTWOCLEAR
AC_201	2	WHCCPITFOR
AC_202	2	PITONECARIN
AC_203	2	CSTEDSMITH
AC_206	2	PITPRACTICE
AC_210	2	EDTESTSMITH
DTU_01	3	PPCSTTEST
DTU_02		CLERK, EDUN
PSYCH_401		PRODBCTEST
ACWR	2	CSTDEMOBR
ACWR	2	CSTEDRENAU
ACWR	2	IPPHYONE, J
ACWR	3	CSTDEMOELA
ACWR	3	ABASSI, FATI
ACWR	3	CSTDEMOKY
ACWR	3	WONG, KIM
ACWR	3	IPPHYTWO, D
ACWR	3	CSTLEARNIN
ACWR	3	CSTDEMOJOH
ACWR		CSTEDDOOLE
ACWR		CSTSNWINDU
ACWR		CSTSNERSO
ACWR		CSTSNLION, S
ACWR		CSTSNERSO, STGALEN

## Activity 2.2 Assign a patient to a bed

- The patient automatically is in the acute care waiting room (**ACWR**) when first registered. To assign a patient to a bed, double click on **ACWR**. The Select a location window will open. Click on an empty, relevant bed for your patient then click **OK**. **Note:** This is mainly the nurses job to assign the patient an appropriate bed, however you may directed to help move a patient into a corresponding bed.

Use the patient: **ED-UC-B, Kelly/Sonia/Gladys** given to you for the following activities.

The screenshot shows the FirstNet Organizer interface. The main window displays a list of patients in the ACWR (Acute Care Waiting Room) unit. A dialog box titled "Select a location for CLERK, EDUNIT" is open, showing a grid of available beds. Red arrows indicate the following steps: 1. Double-clicking on the 'ACWR' unit in the patient list. 2. Selecting a specific bed (e.g., INTK, 302 (1)) in the dialog box. 3. Clicking the 'OK' button to confirm the assignment.

- Bed Hold Note:** The ED Charge Nurse or Triage Nurse will enter the Bed Hold in the system for the patient, however the ED Unit Clerk should know/recognize when the bed hold is in effect. Whenever there is a / that means there is a bed hold. See the screen shot below for bed hold examples:

# PATIENT SCENARIO 2 – New Patients arrive to ED



FirstNet Organizer for TestLab, UnitClerk-Emergency

Task Edit View Patient Chart Links Patient Actions Provider List Help

Tracking Shell LearningLive Patient Health Education Materials Policies and Guidelines UpToDate CareConnect PHSA PACS VCH and PHC PACS MUSE FormFast WR

Unit Address Medical Record Request Scheduling Appointment Book Documents PAI Conversation Document Reporting Portal Conversation Launcher

Tracking Shell

ED SGH Unit Clerk ED SGH All Beds - Unit Clerk ED SGH Available Staff ED SGH Look Up ED WHC Unit Clerk ED WHC All Beds - Unit Clerk ED WHC Available Staff ED WHC Look Up

ED LGH Unit Clerk ED LGH All Beds - Unit Clerk ED LGH Available Staff ED LGH Look Up ED PEM Unit Clerk ED PEM All Beds - Unit Clerk ED PEM Available Staff ED PEM Look Up

Patient: CSTDEMOFELIX, KIDNEY Avg LOS: 335:10 Median LOS: 166:36 Total: 70 WR: 40 Filter: <None>

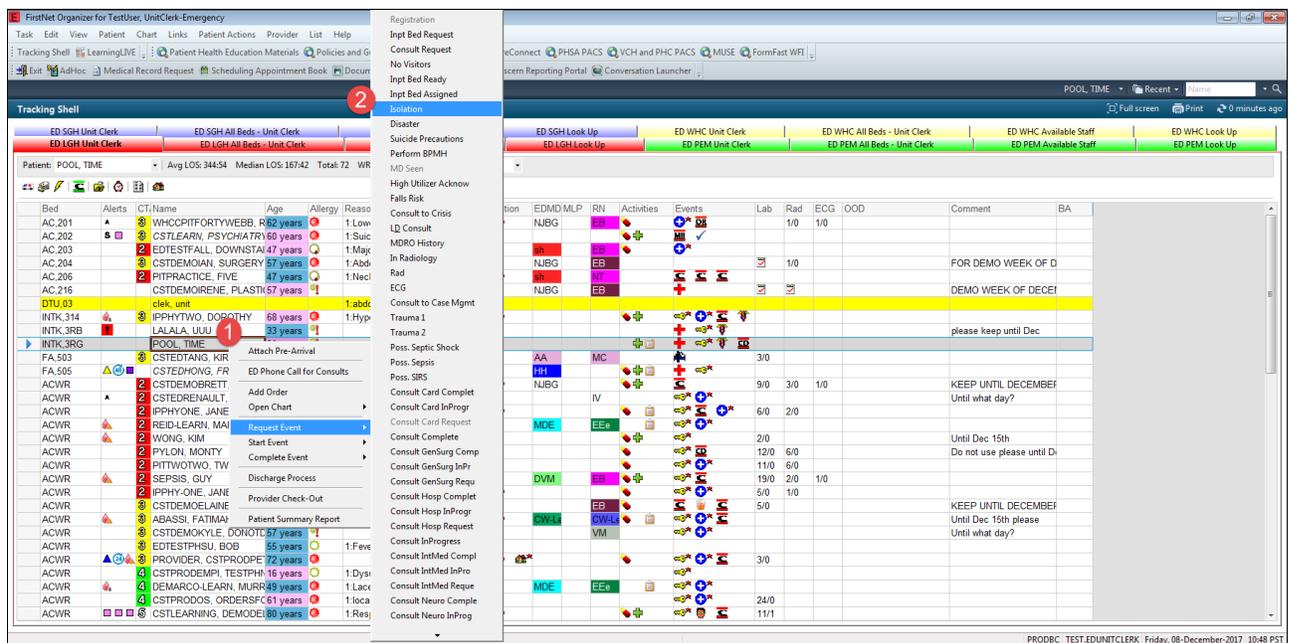
Bed	Alerts	CTName	Age	Allergy	Reason for Visit	LOS	Disposition	EDMD/MLP	RN	Activities	Events	Lab	Rad	ECG	OOD	Comment	BA
ACWR		CSTINTEGRATION, COMP	30 years			0:17											
		CSTEDHONG, TOMMY	27 years			3:38:15											
		CSTPRODREG, NEWWEDE	27 years			3:02:24											
		CSTBNOPOE, STTESTON	28 years			2:55:45											
		CSTSINTEST, STWORKFL	37 years			2:55:13											
		CSTLABDEMO, POPUP	36 years			1:59:32											
		TONG, BABYTWO	2 months			1:48:30						1/0	1/0				
		CSTZEROTWIOASTHMA,	57 years			1:53:29							1/0				
		TONG, DOROTHY	8 weeks			1:29:26											
RESUS 102 / AC 205		PITTPRACTICE, FOUR	47 years		1 Major trauma (2), bl	2:19:45		NIBG	NT			1/0	6/0				
AC 209 / AC 2		CSTPRODBCCA, STST	62 years		1 Anal/rectal trauma (1	1:16:47:54											
AC 212 / AC 2		CSTONIC, ANGEL	27 years			48:21											
AC 212 / AC 2		CSTDEMOCHRIS, DONOT	55 years		1 Respiratory distress	3:05:26								1/1		KEEP UNTIL DECEMBER	
AC 213 / AC 2		CSTPRODREG, MATINAE	12 years		1 Chest trauma (3), bl	52:57											
AC 214 / AC 2		CSTDEMOFELIX, KIDNEY	57 years		1 Flank pain (2), sever	55:54		NIBG	EB			3/0				DEMO WEEK OF DECE	
AC 217 / AC 2		CSTDEMOGRANT, NEUR	57 years		1 Headache (2), sever	1:51:07		NIBG	EB							DEMO WEEK OF DECE	
INTK 301 / INT		CSTDEMOEARL, DONOT	37 years		1 Respiratory distress	1:53:14		NIBG	EB				1/1			FOR DEMO NOVEMBER	
INTK 302 / INT		CSTDEMOSTONE, KID	47 years		1 Flank pain (2), sever	5:02:32			EB				8/1			KEEP UNTIL DECEMBER	
FA 502		CSTEDDEMO, GI	72 years		1 Melena or rectal bl	4:56:47			EB				2/1	1/0		KEEP UNTIL DECEMBER	
		CSTLEARNPYLON, MONT	45 years			6:56:57											

PRODBC TEST.EDUNITCLERK Thursday, 07-December-2017 14:56 PST

## Activity 2.3 Request Event/Complete Event (Isolation Alert, Falls Risk)

1

- Click on a patient **ED-UC-B, Kelly/Sonia/Gladys** so that it is highlighted, then right click and scroll to **Request Event**. There is a selection of functions listed, for example, inpt bed request, consult request, inpt bed ready, inpt bed assigned, suicide precautions, and many more.
- Select **Isolation**. Notice a exclamation mark inside a red box  now appears on the alerts column. **Note:** This symbol does not indicate what type of isolation (contact, droplet, airborne, etc.) Open the patient's chart and the isolation type should be located in the Banner Bar, once it has been entered by a nurse or infection control nurse.



Let's also add in a **Falls Risk**. After you have selected it, you realized it was for the wrong

patient. To remove this alert click on the clock  icon on the FirstNet Toolbar. Select **Complete**

**Event**, then **Falls Risk**. **Note:** you can also click on the clock  icon to request an event as well, then the corresponding icon will appear in the appropriate column.

# PATIENT SCENARIO 2 – New Patients arrive to ED

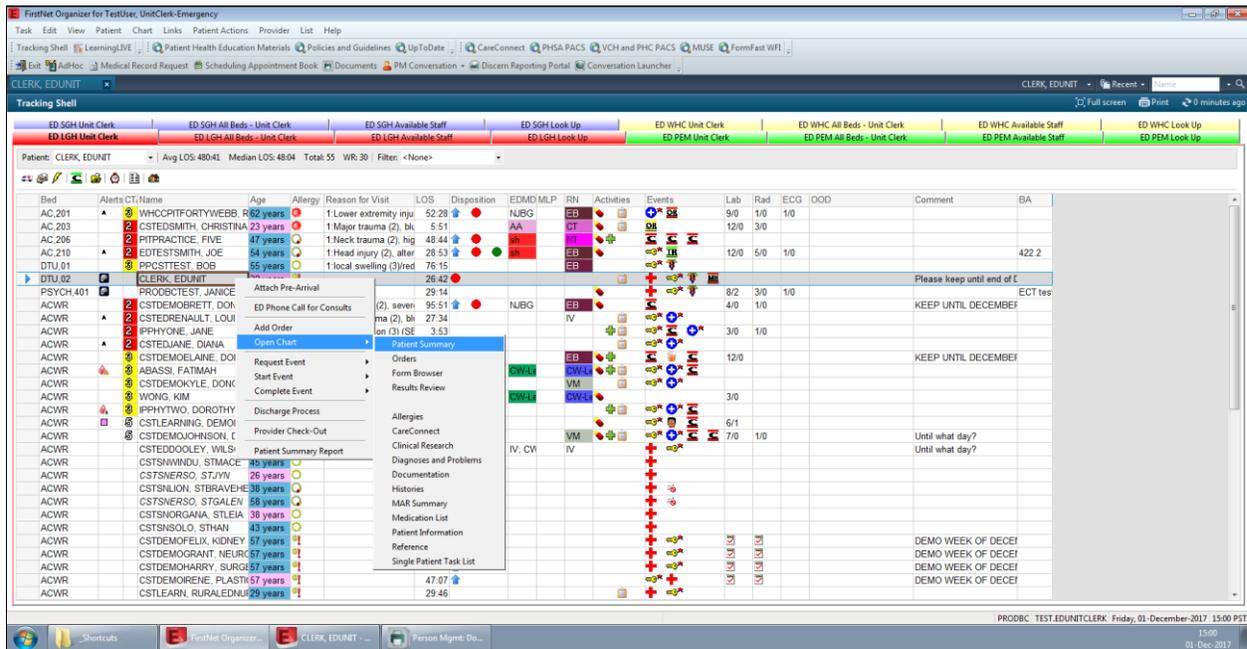


Unit Clerk		ED LGH All Beds - Unit Clerk		ED LGH Available S	
RK, EDUNIT   Avg LOS: 506:22   Median LOS: 44:31   Total: 52   WR: 26					
			Age	Allergy	Reason fo
,101	A		54 years		1:Major tra
,102	STOP				1:Major tra
	A	WHCCPITFORT			1:Lower ex
	A	PITONECARINC			1:Chest pa
		CSTEDSMITH, C			1:Major tra
		JO, JIMMYJOJC			1:Dysuria
		CSTEDLAI, CAR			1:Major tra
		PITPRACTICE, FIVE	47 years		1:Neck tra
	A	EDTESTSMITH, JOE	54 years		1:Head inj
		PPCSTTEST, BOB	55 years		1:local sw
		CLERK, EDUNIT	32 years		
,401		PRODBCTEST, JANICE	31 years		
		CSTDEMOBRETT, DONOT	57 years		1:Headach
	A	CSTEDRENAULT, LOUIS	88 years		1:Chest tra
		CSTDEMOELAINE, DONO	57 years		
		ABASSI, FATIMAH	26 years		1:local sw
		CSTDEMOKYLE, DONOTD	57 years		
		CSTLEARNING, DEMODEL	80 years		1:Respirat

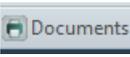
## Activity 2.4 Print patient labels (arm band, specimen labels)

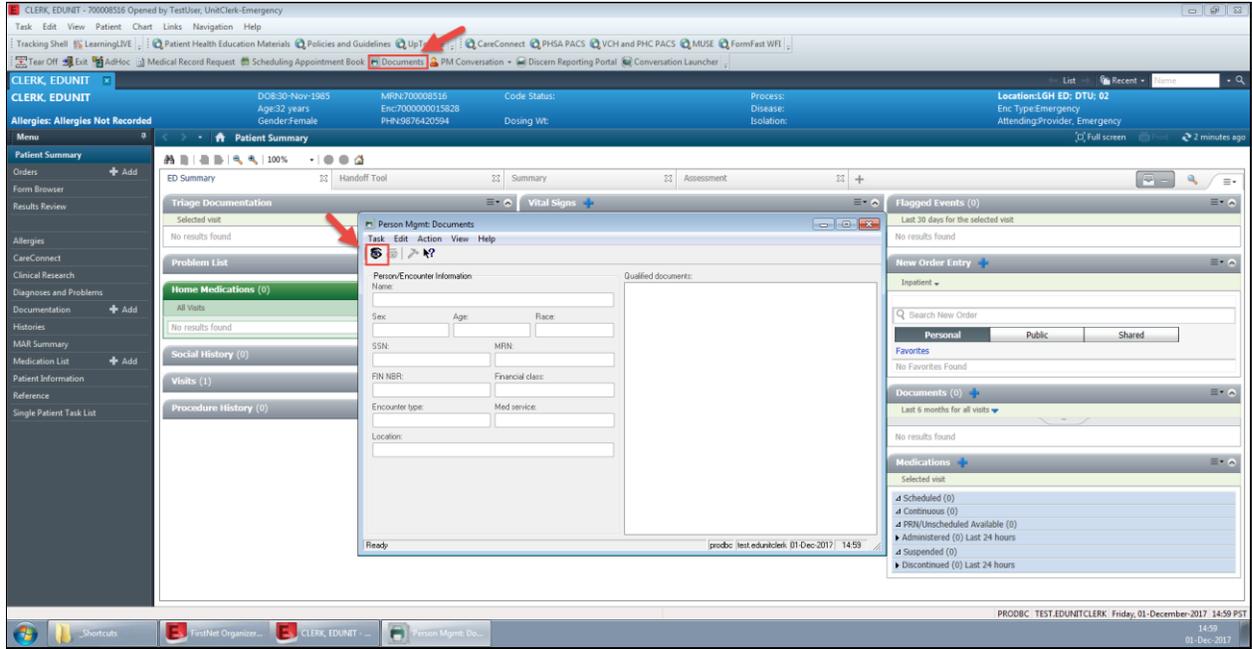
1

Select the patient **ED-UC-B, Kelly/Sonia/Gladys** and right click. Select **Open Chart** then **Patient Summary**. The patient's chart will open. This is important as you will have the encounter number displayed up in the blue banner bar.

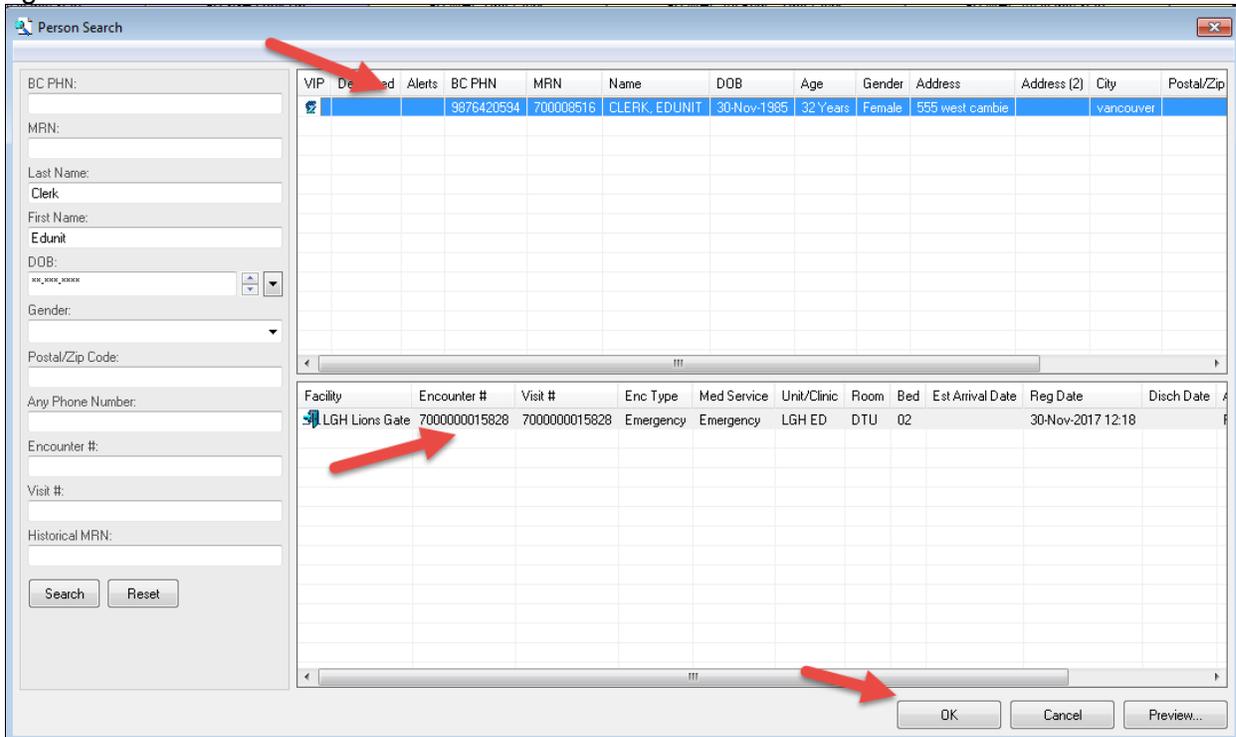


2

From the Toolbar, select the **Documents**  icon. The Person Mgmt: Documents window will open. Click on the **Eye**  icon.



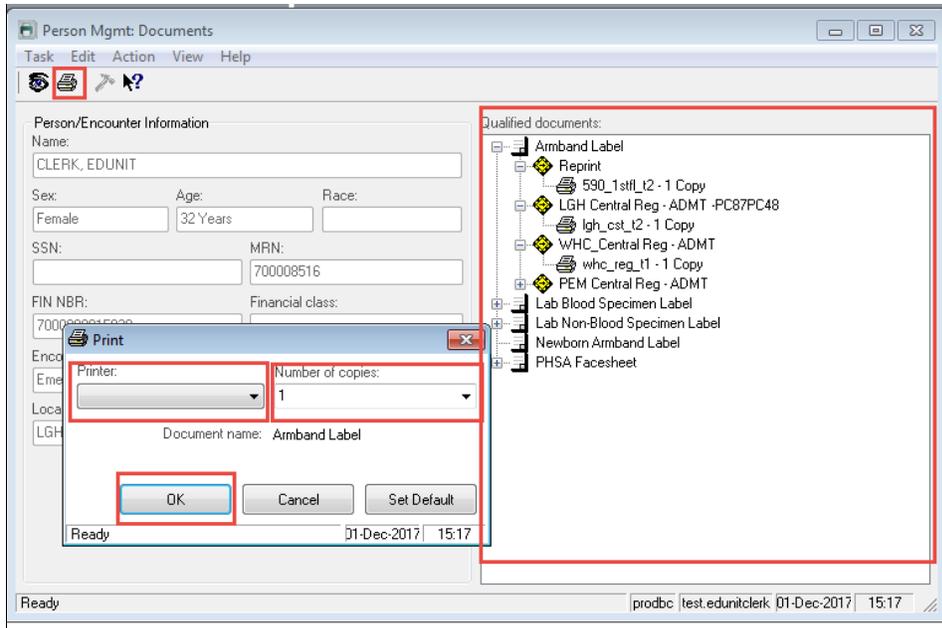
- 3 The Person Search window will open. Enter relevant patient information in the fields (First name, Last name, MRN, PHN, Encounter number, etc) then click **Search**. Select the right patient and right encounter number then click **OK**.



**PATIENT SCENARIO 2 – New Patients arrive to ED**  
The Print window opens and you choose which labels you want to print on the right hand side. Then when you are ready click the printer icon on the top left corner. Then you select a printer, number of copies and click OK to print.

4

The Print window opens and you choose which labels you want to print on the right hand side. Then when you are ready click the printer icon on the top left corner. Then you select a printer, number of copies and click **OK** to print.



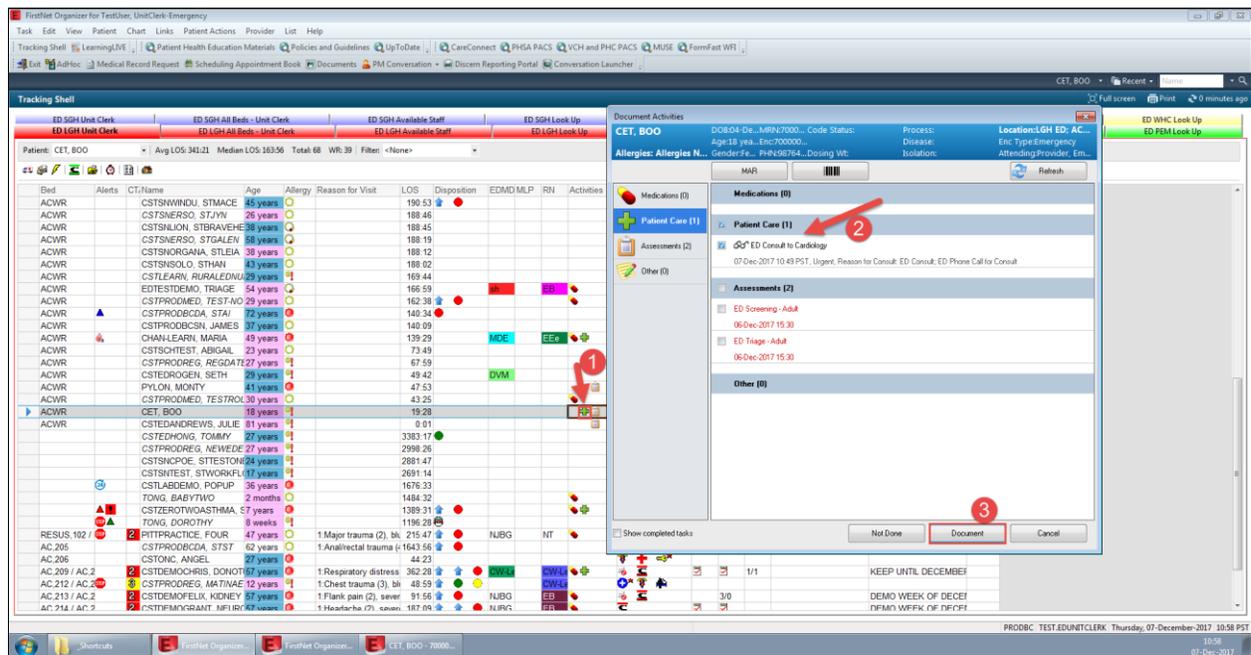
## Activity 2.5 Record ED Phone Calls for Consults

- 1 You may be asked by the provider to call for consult or the provider will directly call him/herself but doesn't get through and then the consult ends up calling back (Step 5). In each case, you will need to document attempts and call backs (Step 5).

Select patient: **ED-UC-B, Kelly/Sonia/Gladys**

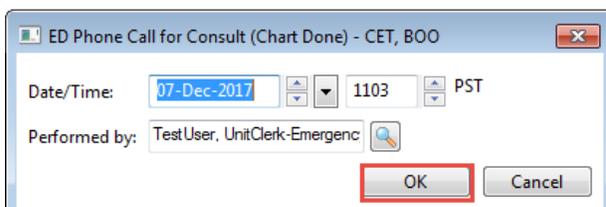
**First Attempt Phone Call:** (The Provider has already entered the consult order).

1. In the Activities Column, click on the Patient Care  icon.
2. Under Patient Care, select the ED consult to Cardiology by checking the box.
3. Then click **Document**.



The screenshot shows the FirstNet Organizer interface. On the left, a table lists patients with columns for Bed, Alerts, CT/Name, Age, Allergy, Reason for Visit, LOS, Disposition, EDMD/MLP, RN, and Activities. The patient 'CET, BOO' is selected. On the right, the 'Document Activities' panel is open for 'CET, BOO'. It shows a 'Patient Care (1)' section with a checked box for 'ED Consult to Cardiology'. A red arrow points to this box. Below it, an 'Assessments (2)' section is visible. At the bottom of the panel, the 'Document' button is highlighted with a red circle and the number '3'.

- 2 Enter "t" for today's date, and "n" for now (time). Then click **Ok**. You have successfully completed and taken the Patient Care task off of the Activities column for the Phone Call for Consults.



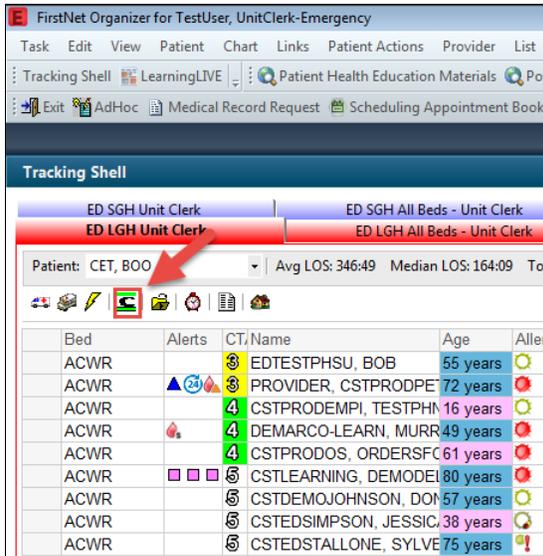
The dialog box is titled 'ED Phone Call for Consult (Chart Done) - CET, BOO'. It contains the following fields:

- Date/Time: 07-Dec-2017 1103 PST
- Performed by: TestUser, UnitClerk-Emergenc

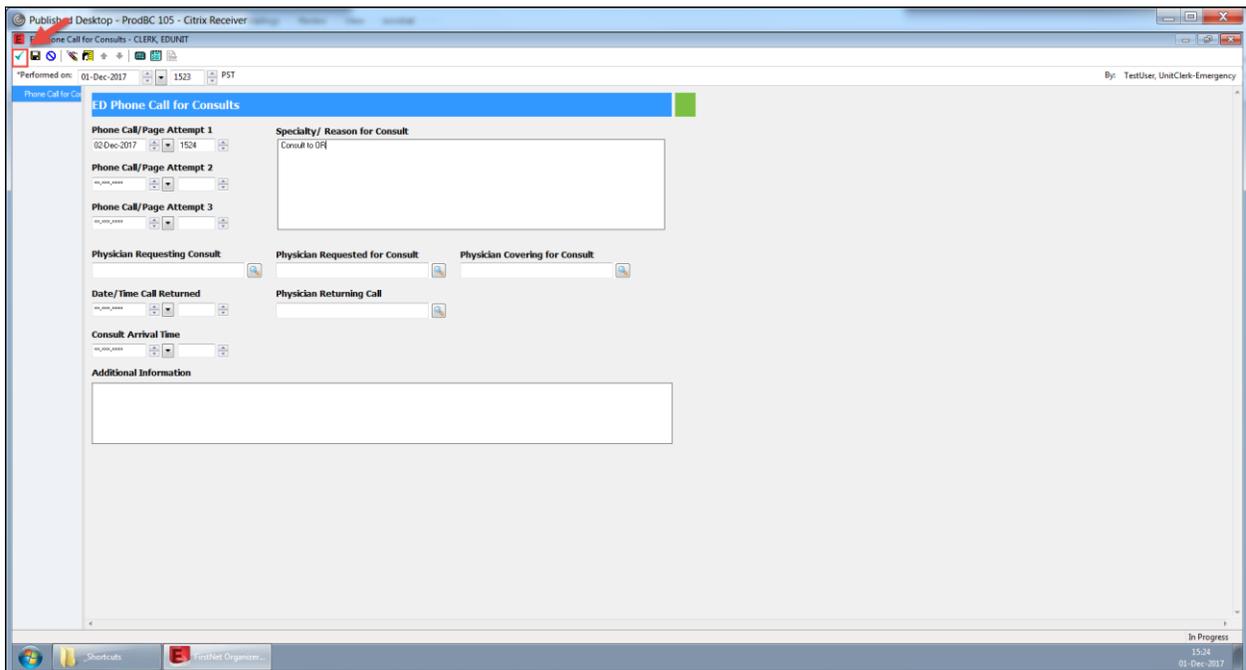
At the bottom, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box.

3 Second Attempt Phone Call:

1. Click on the ED Phone Call for Consults  icon.

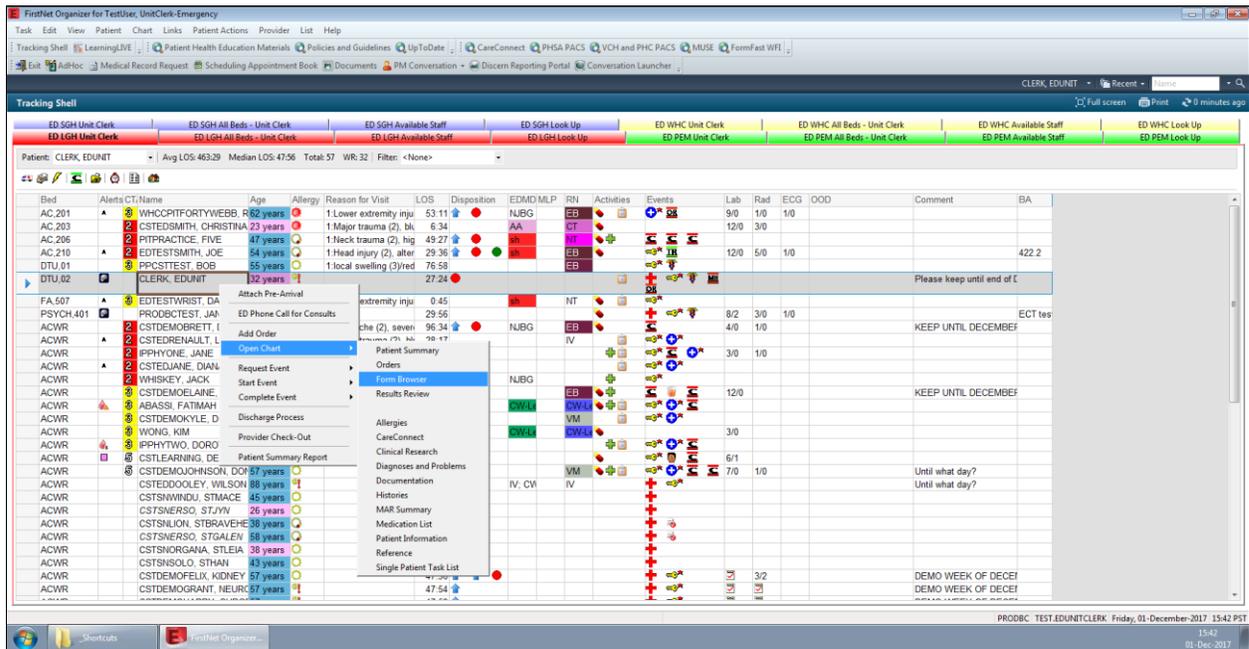


2. The **ED Phone Call for Consults** window will open. Fill in the fields as necessary. For today's date, type "t" and "n" for now (time). Click the green checkmark  icon at the top left hand corner to save your documentation.



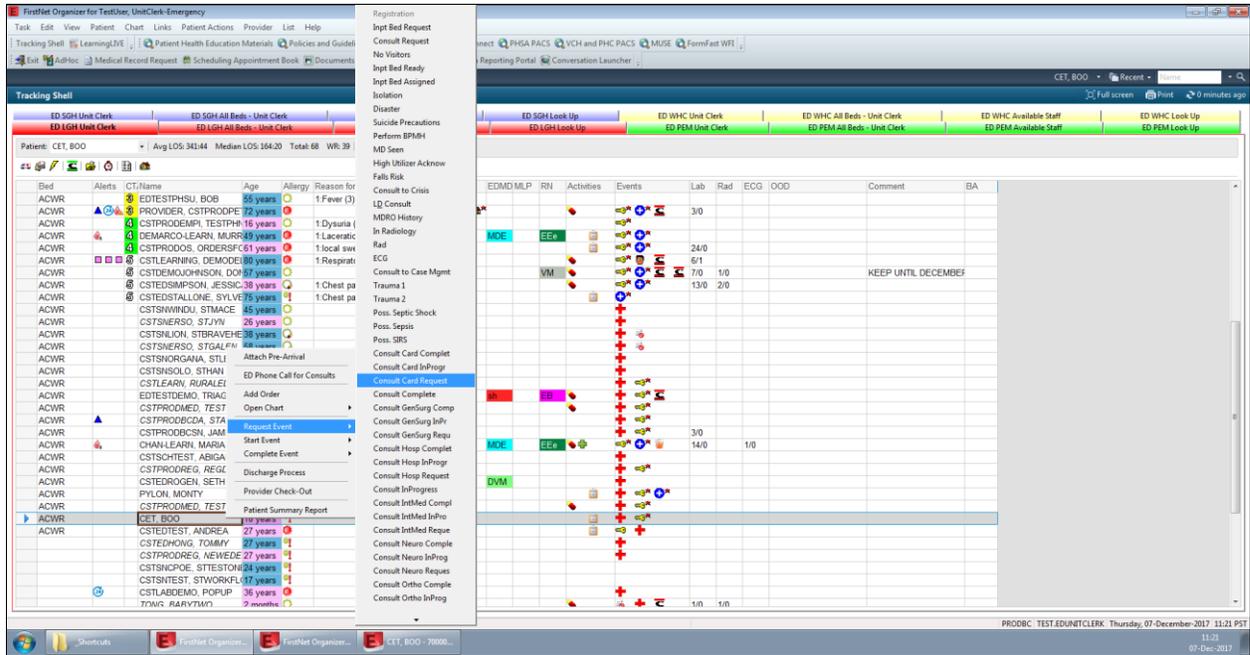
4 Third Attempt Phone Call:

1. This time you will open the patient's chart and document in the Form Browser. This way, you will continue to document on the same form as the previous attempts. **Note:** If you click on the ED Phone Call for Consults  icon, you will open up a brand new blank form.



2. Click on the previous ED Phone Call for Consults form and double click on it. Fill in all necessary information again (Phone Call/Page Attempt 3). For today's date, type "t" and "n" for now (time). Click the green checkmark  icon at the top left hand corner to save your documentation.

5 The provider service now calls back. Click on the patient. Right click and select **Request Event**. Scroll and find **Consult Cadiology Request**.



You will now see the icon in the Events Column. **Note:** If the provider already entered the Consult order, the corresponding icon will already have appeared in the Events column.

When the consulting provider (Cardiologist) arrives and sees the patient, you will click on the patient's name or clock icon (FirstNet Toolbar), select **Request Event**, scroll to **Consult Card Inprogr**. The icon also displays, which indicates Consult Cardiologist is in progress. When the Cardiologist is done seeing the patient, you select the patient's name, right click and scroll to **Complete Event** then click **Consult Card InProgr**. The icon changes to green. You will need to **Complete Events** for **Consult Card Request** and **Consult Card Complete** to have the icons disappear off of the Events column.

**Note:** The Event column is basically a display showing what is happening. Requesting or Starting an Event *does not* trigger any activity for anyone. This would only be if you wanted to display to the unit that you had acted on a request for a consult. Clicking these buttons doesn't trigger anything besides displaying the icons, so it acts as a visual communication that this has been done or hasn't. Events do not display in the patient's chart.

Responding to an order creates a record, as does using the Consult PowerForm.

# PATIENT SCENARIO 2 – New Patients arrive to ED



FirstNet Organizer for TestUser, UnitClerk - Emergency

Task Edit View Patient Chart Links Patient Actions Provider List Help

Tracking Shell Learning LIVE Policies and Guidelines UpToDate CareConnect PHSA PACS VCH and PHC PACS MUSE FormFast WFI

Exit Address Medical Record Request Scheduling Appointment Book Documents PM Conversation Discern Reporting Portal Conversation Launcher

Tracking Shell

ED SGH Unit Clerk ED SGH All Beds - Unit Clerk ED SGH Available Staff ED SGH Look Up ED WHC Unit Clerk ED WHC All Beds - Unit Clerk ED WHC Available Staff ED WHC Look Up

Patient: CET, BOO | Avg LOS: 342.21 Median LOS: 164.56 Total: 68 WR: 38 Filter: <None>

Bed	Alerts	CT/Name	Age	Allergy	Reason for Visit	LOS	Disposition	EDMD/MLP	RN	Activities	Events	Lab	Rad	ECG	OOD	Comment	BA
ACWR		EDTESTPHSU, BOB	55 years		1 Fever (3), looks unwe	72.56											
ACWR		PROVIDER, CSTPRODPE	72 years			50.04											
ACWR		CSTPRODDEPI, TESTPH	16 years		1 Dysuria (4) possible	140.47											
ACWR		DEMARCO-LEARN, MURR	49 years		1 Laceration (4), contr	139.39		MOE	EEA								
ACWR		CSTPRODOS, ORDERSFC	61 years		1 local swelling (4) red	44.40											
ACWR		CSTLEARNING, DEMODEL	80 years		1 Respiratory distress	212.10											
ACWR		CSTDEMOJOHNSON, DO	57 years			164.57			VM							KEEP UNTIL DECEMBER	
ACWR		CSTEDSIMPSON, JESSIC	38 years		1 Chest pain (4) and n	49.14											
ACWR		CSTEDSTALLONE, SYLVE	75 years		1 Chest pain (4) and n	1.51											
ACWR		CSTSNWINDU, STMACE	45 years			191.53											
ACWR		CSTSNERSO, STJYN	26 years			189.46											
ACWR		CSTSNLJON, STBRAVEHE	39 years			189.45											
ACWR		CSTSNERSO, STGALLEN	34 years			189.19											
ACWR		CSTSNORGANA, STLEI		Attach Pre-Arrival		189.12											
ACWR		CSTSNSOLO, STHAN		ED Phone Call for Consults		189.02											
ACWR		CSTLEARN, RURALEDI				170.44											
ACWR		EDTESTDEMO, TRIAGE		Add Order		167.59											
ACWR		CSTPROMED, TESTPH		Open Chart		163.38											
ACWR		CSTPROBCDA, STAU		Request Event		141.34											
ACWR		CSTPROBCSN, JAME		Start Event		141.09											
ACWR		CHANLEARN, MARIA		Complete Event		140.79											
ACWR		CSTSCHTEST, ABIGAIL		Registration													
ACWR		CSTPRODREG, REGDA		Discharge Process													
ACWR		CSTEDROGEN, SETH		Consult Card Complet													
ACWR		PYLON, MONTY		Provider Check-Out		48.53											
ACWR		CSTPROMED, TESTR		Patient Summary Report		44.25											
ACWR		CET, BOO	10 years			20.28											
ACWR		CSTEDHONG, TOMMY	27 years			3384.17											
ACWR		CSTPRODREG, NEWEDE	27 years			2999.26											
ACWR		CSTSNOROE, SITTESTON	24 years			2882.47											
ACWR		CSTSNTEST, STWORKFL	17 years			2692.14											
ACWR		CSTLABDEMO, POPUP	36 years			1677.33											
ACWR		TONG, BABYIWO	2 months			1486.32											
ACWR		CSTDFRONTWASTHMA	<7 years			1196.11											

PRODBC, TEST.EDUNITCLERK Thursday, 07-December-2017 11:58

## Activity 2.6 Complete AdHoc PowerForm (Trauma Initiate/Upgrade)

1. Select the patient: **ED-UC-B, Kelly/Sonia/Gladys**

2. Click on the AdHoc  icon in the Toolbar.

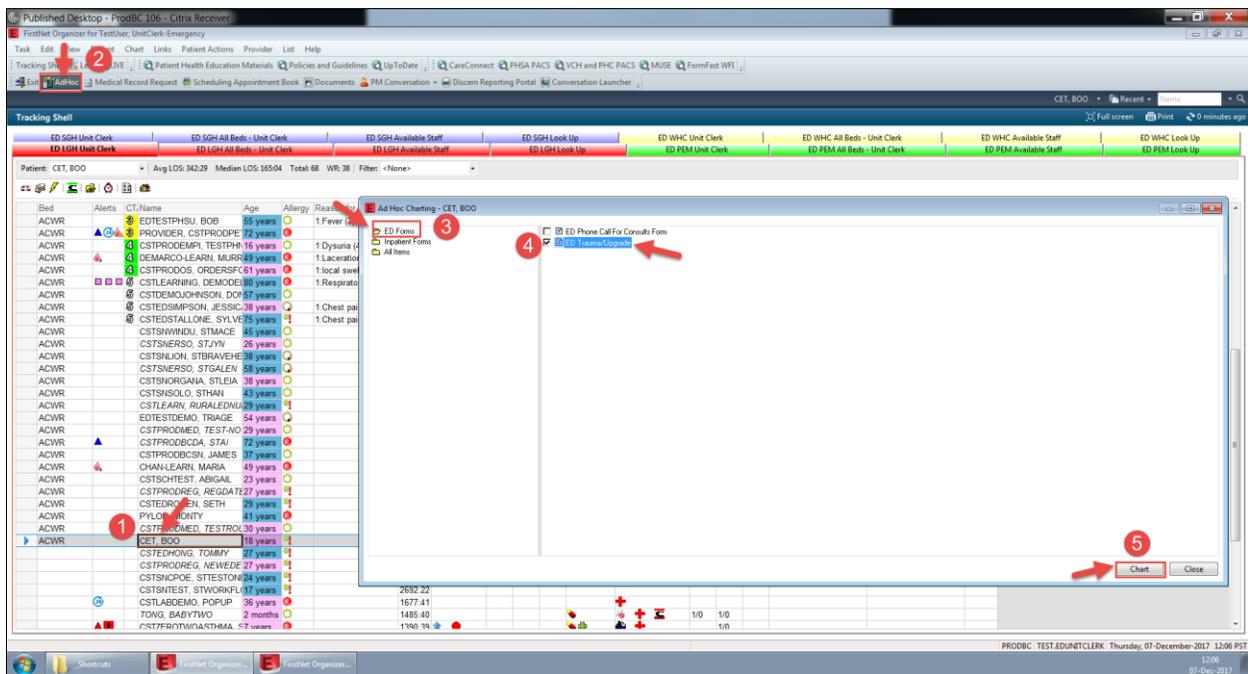
3. Select ED Forms. There should be the ED Trauma/Upgrade and ED Phone Call for Consults Form only listed.

**Note:** You may have access to chart on other forms in the other folders, however, it does not mean this is within your scope of practice to do so. Remember, the tracking shell was once used by nurses.

4. Select ED Trauma/Upgrade.

5. Click **Chart**.

**Note:** You can also access the ED Phone Call for Consults Form here.



2 The Ed Trauma/Upgrade window will open. Fill in all the necessary details. For today's date, enter "t" and "n" for now (time). Be sure to scroll down to see the full list of options. When you are done click the green checkmark ✓ on the top left hand corner of the screen to save your documentation.

The screenshot shows a software window titled "Trauma Initiate/Upgrade - CLERK, EDUNIT". At the top, it indicates the date and time as "04-Dec-2017 0855 PST" and the user as "By: TestUser, UnitClerk-Emergency". The main section is titled "Trauma Initiate/Upgrade" and contains several rows of input fields:

- ED Trauma Activation:** Radio buttons for "Yes" (selected) and "No".
- Time Trauma Team Notified:** Date and time fields showing "03-Dec-2017 0855".
- Anesthesia Called:** A text input field.
- Anesthesia Called Time:** A time selection field.
- Anesthesia Arrive Time:** A time selection field.
- Emergency Physician/TTL Called:** A text input field.
- Emergency Physician/TTL Called Time:** A time selection field.
- Emergency Physician/TTL Arrive Time:** A time selection field.
- General Surgeon Called:** A text input field.
- General Surgeon Called Time:** A time selection field.
- General Surgeon Arrive Time:** A time selection field.
- Lab Technician Called:** A text input field.
- Lab Technician Called Time:** A time selection field.
- Lab Technician Arrive Time:** A time selection field.
- Neurosurgeon Called:** A text input field.
- Neurosurgeon Called Time:** A time selection field.
- Neurosurgeon Arrive Time:** A time selection field.
- Orthopedic Surgeon Called:** A text input field.
- Orthopedic Surgeon Called Time:** A time selection field.
- Orthopedic Surgeon Arrive Time:** A time selection field.
- Other Provider # 1 Called:** A text input field.
- Other Provider # 1 Called Time:** A time selection field.
- Other Provider # 1 Arrive Time:** A time selection field.
- Other Provider # 2 Called:** A text input field.
- Other Provider # 2 Called Time:** A time selection field.
- Other Provider # 2 Arrive Time:** A time selection field.

The bottom right corner of the window displays "In Progress".

## Activity 2.7 Complete a Medical Record Request

1. Select patient: **ED-UC-B, Kelly/Sonia/Gladys**
2. Select the **Medical Record Request**  icon in the Toolbar.
3. Fill in all the necessary and relevant information. Then select **Preview** or **Send**.

Event Status: **All results**

Template: **Document Template**

Purpose: **Patient Transfer**

Date Range: Leave Blank

Related Providers: **Provider, Emergency**

The screenshot shows the FirstNet Organizer interface. A patient list is visible on the left, with patient CSTDEMOBRET, DONOTDISCHARGE highlighted. A 'Medical Record Request' dialog box is open in the center, showing the following details:

- Event Status:** All results
- Template:** Document Template
- Purpose:** Patient Transfer
- Date Range:** (Blank)
- Related Providers:** TestPET, TestRT, TestUser, TestUser
- Device:** lgh\_26\_11
- Buttons:** Preview, Send

**Note:** Click **Preview** to review the document before you click **Send**.



**LGH Lions Gate Hospital**  
231 E. 15th Street  
North Vancouver, British Columbia V7L 3L7

MRN: 700008505 BC PHN: 9876421421  
Patient: CSTEDRENAULT, LOUIS

DOB: 29-Jun-1929 Gender: Male  
Admitt Date: 30-Nov-2017  
Discharge Date:  
Encounter #: 7000000015817  
Encounter Type: Emergency

---

**Emergency Documentation**

Document Type: ED Pre Arrival Note  
Service Date/Time: 30-Nov-2017 12:20  
Result Status: Auth (Verified)  
Document Subject: ED Pre Arrival Note  
Sign Information: TestED,Nurse-Emergency6 (30-Nov-2017 12:20)

**ED Pre Arrival Note**

**Pre-Arrival Summary**

**Name:** CSTEDREnault, Louis      **Current Date:** 30-Nov-2017 12:20:12 PST  
**Gender:** Male

**Age:** 88  
**ETA:** 30-Nov-2017 10:34:00 PST

**Presenting Problem:** blunt force chest injury, fall, elbow lacerations

**Referring Source:** EHS  
**Room Assignment:** PreArrival  
**Allergies:** Demerol

**Provider/Referral Info:**

**Nursing/EHS Additional Info:** Suffered a blunt force injury to the chest due to fall and large elbow laceration. Fall was by accident as patient slipped. Wife called 911 immediately reported that patient had LOC ~ 1 minute. The paramedics called to say that the patient complains of 10/10 chest pain; Sharp stabbing, worse on inspiration.

---

Document Type: ED Triage - Adult - Text  
Service Date/Time: 30-Nov-2017 13:50  
Result Status: Modified  
Document Subject: ED Triage - Adult  
Sign Information: TestED,Nurse-Emergency6 (30-Nov-2017 14:38); TestED,Nurse-Emergency9 (30-Nov-2017 13:50)

This record contains confidential information which must be protected. Any unauthorized use or disclosure is strictly prohibited.  
Report Tracking ID: 3668040      Page 1 of 2      Print Date/Time: 04-Dec-2017 09:05  
Name of Printer: TestUser,UnitClerk-Emergency



**LGH Lions Gate Hospital**

MRN: 700008505  
Patient: CSTEDRENAULT, LOUIS  
DOB: 29-Jun-1929  
Encounter #: 7000000015817

---

**Emergency Documentation**

ED Triage - Adult Entered On: 30-Nov-2017 14:35 PST  
Performed On: 30-Nov-2017 13:50 PST by TestED, Nurse-Emergency6

ED Triage Part 1 - Adult  
COT Modifiers : Vital signs      TestED, Nurse-Emergency6 - 30-Nov-2017 14:38 PST

Chief Complaint : 15ft fall onto right side, hit concrete  
ED Mode of Arrival : Stretcher  
History/Obtained From : Patient, EHS  
ED Travel Outside US last 30 days : Yes, patient  
ED ADE Document ADE Risk Screen : Document ADE Screen      TestED, Nurse-Emergency6 - 30-Nov-2017 13:50 PST  
TestED, Nurse-Emergency6 - 30-Nov-2017 13:50 PST

**DCP GENERIC CODE**  
Tracking Acuity : 2 - Emergent      TestED, Nurse-Emergency6 - 30-Nov-2017 14:38 PST

Tracking Group : ED Lions Gate Tracking Group      (As Of: 30-Nov-2017 14:53:58 PST)

**Diagnoses(Active)**  
Chest trauma (2), blunt, high risk mechanism of injury and/or hemodynamic compromise TR016      Date: 30-Nov-2017 ; Diagnosis Type: Reason For Visit ; Confirmation: Complaint of ; Clinical Dx: Chest trauma (2), blunt, high risk mechanism of injury and/or hemodynamic compromise TR016 ; Classification: Nursing ; Clinical Service: Non-Specified ; Code: COT ; Probability: 0 ; Diagnosis Code: 804TR016

ED Travel History  
Recent Travel Location : Africa      TestED, Nurse-Emergency6 - 30-Nov-2017 13:50 PST

ED ADE Risk Screen  
ED ADE Past two weeks meds : Yes  
ED ADE Prior Medical Issue Abx : Yes  
ED ADE Age 80 Meds Change : No      TestED, Nurse-Emergency6 - 30-Nov-2017 13:50 PST

This record contains confidential information which must be protected. Any unauthorized use or disclosure is strictly prohibited.  
Report Tracking ID: 3668040      Page 2 of 2      Print Date/Time: 04-Dec-2017 09:05  
Name of Printer: TestUser,UnitClerk-Emergency

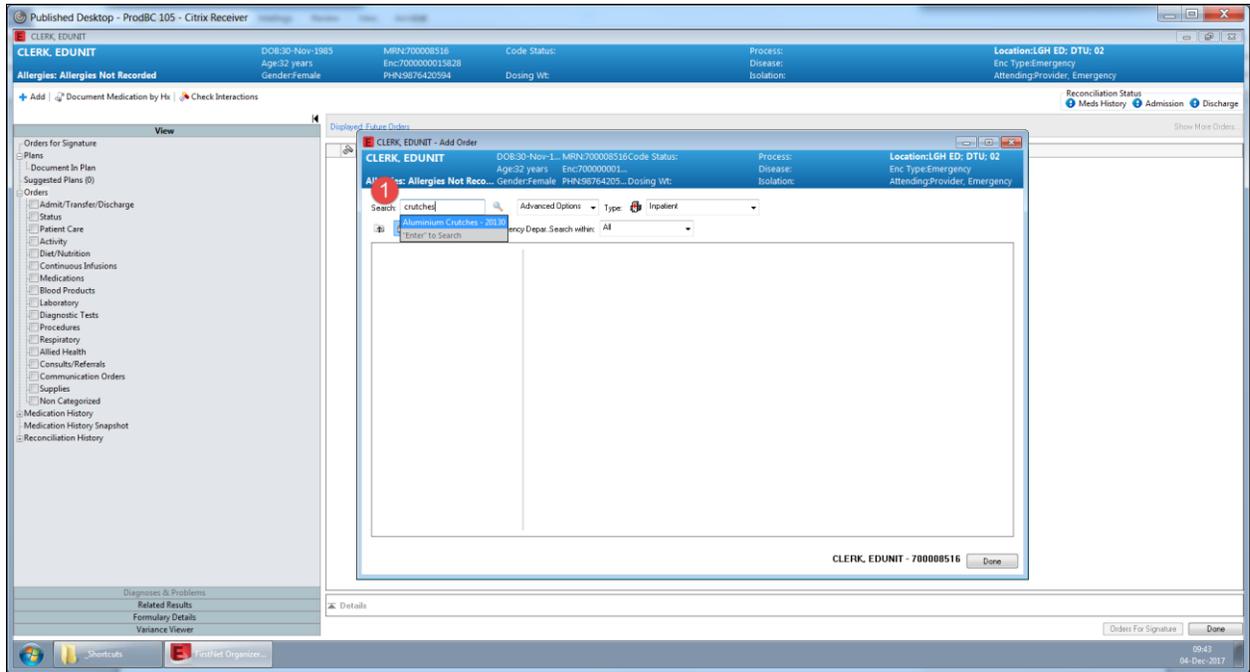
## Activity 2.8 – Complete a Medical Equipment request

- 1 Select patient: **ED-UC-B, Kelly/Sonia/Gladys**, right click and scroll and click **Add Order**.

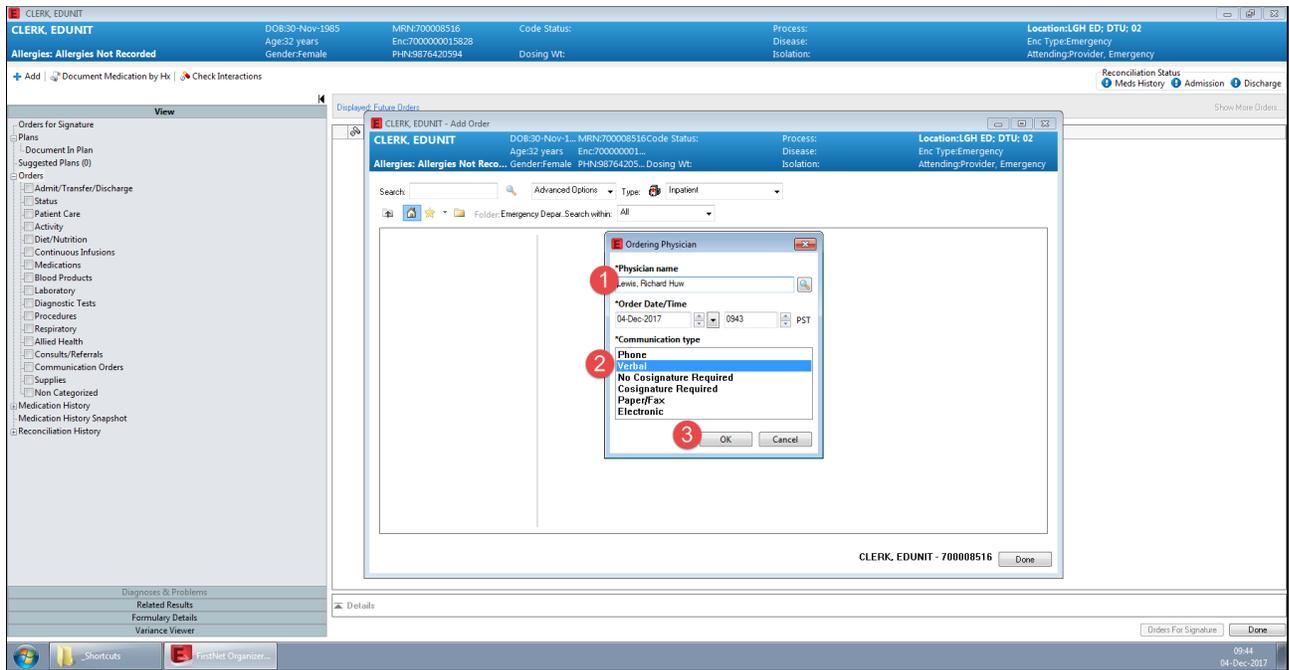
The screenshot shows the FirstNet Organizer interface for the ED Unit. A table lists patients with columns for Bed, Alerts/CT Name, Age, Allergy, Reason for Visit, LOS, Disposition, EDMD/MLP, RN, Activities, Events, Lab, Rad, ECG, OOD, Comment, and BA. The patient 'CLERK, EDUNIT' (Age 52) is selected, and a context menu is open over their row. The menu options include 'Attach Pre-Arrival', 'ED Phone Call for Consults', 'Add Order', 'Open Chart', 'Request Event', 'Start Event', 'Complete Event', 'Discharge Process', 'Provider Check-Out', and 'Patient Summary Report'. The 'Add Order' option is highlighted in blue.

- 2 The Add Order window will open. Type in the equipment name in the search box. A dropdown list will appear and select the appropriate equipment.

Ex. **Aluminum Crutches**



3 The Ordering Physician window will open. Fill out all fields as required (physician name, communication type). For this example, we will use physician: Test, Alex. Then click **OK**.



Click **Done**.

# PATIENT SCENARIO 2 – New Patients arrive to ED



CLERK, EDUNIT  
DOB: 30-Nov-1983 MRN: 700008516 Code Status: Process: Location: LGH ED, DTU: 02  
Age: 32 years Enc: 700000015828 Disease: Enc Type: Emergency  
Gender: Female PHN: 9876420594 Dosing Wt: Isolation: Attending Provider, Emergency

Allergies: Allergies Not Recorded

Orders for Signature

CLERK, EDUNIT - 700008516 Done

You will see the Order request, click **sign** to complete the process.

CLERK, EDUNIT  
DOB: 30-Nov-1983 MRN: 700008516 Code Status: Process: Location: LGH ED, DTU: 02  
Age: 32 years Enc: 700000015828 Disease: Enc Type: Emergency  
Gender: Female PHN: 9876420594 Dosing Wt: Isolation: Attending Provider, Emergency

Allergies: Allergies Not Recorded

Orders for Signature

Order Name	Status	Start	Details
Aluminium Crutches - 20130	Order	04-Dec-2017 0943... 04-Dec-2017 0943 PST, 1	

Details for Aluminium Crutches - 20130

Requested Start Date/Time: 04-Dec-2017 0943 PST Quantity: 1

Sign Cancel

# PATIENT SCENARIO 2 – New Patients arrive to ED



Published Desktop - Train1 - Citrix Receiver  
ED-UC-B, Kelli - 76000436 Opened by Train, Unsolicited-Emergency

Task Edit View Patient Chart Links Options Current Add Help

Tracking Sheet LearningLIVE Patient Health Education Materials Policies and Guidelines UpToDate CareConnect PHSA PACS VCH and PHC PACS MUSE FormFast WFI

Year Off Edit Edit Medical Record Request Scheduling Appointment Book Documents Discom Reporting Portal Conversation Launcher

ED-UC-B, Kelli DOB: 1992-Feb-20 MMR: 760000436 Code Status: Process: Location: IGH ED  
ED-UC-B, Kelli Age: 35 years Enc: 76000000436 Discharge: Epic Type: Emergency  
Allergies: No Known Allergies Gender: Female PHN: 1076000436 Dosing: WL: 55 kg Isolation: Attending: Train, General Medicine-Physician7, MD

Menu  
Patient Summary  
Orders  
Form Browser  
Results Review  
Allergies  
CareConnect  
Clinical Research  
Diagnoses and Problems  
Documentation  
Histories  
MAR Summary  
Medication List  
Patient Information  
Reference  
Single Patient Task List

Orders Medication List Document In Plan

View

Orders for Signature  
Plans  
Document In Plan  
Suggested Plans (0)  
Orders  
Admit/Transfer/Discharge  
Patient Care  
Activity  
Diet/Nutrition  
Continuous Infusions  
Medications  
Blood Products  
Laboratory  
Diagnostic Tests  
Procedures  
Respiratory  
Allied Health  
Consults/Referrals  
Communication Orders  
Supplies  
Non Categorized  
Medication History  
Medication History Snapshot  
Reconciliation History

Related Results  
Formulary Details  
Variance Review

Displayed: All Active Orders | All Inactive Orders | All Orders (All Statures)

Order Name	Status	Dose	Details
Admit/Transfer/Discharge	Ordered		2017-Dec-28 06:30 PST, Discharged Home without Support Services
Patient Care	Ordered		2017-Dec-28 09:29 PST, Stop: 2017-Dec-28 09:29 PST Order placed due to patient arrival to the Emergency Department
Medications	Prescribed	500 mg, PO, TID, order duration: 7 day, drug form: cap, dispense qtr: 21 cap, refill(s): 0, start: 2017-Dec-28 10:12 PST, stop: 2018-Jan-04	
Laboratory	Completed		Whole Blood, Routine, Collected, Collection: 2018-Jan-06 08:15 PST, once
Arterial Blood Gas (Ar...	Completed		Blood, Routine, Collected, Collection: 2018-Jan-06 08:30 PST, once
Basic Metabolic Panel...	Completed		Blood, Routine, Collected, Collection: 2018-Jan-06 09:15 PST, once
Bilirubin Total and Di...	Completed		Blood, Routine, Collected, Collection: 2018-Jan-06 07:30 PST, once
CBC (Complete Blood...	Completed		Blood, Routine, Collected, Collection: 2018-Jan-06 07:30 PST, once
Comprehensive Meta...	Completed		Blood, Routine, Collected, Collection: 2018-Jan-06 07:45 PST, once
Electrolytes Panel (Na...	Completed		Blood, Routine, Collected, Collection: 2018-Jan-06 08:00 PST, once
Glucose Random	Completed		Blood, Routine, Collected, Collection: 2018-Jan-06 09:00 PST, once
Hemoglobin A1C	Completed		Blood, Routine, Collected, Collection: 2018-Jan-06 08:45 PST, once
Urinalysis Macroscop...	Completed		Urine, Routine, Collected, Collection: 2018-Jan-06 09:30 PST, once
Urine Culture	Ordered		Urine, STAT, Uns Collect, Collection: 2017-Dec-28 09:00 PST, once SPECIAL COLLECTION REQUIREMENTS: Please refer to specific site Laboratory Test Manual.
Consults/Referrals	Ordered		12-Jan-2018 11:00 PST, Urgent, Reason for Consult: ED Consult
ED Consult to Cardiol...	Ordered		12-Jan-2018 11:00 PST, Urgent, Reason for Consult: ED Consult
Supplies	Completed		2018-Jan-24 13:12 PST, 1
Aluminum Crutches ...	Completed		2018-Jan-24 13:12 PST, 1

**Note:** Ensure your filter is set to: **Displayed All Active Orders**

PATIENT SCENARIO 2 – New Patients arrive to ED  
 Activity 2.9 – Search for a patient then complete a Quick  
 Registration for a deceased patient

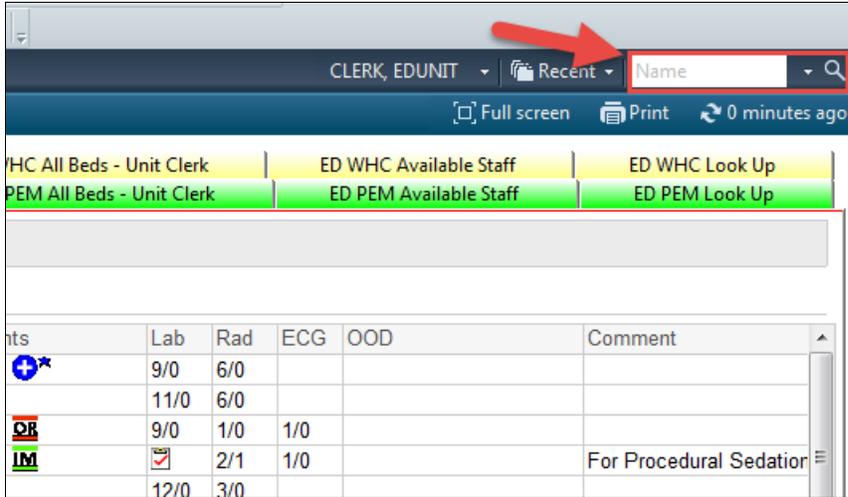


## Activity 2.9 – Search for a patient then complete a Quick Registration for a deceased patient

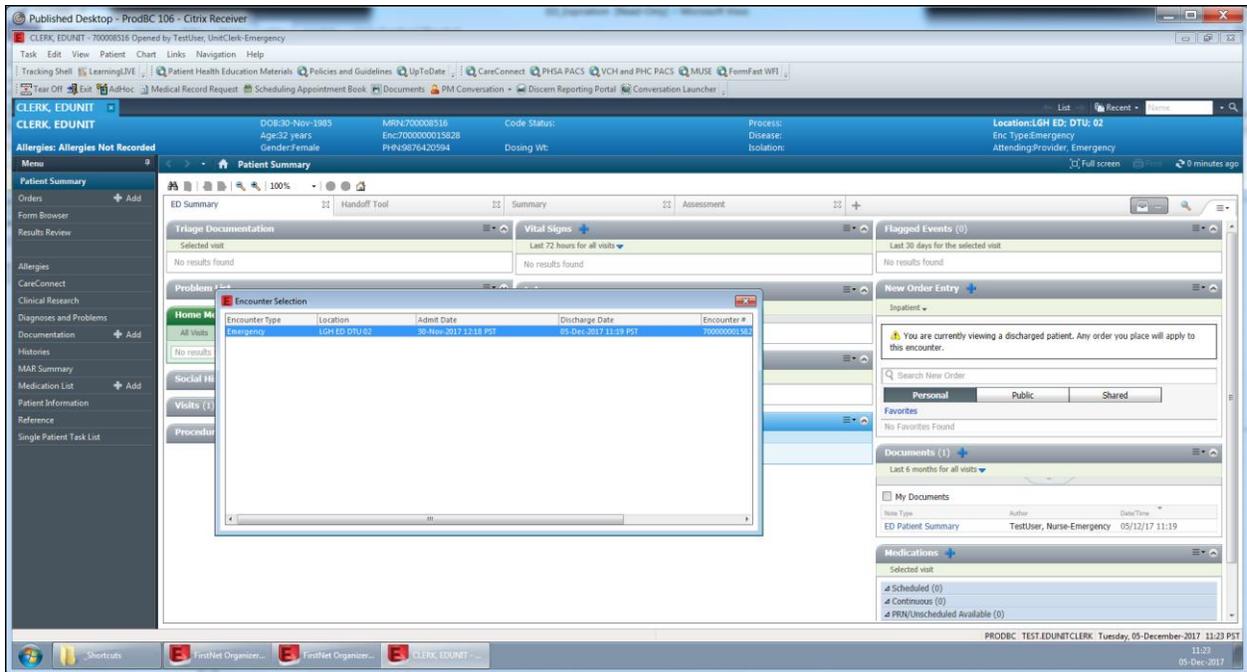
1 **Note:** The unit clerk will be able to complete a Quick Reg *only after* the nurse completes the Notification of Death and has discharged the patient as 'deceased.'

Click on **Recent** on the top right hand corner of your screen. Select the deceased patient. If you don't see the patient here, type in the search toolbar beside the **Recent** tab. Click the **Enter Key**. **Note:** you can click on the down arrow next to the **Search** box to search for patient using **MRN #** or **FIN #**.

You have been assigned one of these already deceased patients: **ED-UC-A, Hugo/Byron/Israel/Larry/Terry/Alberto.**



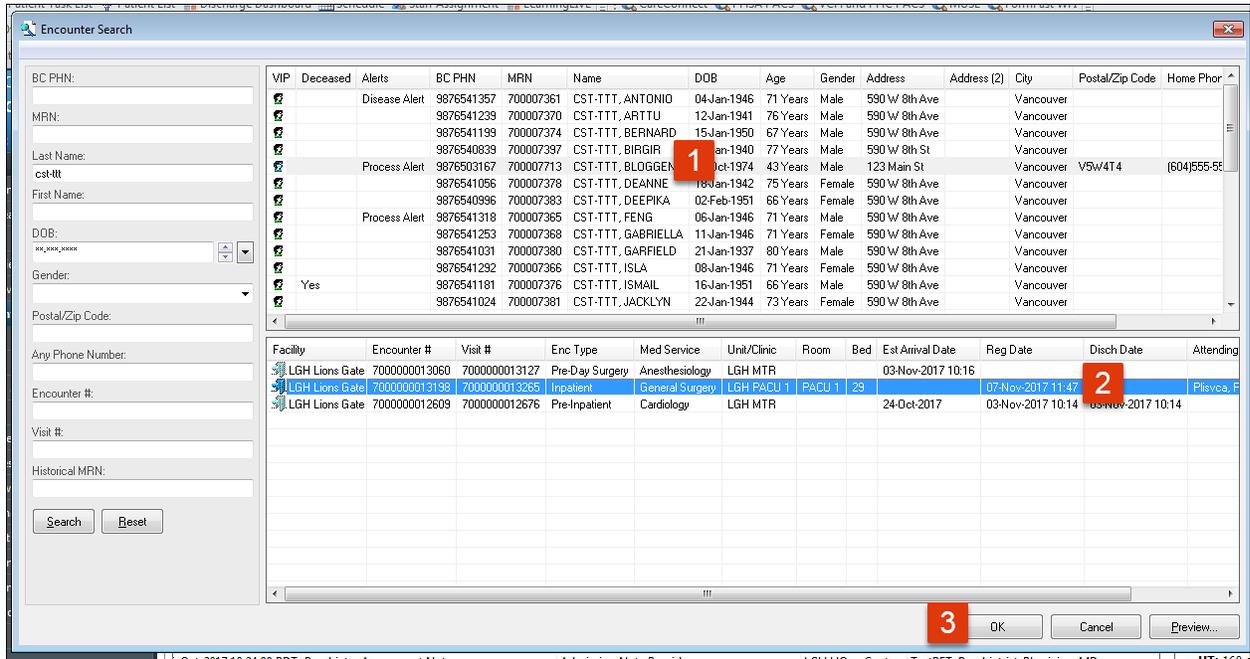
The Encounter Selection window will open. Click the to close the window after you verified the right encounter number.



Or if there are multiple encounters/patients:

1. Select the right patient
2. Select the right encounter.
3. Click **OK**.

# PATIENT SCENARIO 2 – New Patients arrive to ED

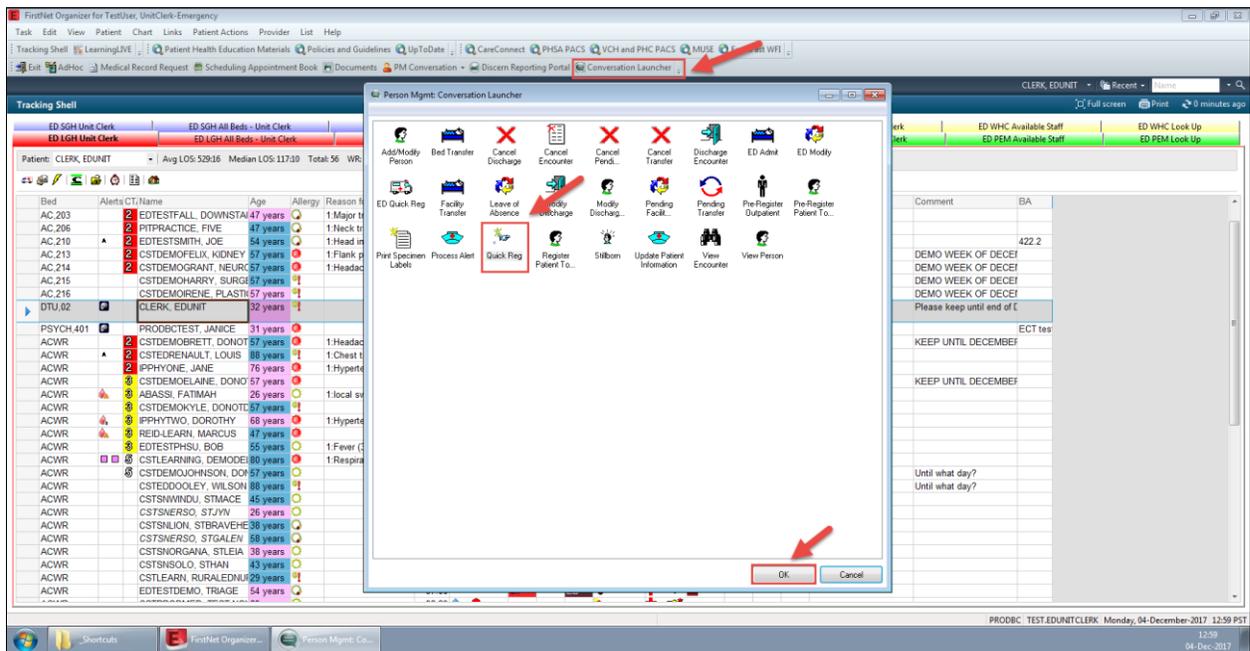


2

Click the **Conversation Launcher** in the Toolbar. Find and select the



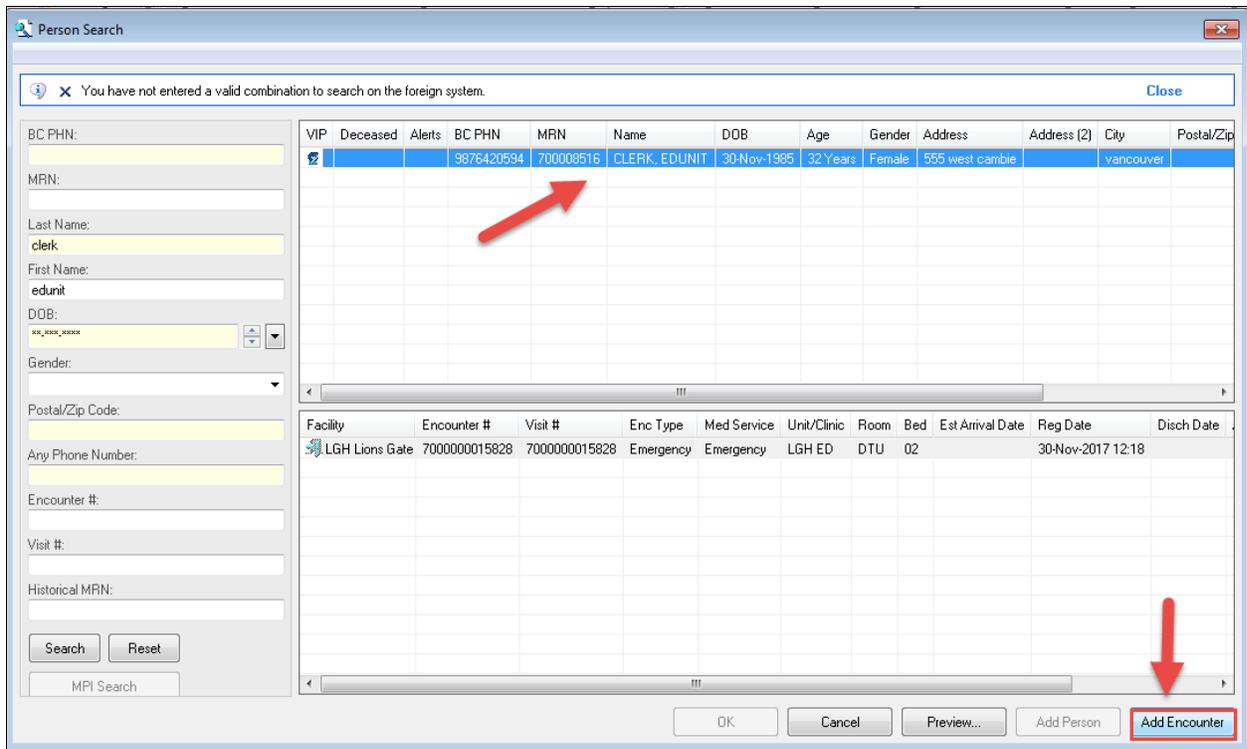
**Quick Reg** icon. Then click **OK**.



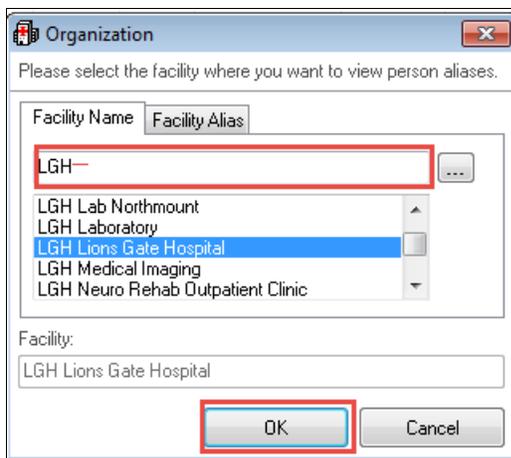
The Person search window opens. Enter the patient's first and last name (unless you know the

PATIENT SCENARIO 2 – New Patients arrive to ED  
 The Person search window opens. Enter the patient’s first and last name (unless you know the MRN/PHN). Click on the right patient and click Add Encounter.

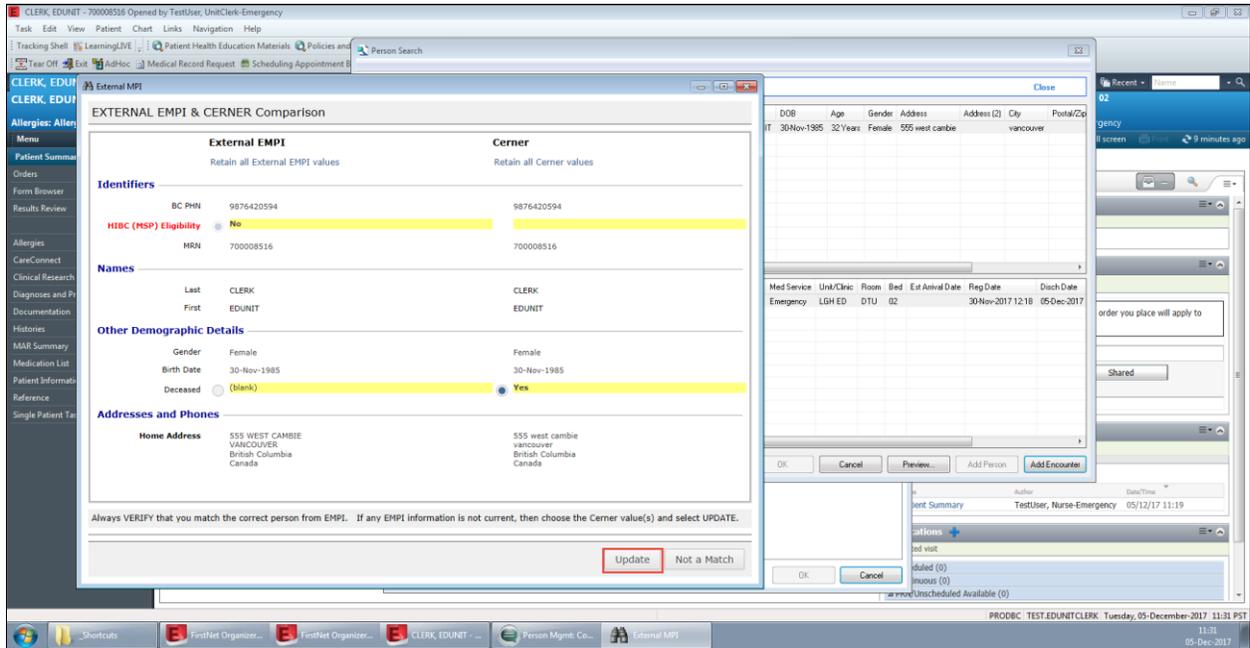
MRN/PHN). Click on the right patient and click **Add Encounter**.



The Organization window will then open and select the hospital/department. Click **OK**.



The EXTERNAL EMPI & CERNER Comparison window opens. Verify all this information to be correct then click **Update**.



The Quick Reg window opens. Select the **Encounter Information** tab. Fill in all yellow fields, as it is mandatory. Most yellow fields will already be automatically populated from previous documentation entry from the nurse.

Encounter Type: **Deceased**

Medical Service: **Deceased**

Unit/clinic: **LGH Morgue**

Attending Provider: Current attending provider

Go through each tab and fill in necessary information that is relevant to your role. Then click **OK**.

Medical Record Number: 700008516 | Encounters Number: CLERK | Last Name: EDUNIT | First Name: | Middle Name: | Preferred Name: | Previous Last Name: | Date of Birth: 30Nov-1985 | Age: 32Y | Gender: Female | BC PIN: 9876420534

Encounter Type: Medical Service | Reason for Visit: Deceased

Location: | Facility: LGH Lions Gate | Building: LGH Lions Gate | Unit/Clinic: LGH Morgue | Room: | Bed: | Bed Availability: [Button]

Account Data

Registration Date	Registration Time	Quick Reg User Name	Deceased?	Deceased Date	Deceased Time
05Dec-2017	11:32	TestUser, UserCheck-Ease	Yes	05Dec-2017	11:15



This message will pop up stating all required fields needs to be completed. Under the **Insurance** tab, fill out all mandatory necessary information, including the **Search for Health Plan** tab (very hard to see that yellow is hilgited around the button). Fill in all necessary information. Then click **OK**.

# PATIENT SCENARIO 2 – New Patients arrive to ED

Quick Reg

Medical Record Number: 70000016 Encounter Number: 7000001670 Last Name: **CLERK** First Name: EDUNIT Middle Name: Preferred Name: Previous Last Name: Date of Birth: 30-Nov-1985 Age: 32Y Gender: Female BC PIN: 9876420594

ALERTS | Patient Information | Encounter Information | Insurance | Insurance Summary

MSP Eligibility  
Valid Status: No Valid Date: 05-Dec-2017 Valid Time: 11:29  
Inquire if patient has proof of other Provincial or Federal health insurance coverage (if YES, select Insured Resident)  
Status in Canada: Canadian Citizen

UNINSURED Residency Information  
Residency > 6 Months? No Document Type: Canadian Passport Document Number: 123456 Effective Date: Expiry Date:

Accident/Injury Information  
Accident Related Visit?

PRIMARY INSURANCE  
Guardian Relationship to Patient: Self  
Search for Health Plan  
Health Plan Name: Effective Date:

SECONDARY INSURANCE  
Please ensure relationship is set before selecting Health Plan  
Relationship to Patient:  
Search for Health Plan  
Health Plan Name: Effective Date:

EXTENDED INSURANCE  
Relationship to Patient:  
Search for Health Plan:

Ready PRODEC TEST EDUNITCLERK 05-Dec-2017 11:48

CLERK, EDUNIT - 7000001670 Opened by TestUser, UnitClerk-Emergency

Task Edit View Patient Chart Links Navigation Help

Tracking Shell LearningLIVE Patient Health Education Materials Policies and Guidelines UpToDate CareConnect PHSA PACS VCH and PHC PACS MUSE FormFast WiFi

Task Off Exit AdHoc Medical Record Request Scheduling Appointment Book Documents PM Conversation Discern Reporting Portal Conversation Launcher

CLERK, EDUNIT DOB: 30-Nov-1985 Age: 32 years Gender: Female

Allergies: Allergies Not Recorded

Menu Patient Summary

Orders ED Summary 100% Handoff Tool

Form Browser

Results Review

Allegies

CareConnect

Clinical Research

Diagnoses and Problems

Documentation

Histories

MAR Summary

Medication List

Patient Information

Reference

Single Patient Task List

Person Mgmt: Conversation Launcher

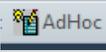
Quick Reg

The following LGH Lions Gate Hospital aliases have been assigned for CLERK, EDUNIT:  
Encounter Number: 700000016070  
Visit Id: 700000016070

PRODEC TEST EDUNITCLERK Tuesday, 05-December-2017 11:52 PST

Select **OK** to close the window.

## Key Learning Points

- Nurses have used Tracking Shell in the past before. You may notice that you have access to some functions (such as attaching a pre-arrival form) but that does not mean it is in your role to do so. You should always know your own roles and responsibilities through your health authority.
- Yellow fields in PowerForms are required and needs to be filled out before you are able to click out of the screen/window.
- There are two ways to Request Event/Complete Event: clicking on the clock  icon on the FirstNet Toolbar and right clicking on the patient's name. The corresponding icon will appear in the appropriate column.
- For printing patient labels, always check the encounter number (located in blue Banner Bar) is correct by opening up the patient's chart.
- There are four ways you can access the ED Phone Call for Consult PowerForm: 1. Click on the ED Phone Call for Consults  icon on the FirstNet Toolbar 2. Right click on the patient's name on the Tracking Shell and click on the ED Phone Call for Consults 3. Right click on the patient's name, click Open Chart and then click Form Browser. **Note:** with Form Browser, you can only see the documents you have previously documented to modify. 4. Click on the AdHoc  icon in the Toolbar
- For the AdHoc PowerForms (ED Trauma and ED Phone Call for Consults), enter "t" for today's date and "n" for now (time). Also, remember to click the green checkmark  at the top left hand corner to save.
- You can find blank forms by clicking on the AdHoc  icon on the FirstNet Toolbar.
- The unit clerk will be able to complete a Quick Reg *only after* the nurse completes the Notification of Death and has discharged the patient as 'deceased.'
- When searching for a patient, make sure you choose the *right* encounter number (if more than one).

## ■ PATIENT SCENARIO 3 – FormFast WebForm Imprint (WFI)

### Learning Objectives

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

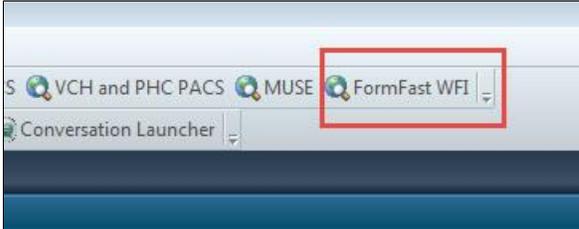
- Log into WFI from FirstNet or from the WFI icon from your desktop
- Search/Select the Patient(s) and their Encounter(s)
- Refresh the Patient Information Screen
- Search/Select Forms and Labels
- Print Forms and Labels
- Correctly Apply Labels to Forms

**Note:** It is important to note that WFI will only display patients who were admitted / discharged in the last two weeks. This is to prevent users from choosing the wrong encounter.

## Activity 3.1 – Getting Started

1 There are 2 ways to access FormFast WebForm Imprint:

1. Through FirstNet, using the **FormsFastWFI** tab  located under the toolbar.



2. From the Web FormImprint (WFI)  icon on your desktop. It is recommended to open this application in Google Chrome. This will take you to the WFI logon screen where you will enter your Network logon again.

The Web FormImprint window will appear and look similar to this.

**Menu Processing Buttons**  
Choose for Printing or Refreshing patient information or to set Favorites or Settings.

**Jobs Tree**  
Clicking on the expands/collapses the information.  
  
Jobs with  are selected for printing.

**Record** One line of patient information is called a Record.

Job	Print	Copies
Administration		
- Release of Information		
- Authorization For The Release of Health Information		
- Request by Law Enforcement For Data		
- Advance Care Planning Documentation		
- Allied Health Documentation		
- Anesthesia Records		
- Cardiology Procedures		
- Clinic Notes		
- Clinical Pharmacy Notes		

Job	Print	Copies
Administration		
- Release of Information		
- Authorization For The Release of Health Information		
- Request by Law Enforcement For Data		
- Advance Care Planning Documentation		
- Allied Health Documentation		
- Anesthesia Records		
- Cardiology Procedures		
- Clinic Notes		
- Clinical Pharmacy Notes		

Job	Print	Copies
Administration		
- Release of Information		
- Authorization For The Release of Health Information		
- Request by Law Enforcement For Data		
- Advance Care Planning Documentation		
- Allied Health Documentation		
- Anesthesia Records		
- Cardiology Procedures		
- Clinic Notes		
- Clinical Pharmacy Notes		

## Activity 3.2 Selecting the patient

1 There are few different ways to locate patients.

1. Highlight the patient from the list on Tracking Shell. Then, click the FormFast



icon from the Toolbar.

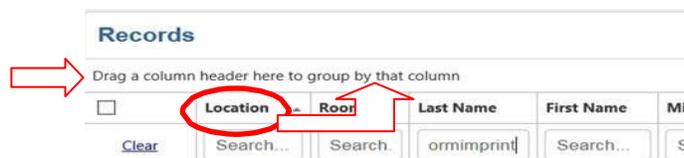
2. Search by typing the patient's name, MRN, PHN, encounter, etc. in the box located in the top right hand corner. Or, search by clicking on the magnifying glass . Select the appropriate encounter then click **OK**. Click on the **FormFast** icon in the Toolbar. **Note:** This search option is not available through the WFI icon on your desktop.

The screenshot shows the 'Encounter Search' window. On the left, there are input fields for BC PHN, MRN (700001770), Last Name, First Name, DOB, Gender, and Postal/Zip Code. Below these are fields for Any Phone Number, Encounter #, Visit #, and Historical MRN. A 'Search' button and a 'Reset' button are at the bottom left. The main area is a table with columns: Facility, Encounter #, Visit #, Enc Type, Med Service, Unit/Clinic, Room, Bed, Est Arrival Date, and Reg Date. One row is highlighted in blue. At the bottom right, the 'OK' button is circled in red, along with 'Cancel' and 'Preview...' buttons.

The WFI window will appear and only the specific encounter will display.

The screenshot shows the 'Records' window. At the top right, there is a 'Sign Out' button. Below it is a table with columns: Last Name, First Name, MiddleName, PreferredName, Birth Date, Gender, Medical Record Number, Encounter Number, Encounter ID, VisitNumber, Patient Type, PatientClass, Address1, Address2, AdmitDate/Time, AdmitDate/TimeDisplay, and AdmitSource. The first row is selected. Below the table, it says 'Records Last Refreshed: 3:05:14 PM'.

**Note:** You can drag any of the headers for your preferred view by dragging and dropping the column header to where you want it to appear.



## Activity 3.3 Updating patient information using Refresh

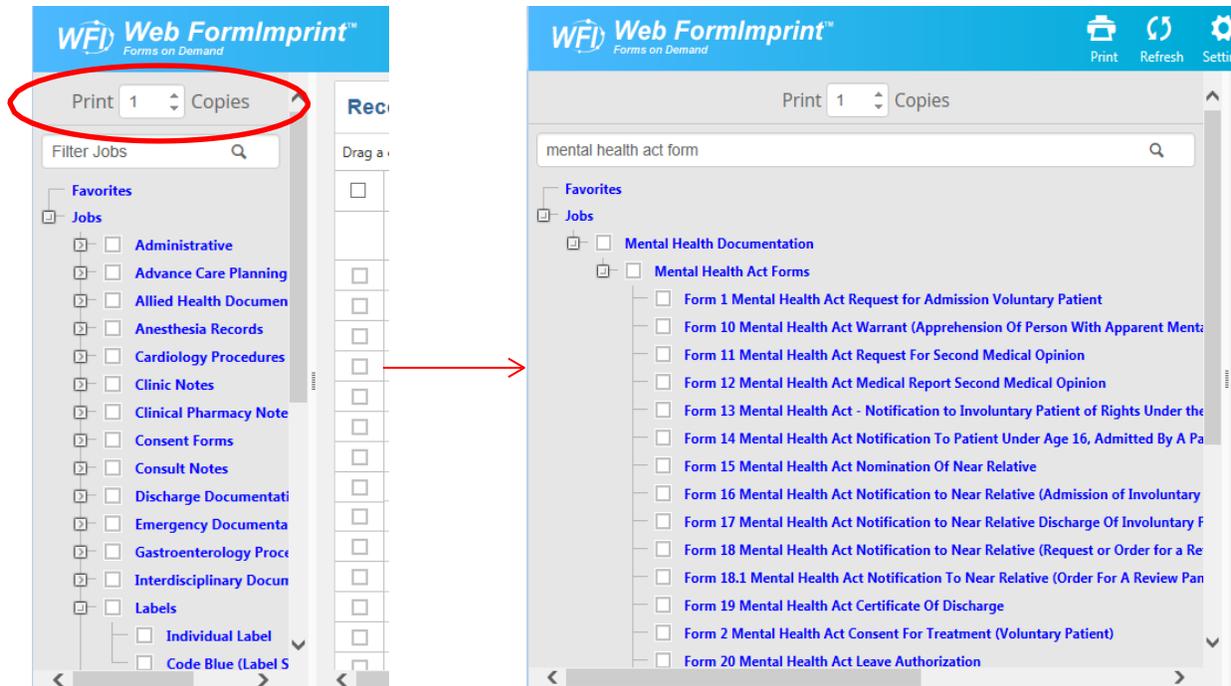
- 1 The database updates the names of patients admitted and discharged within two weeks each time the application is opened. To update information while the application is open, click the **Refresh** button then select appropriate filter.

The screenshot shows the Web Form Imprint (WFI) application interface. The top navigation bar includes a 'Refresh' button, which is circled in red. A dropdown menu is open over the 'Refresh' button, showing options: 'Default Sort', 'Records', and 'Job Tree'. The 'Records' option is also circled in red. The main content area displays a table of patient records with columns: Last Name, First Name, MiddleName, PreferredName, Birth Date, Gender, Medical Record Number, Encounter Number, Encounter ID, and Visit. A single record is visible with a checked checkbox in the first column. The status bar at the bottom right indicates 'Records Last Refreshed: 2:11:11 PM'.

	Last Name	First Name	MiddleName	PreferredName	Birth Date	Gender	Medical Record Number	Encounter Number	Encounter ID	Visit
<input checked="" type="checkbox"/>	POOL	TIME			08-Dec-1987	F	700008707	7000000016251	96972791	7000

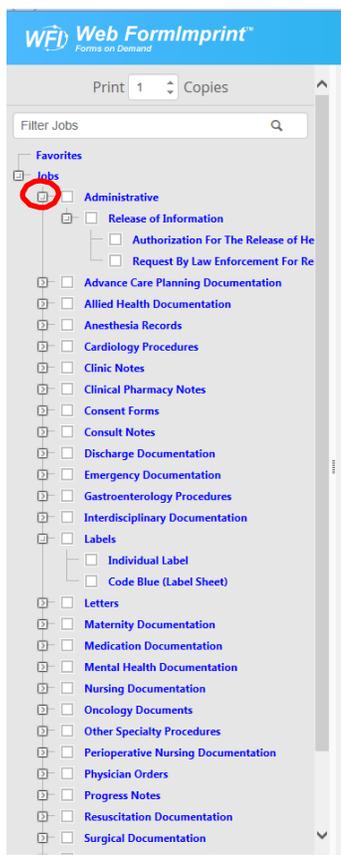
## Activity 3.4 Searching for and selecting forms/labels

1. In the WFI window, under the Filter Jobs field on the left Jobs pane, enter a keyword or the title of the form you are searching for in the space provided. Press “**Enter**” or click on the search icon
2. All forms with that keyword or title will then appear in the jobs pane.



- 2 To view the full form/label names, you can:
  1. Use the scroll bars to the left and on the bottom of the job pane.
  2. Expand the pane size by hovering between the two window panes and click and drag
  3. You can also search the forms/labels by clicking on the arrow keys next to the document headings listed in the Jobs Pane to expand all the forms under that heading.

## PATIENT SCENARIO 3 – FormFast WebForm Imprint (WFI) Activity 3.4 Searching for and selecting forms/labels



3 To view forms, click on the form name to open.

Example: Progress Notes>Trauma Progress Note>History Sheet-Trauma Service Daily Staff Rounds

PATIENT SCENARIO 3 – FormFast WebForm Imprint (WFI)  
Activity 3.4 Searching for and selecting forms/labels



Job Preview

◀ Previous ▶ Next Print Done Zoom: 25

**Vancouver Coastal Health**  
 10th Floor Gate Hospital  
**HISTORY SHEET**  
 TRAUMA SERVICE DAILY STAFF ROUNDS

LAST, FIRST: [Redacted] E: [Redacted]  
 REP ID: 100011000 REP ID: 100011000 F: [Redacted]  
 MFE: 100000000 F: [Redacted]

TRAUMA SERVICE DAILY STAFF ROUNDS

DATE: \_\_\_\_\_

Active Injuries/Issues: \_\_\_\_\_ Plans/Goals: \_\_\_\_\_

1. \_\_\_\_\_ 1. \_\_\_\_\_

2. \_\_\_\_\_ 2. \_\_\_\_\_

3. \_\_\_\_\_ 3. \_\_\_\_\_

4. \_\_\_\_\_ 4. \_\_\_\_\_

5. \_\_\_\_\_ 5. \_\_\_\_\_

Nutritional Status/Goals: \_\_\_\_\_ Pharmacy Issues/Goals: \_\_\_\_\_

Activity/Mobility: \_\_\_\_\_

Acuity Status:  ICU  High Acuity  Ward Ready  Trauma Subacute

Disposition Planning/Barriers to Discharge: \_\_\_\_\_

Signature: \_\_\_\_\_

FORM ID: W38-3883-01-2019-007-01 Page 1 of 1

◀ Previous ▶ Next Print Done Zoom: 25

**HISTORY SHEET**  
 TRAUMA SERVICE DAILY STAFF ROUNDS

LAST, FIRST: [Redacted] E: [Redacted]  
 REP ID: 100011000 REP ID: 100011000 F: [Redacted]  
 MFE: 100000000 F: [Redacted]

TRAUMA SERVICE SIGN OFF NOTE + DISCHARGE NOTE

Sign off date: \_\_\_\_\_

MRP and service assuming care: \_\_\_\_\_

Trauma attending at time of sign off:  
 Follow up still required?  Yes  No

Recommended date of follow-up:  
 Follow up imaging required: \_\_\_\_\_

Other special instructions: \_\_\_\_\_

FORM ID: W38-3883-01-2019-007-01 Page 2 of 2

4 Select the form(s)/label(s) from the Jobs pane that you want to print by clicking on the box  to the left of the form/label name.

Here are some forms that you will often print in the ED. Try locating each of the forms by following these steps:

- Nursing Documentation> FlowSheet>ECG Strip Flowsheet
- Labels>Code Blue (Label Sheet)
- Labels>Individual Label
- Mental Health Documentation>Mental Health Act Forms>Form 4 Mental Health Act Medical Certificate- Involuntary Admission
- Consent Forms>Consent Procedure>Consent Medical or Procedure, Administration of Blood Products
- Consent Forms>Consent Other>Authorization for Leave of Absence For Therapeutic Purposes

## Activity 3.5 Printing

All forms and labels will be printed with patient ID on the forms.

1. After selecting all the form(s)/label(s) you want to print from the Jobs pane by clicking on the box  to the left of the form/label name, use the up and down arrow keys to select how many copies you want

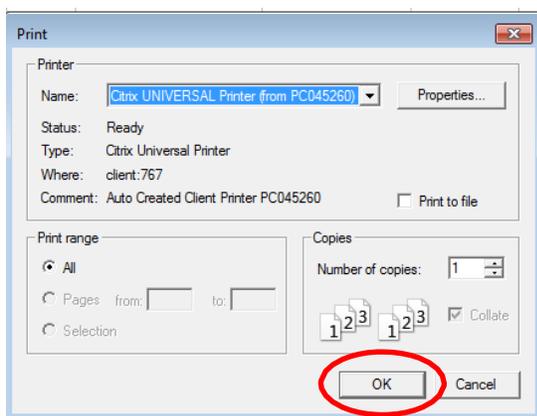
**Note:** Be sure to revise printing preferences within the FormFast screen (as requests such as colour copy, number of copies etc. cannot be modified from within the Print Dialogue box).



2. Click the Print button  at the top of the WFI window to print the selected form(s)/label(s).



The **Print** dialogue box will open. Click



## Activity 3.6 – Printing blank forms

Blank forms can be printed (no patient ID on form). Forms printed without the patient’s identification will require manual application of a label to correctly identify the patient.

1. In the WFI window, enter a “0” in the **Medical Record Number Search** field. This will blank out the patient listing.

Records

Drag a column header here to group by that column

<input type="checkbox"/>	First Name	Middle Name	Last Name	Preferred Name	Birth Date	Gender	Medical Record Number	Encounter Number	Encounter ID
Clear	Search	Search...	Search	Search...	Search	Sex	0	Search...	Search...

2. Select the form(s)/label(s) you want to print from the Jobs pane by placing clicking on the box  to the left of the form/label name.

Click the Print button



Here are samples of the same form with patient ID and without.

Form with Patient ID

Vancouver Coastal Health  
Providing excellent, seamless care.  
LGH Laboratory

AUTHORIZATION FOR THE RELEASE OF HEALTH RECORDS

2768 Release of Information

Please fax or mail your completed request to each hospital/facility you are requesting records from.  
ATTENTION: Health information Management, Release of Information Office

Part 1. Patient / Resident Information				
LAST NAME OF PATIENT	FIRST NAME	ALSO KNOWN AS / ALIAS		
MAILING ADDRESS	CITY / PROVINCE / COUNTRY	POSTAL CODE		
TELEPHONE NO. (INCLUDING AREA CODE)	DATE OF BIRTH DAY   MONTH   YEAR	PERSONAL HEALTH NUMBER (CARECARD)		

Blank Form

Place Patient Label Here

AUTHORIZATION FOR THE RELEASE OF HEALTH RECORDS

2768 Release of Information

Please fax or mail your completed request to each hospital/facility you are requesting records from.  
ATTENTION: Health information Management, Release of Information Office

Part 1. Patient / Resident Information				
LAST NAME OF PATIENT	FIRST NAME	ALSO KNOWN AS / ALIAS		
MAILING ADDRESS	CITY / PROVINCE / COUNTRY	POSTAL CODE		
TELEPHONE NO. (INCLUDING AREA CODE)	DATE OF BIRTH DAY   MONTH   YEAR	PERSONAL HEALTH NUMBER (CARECARD)		

## Activity 3.7 - Correct application of labels to blank form

1. Print a label with the correct patient name/encounter from WFI.
2. Place the label on the form **without obscuring any patient information** that was hand-written (either patient documentation or the patient name).

The image shows a 'PHYSICIAN ORDERS' form with a patient label overlaid. The label contains handwritten text and printed patient information. A red circle highlights the label's content.

**PHYSICIAN ORDERS**

DRD0100019A Rev: Oct. 29/04 Page: 1 of 1  
DRUG & FOOD ALLERGIES

**PHYSICIAN ORDERS (USE BLACK BALL POINT PEN)**

**OETRAIN, Barney**  
BD 22-DEC-22  
#0258

**OETRAIN, BARNEY**  
DOB: 22-Dec-22 Gnd: M Age: 83  
PHN: N/A Unit#: AB0000008  
MSA ACU Date: 02-Nov-06  
Dr: Finch, Christopher A. Acct#: MS000058/06  
Dr: FINCH

## Activity 3.8 - Correct application of labels to forms with incorrect patient identification

- 1 Print a label with the correct patient name/encounter from WFI.
- 2 Place the correct label on the form **without obscuring any patient information** (either patient documentation or the incorrect name).
- 3 With a pen, strike out the incorrect name with a few lines (do not obscure the incorrect name completely), write "incorrect patient", the date, and your initials.
- 4 Communicate change of patient identification to all other clinical areas (eg. Pharmacy, Medical Imaging, Lab) as appropriate.



23/02/2008 10:17

INCORRECT PATIENT 2/6/2/08 JC

**PHYSICIAN ORDERS**

ITSTEST, BARNEY RUBBLE  
BD: 17/11/1955 GND: M AGE: 52Y  
PHN: Unit#: AB00001174  
MS: ACU SERVICE DATE: 17/11/2007  
Edelson, Andrew Rabcock, Bruce

OETRAIN BARNEY  
DOB: 22-Dec-22 Gnd: M Age: 83  
PHN: N/A Unit#: AB00000058  
MSA: ACU Date: 02-Nov-08  
Dr: Finch, Christopher A. Acct#: MS000058/06  
Dr: FINCHC

BRD0100019A Rev: Oct. 29/04 Page: 1 of 1

DRUG & FOOD ALLERGIES:

DATE/TIME PHYSICIAN ORDERS (USE BLACK BALL POINT PEN)

## PATIENT SCENARIO 4 – Accessing a patient’s chart

### Learning Objectives

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

-  Review the Banner Bar, Organizer Toolbar, and Menu (Table of Contents)
-  Review Patient Summary
-  Results Review
-  Review Orders
-  Review Single Patient Task List
-  Review MAR Summary
-  Review Documentation

### SCENARIO

Let’s now open up the patient’s chart. We will do an overview on this screen.  
You will be completing the following activities:

-  Reviewing the Banner Bar, Organizer Toolbar, and Menu (Table of Contents)
-  Reviewing Patient Summary
-  Results Review
-  Reviewing Orders
-  Reviewing Single Patient Task List
-  Reviewing MAR Summary
-  Reviewing Documentation

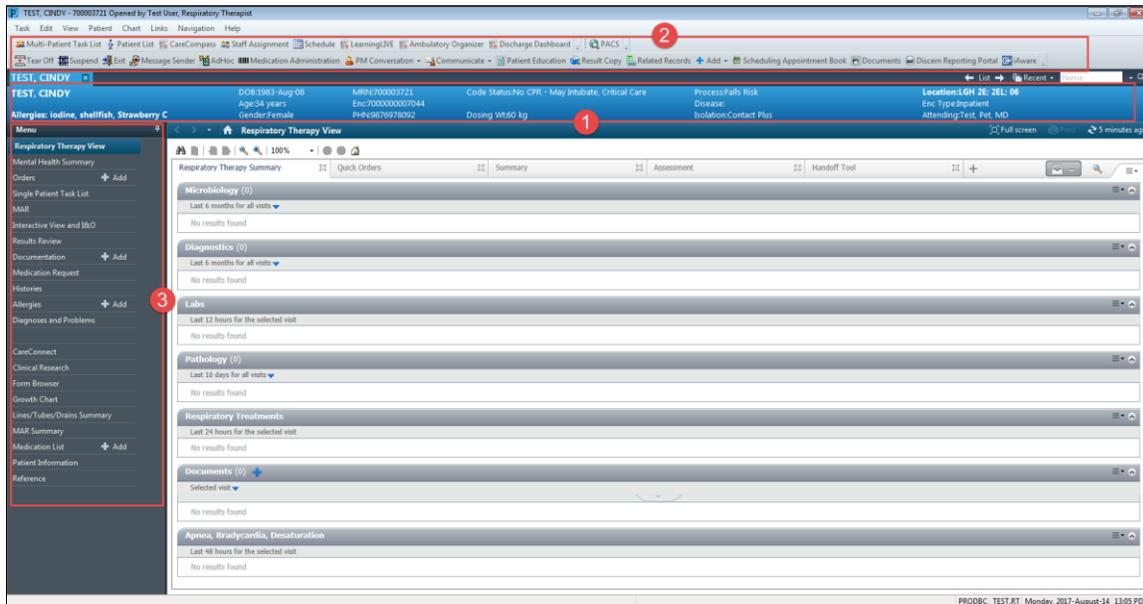
## Activity 4.1 – Reviewing the Banner Bar, Organizer Toolbar, and Menu (Table of Contents)

1

Select a patient **ED-UC-B, Kelly/Sonia/Gladys**.

**Note:** you will need to click the Refresh  icon each time when you are in the patient's chart, to get the most updated information.

- Banner Bar:** Blue bar on the top gives you at-a-glance view of the patient, including allergies, code status, reason for visit, MRN, PHN, encounter #, isolation type and more.
- Organizer Toolbar**  
The Toolbar is located above the Banner Bar and it contains buttons for the different Organizer views available for you.
- Menu (Table of Contents)**  
Tabs on the left are similar to your patient chart colored organizer tabs. You click on the tab that you want to access.



The screenshot displays a patient chart interface. At the top, a blue banner bar contains patient information: NAME: TEST, CINDY; DOB: 1983-Aug-08; Age: 34 years; Gender: female; MRN: 700003721; Code Status: No CPR - May Intubate, Critical Care; Process/Falls Risk: Disease; Location: LGH 2E 2EL; 06. Below the banner bar is the Organizer Toolbar with various icons. A red circle '2' highlights the Refresh icon. On the left side, a dark grey Menu (Table of Contents) is visible, with a red circle '3' highlighting the 'Respiratory Therapy View' tab. The main content area shows the 'Respiratory Therapy View' with sections for Microbiology, Diagnostics, Labs, Pathology, Respiratory Treatments, Documents, and Apnea, Bradycardia, Desaturations. A red circle '1' highlights the 'Respiratory Therapy View' tab in the menu.

The **Menu** on the left side of the screen allows you to view detailed specific patient information under each tab. Click on the tabs in the **Menu** to access the information.

# PATIENT SCENARIO 4 – Accessing a patient's chart

## Activity 4.1 – Reviewing the Banner Bar, Organizer Toolbar, and Menu (Table of Contents)

The screenshot displays the EHR interface for a patient named TEST, CINDY. The interface is divided into several sections:

- Header:** Patient name (TEST, CINDY), DOB (1983-Aug-08), MRN (700003721), Code Status, Process/Falls Risk, Location (LGH LD: LDR7; 01C), and Allergies (Iodine, shellfish, Strawberry C).
- Menu (Left):** A vertical navigation menu with categories like Respiratory Therapy View, Mental Health Summary, Orders, Single Patient Task List, MAR, Interactive View and IBO, Results Review, Documentation, Medication Request, Histories, Allergies, Diagnoses and Problems, CareConnect, Clinical Research, Farm Browser, Growth Chart, Lines/Tubes/Drains Summary, MAR Summary, Medication List, Patient Information, and Reference.
- Respiratory Therapy View (Main Content):**
  - Patient Information:** Chief Complaint (No results found), Reason For Visit (pregnant), Admitting Physician (Core Provider, Admit Internal Test, MD), Admit Date (15/08/17), Targeted Discharge Date (No results found), Last Visit (04/07/17 (Inpatient)), Code Status (No results found), Diet and Activity (0).
  - Problems List:** All Visits, Classification: All, This Visit (0), Active (1) - Pregnant 02-MAR-2017 09:35:48<3>, Resolved (1).
  - Medications:** Last 12 hours for the selected visit, Scheduled (0), Continuous (0), PRN/Unscheduled Available (0), Administered (0) Last 24 hours, Suspended (0).
  - Vital Signs:** Selected visit, No results found.
  - Labs:** Last 12 hours for the selected visit, No results found.
  - Diagnostics:** Last 6 months for all visits, No results found.
  - Microbiology:** Last 6 months for all visits, No results found.
  - Pathology:** Last 10 days for all visits, No results found.
  - Measurements and Weights:** Last 12 hours for the selected visit, Height/Length Measured (170cm, 3 lbs).
  - Respiratory Assessments:** Last 24 hours for the selected visit, No results found.
  - Respiratory Treatments:** Last 24 hours for the selected visit, No results found.
  - Documents:** Selected visit, No results found.
  - Notes/Reminders:** All Visits, No results found.
  - Outstanding Orders:** 3 orders listed: End Tidal CO2 Monitoring, IP Consult to Respiratory Therapy, and IP Consult to Respiratory Therapy.
  - Intake and Output:** Last 3 days for the selected visit, No results found.
  - Flagged Events:** (0).

## Activity 4.2 – Reviewing Patient Summary

- 1 Click on the **Patient Summary** tab in the table on contents. There are different tabs on the top: **Handoff Tool, Summary, Assessment, and Discharge**

The screenshot displays a patient summary page for a patient named CSTPRODAC, DISCHARGE. The patient's information includes DOB: 08-Feb-1899, Age: 118 years, Gender: Male, and various medical identifiers. The page is divided into several sections:

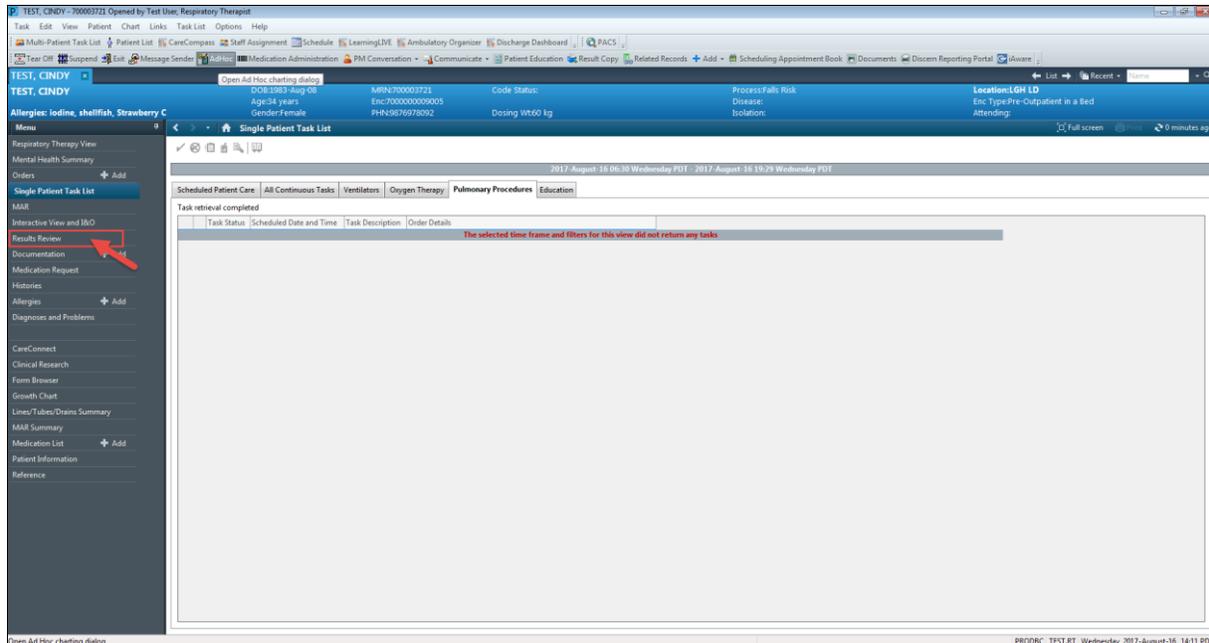
- Informal Team Communication:** This section includes fields for "Add new action" and "Add new comment". It shows "No active actions documented" and "No comments documented".
- Active Issues:** This section lists active issues with columns for Name, Classification, and Actions. The issues listed are:
 

Name	Classification	Actions
Heart & renal disease, hypertensive malignant	Medical	This Visit Chronic
Leg bone infarction, right	Medical	This Visit Chronic
Wound abscess	Medical	This Visit Chronic
- Allergies (8):** This section lists allergies with columns for Substance, Reactions, Category, Status, Severity, Reaction Type, Source, and Comments. The allergies listed are:
 

Substance	Reactions	Category	Status	Severity	Reaction Type	Source	Comments
Tylenol	--	Environment	Active	Severe	Allergy	Patient	--
Grass	--	Environment	Active	--	Allergy	--	--
metastasis	--	Drug	Active	--	Allergy	--	--
Mice	--	Environment	Active	--	Allergy	--	--
Milk of Magnesia-Cascara	--	Food	Active	--	Allergy	--	--
Multi-Symptom Cold Relief (obsolete)	--	Drug	Active	--	Allergy	--	--

## Activity 4.3 – Results Review

- 1 Click on the **Results Review** tab to review recent results, lab results, vitals, etc.



- 2 The **Results Review** screen opens. Results Review is a repository of all results charted in the Electronic Health Record (EHR), including lab, diagnostic imaging, documents and clinical information (e.g. vital signs, measurements, lines and tubes).

### 1. Tabs

On the top of the page there are tabs that display different results such as **Recent Results, Labs, Vitals, Assessment View** and more.

### 2. Navigator

The Navigator is a list of categories that serves as an electronic index. The index will only display items with available results.

### 3. Results Display

Displays results against a time continuum. Results are displayed in a spreadsheet/ flowsheet.

### 4. Graph and Flowsheet Seeker icon

Click on the different **Tabs** to learn more about the patient.

The screenshot shows a patient chart for 'TEST, CINDY' with a 'Results Review' window open. The window displays a table of measurements and vital signs for three dates: 2017-Aug-14 13:55 PDT, 2017-Aug-15 12:40 PDT, and 2017-Aug-14 13:58 PDT. Red boxes and numbers 1-4 highlight specific UI elements: 1 points to the 'Vitals - Recent' tab, 2 points to the 'Quick View' button, 3 points to the table header, and 4 points to the 'Results Review' window title bar.

	2017-Aug-14 13:55 PDT	2017-Aug-15 12:40 PDT	2017-Aug-14 13:58 PDT
<b>Measurements</b>			
Height/Length Measured	170	170	
Weight Measured	60		
Pre-Pregnancy Weight		64	
Body Surface Area Measured	1.68		
Body Mass Index Calculated Pre-Pregnancy		22	
Body Mass Index Measured	21		
<b>Vital Signs</b>			
Respiratory Rate			20
<b>Basic Oxygen Information</b>			
Oxygen Therapy			Ambient oxygen
SpO2			90

## Activity 4.4 – Reviewing Orders

- 1 Click **Orders** to review order's profile in the **Menu List**.

The screenshot shows a clinical information system interface for a patient named TEST, CINDY. The interface includes a menu on the left, a patient header, and a main area with a 'View' window and an 'Orders' table. Red circles and arrows highlight the 'View' window and the 'Check Interactions' button.

Order Name	Status	Dose	Details	Last Updated
Admit/Transfer/Discharge	Ordered		2017-Jul-27 10:45 PDT, Home Independently	2017-Jul-27 10:45 PDT
Discharge Patient	Ordered		Admit to Inpatient	2017-Jul-25 11:33 PDT
Status	Ordered		Code Status: No CPR - May Intubate, Critical Care	2017-Jul-25 11:16 PDT
SRS Alert	Ordered		SRS Criteria: 04/07/21 10:26:00 Heart Rate Monitored = 150 bpm (H) [greater than...]	2017-Jul-04 10:27 PDT
Patient Care	Ordered		Morse Fall Risk Assessment	2017-Jul-25 11:51 PDT
Monitor Intake and Output	Ordered		2017-Jul-25 11:16 PDT, q4h	2017-Jul-25 11:16 PDT
Height/Length	Ordered		2017-Jul-25 11:16 PDT, on admission	2017-Jul-25 11:16 PDT
Pain Assessment	Ordered		2017-Jul-25 11:16 PDT, q4h, if patient expresses pain, use Numeric Rating Scale with ...	2017-Jul-25 11:16 PDT
Weight	Ordered		2017-Jul-25 11:16 PDT, Stop: 2017-Jul-25 11:16 PDT, On admission	2017-Jul-25 11:16 PDT
Cardiorespiratory Monitoring	Ordered		2017-Jul-25 11:16 PDT, Remains on at all times	2017-Jul-25 11:16 PDT
POC Glucose Whole Blood	Ordered		2017-Jul-25 11:16 PDT, Stop: 2017-Jul-25 11:16 PDT, As per blood glucose frequency ...	2017-Jul-25 11:16 PDT
Oximetry - Continuous (Pulse Oximetry Conti...	Ordered		2017-Jul-25 11:16 PDT	2017-Jul-25 11:16 PDT
Vital Signs	Ordered		2017-Jul-25 11:16 PDT, q4h	2017-Jul-25 11:16 PDT
Sedation Assessment (Richmond Agitation S...	Ordered		2017-Jul-25 11:16 PDT, q4h and PRN	2017-Jul-25 11:16 PDT
Richmond Agitation Sedation Scale Goal (RA...	Ordered		2017-Jul-25 11:16 PDT, RASS goal of 0, Alert and Calm	2017-Jul-25 11:16 PDT
Intensive Care Delirium Screening Checklist	Ordered		2017-Jul-25 11:16 PDT, BID, to be done at 0600 and 1600 and as needed	2017-Jul-25 11:16 PDT
POC Glucose Whole Blood (POC Capillary BL...	Ordered		2017-Jul-20 10:54 PDT, once, Stop: 2017-Jul-20 10:54 PDT	2017-Jul-20 10:55 PDT
POC Urine Pregnancy Test	Ordered		2017-Jul-19 15:41 PDT, once, Stop: 2017-Jul-19 15:41 PDT	2017-Jul-20 10:55 PDT
Hospital High Utilizer	Ordered		2017-Jul-04 10:20 PDT, Stop: 2017-Jul-04 10:20 PDT	2017-Jul-04 10:20 PDT
Basic Admission Information Adult	Ordered		2017-Jul-04 10:20 PDT, Stop: 2017-Jul-04 10:20 PDT	2017-Jul-04 10:20 PDT
Admission History Adult	Ordered		2017-Jul-04 10:20 PDT, Stop: 2017-Jul-04 10:20 PDT	2017-Jul-04 10:20 PDT
Infectious Disease Screening	Ordered		2017-Jul-04 10:20 PDT	2017-Jul-04 10:20 PDT

1. The **View** window on the left displays the different types of orders. The items with a **Checkmark** and **Bolded** have an order in that category. There are various categories of Orders which may be displayed including **Suggested Plans** (orders in a planned state), **Orders for Signature** (orders requiring a sign off), and then a listing of **Orders** (active orders on the patient profile).
2. The window on the right displays the list of orders. When you hover your pointer (“**Hover to Discover**”) over specific icons, a message will appear telling you their functionality.

Hover over the below icons to learn about what it refers to.



This order is part of an Order Set



This order is yet to be reviewed by clinician

## Activity 4.5 – Reviewing Single Patient Task List (SPTL)

- 1 The **Single Patient Task List (SPTL)** is a list of tasks for an individual patient. When you open SPTL you will see:
  1. **Task List toolbar**
  2. **Time Frame** for the tasks to be displayed.
  3. **Task Tabs**
  4. **Task List**

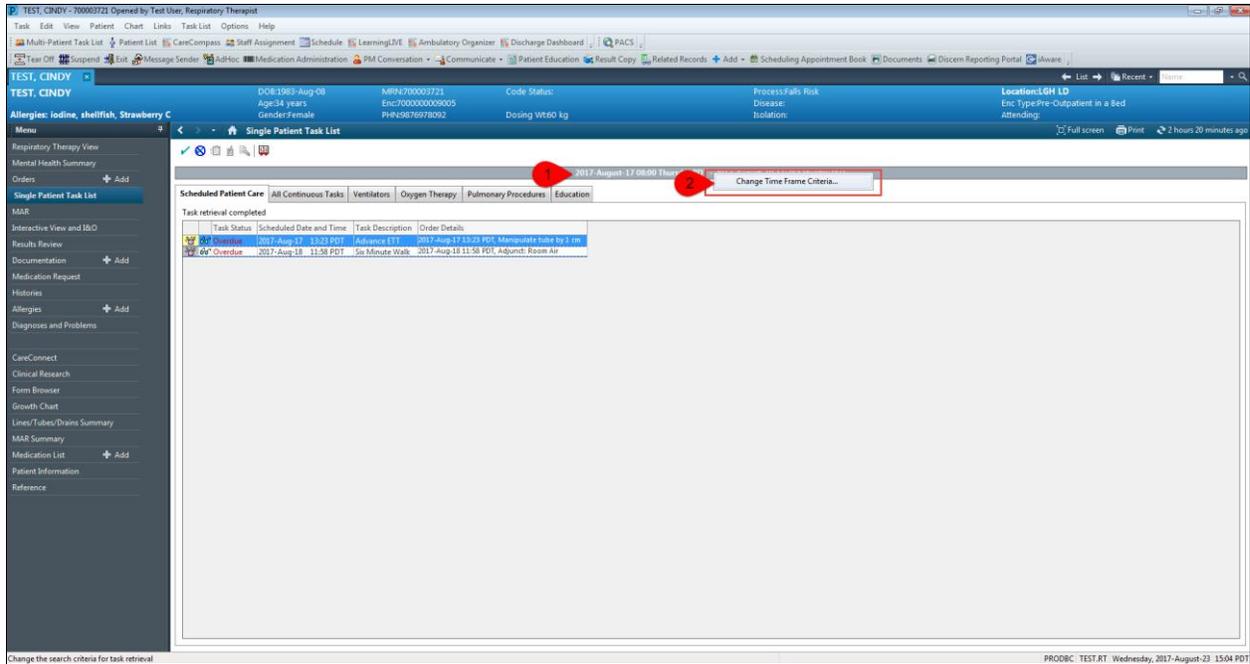
Change the search criteria for task retrieval

PROOBC TEST\_RT Wednesday, 2017-August-23 14:44 PDT

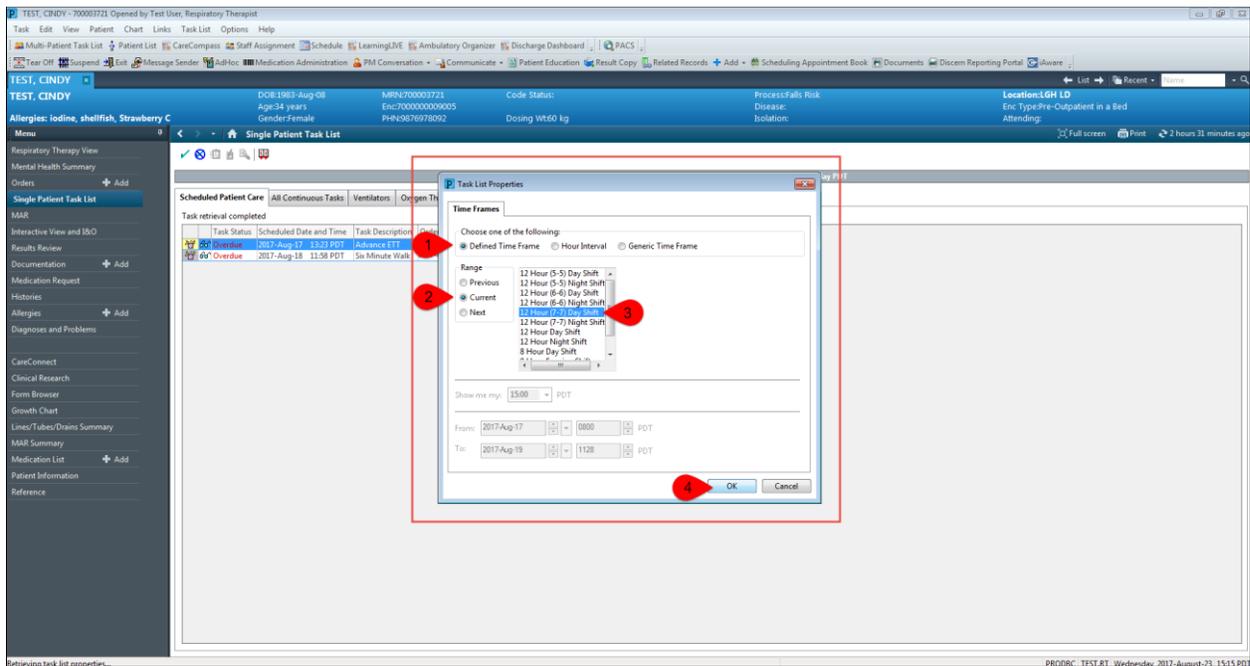
**Note:** Hover over the different icons and to find out more and what you may need to do. Hover over the below icons to learn about what it refers to.

 This order is yet to be reviewed.

- 2 **Time Frame** can be changed by right clicking the date and select **Change Time Frame Criteria**.



The Task List Properties window opens and you can change or update the criteria.



## Activity 4.6 – Reviewing MAR Summary

- 1 Click **MAR Summary** in the **Menu List** to access **Medication Administration Record (MAR) Summary**. **MAR Summary** displays a condensed view of medication administration information so that you can view a high-level overview of the medications that are prescribed for the patient.

The screenshot shows the 'MAR Summary' interface for Patient C. The menu on the left has 'MAR Summary' highlighted with a red arrow. The main area displays a table of medication orders. The table has columns for time periods: 01-Nov-2017, 01-Nov-2017, 31-Oct-2017, 31-Oct-2017, 30-Oct-2017, 30-Oct-2017. The rows show medication details: acetaminophen (TYLEN...), 325 mg PO q6h, drug form: oral liq, start: 26-Oct-2017 11:19 PDT. The table also shows scheduled times and medication administration times.

Time View	01-Nov-2017	01-Nov-2017	31-Oct-2017	31-Oct-2017	30-Oct-2017	30-Oct-2017
Scheduled	1200 - 2359	0000 - 1159	1200 - 2359	0000 - 1159	1200 - 2359	0000 - 1159
Medication	01400	02000	01400	01400	01400	01000
Medication	01800	01600	01800	01800	01800	01600
Medication	02200	01800	02200	02200	02200	01800

Now that you know how to get to the **MAR Summary**, you can review patient medication orders.

1. **Hover to Discover** over the medication and administration times to
2. learn more about the medication order information.

**Note:** You can click on the **Navigator**  button to change the time frame.



## Activity 4.7 – Reviewing Documentation

- 1 Documentation can include provider notes, nurse notes, clinician notes, completed forms, assessments, and more. Click on **Documentation** in the **Menu List** to open the screen.
  1. Select the document that you want to review under the **List** tab and the document will open in the window to the right.
  2. Select any document in the **List** box and
  3. review what was documented on the patient. You can also print the document by clicking on the printer icon just underneath the Banner Bar, on the top right hand corner.

The screenshot displays a clinical information system interface for a patient named CSTEDHONG, FRANK. The top banner shows patient demographics: DOB: 20-Feb-1990, Age: 27 years, Gender: Male, Enc: 700000016207, PHN: 9876181168, Code Status: Dosing: WE80 kg, Process/Violence Risk: Isolation/Airborne and Contact, Location: LGH ED, FA: 905, Enc Type: Emergency, Attending: TestED, Emergency-Physician7, MD. The left sidebar contains a 'Menu' with 'Documentation' highlighted (marked with a red circle 1). The main area is split into a 'List' of documents (marked with a red circle 2) and a 'Preview' of a selected document (marked with a red circle 3). The 'List' table has columns for Service Date/Time, Subject, Type, and Facility. The 'Preview' shows details for 'ED Screening - Adult' performed on 08-Dec-2017 15:07 PST by TestED, Nurse-Emergency7. The document content includes sections for General Assessment, ID Risk Screen, Immunocompromised status, and Communicable Disease. A 'Print' icon is visible in the top right corner of the preview area (marked with a red arrow).

Service Date/Time	Subject	Type	Facility
12-Dec-2017 16:44:00 PST	consult complex wrist reduction	ED Note Provider	LGH Liens G
08-Dec-2017 14:50:00 PST	ED Screening - Adult	ED Screening - Adult - Text	LGH Liens G
08-Dec-2017 08:50:00 PST	ED Triage - Adult	ED Triage - Adult - Text	LGH Liens G
07-Dec-2017 08:43:00 PST	ED Note	ED Note Provider	LGH Liens G
05-Dec-2017 13:17:24 PST	ED Patient Summary	ED Patient Summary	WHC, Whist
05-Dec-2017 13:15:29 PST	ED Patient Summary	ED Patient Summary	LGH Liens G
27-Nov-2017 11:47:03 PST	ED Patient Summary	ED Patient Summary	LGH Liens G
20-Nov-2017 16:20:00 PST	Transport Ticket	Transport Ticket - Text	LGH Liens G
14-Nov-2017 13:45:31 PST	ED Patient Summary	ED Patient Summary	LGH Liens G
14-Nov-2017 10:03:22 PST	ED Patient Summary	ED Patient Summary	LGH Liens G
09-Nov-2017 10:49:48 PST	XR Chest	XR Chest	LGH Liens G
01-Nov-2017 10:18:36 P...	ED Patient Summary	ED Patient Summary	LGH Liens G
31-Oct-2017 16:29:25 PDT	ED Patient Summary	ED Patient Summary	LGH Liens G
28-Oct-2017 22:00:00 PDT	ED Screening - Adult	ED Triage - Adult - Text	LGH Liens G
28-Oct-2017 21:53:00 PDT	ED Triage - Adult	ED Triage - Adult - Text	LGH Liens G
27-Oct-2017 12:37:00 PDT	ED Note	ED Note Provider	LGH Liens G
27-Oct-2017 12:07:00 PDT	ED Note - WorksafeBC	ED Note WorksafeBC	LGH Liens G
25-Oct-2017 12:42:56 PDT	ED Patient Summary	ED Patient Summary	LGH Liens G
25-Oct-2017 12:42:00 PDT	ED Triage - Adult	ED Triage - Adult - Text	LGH Liens G
24-Oct-2017 14:43:00 PDT	ED Screening - Adult	ED Triage - Adult - Text	LGH Liens G
24-Oct-2017 14:39:00 PDT	ED Triage - Adult	ED Triage - Adult - Text	LGH Liens G
20-Oct-2017 08:23:10 PDT	ED Patient Summary	ED Patient Summary	LGH Liens G
17-Oct-2017 14:17:32 PDT	ED Patient Summary	ED Patient Summary	LGH Liens G
16-Oct-2017 14:10:38 PDT	ED Patient Summary	ED Patient Summary	LGH Liens G
16-Oct-2017 12:47:00 PDT	ED Screening - Adult	ED Triage - Adult - Text	LGH Liens G

## Key Learning Points

- Remember to click the Refresh  icon each time when you are in the patient's chart, to get the most updated information.
- The Patient Summary view provides at-a-glance information on the patient.
- You can click on the different tabs in the table of contents to access more detailed information on the patient.
- Results are displayed in different tabs. If the results are not in the recent results tab, use the other appropriate tabs to look for results.
- Hover to discover on specific icons, a message will appear telling you what they mean.
- Orders are viewable by categories, including suggested, Orders for Signature, and Active Orders.
- Orders have icons associated with them if there is specific information required to know about a particular order.
- If tasks are not displayed in the Single Patient Task List check all the tabs and change the Time Frame if needed.

## ■ PATIENT SCENARIO 5 – Scheduling appointments to Medical Day Care (MDC)

### Learning Objectives

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

- Log in and out of Schapptbook
- See an overview of Schapptbook Interface
- Schedule appointments (pre-requisite steps to book an appointment)
- Three methods of booking an appointment (drag and drop, suggest, and schedule)
- Confirm booking an appointment
- Request Lists

### SCENARIO

Dr. Test wrote an order for patient: **ED-UC-B, Kelly/Sonia/Gladys** to go to Medical Day Care tomorrow for an IV antibiotic infusion for his/her right leg cellulitis. **Note:** depending on where you work, the ED Physician may send the patient to MDC for the remaining antibiotic treatments and to be reassessed by the ID provider there or they may tell the patient to come back to the ED for the remaining medication treatment and to be reassessed in ED again. You will only schedule the first appointment for patients that are going to MDC. Any changes/cancellations needed after will be done at MDC.

You will be completing the following activities:

- Log in and out of Schapptbook
- See an overview of Schapptbook Interface
- Schedule appointments (pre-requisite steps to book an appointment)
- Three methods of booking an appointment (drag and drop, suggest, and schedule)
- Confirm booking an appointment
- Request Lists

## Activity 5.1 – Log in and out of SchApptBook

### 1 Logging in:

Double-click on the SchApptBook icon  to open the application.

### 2 Logging out:

When you have completed your activities, remember to log out of the application you are working on for security purposes. Logging out can be done in one of the following two ways:

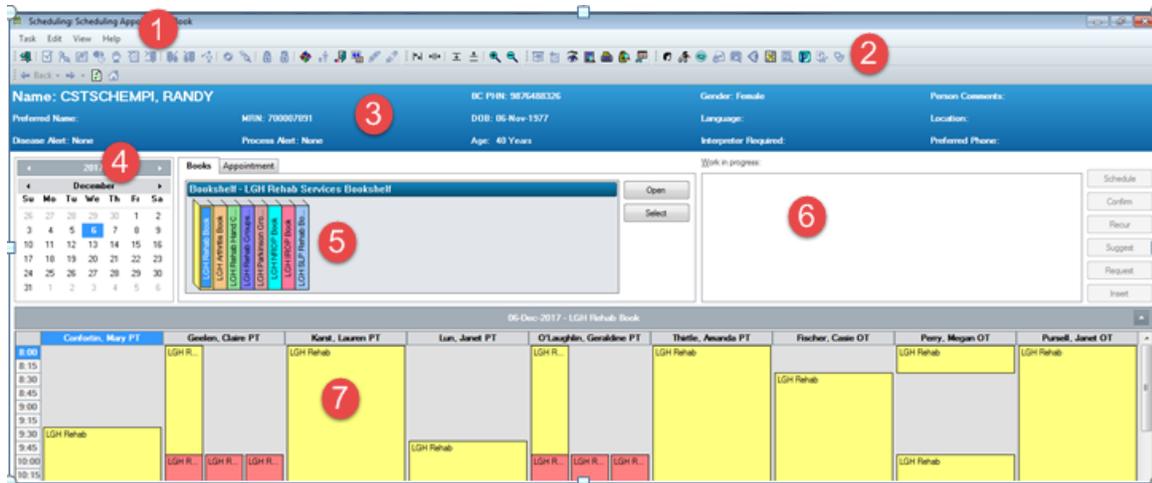
1. From the toolbar, you may select the **Exit** icon (recommended to avoid locking the patient

record). 

2. You may also click the  in the upper right hand corner of your screen.

## Activity 5.2 – Overview of SchApptBook interface

- 1 When you log-in to the Scheduling Appointment Book application, the Scheduling Appointment Book window displays:



1. **Menu Bar:** includes Task, Edit, View and Help options.
2. **Toolbar:** includes buttons or other window elements (such as Person Management, Request List Inquiry, Modify, Cancel, Reschedule, Print, Shuffle, Create Group Session, Swap Resources, and Exit) to facilitate accomplishing a task.
3. **Demographics Bar:** displays Patient's Name, Age, Date of Birth, Gender and MRN.
4. **Calendar:** assists in booking appointments by the days, weeks and months of a particular year.
5. **Bookshelf:** contains the Scheduling Appointment Books that are used to schedule and manage appointments.
6. **Work in Progress (WIP):** an area where a partially completed appointment resides until you are ready to book and confirm it.
7. **Scheduling Grid:** contains Resource (person, equipment, room/place) schedules. This is where appointments are scheduled and managed.

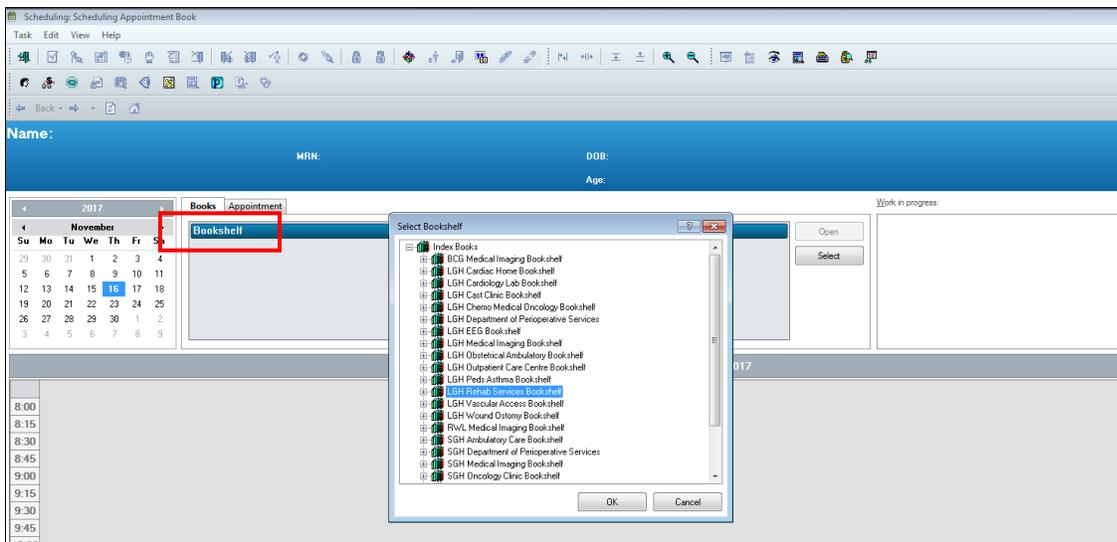
## Activity 5.3 – Scheduling appointments (prerequisite steps for booking an appointment)

- 1 There are several different methods for scheduling an appointment within the Scheduling Appointment Book application. This section will discuss each of those methods and explain when one method should be used over the others.

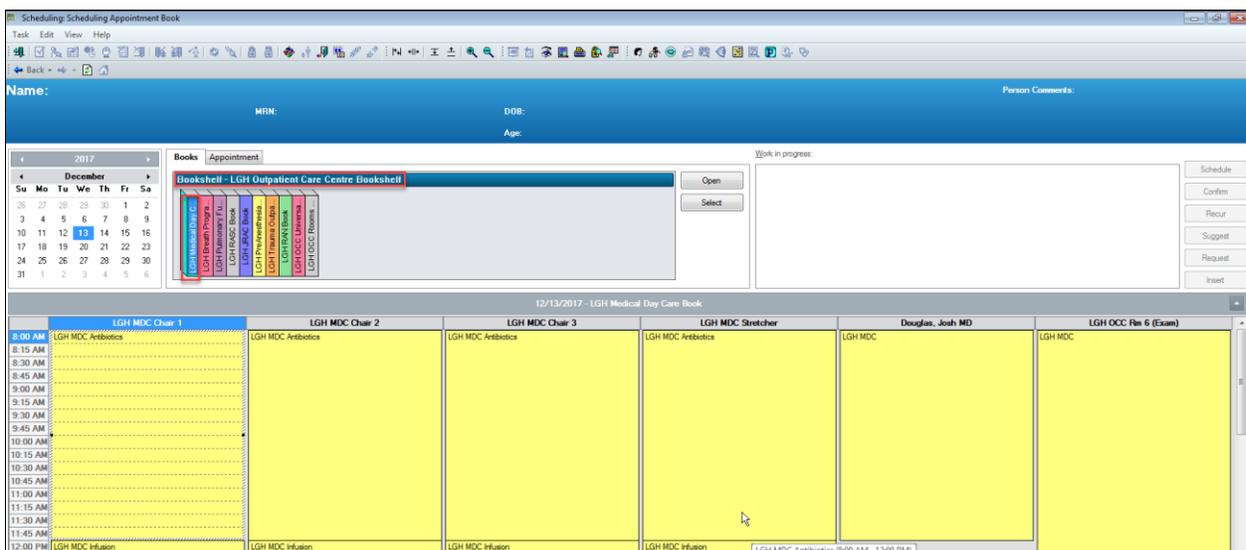
### Pre-requisite Steps for Booking an Appointment

These are the pre-requisite steps for booking an appointment prior to selecting one of the three methods.

1. Click on the **Bookshelf** banner to select a Bookshelf.
2. Select the appropriate **Bookshelf** and click **OK**.



3. Double-click on a **Book** to open.



4. Click the Appointment tab

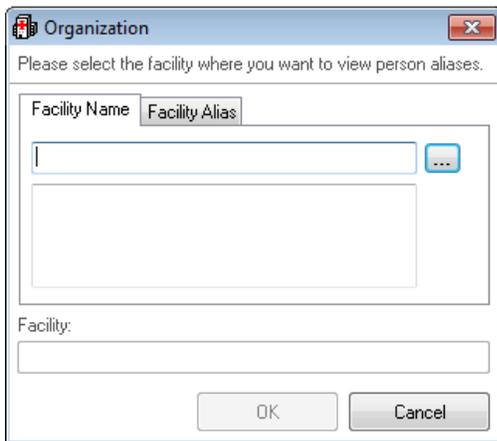
Appointment

Activity 5.3 – Scheduling appointments (prerequisite steps for booking an appointment)

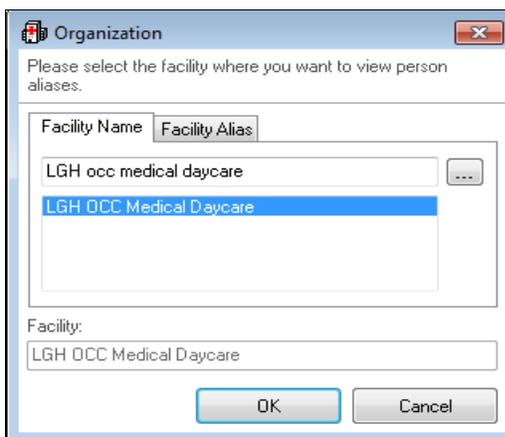
- The first few fields of required information appear in the window. You may begin to schedule the appointment here.

**NOTE:** Mandatory fields are marked with red asterisks (\*) indicating you will need to complete these fields in order to move to the next step of scheduling an appointment.

- Click the **Ellipsis** button beside the Person name field 
- Search for the patient, by entering the **PHN**, then click **OK** (if you do not have a PHN, search by partial last name and first name or date of birth and gender).
- If you have found the correct patient, click only **ONCE** on their name to select, then click **OK**.  
**NOTE:** Refer to Registration’s EMPI Reference material to learn about requesting a new PHN for a brand new patient. Approximately 99% of all **BC** Residents are registered in the EMPI.
- The Organization window appears. Click the ellipsis.

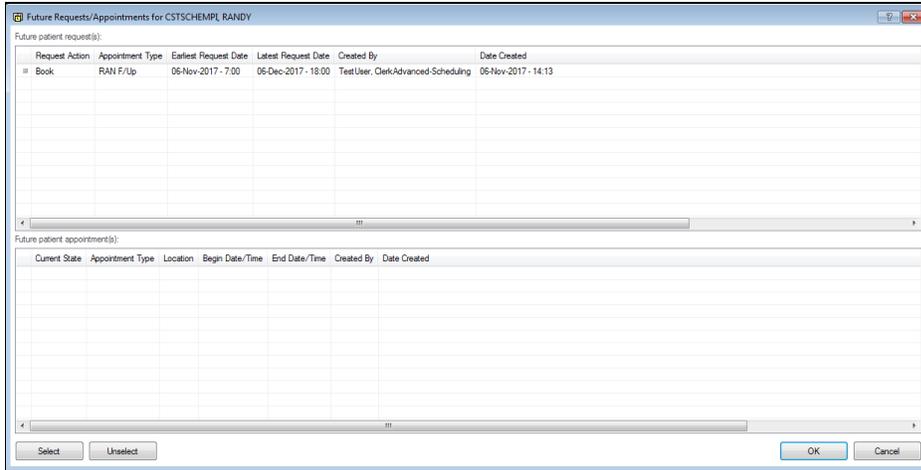


- Scroll down through the list of the clinics until you see your clinic name, click on it to select it, then click **OK**.



- The EMPI window will appear momentarily as your patient is checked against the EMPI database.
- The Future Requests/Appointments window will appear for the patient if they have appointments that are booked in the future. Click **OK** to close the window.

PATIENT SCENARIO 5 – Scheduling appointments to Medical Day Care (MDC)  
 Activity 5.3 – Scheduling appointments (prerequisite steps for booking an appointment)

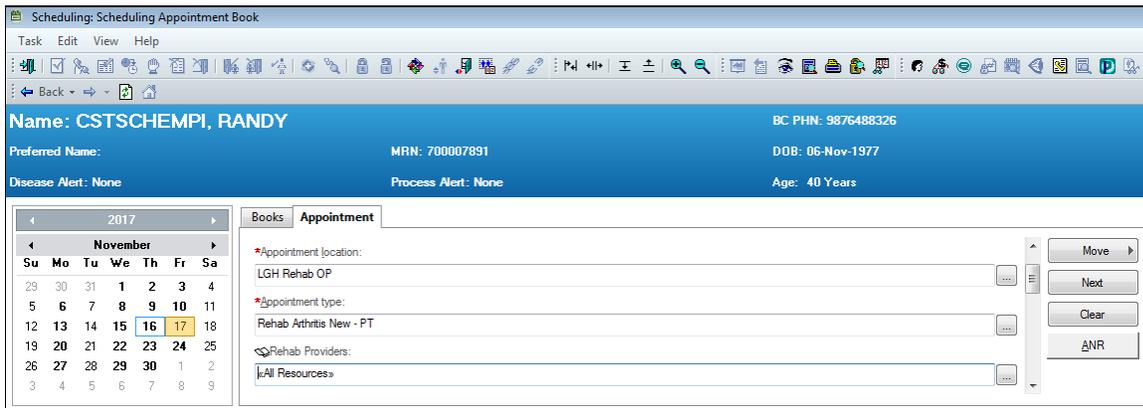


13. The patient’s name will now display in the **Person Name** field.

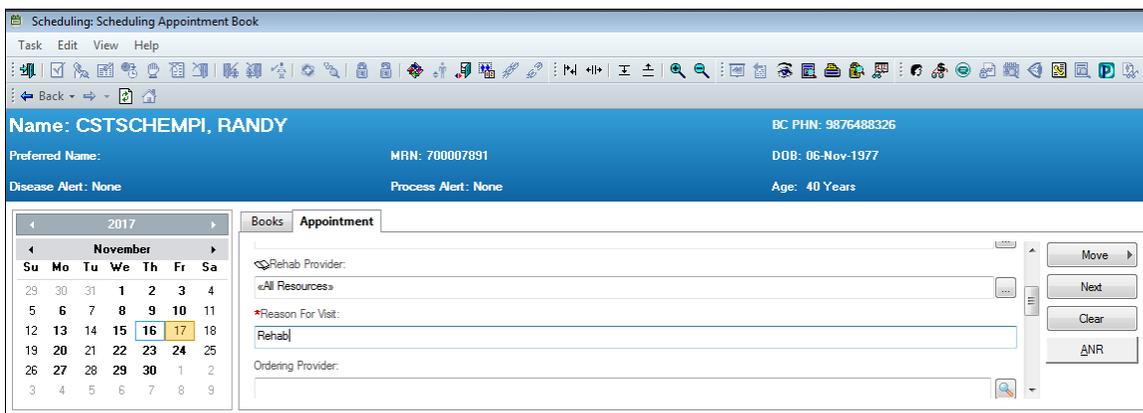
14. Click the **ellipsis** button beside the **Appointment Location** field and double click on your clinic location name to select as the appointment location.

**NOTE:** If there is only one valid location for the Appointment Type you selected, then the Appointment Location will automatically default and you will not be required to select one.

15. Select the **ellipsis** beside the **Appointment Type** field and double click on an appointment type to select.

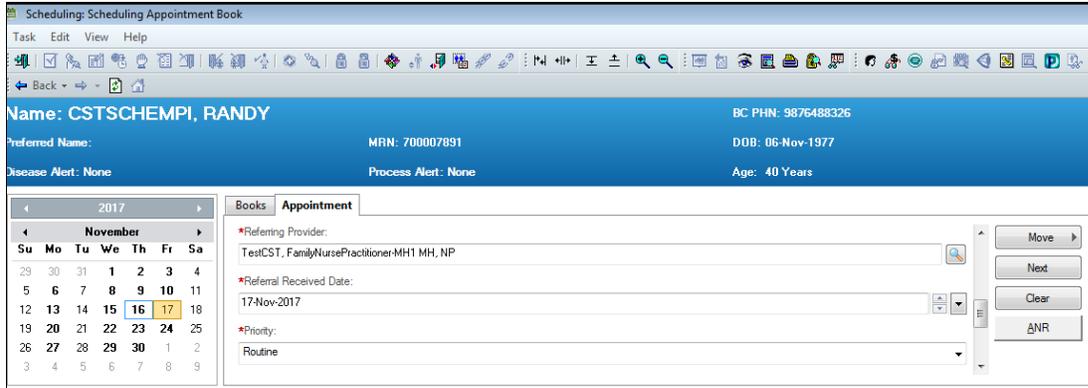


16. Scroll down to add a **Reason for Visit**. Press **TAB** to move to the next field.

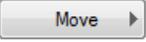


17. Scroll down to enter Referring Provider, Referral Received Date and Priority fields.

Activity 5.3 – Scheduling appointments (prerequisite steps for booking an appointment)



18. Scroll down to find **Interpreter Required** field and select **No**

19. Click on the **Move** button  to move the appointment request information in **Work In Progress (WIP)** area.

Activity 5.4 – Three methods of booking an appointment (drag and drop, suggest, and schedule)

**Activity 5.4 – Three methods of booking an appointment (drag and drop, suggest, and schedule)**

1

**Note:** once the appointment information is in the WIP, use any of the following three methods (Drag & Drop, Suggest, Schedule) to move the request to a Pending status in the scheduling grid.

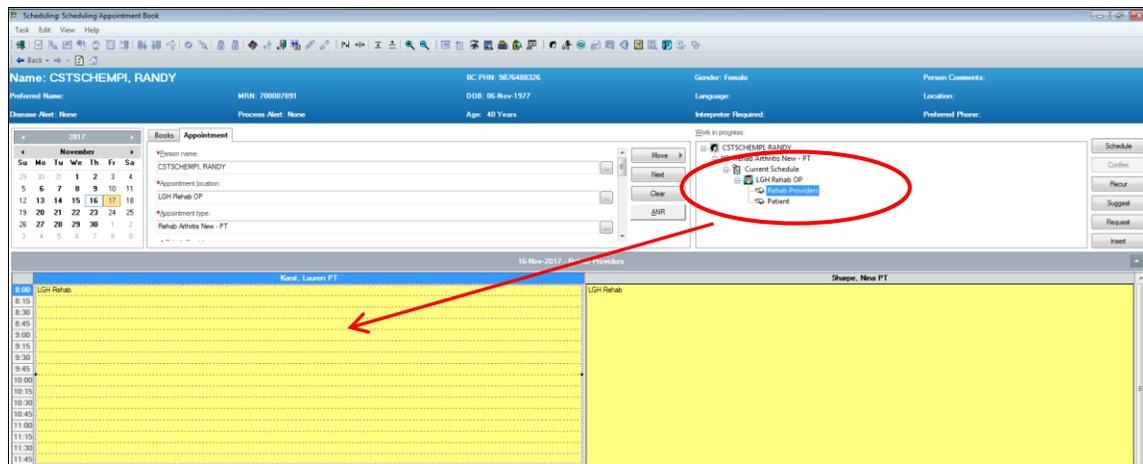
**Drag and Drop Method**

The drag and drop functionality is a quick and simple method for scheduling single appointments. It should be used when you need to schedule an appointment in a pre-determined date and time. This method works best for clinics that do not book appointments far into the future. This method is not recommended when an appointment is scheduled to multiple resources.

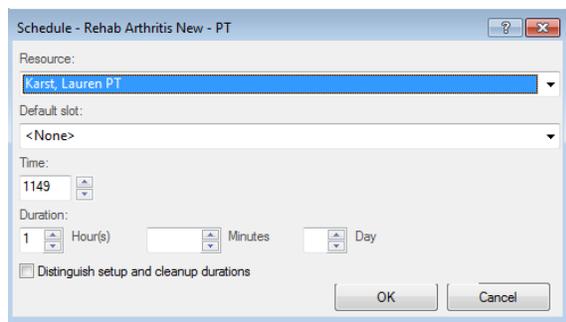
**Highlights:**

- Quick method for booking a single appointment.
- Allows you to schedule an appointment to a pre-determined date and time.
- Works well for clinics that do not book appointments far in advance.

Left click on the selected resource (the resource directly below the clinic name) and drag the cursor to the appropriate resource and start time.

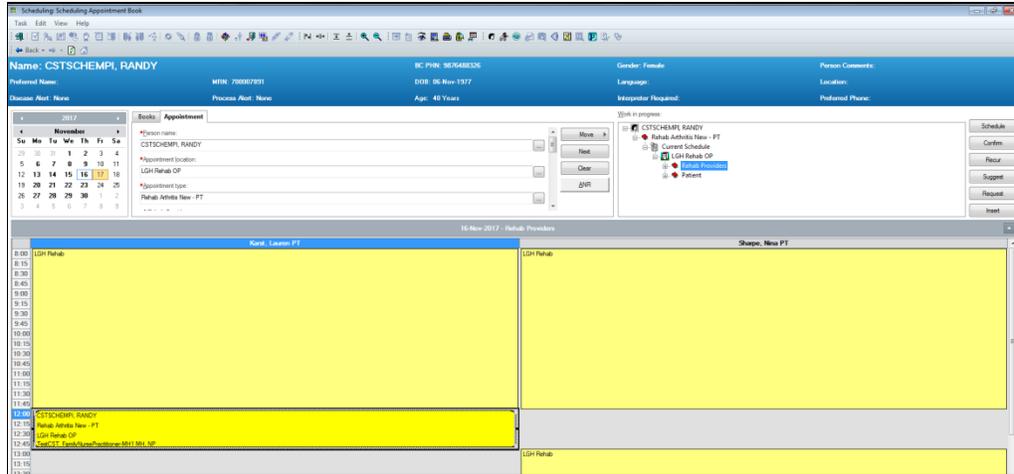


Once the mouse button is released, the Schedule window will display on the screen. Verify that the Resource and the time slot fields are correct. After reviewing the information, click **OK**.



The appointment will show in the slot in a pending state, which will be denoted by the red books in the **WIP**.

Activity 5.4 – Three methods of booking an appointment (drag and drop, suggest, and schedule)



The appointment will appear in the scheduling grid in a Pending state.

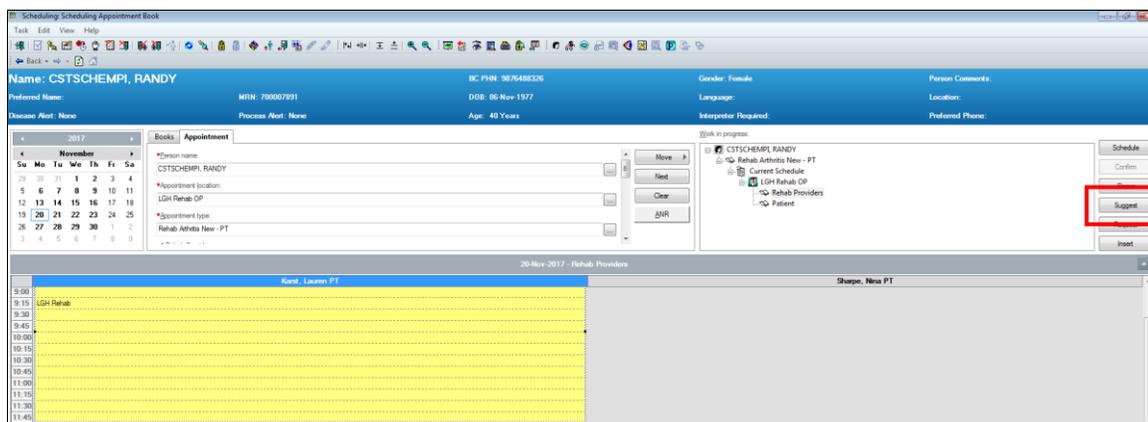
**2 Suggest Scheduling Method**

The system can suggest available times at which an appointment can be scheduled based on date and time parameters set. This provides available date and time options without having to search through the scheduling grid. This method is recommended for those areas where available appointment times are limited and also for more complicated appointments.

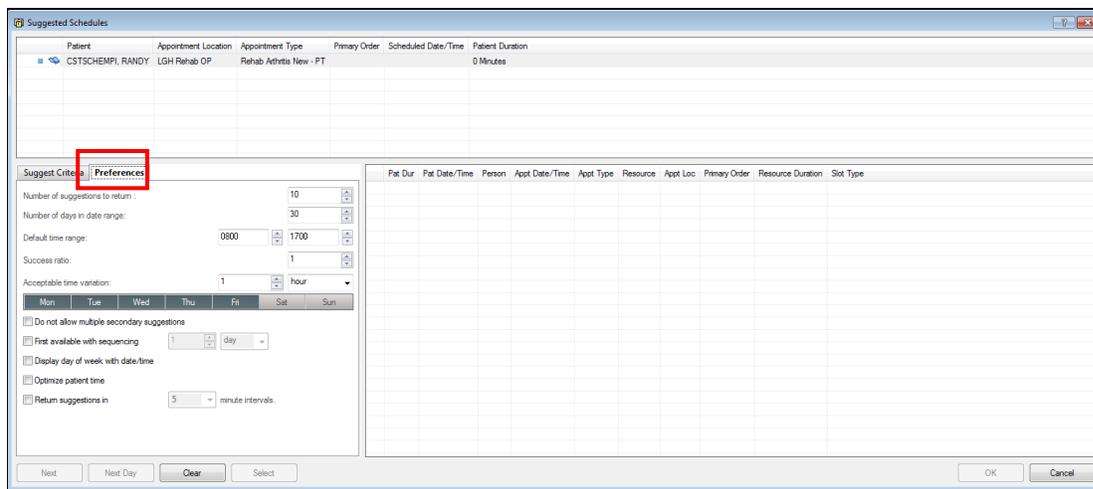
**Highlights:**

- Helps you to find the FIRST available appointment at the clinic.
- Allows you to set a date range for the appointment search.
- Avoids scheduling conflicts (resources/patients will never be double-booked).
- Results in the least amount of booking errors.

With your appointment in the Work In-Progress area, click the **Suggest** button to open the Suggested Schedules window.



If Preferences need to be modified (for example: the number of options returned), click on the Preferences tab in Suggested Schedules window.



Click  for the system to display suggested times that the appointment could be scheduled.

If the suggested times do not work, click **Next** to display the next available times.

If the suggested dates do not work, click **Next Day** to display the available times for the next day.

Once you have found a suggested date and time to use, click **Select**. Click **OK** to close the Suggested Schedules window and schedule the appointment.

The appointment will appear in the scheduling grid in a Pending state.

### 3 Schedule Button Method

The **Schedule** button allows the user to view the default selections such as duration and slot. Within one window, the user can verify or change the resource, duration, slot, and time using the dropdown boxes that display available options. It is the **least** recommended method for booking regular appointments as users can accidentally book appointments outside the slot which could result in double-booking.

#### Highlights:

- Allows you to pre-select the time slot you would like to schedule to.
- Allows you to view/modify the appointment Resource, Slot, Start time and Duration.
- Allows you to book appointments outside of slots when required.

With the appointment in the WIP, select the preferred time and resource in the scheduling grid and click the **Schedule** button.

Activity 5.4 – Three methods of booking an appointment (drag and drop, suggest, and schedule)

Schedule - Rehab Arthritis New - PT

Resource:  
Karst, Lauren PT

Default slot:  
LGH Rehab (8:00 - 12:00)

Time:  
0800

Duration:  
Hour(s) Minutes Day

Distinguish setup and cleanup durations

OK Cancel

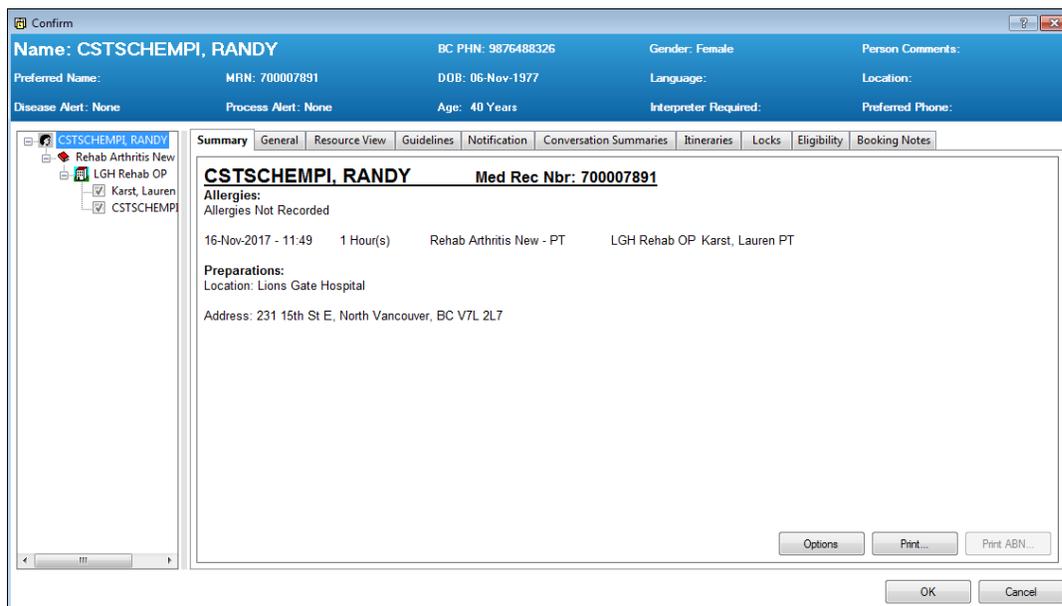
If necessary, modify any of the fields (Resource, Default Slot, Time and Duration) and click **OK**. The appointment will appear in the scheduling grid in a Pending state.

## Activity 5.5 – Confirming an appointment

1 Once the appointment moves to the Pending status in the scheduling grid (using any of the above three methods), follow the below steps to **Confirm** and create a **Pre-outpatient Encounter** for the appointment.

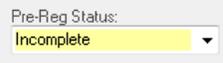
1. Click the  button to confirm the appointment. The Confirm window will display a summary of the appointment including any patient preparations/instructions.
2. Click **OK** in the Confirm window.

**NOTE:** At your clinic, you may print and give a copy to the patient by using the Print button at the bottom of this Summary page.



The screenshot shows a 'Confirm' window for patient CSTSCHEMPI, RANDY. The patient's details include BC PHN: 9876488326, Gender: Female, MRN: 700007891, DOB: 06-Nov-1977, Age: 40 Years, and Location: Lions Gate Hospital. The appointment is for 16-Nov-2017 from 11:49 to 12:49 at the Rehab Arthritis New - PT location. The window also displays a 'Preparations' section with the location and address of Lions Gate Hospital. At the bottom, there are buttons for 'Options', 'Print...', 'Print ABN...', 'OK', and 'Cancel'.

3. The Encounter Selection window will open with the patient's previous and current encounters. Click on the  button to create a new encounter for this appointment.
4. The External MPI window appears momentarily to ensure you have the most up-to-date demographics on the patient.
5. The Pre-Register Outpatient window will appear for you to complete the pre-registration. Only the Patient and Encounter Information tabs are necessary to complete a pre-registration.

6. Leave the Pre-Reg Status as Incomplete , since you do not have the patient here with you at this time, nor are you able to reach them by phone.

7. In the Patient Information tab  verify the demographic information on every visit as much as possible.
8. Click on the Encounter Information tab.
9. In the Location section, the Facility is auto-populated. Verify the Building and Unit/Clinic

are correct.

Location

Facility: **LGH Rehab OP** Building: **LGH Rehab OP** Unit/Clinic: **LGH Rehab OP**

10. In the Current Encounter Information section, complete the mandatory fields as below:

**Encounter Type:** Pre-Outpatient

**Medical Service:** select one from the drop-down list

Encounter Type: **Pre-Outpatient** Medical Service: **Occupational Therapy** Reason for Visit: **Rehab** Referral Source:

**Note:** the Reason for Visit carries over from the appointment.

11. The other fields are not mandatory on the Pre-outpatient Encounter.

**NOTE:** the Estimated Arrive Date and Time are auto-populated from appointment date and time.

12. Click **Complete** to finish.

13. The Document Selection window displays. Uncheck the “Do not Print Documents” checkbox to print any relevant documentation. Click **OK** to complete.

Document Selection

Document	Printer	Copies
<input checked="" type="checkbox"/> Armband Label	590_1stfl_I8	1
<input checked="" type="checkbox"/> Lab Blood Specimen Label	590_1stfl_I8	1
<input checked="" type="checkbox"/> Lab Non-Blood Specimen Label	590_1stfl_I8	1
<input checked="" type="checkbox"/> PHSA Facesheet	ph_590_k_I1-General	1

Do not print documents

Edit OK

14. The Pre-Register Outpatient window displays. Verify and click **OK**.

Pre-Register Outpatient

The following LGH Rehab Outpatient aliases have been assigned for CSTSCHEMPI, RANDY:

Encounter Number: 7000000015175  
Visit Id: 7000000015175

OK

## Activity 5.6 – Request Lists

1 Request Lists are a type of Inquiry that allow for a listing of appointment requests. Request lists are different than regular inquiries because they display requests for appointments rather than the booked appointments.

The requests for appointments can be generated automatically through an Order entered in FirstNet (refer to “Requests Generated Through Orders-to-Scheduling” section) or through an action performed in the Scheduling Appointment Book. The table below lists the standard Request List Queues that are available to all clinics.

Request List Queue	Description
Appointment Reviews	Automatically populated with review requests. These requests are generated when the associated order in FirstNet is modified by the Provider.  (Only to be used by clinics that schedule medication infusions such as MDC and Oncology.)
Cancellation List	Manually populated with patients who have a scheduled appointment but have requested an earlier appointment if one becomes available.  Refer to the Cancellation List Quick Reference Guide for more information.
Future Requests	Automatically populated with requests that have been generated via an order (Referral, Follow-up or Procedure order).  Manually generated requests can also be added to this list.
Reschedule Requests	Automatically populated with patients/appointments that have been No Showed or displaced due to a template change.
Triage List	Manually populated with requests that have been moved over from the Future Request list.  This list should be used by clinics that need to triage requests they receive via orders.
Waitlist	Manually populated with patients that could not be scheduled when the referral was received.  This list is populated by manually generated Requests or by moving a Request from another queue such as Future Requests.

## 2 Open a Request List

Request lists are a type of Inquiry. Therefore, the steps outlined in the Appointment Inquiry section could be used to open a Request List. The following steps are used to access the Request List directly.

1. Click on the **Request List Inquiry** icon located in the Toolbar. The “Schedule Inquiry window” will open.



2. The Inquiry field should default to “Request List by Location.” Keep this Inquiry to run a Request List for a specific clinic. The other Inquiries do not filter by Location so they could be very long.

**Request List**

Inquiry:  
Request List by Location

Request List Queues:

3. Select the appropriate **Request List Queue** (refer to the table above for a brief description of the most common Request Lists).
4. Select the appropriate **Location Type** and select the appropriate clinic from the **Location** dropdown.
5. Click the **Find** button. All appointment requests that meet the search criteria are displayed.

Schedule Inquiry - Request List by Location

Task Edit View Help

Name: Person Comments:

MRN: DOB:

Age:

**Request List**

Inquiry:  
Request List by Location

Request List Queues:  
Future Requests

Location type:  
Ambulatory(s)

Location:  
LGH RAN

Find Clear Close

MRN	Person Name	Appointment Type	Order	Priority	Received Date
700000659	CSTSCHYURI, ST-ONE	RAN F/Up	Follow Up - Clinic	Routine	
700000659	CSTSCHYURI, ST-ONE	RAN New	Referral to Neurology	Routine	18-Jul-2017 - 8:39
700000659	CSTSCHYURI, ST-ONE	RAN New	Referral to Neurology	Routine	19-Jul-2017 - 11:45
700001007	CSTPRODSCH, TESTKG	RAN New	Referral to Neurology	Urgent (less than 1 month)	03-Aug-2017 - 12:04
700006727	CSTMATTEST, TESTUSER	RAN New	Referral to Neurology	Routine	10-Oct-2017 - 10:37
700007575	SPIEGEL, SPIKE	RAN New	Referral to Neurology	Routine	20-Oct-2017 - 15:08
700006640	CSTAMBTTEST, JAMIE	RAN New	Referral to Neurology	Emergent (less than 1 week)	21-Nov-2017 - 16:05
700008318	AMBTTEST, DEMO	RAN New	Referral to Neurology	Urgent (less than 1 month)	27-Nov-2017 - 15:15

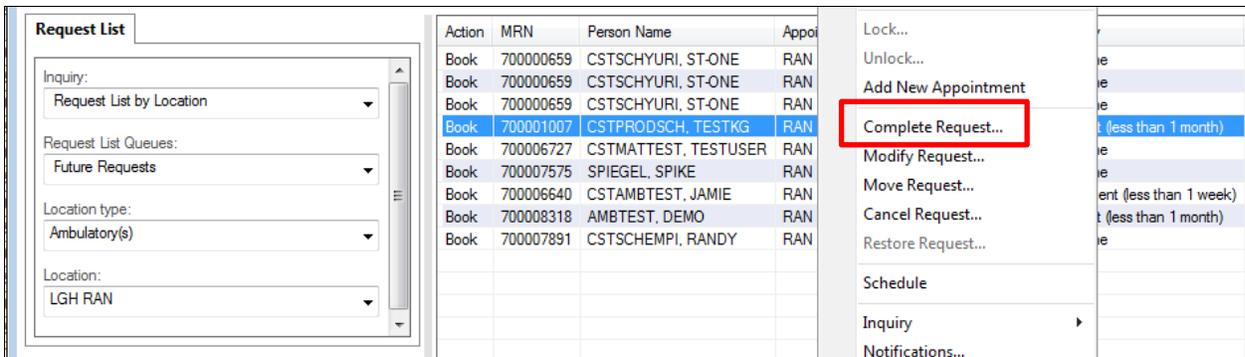
### 3 Requests Generated Through Orders-to-Scheduling

The “Orders to Scheduling” functionality allows for an automatic appointment request to be sent to Cerner Scheduling Management when an order is placed in FirstNet. A scheduler can then view the request in their clinic-specific queue and schedule it according to the provider’s instructions. The Orders to Scheduling workflow can be useful in the following scenarios:

- Clinic to Clinic: For example, a specialty clinic referral.
- Discharge Follow Up: For example, an inpatient is discharged and is referred to a clinic to be seen as an outpatient.
- Internal Clinic Follow Up: For example, after seeing a patient in the clinic the provider requests a follow-up appointment.

### 4 Schedule an Appointment from a Request List

1. Follow the steps outlined in the “[Open Request List](#)” section above.
2. Right-click the person you want to schedule and select **Complete Request**.



3. If the “Future/Requests/Appointments” window opens, click **OK**.
4. The “Appointment Attributes” window will open if there are mandatory fields that have not been entered. Fill in the fields and click **OK**.

**NOTE:** Copy and paste the Ordering Provider into the Referring Provider field.

The screenshot shows the 'Appointment Attributes' dialog box with the 'Details' tab selected. The left pane shows a tree view with 'CSTPRODSCH, TESTKG' and 'Neuro New'. The main area contains the following fields:

- \*Reason For Visit: ran
- Ordering Provider: TestUser, Neurologist-Physician, MD
- \*Referring Provider: (empty)
- \*Referral Received Date: 03-Aug-2017
- \*Priority: Urgent (less than 1 month)
- \*Interpreter Required?: No
- Language: (empty)
- Special Instructions: Patient was contacted Nov 19/17

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog.

5. The appointment opens in the WIP.

The screenshot shows the 'Work in progress' window with the 'Appointment' tab selected. The left pane has the following fields:

- Appointment type: Neuro New
- RAN Provider: «All Resources»
- \*Reason For Visit: ran

The central pane shows a tree view:

- CSTPRODSCH, TESTKG
  - Neuro New (Thursday, 03-Aug-2017)
    - Current Schedule
      - LGH RAN
        - RAN Provider
          - OCC Rooms
            - Patient

Buttons for 'Move', 'Next', 'Clear', and 'NKA' are in the center. Buttons for 'Schedule', 'Confirm', 'Recur', 'Suggest', 'Request', and 'Insert' are on the right.

6. From this point, any of the scheduling methods can be used to complete the booking. However **Suggest** is recommended because the date range will default to the dates entered by the ordering Provider.

## 5 Cancel a Request

Follow the steps below to move a request from one Request Queue to another.

**NOTE:** Once a request is cancelled, it cannot be un-cancelled. If a request is cancelled in error, a new request must be created either from the Scheduling Appointment Book or from an order in FirstNet.

1. Right-click on the appropriate request and select **Cancel Request**. The “Cancel” window will open.

Cancel

**Name:** CSTPRODSCH, TESTKG      BC PHN: 9878393779      Gender: Female      Person Comments:

Preferred Name:      MRN: 700001007      DOB: 01-Nov-2016      Language:      Location:

Disease Alert: None      Process Alert: None      Age: 13 Months      Interpreter Required:      Preferred Phone: (778) 123-4567

General Summary Details Orders Guidelines Notification Conversation Summaries Itineraries Locks Booking Notes

\*Cancel reason:

Comments:

Person Name	MRN	Home Phone	Enc Type	Encounter Number	VIP
CSTPRODSCH, TESTKG	700001007	(604)556-4322	Pre-Outpatient	7000000012817	

View      Modify      Cancel Enc

2. Select a “**Cancel reason**” from the drop down menu and click **OK** to remove the Request from the List.

### Key Learning Points

- There are pre-requisite steps for booking an appointment.
- Once the appointment information is in the **Work in progress** box, use any of the following three methods (Drag & Drop, Suggest, Schedule) to move the request to a Pending status in the scheduling grid.
- Once the appointment moves to the pending status in the scheduling grid, you need to confirm and create a pre-outpatient encounter for the appointment.
- Request Lists are a type of Inquiry that allow for a listing of appointment requests. Request lists are different than regular inquiries because they display requests for appointments rather than the booked appointments.

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## End of Workbook One

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