SELF-GUIDED PRACTICE WORKBOOK [N47] CST Transformational Learning

WORKBOOK TITLE: Unit Clerk: Emergency





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SELF-GUIDED PRACTICE WORKBOOK

Duration	4 hours
Before getting started	 Sign the attendance roster (this will ensure you get paid to attend the session). Put your cell phones on silent mode.
Session Expectations	 This is a self-paced learning session. A 15 min break time will be provided. You can take this break at any time during the session. The workbook provides a compilation of different scenarios that are applicable to your work setting. Work through different learning activities at your own pace.
Key Learning Review	 At the end of the session, you will be required to complete a Key Learning Review. This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.



🖬 Using Train Domain

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

Please note:

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

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:

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ACWR		SCSTED, TESTISO	22 years 🔾	1:Fever (3), looks unw	359:16		RN	«»* 🗘*						
ACWR		8 LOLLIPOP, CANDY	22 years O		53:23		•							
ACWR		8 BAINES, LORRAINE	76 years O		48:17 🞓 🛛 🔴		•	⇒* 🗘* ⊆	3/0	1/0				
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ACWR		CSTEDNEWMAN, PAUL	83 years 🔘	1:Chest pain (2) and n	364:12	DVM	V94	🗠 🏷 📼	-					
ACWR		4 AABASSI, FATIMAH	36 years	1:Laceration (4) contr	29:15	CW-Le Res:	MCW-Le	-*				Please do not use-Pa	tient	
ACWR		4 CSTEDCOX. COURTENEY	54 years	1:Chest pain (2) and n	27:20		VM 📋							
ACWR		S CST-UUU, DAA	32 years	1:Back pain (5), mild 1	193:01		VM							
ACWR		CSTPRODREG, EDTEST	27 years		533:00									
ACWR	<i>è</i> ,	CSTPRODOS, DEMOGIO	10 years O		532:54			+ 🕫						
ACWR		CSTPRODREG, JUSTINE	37 years O		508:58 🞓 🔶		•	🛉 🖘 🚥	7					
		MILLED LEADN ADAM	CO		404-00 📥 🧥				7/0		4.10			



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 <u>ED LGH Unit Clerk</u>, <u>ED LGH All Beds-Unit Clerk</u>, and <u>ED LGH Look up</u> 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.

	ED LGH U	nit Clerk		ED LGH All Beds - Unit C	lerk	E	D LGH Available Staff		ED LG	l Look	Up
Pati	ient: INSON, SI	TTWOSTE	VEN 👻 Avg LOS: 388:	:14 Median LOS: 295:15	Total:	73 WR: 44 Filter:	<none></none>	•			
* *	🤗 🖊 i ⊆ i i	🗟 🙆	11 🏄				<none> .Admit to Floor</none>				
	Bed	Alerts	CT/Name	Age	Allergy	Reason for Visit	Pre-Arrival		EDMD MLP	RN	Activities
	ACWR		CSTPRODBCS	N, ROUTES <mark>47 years</mark>	\mathbf{Q}		Waiting Room LGH				
	ACWR		CSTZEROONER	PYLON_SIT 81 years	6		341 42				



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) CLINICAL+SYSTEMS TRANSFORMATION Our path to imate seemises care

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. $\frac{43 \text{ even} \text{ for a characteristic on to discover}}{44 \text{ the functions of each.}}$ Hover your mouse over each icon to discover

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.

Bed	Alerts	CT/Name	Age	Allergy	Reason for Visit	LOS	Disposition	EDM	MLP	RN	Activities	Event	s	Lab	Rad	ECG	OOD	Comment	BA
RESUS,103		2 PYYLON, MONTYY	41 years	0	1:Chest trauma (2), bli	25:34		CW-Le	\sim	CW-Le	٠	~3 *					-	V	\smile
AC,201		CSTTRNEXAMPLE, JEREN	79 years	۰		25:58	1				<u> </u>	* •	⊨ ⊲*	7			\searrow		
AC,202		CSTMATTEST, MAUI	39 years	0		0:52					٠	1	- ⊲*						

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.

Triage	+	Inpt Bed Request	
Dr Exam	*	Inpt Bed Ready	
RN Exam	0	Inpt Bed Assigned	
Registration	~ 0	Consult	С

Standard Icons and their Meanings



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

Discharge		Transfer	
No Visitors	STOP	Suicide Precautions	S
RT	R	Confidential	
Disaster	₹ <mark>`</mark> *	Document Home Meds	
Isolation		Readmission Risk	
Certified		Falls Risk	K
ADE Risk Positive	A	Medically Cleared	✓
Interdisplinary Activities		Urine collection	
8	Admit to Day Surgery		Familiar Faces Shared Care Plan

Other Icons by Column	Screen Ti	ps that appear w	/hen you hover	over the icon
Alerts Column	Time 2017-Aug-28 11:34	Event 72 Hour Return	Status Request	
CTAs indicators	Acuity: 4 - Less	Urgent		
EDMD column	Grafstein, Eric -	- EG		
Alerts Column	Time 2017-Aug-25 13:39	Event Hosp High U	Stat Utilizer Requ	us lest



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	Time Event Status
	2017-Aug-25 13:44 ADE Risk Positive Request
Α	
Disposition column	Time Event Status
	2017-Aug-25 14:11 Admit Request
Disposition column	Time Event
	2017-Aug-25 14:11 Inpt Bed Request
Events column	Event
~	Consult Request
Events column	Time Event Status
MH	2017-0415:06 Consult Fsych Request Request
Events column	Registration overdue by 30 minutes
	Registration overade by 66 minutes
~~ <u>•</u> •	
Events column	Registration overdue by 15 minutes
≂ ⊙ ×	
Events Column	Time Event Status
	2017-Aug-25 14:11 Perform BPMH Request
Events Column	
	RN Exam overdue by 30 minutes
Allergy column	Allergy Update
0	PENICILLIN 2017-Jun-28 12:49
Alleray column	No. Volumina
	No known Allergies
Bed Column	Dirty bed
<u>6</u>	
Bed column	Held bed
Age Column	Blue background indicates Male.
46 years	

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.

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.



FATIENT 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 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 prearrival), we will use another patient: <u>ED-UC-B, Kelly/Sonia/Gladys</u> (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



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

Tracking Shell	Pre-Arrival Form
ED SGH Unit Clerk E ED LGH Unit Clerk	Referring Source Last Name First Name Age Gender Room Assignment of date and the PreAntival (0)
Patient: US EDUNIT Avg LOS	Estimated Date Estimated Time 01-Dec-2017
RESUS, 101 Z PITTWOCLAP	
	Pulse Resp SBP DBP Sats U2 Pain Temp Weight Glucose
AC 203 2 CSTEDSMIT	
AC 206 2 PITPRACTICE	GCS Stroke CPR in Progress Trauma Team Activation
AC 210 A 2 EDTESTSMIT	
DTU 01 3 PPCSTTEST	
DTU.02 CLERK, EDU	EHS Interventions
PSYCH,401 PRODBCTES	
ACWR 2 CSTDEMOBR	Alleraies
ACWR A 2 CSTEDRENA	
ACWR 2 IPPHYONE, J	
ACWR SCSTDEMOEL	Other Information
ACWR 3 ABASSI, FAT	Provider/Referral Info:
ACWR SCSTDEMOKY	a la
ACWR 8 WONG, KIM	
ACWR 🍓 🛞 IPPHYTWO, I	Nursing/EHS Additional Info
ACWR 🛛 🗟 CSTLEARNIN	
ACWR S CSTDEMOJO	e
ACWR CSTEDDOOL	
ACWR CSTSNWIND	
ACWR CSTSNERSC	OK Cancel
ACWR CSTSNLION,	
ACWR CSTSNERSC	1, STGALEN 58 years 🖓 46:58 🕂 🤞



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.



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:



																			CSTDEMOFELIX, KIDP	IEV 🔹 👘 Recent 🔸	Name
Shell																				[0] Full screen	g Print 🛛 🎅 O n
ED SGH Unit C ED LGH Unit (ilerk Clerk	ED SGH All Be ED LGH All F	ds - Unit Cle Beds - Unit (erk Elerk	ED SGH Av ED LGH	/ailable S ^I Available	aff) Staff		ED SGH ED L	Look Up GH Look U	Jp		D WHC Unit (ED PEM Unit	lierk t Clerk			ED WHC All Beds - Unit Clerk ED PEM All Beds - Unit Clerk	ED V EF	VHC Available Staff PEM Available Staff	ED Y	VHC Look Up
CSTDEMOFEL	JX, KIDNE	EY + Avg LOS: 335:10 Media	n LOS: 166:3	6 Total:	70 WR:40 Filter: <no< th=""><th>ne></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></no<>	ne>															
/ 🗲 📾	Ø B	à I 🚓																			
d A	Verts C	CT/Name	Age	Allergy	Reason for Visit	LOS	Disposition	EDMD M	ALP P	N Act	civities	Events	Lab	Rad	ECG	OOD	Comment	BA	1		
WR		CSTINTEGRATION, COMP	² 30 years	9		0:17						🛉 🖘									
		CSTEDHONG, TOMMY	27 years	9	·	3387:15	٠				Y	ŧ									
		CSTPRODREG, NEWEDE	27 years	9	*	3002-24						£									
		CSTSNCPOE, STTESION	£24 years	<u></u>	. 2	2885:45															
6	-	CSTSNTEST, STWORKFU	(17 years	<u></u>		2695:13						-									
6	9	CSTLABDEMU, POPUP	36 years	<u>R</u>	+	1680:32						<u>t</u>	- 1/0	1/0							
-		TONG, BABYTWO	2 months	<u>~</u>	+	4202.20						* I *	á 1/0	1/0							
\sim		CSIZERUTWUASTITINA, C	27 years	~	+	1395:29	4				r	4 I -		1/0							
DUID 102			47 years	<u>–</u>	*-Major trauma (2), bl	200.20	4	NIRG		-TT 💊	P		£ 1/0	5/0							
205, 102 7	· ·	COTPRODUCE, FOUR	41 years	K -	1:Major trauma (z),	1647-54	.	NUDG			\longrightarrow		- 1	arv							
205		CSTONE ANGEI	02 years	ă	DAnalmectar tradinary	48-21						4 4 7									
209 / AC 2	P	CSTDEMOCHRIS DONOT	f157 years	6	1-Respiratory distress	366:26	* * •	CW-L4		-W.I . • • /	- · · ·	<u></u>	· 3	3	1/1		KEEP UNTIL DECEMP	<i>es</i>			
212 / AC 2	λ 7	CSTPRODREG. MATINAL	F 12 years	<u> </u>	1 Chest trauma (3), bi	52:57	🕹 🍎 🍎	-	- 7	W-Le	Y	<u>67</u> 77	A				THE OTTLESS	1			
213 / AC.2	1 F	CSTDEMOFELIX, KIDNEY	57 years	li -	1 Flank pain (2), sever	95:54	4 1 1	NUBG				<u></u>		3/0			DEMO WEEK OF DEC	FI	1		
214 / AC.2	F	2 CSTDEMOGRANT, NEUR	C57 years	6	1 Headache (2), sever	191:07	* * •	NJBG			-	c T	3	7	-	-	DEMO WEEK OF DEC	EI	1		
217 / AC.2	1 7	CSTDEMOEARL, DONOT	D57 years	6	1:Respiratory distress	193:14	÷ † •	NJBG	- 7		7	æ	7	7	1/1		FOR DEMO NOVEMB	R			
K.301 / INT ·	./ 🛛	CSTEDDEMOSTONE, KIP	0147 years	ō	1:Flank pain (2), sever	502:32	1 🔴 👘	sh	- 7	A	k			8/1	-		KEEP UNTIL DECEMB	a			
K, 302 / INT	1 6 8	CSTEDDEMO, GI	72 years	0	1:Melena or rectal blev	496:47	÷ •	sh	- 7		×			2/1	1/0		KEEP UNTIL DECEMB	EF.			
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			-								1	/ /									



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

- Click on a patient <u>ED-UC-B, Kelly/Sonia/Gladys</u> so that it is hilighted, 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.
 - 2. Select **Isolation**. Notice a exclaimation 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.

CSTEDHONG, FRANK							⊨ List 🚽 🌇 Recent 🔸
CSTEDHONG, FRANK		DOB:20-Feb-1990 Age:27 years	MRN:700002230 Enc:7000000016207	Code Status:		Process/Violence Risk Disease:	Location:LGH ED; FA; 505 Enc Type:Emergency
Allergies: No Known Medication	Allergies	Gender:Male	PHN:9878183168	Dosing Wt:80 kg		solation:Airborne and Contact	Attending:TestED, Emergency-Physician7
Menu Q	< 🔹 🕈 Patier	nt Summary					
Patient Summary		100% - 0	a				
Orders 🕂 Add	ED Summary	23 Har	idoff Tool	Summary	23 Assessment	× +	
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	Triane Documentat			Vital Signs		= A Elamond Eve	ents (0)



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.



	and a		ED LOUI AILD. d		- Clerk	1	50.00	<u></u>	Assellable C
mit Ci	erk		ED LGH All Bed	s - Ur	hit Clerk		EDI	.GH	Available 5
rk, ed	UNIT		 Avg LOS: 506: 	22	Median	LOS: 44:31	Tota	l: 52	WR: 26
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		2	CSTEDLAI, CAR		ECG				1:Major tra
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		3	ABASSI, FATIN	IAH		26 years	Q		1:local sw
		3	CSTDEMOKYL	E, D(ONOTE	57 years	9		
		5	CSTLEARNING	DE	MODEL	80 vears	0		1:Respirat



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

Select the patient <u>ED-UC-B, Kelly/Sonia/Gladys</u> 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.



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



						- List - St Report + Name
LERK, EDUNIT	DO8:30-Nov-1985	MRN:700008516	Code Status:	Proce	s:	Location:LGH ED; DTU; 02
lergies: Allergies Not Recorded	Age:32 years Gender:Female	Enc:700000015828 PHN:9876420594	Dosing Wt:	Diseas Isolati	ie: on:	Enc Type:Emergency Attending:Provider, Emergency
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reConnect	Problem List					New Order Entry 💠 🔳 🔳
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noses and Problems	All Visite					
torier	No coult found	Sex Age:	Race:	_		Q Search New Order
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						Documents (0) 🖕 🔳
gle Patient Task List	Procedure History (0)	Encounter type:	Med service:			Last 6 months for all visits 💙
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						Selected visit
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						Continuous (0) A DRN/Unocheduled Available (0)
					1 010 2012 1472	Administered (0) Last 24 hours
		Heady		prodoc (rest, edunito	erk [01-0-ec-2017] 14:53 //	⊿ Suspended (0)
						 Discontinued (0) Last 24 hours

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**.

🔮 Person Search												×
BC PHN:	VIP De ed	Alerts	BC PHN	MBN	Name	DOB	Ane	Gender	Address	Address (2)	Citu	Postal/Zin
borna	S S	Alorta	9876420594	700008516	CLEBK EDUN	IT 30-Nov-19	85 32 Years	Eemale	555 west cambie	Add(000 (2)	vancouver	1 Ostdir Zip
MRN:	204											
Last Name:												
Clerk												
First Name:												
Edunit												
DOB:												

Gender:												
Postal/Zip Code:	•				III							Þ
Anv Phone Number:	Facility	Enco	ounter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room B	ed Est Arrival Date	Reg Date	C	isch Date 🔺
	JLGH Lions Ga	e 7000	000015828	70000001582	B Emergency	Emergency	LGH ED	DTU 0	2	30-Nov-20	17 12:18	F
Encounter #:		-										
Visit #:	-											
Historical MRN:												
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	4											
		_										,
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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.



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 a icon on the top left corner. Then you select a printer, number of copies and click **OK** to print.

Person Mgmt: Documents	
Task Edit Action View Help Image: Sex: Age: Race:	
Female 32 Years SSN: MRN: Igh_cat_l2-1 Copy Your Contral Reg - ADMT Your Contral Reg - ADMT Your Contral Reg - ADMT Whc_reg_t1 - 1 Copy Your Contral Reg - ADMT Your Co	
Eme Printer: Number of copies: 1 LGH Document name: Armband Label	
Ready D1-Dec-2017 15:17 Ready prodbc test.edunitclerk 01	-Dec-2017 15:17 //



Activity 2.5 Record ED Phone Calls for Consults

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**.

1



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.

💷 ED Phone Ca	ill for Consult (Chart Done) - CET, BOO
Date/Time:	07-Dec-2017
Performed by:	TestUser, UnitClerk-Emergenc
	OK





Second Attempt Phone Call:

1. Click on the ED Phone Call for Consults $\mathbf{S}^{||}$ icon.

📕 Fir	stNet Org	Janizer	for TestUse	er, U	nitClerk-Em	ergency			
Task	Edit	View	Patient	Cha	irt Links	Patient A	Actions	Provider	List
Trac	king Shell	🏭 Le	arningLIVE	-	🛛 🕄 Patient	Health E	ducation	Materials	🕄 Pol
і 🛃 Б	dit 🖬 Ad	Hoc	Medical	Rec	ord Request	🖀 Schee	duling Ar	pointmen	t Book
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	ED S	GH Un	it Clerk			ED SG	H All Bed	ls - Unit Cl	erk
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	🖗 🖊	E (₩ @	Ľ	11				
	Bed		Alerts	CT	Name			Age	Aller
	ACWR			3	EDTESTP	HSU, BO	B	55 years	Q
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	ACWR		∂ s	4	DEMARCO	D-LEARN	I, MURF	49 years	۲
	ACWR			4	CSTPROD	OS, ORI	DERSFO	61 years	۰
	ACWR			5	CSTLEAR	NING, DE	EMODE	80 years	۰
	ACWR			5	CSTDEMC	JOHNS	on, doi	57 years	Q
	ACWR			5	CSTEDSIN	IPSON,	JESSIC	38 years	Q
	ACWR			5	CSTEDST	ALLONE	, SYLVE	75 years	•

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

Published Desktop - ProdBC 105 - Citrix Receiver	
E For one Call for Consults - CLERK, EDUNIT	
"Performed on: 01-Dec-2017 🕆 💌 1523 🜩 PST	By: TestUser, UnitClerk-Emergency
Proce Call for Con ED Phone Call for Consults	•
Phone Call/Page Attempt 1 Speciality/ Reason for Consult 020ex.2017 124 124 Phone Call/Page Attempt 2 Consult 0 0F	
Phone Call/Page Attempt 3	
Physician Requesting Consult Physician Requested for Consult Physician Covering for Consult	
Date/Time Call Returned Physician Returning Call	
Consult Arrival Time	
Additional Information	
	_
	In Progress
Shortcuts Shortcuts	15:24 01-Dec-2017





Third Attempt Phone Call:

1. This time you will open the pateint'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 $\subseteq^{|}$ icon, you will open up a brand new blank form.

FirstNet Organizer for TestUse	er, UnitClerk-Emergency														
Task Edit View Patient	Chart Links Patient Action	ns Provider List Help													
Tracking Shell 🌇 LearningLIVE	🝦 🔅 😋 Patient Health Educat	tion Materials 🔞 Policies and	Guidelines 🕄 UpToDate 🝦 👯 CareCo	nnect 🕄 PH	SA PACS 🜊 VCH and	PHC PACS 🕄 MUSE 🍕	🕽 FormF	ast WFI	-						
🗐 Exit 🎬 AdHoc 🛅 Medical	Record Request 👹 Scheduling	g Appointment Book 📻 Docu	iments 🔒 PM Conversation 👻 🗃 Discer	n Reporting P	ortal 🏽 Conversation	Launcher g									
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Tracking Shell													[D] Full screen	👼 Print 🕹 0) minutes ago
ED COLUMN Clust	D COLUMN D	h line chut	ED COLLANSING COM	TD COUL	and the second	ED MALC US A Close	_	1	CD WE K	All Dada - Halt Charles	ED MALIC A	and the local state	1	FD MILIC Look II	
ED LGH Unit Clerk	ED SOH All BE	eds - Unit Clerk	ED LGH Available Staff	ED SGM L	Look Up	ED PEM Unit Clerk	i ik	1	ED WHO	All Beds - Unit Clerk	ED WHC #	Available Staff		ED PEM Look U	p o
Patient: CLERK EDUNIT	 Ava LOS: 463-29 Mer 	fian I 05: 47:56 Total: 57 W	R-32 Filter (None)												
	in the second se		and the state.												
⇔ø/⊆∎@!	<u>::</u>														
Bed Alerts C	T/Name	Age Allergy Reaso	n for Visit LOS Disposition	EDMD MLF	P RN Activities	Events	Lab	Rad	ECG 000	Comment		BA			*
AC,201 A	WHCCPITFORTYWEBB,	R 62 years 0 1:Lowe	r extremity inju 53:11 🞓 🔶	NJBG	ЕВ 🔶 📋		9/0	1/0	1/0						
AC,203 2	CSTEDSMITH, CHRISTIN	A 23 years 🥥 1:Majo	r trauma (2), blu 6:34	AA	CT 🔹		12/0	3/0							
AC,206	PITPRACTICE, FIVE	47 years 🚱 1:Neck	t trauma (2), hig 49:27 👕 🗧	sh	NT 🔶 😳	<u>c c c</u>									
AC,210 A 2	EDTESTSMITH, JOE	54 years G 1:Head	l injury (2), alter 29:36 T 🔸 🛡	sh	EB		12/0	5/0	1/0			422.2			
010,01	PPCSTIEST, BOB	55 years Q 1:local	swelling (3)/red 76:58		EB					Diseas la	and the second	_			
10,02	CLERK, EDUNIT	32 years	21:24							Please Ke	sep until end of i				
FA,507 A 8	EDTESTWRIST, DA	ttach Pre-Arrival	extremity inju 0:45	sh	NT 💊 📋	*		_							
PSYCH,401	PRODBCTEST, JAN E	D Phone Call for Consults	29:56		•	+**	8/2	3/0	1/0			ECT tes			1
ACWR 2	CSTDEMOBRETT, [che (2), sever 96:34 🞓 🔶	NJBG	EB 💊	<u>c</u>	4/0	1/0		KEEP UN	TIL DECEMBE	F			
ACWR A 2	CSTEDRENAULT, L	ad Order	trauma (2) bli 28-17		IV 📋										
ACWR 2	IPPHYONE, JANE	Jpen Chart	Patient Summary		4 🗎	=3* 🗲 🗘*	3/0	1/0							
ACWR A 2	CSTEDJANE, DIAN R	lequest Event	Orders			≕* 🗘*									
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ACWR 8	CSTDEMOELAINE, C	Complete Event	Results Review	_	EB 🔶 🖶	2 9 2	12/0			KEEP UN	TIL DECEMBE	£			
ACWR 🔬 🖁	ABASSI, FATIMAH			CW-Le	CW-Le 🔶 🕆 📄	≥ *0 * €									
ACWR	CSTDEMOKYLE, D	hischarge Process	Allergies		VM 🖸	=3n 😯 n									
ACWR	WONG, KIM P	rovider Check-Out	CareConnect	CW-Le	CW-Le		3/0								
ACWR 6 8	PPHYIWO, DORO	Intiant Common Parant	Clinical Research				0.14								
ACWK 6	CSTLEARNING, DE	Attent Summary Report	Diagnoses and Problems		NAME AND ADDRESS		0/1	1/0		I latil what	de a				
ACIMP	CSTEDDOOLEY, WILSON		Documentation	N/: CM			110	1/0		Until what	t day?				
ACWR	CSTSNWINDLL STMACE	45 years	Histories	N, UN	14	1				Until what	u u ay r				
ACIMR	CSTSNERSO ST IVN	26 years	MAR Summary			1									
ACWR	CSTSNLION_STBRAVEH	F 38 years	Medication List			÷									
ACWR	CSTSNERSO, STGALEN	58 years	Patient Information			÷ .									
ACWR	CSTSNORGANA, STLEIA	38 years O	Pafarance			+									
ACWR	CSTSNSOLO, STHAN	43 years O	Classic Declaret Tech List			+									
ACWR	CSTDEMOFELIX, KIDNEY	f 57 years Q	Single Patient Task List			÷	7	3/2		DEMO W	EEK OF DECE				
ACWR	CSTDEMOGRANT, NEUR	C 57 years	47:54 👚			÷	7	7		DEMO W	EEK OF DECE	t			
		10	17.50		1	L	-	-		0010.00					•
											PRO	DBC TEST.EDU	NITCLERK Frida	y, 01-December-20	017 15:42 PS
Shortcuts	FirstNet Organ	üzer												01-	15:42 Dec-2017
														-10	000-2017

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



OSK LUIL TIEW				i nop	Consult Perment					0.							
acking Shell 1 🏭 Le	sarningLIVE	💡 🤅 😋 Patient Health Educatio	on Materials 🙀 Polic	cies and Guideli	Consult Request	nect 🕄 PHS	A PACS 😋	VCH and P	HC PACS 😋 MUSE	C FormFa	ist WFI						
Exit MadHoc	🗿 Medical I	Record Request 👹 Scheduling	Appointment Book	Documents	No Visitors	Reporting Po	rtal 🔍 Con	nversation L	auncher 🖉								
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icking shell					Isolation											juj rui	iscreen (Birnint Co
ED SGH Ur	nit Clerk	ED SGH All E	leds - Unit Clerk		Uisaster		ED SGH Looi	k Up	ED W	HC Unit C	lerk		ED WHC All Beds	- Unit Clerk	ED WHC A	ivailable Staff	ED WHC Look Up
ED LGH U	nit Clerk	ED LGH AII	Beds - Unit Clerk		Development PDML		ED LGH Lo	ook Up	ED	PEM Unit	Clerk	_	ED PEM All Beds	- Unit Clerk	ED PEM /	kvailable Staff	ED PEM Look Up
atient: CET, BOO		 Avg LOS: 341:44 Media 	an LOS: 164:20 Tota	l: 68 WR: 39	MD Seen												
s 🖉 🖊 🕿 I	a 👌 🛙	a 👛			High Utilizer Acknow												
Bed	Alerts	CT/Name	Age Allerg	v Reason for	Falls Risk	EDMD ML	PRN	Activities	Events	Lab	Rad	ECG 00D		Comment	BA		
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ACWR	▲34	8 PROVIDER, CSTPRODP	E 72 years 🧔		MDPO History	b *		٠	⊇ * <mark>C)</mark> *⇔	3/0							
ACWR		4 CSTPRODEMPI, TESTPI	HN16 years 🔘	1:Dysuria (WIDRU History				*								
ACWR	ê.	4 DEMARCO-LEARN, MUR	RR49 years 🧔	1:Laceratic	In Kadiology	MDE	EEe										
ACWR		4 CSTPRODOS, ORDERS	FC61 years 🔘	1:local swe	Rad					24/0							
ACWR		S CSTLEARNING, DEMOD	El 80 years 🧔	1:Respirate	ECG			٠	😨 🛸	6/1							
ACWR		S CSTDEMOJOHNSON, D	Ol 57 years O		Consult to Case Mgmt		VM	•	=>* O* ⊆	S 7/0	1/0			KEEP UNTIL DECEMBE	F		
ACWR		CSTEDSIMPSON, JESS	IC-38 years 🔾	1:Chest pa	Trauma 1			•		13/0	2/0						
ACWR		CSTEDSTALLONE, SYL	VE 75 years 🧐	1:Chest pa	Trauma 2				O *								
ACWR		CSTSNWINDU, STMACE	45 years O		Poss. Septic Shock				+								
ACWR		CSTSNERSO, STJYN	26 years O		Poss. Sepsis				+								
ACWR		CSTSNLION, STBRAVER	HE 38 years 🔾		Post, SIRS				• •								
ACWR		CSTSNERSO, STGALF	AR uppre		Consult Card Complet				+ *								
ACWR		CSTSNORGANA, STLE	Attach Pre-Arrival		Consult Card LeDreas				+								
ACWR		CSTSNSOLO, STHAN	ED Phone Call for	Consults	Consult Card InProgr				+								
ACWR		CSTLEARN, RURALEI			Consult Card Request				+ -3 [*]								
ACWR		EDTESTDEMO, TRIAG	Add Order		Consult Complete	sh	EB	٠	⊇ *≈ •								
ACWR		CSTPRODMED, TEST	Open Chart	,	Consult GenSurg Comp			٠	+ =3*								
ACWR	•	CSTPRODBCDA, STA	Request Event		Consult GenSurg InPr				+ «3*								
ACWR		CSTPRODBCSN, JAM	Start Event		Consult GenSurg Requ				* •3*	3/0							
ACWR	e ,	CHAN-LEARN, MARIA	Complete Event		Consult Hosp Complet	MDE	EEe	•		14/0		1/0					
ACWR		CSTSCHTEST, ABIGA	Complete Event		Consult Hosp InProgr				T								
ACWR		CSTPRODREG, REGL	Discharge Process		Consult Hosp Request	-			T -3*								
ACWR		CSTEDROGEN, SETH	Provider Check O		Consult InProgress	DVM		-	I and								
ACWR		PYLON, MONTY	Fromae Check-O		Consult IntMed Cornel				I								
AUWR		CSTPRODMED, TEST	Patient Summary	Report	Consult IntMed InPro				I an								
ACIAID			To years		Consult Inthing Barrie			-			-						
ACVVR		CSTEDIEST, ANDREA	27 years		Consult Intended Reque				27								
		COTODODODEO NEWER	27 years		Consult Neuro Comple				I								
		COTONODOE OTTOOTO	E Zr years		Consult Neuro InProg				-								
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	9	TONC RARYTMC	36 years		Consult Ortho InProg				1 + F	1/0	1/0						
_		TUNG PARYTWO	Z months ()						100 	-1/0	100	1		1			

You will now see the sicon 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), selct **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 Complete Events for **Consult Card Request** and **Consult Card Complet 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.







Activity 2.6 Complete AdHoc PowerForm (Trauma Initiate/Upgrade)

- 1. Select the patient: ED-UC-B, Kelly/Sonia/Gladys
 - 2. Click on the AdHoc MadHoc 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 in 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.

1

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.



Trau had the /Ungrade - CLERK EDUNIT			
*Performed on: 04-Dec-2017 🔿 💌 0855 🌩 PST			By: TestUser, UnitClerk-Emergen
Trauma Upgrade			
Trauma initiate/opyraue			
ED Trauma Activation	Time Trauma Team Notified		
Yes O No	03-Dec-2017 ≑ 💌 0855 🚔		
Anesthesia Called	Anesthesia Called Time	Anesthesia Arrive Time	
	NE-200, 2000		
Emergency: Dhysician /TH, Called	Emorgong, Physician /III, Called Time	Emorrange Diversion / TIL A wike Time	
General Surgeon Called	General Surgeon Called Time	General Surgeon Arrive Time	
	xe, mor, ymor		
Lab Technician Called	Lab Technician Called Time	Lab Technician Arrive Time	
Neurosurgeon Called	Neurosurgeon Called Time	Neurosuraeon Arrive Time	
	X1,100,2000 A		
Orthopedic Surgeon Called	Orthopedic Surgeon Called Time	Orthopedic Surgeon Arrive Time	
		Ny John John A	
Other Provider # 1 Called	Other Provider # 1 Called Time	Other Provider # 1 Arrive Time	
Other Provider # 2 Called	Other Provider # 2 Called Time	Other Provider # 2 Arrive Time	
	XE 200 X200		
•			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

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Nursing/EHS Additional Info:Suffered a blunt force injury to the chest due to fall and large blow 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 complains of 10/10 chest pain; Sharp stabbing, worse on inspiration. ED Travel History Recent Travel Location: Africa Document Type: ED Triage - Adult - Text 30-Nov-2017 13:50 1 Document Type: ED Triage - Adult - Text 30-Nov-2017 13:50 1 Description History Bod Part Travel History ED ADE Past two weeks meds: Yes ED ADE Past two weeks meds: Yes ED ADE Past two weeks meds: Yes ED ADE Age 80 Meds Change : No Document Type: ED Triage - Adult - Text Bod Travel - Adult - Text Document Subject: This record contains confidential information which must be protected. Any unauthorized use or disclosure is strictly prohibited. This record contains confidential information which must be protected. Any unauthorized use or disclosure is strictly prohibited. This record contains confidential information which must be protected. Any unauthorized use or disclosure is strictly prohibited.	Provider/Referral Info:		Non-Specified ; Code:	COT ; Probability: 0 ; Diagnosis Code:
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Name of Printee: Testiliser Linit Jerk-Emergency	report manning to. addoded	Find Date/Time: 04-Dec-2017 03:03	Report Hacking ID. 3000040	-0



Activity 2.8 – Complete a Medical Equipment request

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

Exit 🎦 AdHoc 🚡 Medic	al Record Request 🗂 Scheduling Appointment Book	🖻 Documents 🔒 PM Conversation 👻 🗃 Disc	ern Reporting Portal 頥 Conversation	Launcher _v				
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Bed Alerts	CT. Name Age Allergy	Reason for Visit LOS Disposition	EDMD MLP RN Activities	Events Lab	Rad ECG OOD	Comment	BA	
AC,203 A	2 CSTEDLEE, ANNA 23 years	1:Chest pain (2), cardi 0:40	СТ 🔶 🕸 🖬	5/0	1/0			
AC,206	2 PITPRACTICE, FIVE 47 years	1:Neck trauma (2), hig 115:27 👕 🗧	sh NT • 🕸	222				
AC,210 *	2 EDTESTSMITH, JOE 54 years	1:Head injury (2), alter 95:36 👕 🛡 🥊		12/0	5/0 1/0		422.2	
AC,213	2 CSTDEMOFELIX, KIDNEY 57 years	1:Hank pain (2), sever 18:41	NJBG EB	<u> </u>	1/0	DEMO WEEK	DF DECER	
AC,214	2 CSTDEMOGRANT, NEURCE/ years	1:Headache (2), seven 113:54	NJBG EB	×	Viii I	DEMO WEEK	OF DECEI	
AC,215	CSTDEMOHARRY, SURGEST years	113:53	NJBG EB			DEMO WEEK	DF DECER	
AC,216	CSTDEMOIRENE, PLASTICS/ years	113:50	NJBG EB		Z	DEMO WEEK	DF DECER	
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ACWR	CSTDEMOJO Patient Summary Report	90:42	VM 💊 🗇		1/0	Until what day?		
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ACWR	CSTSNERSO, STJYN 26 years Q	115:31		+				
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ACWR	CSTSNORGANA STI FIA 38 years	114-57						
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	and the state of the second state of the secon	50.25						

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



Published Desktop - ProdBC 105 - Citrix Receiver	Annual Case of					🗆 💻 🗙
E CLERK, EDUNIT						- P X
CLERK, EDUNIT DOB:30-Nov	/-1985 MR	RN:700008516 Cc	de Status:	Process:	Location:LG	H ED; DTU; 02
Age:32 year						ergency
Allergies: Allergies Not Recorded Gender:Fem	ale PHI	IN:9876420594 Do	osing Wt:	Isolation:	Attending:Pr	ovider, Emergency
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The Ordering Physician window will open. Fill out all fields as required (physician name, communitcaion type). For this example, we will use physician: <u>**Test, Alex**</u>. Then click **OK**.

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CLERK, EDUNIT DOB:30-P	lov-1985	MRN:700008516	Code Status:		Process:	Location	LGH ED; DTU; 02
Age:32 yr		Enc:700000015828				Enc Type	Emergency
Allergies: Allergies Not Recorded Gender:F	emale	PHN:9876420594	Dosing Wt:		Isolation:	Attending	Provider, Emergency
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Click Done.



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Allergies: Allergies Not Recorded	Gender:Female	PHN:9876420594	Dosing Wt:	Isolation:	Attending:P	rovider, Emergency
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Document In Plan			Age:32 years Enc:700000001		Enc Type:Emergency	
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You will see the Order request, click **sign** to complete the process.

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UC-B, Kelli	Age85 years	Enc:760000000436			Disease:	Enc Type Emergency
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	Diet/Nutrition		Arterial Blood Gas (Ar.	Completed	Whole Blood, Routine, Collected, Collection: 2018-Jan-06 08:15 PST, once	
ation List 🛛 💠 Add	Continuous Infusions		Basic Metabolic Panel.	. Completed	Blood, Routine, Collected, Collection: 2018-Jan-06 08:30 PST, once	
at Information	C Medications		Bilirubin Total and Dir.	Completed	Blood, Routine, Collected, Collection: 2018-Jan-06 09:15 PS1, once	
n anormation	2 biood Products		CBC (Comprehensive Meta.	Completed	Blood, Routine, Collected, Collection, 2010-38-90 07:35 PST, once	
	Diagnostic Tests		Electrolytes Panel (Na.	. Completed	Blood, Routine, Collected, Collection: 2018-Jan-06 08:00 PST, once	
	Procedures		Glucose Random	Completed	Blood, Routine, Collected, Collection: 2018-Jan-06 09:00 PST, once	
	Respiratory		Hemoglobin ALC	Completed	🏉 Blood, Routine, Collected, Collection: 2018-Jan-06 08:45 PST, once	
	Allied Health		Urinalysis Macroscopi.	. Completed	Urine, Routine, Collected, Collection: 2018-Jan-06 09:30 PST, once	
	Consults/Referrals	×	Urine Culture	Ordered (Pending	Urine, STAT, Unit Collect, Collection: 2017-Dec-28 05:00 PST, once SPECIAL COLLECTION REQUIREMENTS: Please refer to specific site Laboratory	/ Test Manual
	Communication Orders	d Consults	Referrals			
	Supplies	<u> </u>	6' ED Consult to Cardiol.	Ordered	12-Jan-2018 11:00 PST, Urgent, Reason for Consult: ED Consult	
	Medication History	d Supplies	and the second second			
	Medication History Snapshot		66° Aluminium Crutches	Completed	2018-Jan-24 13:12 PST, 1	
	Reconciliation History					
	Related Results	🔺 Details				
	Formulary Details					
	Variance Viewer	75				Orden Fot Sign

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



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

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 seach 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: <u>ED-UC-A,</u> <u>Hugo/Byron/Israel/Larry/Terry/Alberto</u>.




÷						
			c	:LERK, EDUNIT 🕞 🎬 Rece	nt - Name	- Q
				[□] Full screen	🛱 Print 🛛 🤕 0 m	ninutes ago
HC All Bed PEM All Bed	s - Unit Clerk ds - Unit Cler	c ˈk	ED	WHC Available Staff DPEM Available Staff	ED WHC Look I ED PEM Look I	Jp Jp
			500	0.00		
nts	Lab	Rad	ECG	OOD	Comment	
€*	9/0	6/0				
	11/0	6/0				
OR	9/0	1/0	1/0			
IM	7	2/1	1/0		For Procedural Se	dation ≡
	12/0	3/0				

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

Published Desktop - ProdBC 1	06 - Citrix Receiver		St. Jograms 200	Cold - Microsoft Hoat		
CLERK, EDUNIT - 700008516 Opened	by TestUser, UnitClerk-Emergency					- P X
Task Edit View Patient Chart	Links Navigation Help					
Tracking Shell 👫 LearningLIVE 💡 🕻	🕽 Patient Health Education Materials 🔞 Policies and Gu	idelines 🔃 UpToDate 💡 🕄 📿 CareCon	nect 😋 PHSA PACS 😋 VCH and P	HC PACS Q MUSE Q FormFast WFI		
🗄 🔀 Tear Off 🚽 Exit 📸 AdHoc 🔄 Me	dical Record Request 🝵 Scheduling Appointment Boo	🗑 Documents 🔒 PM Conversation -	Discern Reporting Portal 🙀 Co	inversation Launcher 💡		
CLERK, EDUNIT						- List 🖓 Recent + Name - Q
CLERK, EDUNIT	DOB:30-Nov-1985	MRN:700008516 C	ode Status:	Process:		Location:LGH ED: DTU: 02
Allergies: Allergies Not Recorded	Age:32 years Gender:Female	PHN:9876420594 C	iosing Wt:	Uisease: Isolation:		Enc Type:Emergency Attending:Provider, Emergency
Menu Q	- 🛱 Patient Summary					🗇 Full screen 👘 👘 🕹 0 minutes ago
Patient Summary	A					
Orders 🕂 Add	ED Summary 52 Hande	ff Tool 52	Summary	57 Assessment	22 +	
Form Browser			commery		T	
Results Review	Triage Documentation	≣•	Vital Signs 🍁		=• o	Flagged Events (0)
	Selected visit		Last 72 hours for all visits 🖤			Last 30 days for the selected visit
Allergies	No results tound		No results found			No results round
CareConnect	Problem 1 2+4	=• 4	Letter	_		New Order Entry 🔶 🗮 🔿
Clinical Research	Encounter Selection			×		Inpatient 🗸
Diagnoses and Problems	Encounter Type Location	Admit Date 20 Nov 2017 1218 PST	Discharge Date	Encounter #		
Documentation T Add	Per total					4. You are currently viewing a discharged patient. Any order you place will apply to this encounter.
MAR Summany	Lino results				≡• ∾	
Medication List + Add	Social Hi					Q Search New Order
Patient Information	Viete (1)					Personal Public Shared
Reference					≡• 🔿	Favorites
Single Patient Task List	Procedur					No Favorites Found
2						Documents (1) 💠 🗮 💿
						Last 6 months for all visits 🔻
						My Decumente
						Note Type Author Date/Time
	14 I			<u>}</u>		ED Patient Summary TestUser, Nurse-Emergency 05/12/17 11:19
						Modications -
						Selected visit
						4 Scheduled (0)
						4 Continuous (0)
						∠ PRN/Unscheduled Available (0) +
						PRODBC TEST.EDUNITCLERK Tuesday, 05-December-2017 11:23 PST
Shortcuts	FirstNet Organizer E FirstNet Organize	r E OLEIK, EDUNIT				11:23 05-Dec-2017

Or if there are multiple encounters/patients:

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



VIP Deceased	Alerts	BC PHN	MBN	Name		DOB	Age	Gender	Address	Address (2)	City	Postal/Zip Code
<u> </u>	Disease Alert	9876541357	700007361	CST-TTT, A	NTONIO	04-Jan-1946	71 Years	Male	590 W 8th Ave		Vancouver	
6		9876541239	700007370	CST-TTT, A	RTTU	12-Jan-1941	76 Years	Male	590 W 8th Ave		Vancouver	
1 C		9876541199	700007374	CST-TTT, B	ERNARD	15 Jan 1950	67 Years	Male	590 W 8th Ave		Vancouver	
2		9876540839	700007397	7 CST-TTT, B	IRGIR	an-1940	77 Years	Male	590 W 8th St		Vancouver	
	Process Alert	9876503167	700007713	B CST-TTT, B	LOGGEN	let-1974	43 Years	Male	123 Main St		Vancouver	V5W4T4
2		9876541056	700007378	B CST-TTT, D	EANNE	18Jan-1942	75 Years	Female	590 W 8th Ave		Vancouver	
		9876540996	700007383	B CST-TTT, D	EEPIKA	02-Feb-1951	66 Years	Female	590 W 8th Ave		Vancouver	
	Process Alert	9876541318	700007365	5 CST-TTT, F	ENG	06 Jan 1946	71 Years	Male	590 W 8th Ave		Vancouver	
		9876541253	700007368	B CSI-III,G	ABRIELLA	11-Jan-1946	/1 Years	Female	590 W 8th Ave		Vancouver	
		9876541031	700007380	J USI-III,G	ARFIELD	21-Jan-1937	80 Years	Male	590 W 8th Ave		Vancouver	
		9876941292 007CE41101	700007366	5 USI-111,15	SLA	10 Jan 1051	71 Years	Female	590 W 8th Ave		Vancouver	
▼ 10S		3070341101 9070541034	700007376	Б СБІ-ПІТ, ІЗ І ССТТТТ І.		22 Jan 1044	72 Years	Fomale	550 W BITAVE		Vancouver	
(•				· · ·		III						
Facility	Encounter #	‡ Visit #	E	nc Type	Med Servi	ce Unit/C	linic R	oom E	ed Est Arrival D	ate Reg	Date	Disch Date
🕺 LGH Lions G	ate 700000001	3060 700000	0013127 P	re-Day Surgery	Anesthesic	logy LGH M	ITR		03-Nov-2017	10:16		
LGH Lions G	ate 70000001	3198 700000	0013265 Ir	patient	General St	urgery LGH F	ACU 1 P	ACU 1 2	9	07-N	lov-2017 11:4	7 2 📂
LGH Lions G	ate 700000001	2609 700000	0012676 P	re-Inpatient	Cardiology	LGH M	ITR		24-0ct-2017	4-60	lov-2017 10:1	4 03-NOV-2017

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



💐 Person Search														×
(1) X You have not entered a valid combinat	ion to se	earch on the fo	oreign sj	ystem.									(Close
BC PHN:	VIP	Deceased a	Alerts	BC PHN	MBN	Name	DOB	Age	Gend	er A	Address	Address (2)	City	Postal/Zip
MRN:	22			3070420334	700008016	ULERN, EDUN	IT 30-N04-13	00 02 Fear	s rema		JJJ West Cample		Vancouv	
Last Name:				-										
First Name:														
Gender:														
Postal/Zip Code:	Facili	tu	Enco	unter #	Visit #	III Enc Type	Med Service	Unit/Clinic	Room	Bed	Est Arrival Date	Reg Date		► Disch Date
Any Phone Number:	-∰LL(GH Lions Gate	70000	000015828	700000015828	Emergency	Emergency	LGH ED	DTU	02		30-Nov-20	17 12:18	
Encounter #:														
Visit #:														
Historical MRN:														
Search Reset														
MPI Search	•						"			_				•
							OK	Canc	el		Preview	Add Persor	n A	dd 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.

🖪 Organization 📃	-
Please select the facility where you want to view person aliase	š.
Facility Name Facility Alias	_
LGH-	
LGH Lab Northmount LGH Laboratory LGH Lions Gate Hospital LGH Medical Imaging LGH Neuro Rehab Outpatient Clinic	
Facility:	_
LGH Lions Gate Hospital	
OK Cancel	

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



Tear Off 🗐 Exi	t Medical Record R	equest 👹 Scheduling Appointment B			_						
ERK, EDUI	A External MPI									Close	Recent • Name
ergies: Aller	EXTERNAL EMPI & C	ERNER Comparison			DOB	Age	Gender A	vddress	Address (2) Cit	y Postal/Zip	rgency
lenu		External EMPI	Cerner		11 3U-Nov-198	st 32 means	Female 5	So west camble	va	ncouver	Il screen 💮 Print 🗢 9 n
tient Summar		Retain all External EMPI values	Retain all Cerner values								
ters m Browser	Identifiers										·
ults Review	BC PHN	9876420594	9876420594								=
	HIBC (MSP) Eligibility	No No			-						
ergies	MRN	700008516	700008516								
reConnect	Names									÷	=
nical Research	Last	CLERK	CLERK		Med Service	Unit/Clinic	Room Bed	Est Arrival Date	e Reg Date	Disch Date	
cumentation	First	EDUNIT	EDUNIT		Emergency	LGH ED I	DTU 02		30-Nov-2017 1	2.18 05-Dec-2017	order you place will apply to
stories	Other Demographic D	Details									
AR Summary	Gender	Female	Female								
edication List	Birth Date	30-Nov-1985	30-Nov-1985								Shared
tient Informatie	Deceased	(blank)	Yes								
gle Patient Ta:	Addresses and Phone	25									
	Home Address	555 WEST CAMBIE	555 west cambie								=
		VANCOUVER British Columbia	vancouver British Columbia							,	
		Canada	Canada		OK	Cancel	F	Preview	Add Person	Add Encounter	
								a		luthor	Data/Time
	Always VERIFY that you mate	ch the correct person from EMPI. If any EM	I information is not current, then choose the Cerner value(s) a	nd select UPDATE.				lient Summar	γ	TestUser, Nurse-Em	ergency 05/12/17 11:19
								ations 🕂			=
			Undate	Not a Match				ted visit			
			opute		OK		`ancel	duled (0)			

The Quick Reg window opens. Select the **Encounter Information** tab. Fill in all yellow fields, as it is mandatory. Most yellow fileds 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.



											Contractor
Quick Reg	_										101
cal Record Number: 008516	Encounter Number	Last Name: CLERK.	First Name: EDUNIT	Middle Name:	Preferred Name:	Previous Last Name:	Date of Bith: 30-Nov-1965	Age 32Y	Gender. Female	BC PHN 9876420594	
RTS Patient Informa	tion Encounter Information In	surance Insurance Summan									
occustor Turos	Madeal Course	Passas for blait									
eceased	Deceased	•									
ocation	P. defear	(hat/Claire)		Perm	R-st						
GH Lions Gate	 LGH Lions Gate 	LGH Morgue	Bed Availability		•						
are Providers	Duty in Duritor	D	00000-0								
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onment											
WORNT.											
count Data	Dissistanting Times	Date: Date User House	Description	Descend Date:	Descend Trees						
Dec-2017	Hegutration Time:	Quick Reg User Name: TestUser, Unit Clerk Fin	e Yes	Of Deceated Date: Of Dec-2017	Deceated Time 11:15						
Jec-2017	- 11:32	TestUser, UnitClerk-En	e Yes	 05Dec-2017 	÷ • 11:15	-					
Dec-2017	• 11:32	TestUser, UnitClerk-En	e Yes	 05Dec-2017 	11:15						
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Jick Reg	us Frask	et Organize	biganese 💽 CLER		Prison Myret: Ca					PRODEC TES	OK TERMITCERK 60e-2017 CE

() Re	quired field not populated.	Click 'OK' to set focus to the field
		ОК

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 hilighted around the button). Fill in all necessary information. Then click **OK**.



ick Reg											
al Record Number: 08516	Encounter Number:	Last Name: CLERK	First Name: EDUNIT	Middle Name:	Preferred Name:	Previous Last Name:	Date of Birth: 30-Nov-1965	Age:	Gender: Female	BC PHN: 9876420594	
RTS Patient Information	Encounter Information Inst	rance Insurance Summary									
SP Eligibility											
ly Status:	Verily Date: • 05-Dec-2017	verity Time: 11:29									
ire if patient has proof o	of other Provincial or Federal he	alth insurance coverage (if YES	, select Insured Resident)								
us in Canada: nadian Citizen 🚽	-										
NSURED Residency In	formation		a		C 1 0 1						
ency > 6 Months?:	Canadian Passport	Uther Document Name:	123456	Effective Date:	Expry Date:						
ident/Injury Information											
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										PRODBC TEST.EDUNITCL	ERK 05-Dec-2017
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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)



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



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.





Activity 3.2 Selecting the patient

1 There are few different ways to locate patients.

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

PHN:	VIP	Deceased	Alerts	BC PHN	MBN	Name		DOB	Age	Gender	Addres	55	Address (2)	City
	6			9878216037	700001770	CSTEBODHI		26-Jan-1984	33 Years	Female	987 SI	DE STREET		VANCO
BN:				0010210001	100001110	00111100111	.,	Loodinioon	oo roaro	1 onnaio	001 01	ou onneen		
00001770														
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ender:														
istal/Zip Code:	•									_				,
v Phone Number	Facili	ty	Enc	ounter #	Visit #	Enc Type	Med Service	Unit/Clini	c F	Room	Bed	Est Arrival Da	te RegDa	te
	3 110	GH Lions Gat	e 700	0000012223	70000001229	0 Outpatient	Geriatric Medicir	ne LGH End	loscopy F	Procedure 1	01		18-0ct-3	2017 10:0
counter #	 L0	GH PF Lab	700	0000012214	70000001228	1 Outpatient	Respirology	LGH PF	.ab				18-0ct-3	2017 9:4:
Courter #.	- - A LL	GH Lions Gat	e 700	0000011217	70000001127	9 Inpatient	General Surgery	LGH 6W	6	507	03		02-0 ct-3	2017 9:10
S.0.	 L(GH Lions Gat	e 700	000002713	70000000272	9 Inpatient	zzInternal Medic	ine LGH ECO	2 2	224	01		19-Jan-J	2017 12:0
it #:	 10	GH Lions Gat	e 700	000002712	70000000272	8 Inpatient	Emergency	LGH ASC	C /	ASC	02		19-Jan-	2017 12:0
	1 📲 E I	GH Evergreer	n 700	0000002711	70000000272	7 Inpatient	Residential	EGH ESC	3 E	308	01		19-Jan-	2017 12:0
storical MRN:	E 📲	GH Evergreei	n 700	0000002710	70000000272	6 Inpatient	Residential	EGH ES2	2 E	208	01		19Jan-	2017 12:0
	E STER	GH Evergreei	n 700	000002709	70000000272	5 Inpatient	Residential	EGH EN:	2 E	254	01		19-Jan-	2017 11:5
	E STER	GH Evergreer	n 700	000002708	70000000272	4 Inpatient	Residential	EGH EN	1 E	152	04		19-Jan-	2017 11:5
Search Reset	13	GH Lions Gat	e 700	000002707	70000000272	3 Inpatient	Neonatology	LGH 4E	4	120	01		19-Jan-J	2017 11:5
	3110	GH Lions Gat	e 700	0000002706	700000000272	2 Inpatient	22ENT	LGH 3PC) (306	02		19-Jan-	2017 11:3
	N	GH Lions Gat	e 700	000002705	700000000272	1 Inpatient	Dermatology	LGH 2E	2	218	02		19Jan-	2017 11:3
	3000	GH Lions Gat	e 700	000002627	70000000264	3 Inpatient	Gastroenterolog	y LGH 5E	Ę	518	01		13-Jan-	2017 15:3
	4													•

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

mpri	<i>n</i>											Print Refre	sh Settings	Favorites	NO LOCATION	S- ▼	Lee	gn Out L _ →
^	Rec	ords																
	Drag a	column head	er here to grou	up by that colum	n													
		Last Name	First Name	MiddleName	PreferredName	Birth Date	Gender	Medical Record Number	Encounter Number	Encounter ID	VisitNumber	Patient Type	PatientClass	Address1	Address2	AdmitDateTime	AdmitDateTimeDisplay	AdmitSource
	<u>Clear</u>	Search.	Search.	Search	Search	Search	Sear	Search	70000001633	Search	Search	Search	Search	Search	Searcl	Search	Search	Search
ning		LAST	FIRST			05-Dec-1900	F	700008738	700000016336	96973052	700000016336	Emergency	Emergency	1000 Main St		20171208143600	08-Dec-2017	
Plan																	Records Last Refresh	ed: 3:05:14 PM
men																		
ires																		
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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.

Drag a colun	nn header here to	group by that	column		
	Location	Roor	Last Name	First Name	Mi
Clear	Search	Search.	ormimprint	Search	Is



Activity 3.3 Updating patient information using Refresh

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.

Http://wfi.prod.cs.healthbc.or	g/webfo	rmin 🔎 – C	🖉 Web For	rmImprint® by Fe	or ×					 ŵ %	<mark>-×</mark> - 7 ∰
WFD Web FormImprin	nt™			Prin	C Refresh	ings Favorites	- No	Locations - 🗸 🔻	Lee Tina	Sign Out 🕒	•
Print 1 🗘 Copies	Rec	ords			Default So Records	rt)					
Filter Jobs Q	Drag a	column head	er here to grou	p by that column	Job Tree						
- Favorites		Last Name	First Name	MiddleName	PreferredName	Birth Date	Gender	Medical Record Number	Encounter Number	Encounter ID	Visit
 Jobs Administrative 	<u>Clear</u>	Search.	Search.	Search	Search	Search	Sear	Search	70000001625	Search	Se
Release of Informa	V	POOL	TIME			08-Dec-1987	F	700008707	700000016251	96972791	7000
Authorization									Records Last Refr	eshed: 2:11:11 P	M
Request By La											
D Advance Care Planning											

2



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.

WED FormImprint"	WÊD	Web FormImprint ^{**}	C Refresh	Ö Settir
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Filter Jobs Q Drag	g a mental h	ealth act form	Q	
Favorites	Favori Jobs	tes Mental Health Documentation Mental Health Act Forms		
Advance Care Planning Allied Health Documen Anesthesia Records Cardiology Procedures Clinic Notes Consent Forms Consult Notes Discharge Documentat Gastroenterology Proce		Mental Hearth Act Forms Form 1 Mental Health Act Request for Admission Voluntary Patient Form 10 Mental Health Act Request for Admission Voluntary Patient Form 10 Mental Health Act Request For Second Medical Opinion Form 12 Mental Health Act Medical Report Second Medical Opinion Form 13 Mental Health Act Notification to Involuntary Patient of Right Form 14 Mental Health Act Notification To Patient Under Age 16, Admit Form 15 Mental Health Act Notification to Near Relative Form 16 Mental Health Act Notification to Near Relative (Admission of I Form 17 Mental Health Act Notification to Near Relative (Request or Orn Form 18 Mental Health Act Notification to Near Relative (Order For America Near Relative Near Relative (Order For America Near Relative Near Relative Near Relative Near Relative Near Relative (Order For America Near Relative N	arent Meni Is Under th Ited By A P Involuntary Ivoluntary der for a R Review Pa	tz ie 'a F e
Interdisciplinary Docun Labels Code Blue (Label S S		Form 16.1 Mental Health Act Certification To Near Kelative (Order For A Form 19 Mental Health Act Certificate Of Discharge Form 2 Mental Health Act Consent For Treatment (Voluntary Patient) Form 20 Mental Health Act Leave Authorization	Keview Pa	~

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.



WÊD ,	Web FormImprint [™]								
	Print 1 🗘 Copies	^							
Filter Jobs	Q								
Favorite	s								
lobs									
	Administrative								
Ū-	Release of Information								
	Authorization For The Release of He								
	Request By Law Enforcement For Re								
	Advance Care Planning Documentation								
	Allied Health Documentation								
	Anesthesia Records								
	Cardiology Procedures								
	Clinic Notes								
	Clinical Pharmacy Notes								
	DE Consent Forms								
	Discharge Documentation								
	Emergency Documentation	1							
	Gastroenterology Procedures								
	Interdisciplinary Documentation								
- D	Labels								
TL	Individual Label								
	Code Blue (Label Sheet)								
	Letters								
	Maternity Documentation								
0-0	Medication Documentation								
0-0	Mental Health Documentation								
	Nursing Documentation								
0- 0	Oncology Documents								
0- 0	Other Specialty Procedures								
	Perioperative Nursing Documentation								
0- 🗆	Physician Orders								
0- 🗆	Progress Notes								
0- 🗆	Resuscitation Documentation								
0-0	Surgical Documentation	~							

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

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



review Previous	► Next	 ▶ Next ➡ Print Done Zoom: 25
Vancouver CoastalH Anside orthers 10H ligne	Pour Parso Land Are lealth LAST, PAST Securicon Excuss Gene Marginal Elitti R. Safe Tables Const Duces Security Case Marginal Distribution of the December of the	HISTORY SHEET TRAUMA SERVICE DAILY STAFF ROUNDS HIM HIM HIM HIM HIM HIM HIM HIM HIM HIM
HISTORY SHEL TRAUMA SERV	ET MER 200007/2 Environte 200000016235 VICE DAILY STAFE BOLINDS	DATE Trauma Service Sign Off Note / Discharge Note
		Sign off date:
		MRP and service assuming care:
scet	Tra. m.: Progress Notes	
	CONSULTANTS: PLEASE	Trauma attending at time of sign off:
1. Secondation	DATE TO A CONSULTANTS FORM.	Tollow up vsit required?:YesNp
Sea Stranses	Trauma Services - Daily Staff Kounds	
18-18-1 -	Refine Inforder Resures Disco Posts	
 Family litrary Particular days Family all Data as 	1 1	
N an Albuman		
C Paras Inte.		
Dogradi —	2 2.	
		Recommended date of follow-up:
		Follow up imaging recored:
_	3 3.	
		Other special instructions:
	4 4	
	s b ,	
DO NOT	Nutritional Status/Goals Pharmacy Issues/Goals	
WRITE	Activity/Mobility	
SPACE	SERF ALE NO Sont	
	Acuity Status ICU High Acuity Ward Ready Trauma Sub-Acuite	
	Disposition Planning/Barriers to Discharge	
5071110 0070 177	signature:	
POSE D. M. & VER	na se avez a segre di?	FORM 12 - NUMERON 2015 OCT 01 New 21-012

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.

 After selecting all the form(s)/label(s) you want to print from the Jobs pane by clicking on the box is 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. <u>cannot be modified from within the Print</u> 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

Print	×
Printer	
Name: Citrix UNIVERSAL Printer (from	PC045260) Properties
Status: Ready	
Type: Citrix Universal Printer	
Where: client:767	
Comment: Auto Created Client Printer PC04	15260 Print to file
Print range	Copies
	Number of copies: 1
C Pages from: to:	
C Selection	12 ³ 12 ³ Collate
	OK Cancel



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.

Drag a	column head	er here to group	by that column						
	First Name	MiddleName	Last Name	PreferredName	Birth Date	Gende	Medical Record Number	incounter Number	Encounter IC
Clear	Search.	Search	Search,	Search	Search	Sear	0	Search	Search

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.

For	m with Patient	<u>ID</u>		Blank Form					
and drive loss low 10 -	/			attract - Nucl. (After Same Jan		/			
Vancouver CoastalHealth Denning welless. Evering on LGH Laboratory AUTHORIZATION FOR THE RE OF HEALTH RECORDS	ELEASE	Pigos Patient Labo DEMPI, ABCTEST JANET Outpatient 876742897 DOB: 01-Jan 005977 Encounter#:	H Here h 1955 F 700000008871	AUTHORIZATION FOR TH OF HEALTH RECORDS	IE RELEASE		Piace Patient Label	Here	
Please fax or mail your ATTENTIO	completed request to each hospital/fac I: Health information Management, Rele	ility you are requesting re ase of Information Office	ecords from.	Please fax or mai ATTE	your completed request to each NTION: Health information Manag	ospital/facility y ment, Release o	ou are requesting rec of Information Office	cords from.	
Part 1. Patient / Resident Inform	ation		14.6	Part 1. Patient / Resident I	formation			40	
LAST NAME OF PATIENT	FIRST MARE	ALGO KNOWN AS / A	LMD	DADE MAME OF PATIENT	PIRATINAME		ALSO KNOWN AS / ALI	wa .	
MAILING ADDRESS	CITY	PROVINCE / COUNTRY	POSTAL CODE	MAILING ADDRESS		CITY / PRO	VINCE / COUNTRY	POSTAL CODE	
TELEPHONE NO. (INCLUDING AREA COL	DE) DATE OF BIRTH DAY I MONTH I Y	EAR PERSONAL HEALTH	NUMBER (CARECARD)	TELEPHONE NO. (INCLUDING AR	EA CODE) DATE OF BIRTH DAY I	MONTH I YEAR	PERSONAL HEALTH N	UMBER (CARECARE	



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).

DATE/TIME	PHY	SICIAN ORDERS	USE BLACK BAL	L POINT PEN)	
DRUG & FOOD ALLER	GIES				
DRDO100019A	Rev: Oct. 29/04	Page	DGE: 220 PHN: N/A MSA Dr: Finch, Dr: Finch	ACU Date: C Cchristopher A. Acct C	1 Age: 83 AB00000058 12-Nov-06 F: MS000058/0
PHYSICIAN	ORDERS		-#- P		
			BD	22 - DE	arney c - 22



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 10:1	INCORRECT PATIENT 20,20
			BD:17/11/1958 GND:M AGE:52Y
PHYSICIAN ORD	ERS		MSACU SERVICE DATE:17/11/2007 Edelson,Andrew
			Edelson, Andrew Raberck, Bruce
			DOB: 22-Dec-22 Gnd: M Age: 83 PHN: N/A Unit#: AB00000058
DRDC100019A Rev:	Oct. 29/04	Page: 1 of 1	Dr: Finch, Christopher A. Acct#: MS000058/06
DRUG & FOOD ALLERGIES			
DATE/TIME	PHYSICI	AN 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)

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.

1. **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.

2. Organizer Toolbar

1

The Toolbar is located above the Banner Bar and it contains buttons for the different Organizer views available for you.

3. 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.

P TEST, CINDY - 700003721 Opened by Test Us	er, Respiratory Therapist								- 6 ×
Task Edit View Patient Chart Links	Navigation Help			9					
🖴 Multi-Patient Task List 🎍 Patient List 🎬 🕻	CareCompass 🔉 Staff Assignment 🏢 S	Schedule 👫 LearningLIVE 🎬 Ambulato	ry Organizer 🎬 Discharge Dashbo	ard 💡 🔍 PACS 💡 🥣					
📰 Tear Off 🏭 Suspend 🦺 Exit 🔗 Message	Sender 🎬 AdHoc 🎟 Medication Adm	inistration 🔒 PM Conversation 🝷 🔩 Cr	ommunicate 👻 🚹 Patient Educatio	on 💐 Result Copy 🗓 Related Rec	cords 💠 Add 👻 🗂 Scheduling	g Appointment Book 👩 Docume	nts 🥃 Discern Reporting Portal 💽 iAwar		
TEST, CINDY 💌							← List → 🍋 Rec	ent - Name	<u> </u>
TEST, CINDY	DO8:1983-Aug-08	MRN:700003721	Code Status:No CPR - Ma	iy Intubate, Critical Care	Process:Falls Risk		Location:LGH 2E; 2EL; 06		
Allergies: iodine, shellfish, Strawberry C	Age:34 years Gender:Female	Enc:7000000007044 PHN:9876978092	Dosina Wtt60 ka		Disease: Isolation:Contact Plus		Enc Type:Inpatient Attending:Test, Pet, MD		
Menu P	• A Respiratory There	apy View					[D] Full screer		⋧ 5 minutes ago
Respiratory Therapy View		1004		<u> </u>					
Mental Health Summary	Barrister Theres Courses		10 0	64 America		10 Handall Taal	M 4		2
Orders 🗣 Add	Respiratory Therapy Summary	23 Quick Orders	2.5 Summary	2.5 405/651	smerk	2.5 Handorr Tool	23 +		≡•
Single Patient Task List	Microbiology (0)								≡• ⊙
MAR	Last 6 months for all visits 🔫								
Interactive View and I&O	No results found								
Results Review	Diagnostics (0)								=r o
Documentation 🕂 Add	Last 6 months for all visits							_	
Medication Request	No results found								
Histories	No results round								
Allergies 🕂 Add 🚺	Labs								≡• ⊙
Diagnoses and Problems	Last 12 hours for the selected visit								
	No results found								
CareConnect	Pathology (0)							_	=- 0
Clinical Research	Last 10 days for all visits							_	
Form Browser	No results found								
Growth Chart	101000010010								
Lines/Tubes/Drains Summary	Respiratory Treatments								=- ~
MAR Summary	Last 24 hours for the selected visit								
Medication List 🕂 Add	No results found								
Patient Information	Documents (0) 🜲								≡• ⊙
Reference	Selected visit 🔷							_	
	No results found								
	Apnea, Bradycardia, Desatura	ation							≡• ⊗
	Last 48 hours for the selected visit								
	No results found								
							PRODBC TEST.RT M	onday, 2017-Au	gust-14 13:05 PDT

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.







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

CSTPRODAC, DISCHARGE - 700003089 Opene	ed by TestUser, Dietitian										
Task Edit View Patient Chart Links	Navigation Help										
🖴 Multi-Patient Task List 🛅 Schedule 🔉 Sta	ff Assignment 🛔 Patient List 🎬 Learning	gLIVE 📲 Discharge Dashbo	oard 🛛 🌇 Ambulatory Organ	nizer 🌇 Dynamic Worklist	ACS .						
😨 Tear Off 🇱 Suspend 📲 Exit 🔏 Message !	Sender 🔒 PM Conversation 🔹 🛂 Comm	unicate 👻 📑 Patient Educa	ition 🕂 Add - 🗃 Discen	n Reporting Portal							
CSTPRODAC, DISCHARGE										← List → 🛍 Recent -	Name • Q
CSTPRODAC. DISCHARGE	DOB:08-Feb-1899 Age:118 years	MRN:700 Enc:7000	0003089 000011243	Code Status:		Pro Dise	cess:Gender Sensitivity,Diff tase:	icult Intubation/Airway,C	ytotoxic Loca Enc	ition:LGH 6E: 624: 04 Type:Inpatient	
Allergies: Tylenol, Grass, melatonin, Mice	Milk of Magnesi Gender:Male	PHIN:987	8045829	Dosing Wt85 kg		Isok	ation:		Atter	nding:Plisvca, Rocco, MD	
Menu 9	< 🔿 🔸 🔒 Patient Summary									(II) Full screen	Print 🛛 🍣 8 minutes ago
Patient Summary	A 100%	- • • 4									
Mental Health Summary	Handoff Tool	Situation Backgrou	nd 💱	Assessment	23 1	Discharge	23 +			1	
Orders 🕂 Add											
Single Patient Task List	Informal Team Communication	Informal Team C	ommunication								lel≡- Î
Interactive View and I&O	Active Issues	Informal realine	ommunication								~
Results Review	Allergies (8)	Add new action					Add new comment				
Documentation	Vital Signs and Measurements										
Histories	Documents (8)	No active actions docur	nented				No comments documen	nted			
Allergies 🕂 Add	Transfer/Transport/Accompanim	All Teams				Show Completed (1)	All Teams				
Diagnoses and Problems	ent (0)										
	Assessments										
CareConnect	Lines/Tubes/Drains	Active Issues							Classifi	cation: Medical and Patient Stated 💌	All Visits 2 = -
Clinical Research	Intake and Output										
Form Browser	Labs						Add new as: This Visit 👻	Q			
Growth Chart	Imaging							1.0			
MAR Summary	Medications	Heart & renal d	isease, hypertensive maligr	nant			Medical	This	isit Chronic		
Medication List 🕂 Add	Home Medications	Les hose infard	tion right				Madical	This \	the Chronic		
Patient Information	Orders	Wound shecore	and right				Modical	This	icit Chronic		
Reference	Oxygenation and Ventilation	would abscess					Predical	1115 1	the Chironic		
	Pathology	 Historical 								Show	v Previous Visits
	Histories										
											All Visits 2
	Create Note	Piller gres (8)									
	Interdisciplinary Care Plan										
	Interdisciplinary Rounding Summ	Substance	Reactions		Category	Status	Severity	Reaction Type	Source	Comments	
	ary Note	Tylenol			Environment	Active	Severe	Allergy	Patient		
	Nursing Shift Summary	Grass			Invironment	Active	-	Allergy			
	Select Other Note	melatonin			Drug	Active		Allergy			
		Mile of Magneria			-nvironment	Active		Allergy			
		Cascara	-			ALINE	-	Anto yr	-	-*	
		Multi-Symptom Cold Relief (obsolete)	-		Quid	Active	-	Allergy	-		
										PRODEC TEST DIFTITIAN Friday	13-October-2017 15-21 PD



Activity 4.3 – Results Review

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

P. TEST, CINDY - 700003721 Opened by Test U	Jser, Respiratory Therapist				
Task Edit View Patient Chart Links	s Task List Options Help				
🖴 Multi-Patient Task List 🛉 Patient List 🍴	CareCompass 😫 Staff Assignment 🛄 Schedule 🌇 l	LearningLIVE 👫 Ambulatory Organizer	🎬 Discharge Dashboard 💡 🕅 PACS 🖕		
😨 Tear Off 🇰 Suspend 📲 Exit 🔗 Messag	e Sender 🎬 Addice 🎟 Medication Administration 🔒	PM Conversation 👻 🏹 Communicate	🔹 📄 Patient Education 🔩 Result Copy 🛄 Relat	ed Records 🔸 Add 🍝 🕮 Scheduling Appointment Book 📻 Docum	nents 🗃 Discern Reporting Portal 🔂 iAware 🖕
TEST, CINDY 💌	Onen Ad Hoc charting dialog				← List → Marcent - Name - Q
TEST, CINDY	DOB:1983-Aug-08	MRN:700003721	Code Status:	Process:Falls Risk	Location:LGH LD
Allowing indian shallfish Showhard C	Age:34 years	Enc:700000009005	Device Media ke	Disease:	Enc Type:Pre-Outpatient in a Bed
Menu 0	Sender Patient Task List	PHIN.96/09/6092	Dosing witho kg	ISOIAUON.	Autoriumg.
Perminators Therapy View					C, an zecon Gran C o manazardo
Montal Lingth Summany					
Order Add			2017-August-16 06:30 Wedr	esday PDT - 2017-August-16 19:29 Wednesday PDT	
Single Patient Tark List	Scheduled Patient Care All Continuous Tasks Ve	entilators Ownern Therapy Pulmona	ry Procedures Education		
MAR	Tack article of completed				
Interactive View and 18:0	Task Status Scheduled Date and Time T	ask Description Order Details			
Pendis Periou	Task status Scheduled Date and Time	The s	elected time frame and filters for this view did r	ot return any tasks	
Documentation and d					
Madication Request					
Historier					
Disancer and Problems					
Disgnoses and Houterns					
CareConnect					
Clinical Research					
Energy Browner					
Growth Chart					
Lines/Tubes/Drains Summary					
MAR Summary					
Medication List + Add					
Patient Information					
Reference					
Open Ad Hoc charting dialog	-				PRODBC TEST.RT Wednesday, 2017-August-16 14:11 PDT

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

1

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.







Activity 4.4 – Reviewing Orders

1

Click Orders	to review order'	s profi	le in the Men	u List.			
TEST, CINDY - 700003721 Opened by Tes	st User, Nurse						
Task Edit View Patient Chart Lin	nks Options Current Add Help						
IC CareCompary & Datiant List . Co Staff	Arrighment III: Dircharge Dathhoard 99 Multi-Patient	Tark List III Learning	I IVE 🚾 MyExperience 🕮 Clinical Leader Oro	anizer E C PACS			
m carecompass & Patient List a stan	Assignment moischarge basilboard an Multi-Patient	Task List M Learning	Live manyexperience machinear ceader org				
Exit Provide Tear Off	sage Sender 🎬 AdHoc 🎟 Medication Administration ,	PM Conversation	 La Communicate + B Patient Education 	Medical Record Request	🕈 Add 👻 🛅 Documents 🗃 D	Discern Reporting Portal 💽 iAware 🖕	
TEST, CINDY 🛛						🗲 List	🔿 🕋 Recent 👻 Name
TEST, CINDY	DO8:1983-Aug-08 Age:33 years	MRN:700003721 Enc:700000000704	Code Status:No CPR - May Int 4	tubate, Critical Care	Process:Falls Risk Disease:	Location:LGH 2E; Enc Type:Inpatient	2EL; 06
Allergies: iodine, shellfish, Strawberry	y C Gender:Female	PHN:9876978092	Dosing Wt:60 kg			Attending:Test Use	r, Physician - Emergency
Menu 🤬 🗸	> • 🖨 Orders						🗅 Full screen 💼 Print 🗈 0 min
Patient Summary	Add 🖓 Document Medication by Hx P	n <mark>z 🕂 🕭 Chock Intera</mark>	tions 2			Rec	conciliation Status Meds History 🗿 Admission 🗿 Dir
Orders + Add						•	Admission View
Single Patient Task List	riders Medication List Document In Plan						
MAR							
Internation View and 1800	View	Displayed: All Active	Orders All Active Orders				Show More O
Interactive view and 300	Medical	8 17	Out-News	Chatan	Dava Datalla		to a the date of the
Results Review	zzHospital Discharge Orders (Initiated)	o v	Dischases	Status	Dose Details		Last Opdated -
Documentation 🕂 Add	ICU General Admission Medical / Surgical (prot		Discharge Patient	Ordered	2017-Jul-2	7 10:45 PDT. Home Independently	2017-Jul-27 10:45 PDT
Medication Request	-Venous Thromboembolism (VTE) Prophylaxis		Admit to Inpatient	Ordered	2017-Jul-2	5 11:31 PDT, Admit to Hospitalist Medicine, Admitting provider: T	est User 2017-Jul-25 11:33 PDT
Direct Deck	- ICU Insulin Infusion - Critical Care (Module) (⊿ Status					
blood bank	Suggested Planz (1)		Code Status	Ordered	2017-Jul-2	15 11:16 PDT, No CPR - May Intubate, Critical Care	2017-Jul-25 11:18 PDT
Histories	Orders		SIRS Alert	Ordered	2017-Jul-0	14 10:27 PDT, Stop: 2017-Jul-04 10:27 PDT	2017-Jul-04 10:27 PDT
Allergies 🕂 Add	Admit/Transfer/Discharge	4. Patient Care			Sins Criter	na: 04/07/1710:20:00 Heart Rate Monitored = 150 Bpm (H) [gre.	ster than
Diagnoses and Problems	2 Status		Morse Fall Risk Assessment	Ordered	2017-Jul-2	5 11:51 PDT	2017-Jul-25 11:51 PDT
	- Patient Care	M 🖬	Monitor Intake and Output	Ordered	2017-Jul-2	15 11:16 PDT, q1h	2017-Jul-25 11:18 PDT
	- Activity	M 💀	Height/Length	Ordered	2017-Jul-2	5 11:16 PDT, once, Stop: 2017-Jul-25 11:16 PDT, on admission	2017-Jul-25 11:18 PDT
CareConnect	- Diet/Nutrition		Pain Assessment	Ordered	2017-Jul-2	15 11:16 PDT, q4h, if patient expresses pain, use Numeric Rating Sc	ale with 2017-Jul-25 11:18 PDT
Clinical Media 🛛 🕂 Add	- Continuous Infusions		Weight	Ordered	2017-Jul-2	5 11:16 PDT, Stop: 2017-Jul-25 11:16 PDT, On admission	2017-Jul-25 11:18 PDT
Clinical Perearch	- Medications		Cardiorespiratory Monitoring	Ordered	2017-Jul-2 2017 Jul-2	IS 11:16 PD I, Remains on at all times IS 11:16 PDT, Show 2017, Jul 25 11:16 PDT. An analysis of shows for	2017-Jul-25 11:18 PD I
	Blood Products		Ovimetry - Continuous (Pulse Ovimetry Conti-	Ordered	2017-Jul-2	IS 11:10 PD 1, Stop: 2017-301-25 11:10 PD 1, AS per blood glucose ne IS 11:16 PDT	2017-Jul-25 11:18 PD1 2017-Jul-25 11:18 PD1
Form Browser	Disgnortic Tertr	I I I I	Vital Signs	Ordered	2017-Jul-2	15 11:16 PDT, q1h	2017-Jul-25 11:18 PDT
Growth Chart	Procedures	🗹 🖬	Sedation Assessment (Richmond Agitation S	Ordered	2017-Jul-2	5 11:16 PDT, g4h and PRN	2017-Jul-25 11:18 PDT
Immunizations	Respiratory	✓ 2	Richmond Agitation Sedation Scale Goal (RA	Ordered	2017-Jul-2	IS 11:16 PDT, RASS goal of 0, Alert and Calm	2017-Jul-25 11:18 PDT
Lines (Tubes (Drains Summan)	- Allied Health		Intensive Care Delirium Screening Checklist	Ordered	2017-Jul-2	15 11:16 PDT, BID, to be done at 0600 and 1600 and as needed	2017-Jul-25 11:18 PDT
circle robes brains summary	Consults/Referrals	1 66	POC Glucose Whole Blood (POC Capillary Bl BOC Urine Pregnancy Text	Ordered	2017-Jul-2	0 10:54 PD F, once, Stop: 2017-Jul-20 10:54 PD F 9 15:41 PDT, once, Stop: 2017-Jul-19 15:41 PDT	2017-Jul-20 10:55 PDT
MAR Summary	Communication Orders	- 00°	Hospital High Utilizer	Ordered	2017-Jul-1 2017-Jul-0	4 10:20 PDT Stop: 2017-Jul-04 10:20 PDT	2017-Jul-20 10:35 PDT 2017-Jul-04 10:20 PDT
Medication List 🕈 🖶 Add	- Supplies				Order plac	ed due to patient having 3+ hospitalizations in the last 12 months	Louis ser on anno PD1
Patient Information	Medication History		Basic Admission Information Adult	Ordered	2017-Jul-0 Order ente	l4 10:20 PDT, Stop: 2017-Jul-04 10:20 PDT ered secondary to inpatient admission.	2017-Jul-04 10:20 PDT
Reference	Medication History Snapshot Reconciliation History		Admission History Adult	Ordered	2017-Jul-0 Order ente	l4 10:20 PDT, Stop: 2017-Jul-04 10:20 PDT ered secondary to inpatient admission.	2017-Jul-04 10:20 PDT
			Infectious Disease Screening	Ordered	2017-Jul-0	14 10:20 PDT	2017-Jul-04 10:20 PDT
	Related Results	▲ Details					
	Variance Viewer	Orders For Cosigna	Urders For Nurse Review				Orders For Sig
						PRODBC	TEST.NURSE Monday, 2017-July-31

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
- make to be reviewed by clinician



Activity 4.5 – Reviewing Single Patient Task List (SPTL)

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

1

4. Task List



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.

TEST, CINDY - 700003721 Opened by Test U	Jser, Respiratory Therapist					- Ø X
Task Edit View Patient Chart Links	s Task List Options Help					
🖴 Multi-Patient Task List 🛔 Patient List 🎬	CareCompass 🟩 Staff Assignment 🏢 Schedule 🎬 Lea	ningLIVE 🛛 🎬 Ambulatory Organize	r 🌇 Discharge Dashboard 💡 🤅 😋 PACS 💡			
📰 Tear Off 🇰 Suspend 🚽 Exit 🔗 Messag	e Sender 鞧 AdHoc 🎟 Medication Administration 🔒 Pl	l Conversation 🔹 🕞 Communicati	e 🔹 🔝 Patient Education 📹 Result Copy 🛄 Related Reco	rds 🕂 Add 👻 🛱 Scheduling Appoi	intment Book 🛞 Documents 🗃 Discem F	(eporting Portal 💽 iAware 💡
TEST, CINDY 🛛						← List → Marcent + Name - Q
TEST, CINDY	DOB:1983-Aug-08	MRN:700003721	Code Status:	Process:Falls Risk		Location:LGH LD
Allergies: jodine, shellfish, Strawberry (Age:34 years Gender:Famale	Enc:700000009005	Doring WE60 kg	Disease: Teolation:		Enc Type:Pre-Outpatient in a Bed
Menu 0	Single Patient Task List		Dosing Hoto kg	Isolation.		"D' Full screen Print 2 hours 31 minutes ago
Respiratory Therapy View						
Mental Health Summary	V 🚫 💷 🖻 🛰 🙀					
Orders + Add		Task List P	roperties]	lay Pl IT	
Single Patient Task List	Scheduled Patient Care All Continuous Tasks Venti	ators Oxygen Th				
MAR	Task retrieval completed	Time Frame	5			
Interactive View and I&O	Task Status Scheduled Date and Time Task	Description Order Choose o	ne of the following:			
Results Review	생 du' Overdue 2017-Aug-17 13:23 PDT Adv	nce ETT 🔹 🖉 🖉 Defined	d Time Frame 💮 Hour Interval 💿 Generic Time Frame			
Documentation + Add	75 66 Overdue 2017-Aug-18 11:58 PDT Six N	linute Walk				
Medication Request		Previos	12 Hour (5-5) Day Shift A 12 Hour (5-5) Night Shift			
Histories		2 © Curren	t 12 Hour (6-6) Day Shift			
Allergies 🕂 Add		Next	12 Hour (7-7) Day Shift 3			
Diagnoses and Problems			12 Hour (7-7) Night Shift 12 Hour Day Shift			
			12 Hour Night Shift			
CareConnect			d man bay sime			
Clinical Research						
Form Browser		Show me m	vy: 15:00 - PDT			
Growth Chart						
Lines/Tubes/Drains Summary		From: 201	17-Aug-17 × 0800 × PDT			
MAR Summary		To: 201	17-Aug-19			
Medication List 🕂 Add		2.01	Traging T The PUT			
Patient Information						
Reference			4	OK Cancel		
					·	
Retrieving task list properties						PRODEC TEST BT Wednesday 2017-August-23 15:15 PDT



Activity 4.6 – Reviewing MAR Summary

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.



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

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

1

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.









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: <u>ED-UC-B, Kelly/Sonia/Gladys</u> 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 <u>only</u> schedule <u>the first appointment</u> 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

Logging in:

1

2

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

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



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



Activity 5.2 – Overview of SchApptBook interface

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

Scheduling: Scheduling Apport							
Task Edit View Help							
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i 🗢 lack + 👄 + 👔 🖪			_				
Name: CSTSCHEMPI, RANDY	DC PHN: 987548832	x	Gender: Female	Person Comments:			
Preferred Name: MIDN: 700007091	3 DOB: 05-Nov-1977		Language:	Location:			
Disease Net: None Process Net: None	Age: 40 Years		Interpreter Required:	Preferred Phone:			
Books Appointment			Work in progress:				
4 December > Destational - 1 Chi Databab Para Area Dec	be ball				Schedule		
Su Mo Tu We Th Fr Sa		open			Confirm		
38 27 28 29 30 1 2 . 8 0 5 6 4 4 8							
					Suggest		
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31 1 2 3 4 5 6					head		
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06 Dec-2017 - Lúlt Rivhab Book							
Contastan, Mary PT Geelen, Claire PT Karst, Laure	PT Lun, Janet PT O'La	aughlin, Geraldine PT Thirtle	, Ananda PT Fischer, Casie OT	Perry, Megan OT	Pursell, Janet OT		
LGH R. LGH Rehab	LGH R	R LGH Renab		LGH Rehab	LGH Rehab		
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9.15							
9:30 LGH Rehab	1010 Add						
10.00 LOHR LOHR LOHR	LGHR	R. LOHR. LOHR.		LOH Rehab			
10.15							

- 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)

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

1

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.

Scheduling: Scheduling Appointment Book						
fask Edit View Help						
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			Medical Day Care Book			
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00 AM LGH MDC Antibiotics	LGH MDC Antibiotics	LGH MDC Antibiotics	LGH MDC Antibiotics	LGH MDC	LGH MDC	
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:00 AM						
: 15 AM						
:45 AM						
.00 AM						
:15 AM			N			
1:30 AM			-2			



5. 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.

- 6. Click the Ellipsis button beside the Person name field ----
- 7. 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).
- 8. 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.

9. The Organization window appears. Click the ellipsis.

🚯 Organization
Please select the facility where you want to view person aliases.
Facility Name Facility Alias
I
Facility:
OK Cancel

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

🕄 Organization
Please select the facility where you want to view person aliases.
Facility Name Facility Alias
LGH occ medical daycare
LGH OCC Medical Daycare
Facility:
LGH OCC Medical Daycare
OK Cancel

- 11. The EMPI window will appear momentarily as your patient is checked against the EMPI database.
- 12. 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.


🕄 Future Reque	sts/Appointments for	CSTSCHEMPI, RAND	Y				? 🗙
Future patient requ	est(s):						
Request Act	ion Appointment Type	Earliest Request Date	Latest Request Date	Created By		Date Created	
= Book	RAN F/Up	06-Nov-2017 - 7:00	06-Dec-2017 - 18:00	TestUser, Clerk	Advanced-Scheduling	06-Nov-2017 - 14:13	
•							•
Huture patient appl	pintment(s):						
Current State	Appointment Type	Location Begin Date/	Time End Date/Time	Created By Da	ite Created		
•							•
Select	Unselect					OK	Cancel

- 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.

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Та	ask	Edit	Vie	w	Help													
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Pre	ferre	ed Na	me:						MRN: 700007891			DOB: 06-	Nov-1977					
Dis	ease	e Alei	t: No	ne					Process Alert: None			Age: 40	Years					
	٩			2017			Þ	Books Appointment										
	•		No	ovem	ber		۰.	*Appointment location:								^	Move	•
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	29	30	31	1	2	3	4	-								=	Next	
	5	6	7	8	9	10	11	*Appointment type:									Clear	
	12	13	14	15	16	17	18	Rehab Arthritis New - PT									0.00	
	19	20	21	22	23	24	25	SRehab Providers:									<u>A</u> NR	
	26	27	28	29	30	1	2	All Resources»										
	3	4	5	6	7	8	9									*		

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

🖺 So	hedul:	ing: Sc	hedu	ling A	ppoir	ntment	Book												
Task	Edi	t Vie	w	Help															
: ⊴ ∥L	1	à 🛙	1 🦷	5 👲	1		≨釧 (4) ◎ (4) 🔒	3 🚸 👬 🎜 🏪 🦧 🖉	±∣€ ∈	🔾 i 🖂 🔚	🗟 🛃 d	è 🚯 🛛	, i e	8 6 8	0	P 👼	٩	3	1 🖸 🕼 🤇
i 🔶 I	Back 🝷	⇒ -	1	đ															
Nar	ne:	CST	rso	CHE	EMF	PI, R	ANDY			I	BC PHN: S	876488	326						
Prefe	red N	ame:						MRN: 700007891		I)OB: 06-N	lov-1977							
Disea	se Ale	rt: No	ne					Process Alert: None		1	\ge: 40 Y	'ears							
•			2017			Þ	Books Appointment												
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Su	Мо	Tu	We	Th	Fr	Sa	Rehab Provider:												
29	30	31	1	2	3	4	«All Resources»												Vext
5	6	7	8	9	10	11	*Reason For Visit:										_	(Clear
12	13	14	15	16	17	18	Rehab												
19	20	21	22	23	24	25	Ordering Provider:											-	ANR
26	27	28	29	30	1	2	Cidaling Hovida.												
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17. Scroll down to enter Referring Provider, Referral Received Date and Priority fields.



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e sci	neauli	ng: so	neau	ling A	ppoir	itment	500K	
Task	Edit	Vie	W	Help				
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🖨 B	ack 🕶	⇒ -	1	ſ۵.				
Nan	ne:	cs ⁻	rso	CHE	MF	<mark>Я, В</mark>	ANDY	BC PHN: 9876488326
Preferr	ed Na	me:					MRN: 700007891	DOB: 06-Nov-1977
Diseas	e Ale	t: No	ne				Process Alert: None	Age: 40 Years
•			2017			•	Books Appointment	
4		No	ovem	ber		•	*Referring Provider:	A Move b
Su	Мо	Tu	₩e	Th	Fr	Sa	TestCST, FamilyNursePractitioner-MH1 MH, NP	
29	30	31	1	2	3	4	*Perform Reserved Date:	Next
5	6	7	8	9	10	11	17.1 2017	Clear
12	13	14	15	16	17	18	17-N0V-2017	
19	20	21	22	23	24	25	*Priority:	ANR
26	27	28	29	30	1	2	Routine	
3	4	5	6	7	8	9		Ψ.
							L	

- 18. Scroll down to find Interpreter Required field and select No
- 19. Click on the **Move** button **Move** 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)

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:

1

- 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**.

Schedule - Rehab Arthritis New - PT
Resource:
Karst, Lauren PT 🗸 🗸 🗸
Default slot:
<none> •</none>
Time: 1149 v
Duration:
1 A Hour(s) Minutes Day
Distinguish setup and cleanup durations
OK Cancel

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)

Schedule
Confirm
Baser
THECO .
Suggest
Request
Insert
•
*
1
1

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.

Scheduling: Scheduling Appointment Book				- 4
Task Edit View Help				
41 F & F + O T > T = K > A > A) 🗄 🐟 🖈 🗐 🐻 🖉 🧷 în 📲 🗉 🔍 🔍 îm :	🏚 🛪 🖬 🙈 🕼 🔎 🖉 🦽 🔿 🖉 🍕 🕅 🗔 🛯	0. 9·	
🖨 Back - 🔿 - 👔 🚮				
Name: CSTSCHEMPI, RANDY		BC PHN: 9875488326	Gender: Female	Porson Comments:
Preferred Name:	MRN: 700007891	DOB: 06-Nov-1977	Language:	Location:
Disease Alert: None	Process Alert: None	Age: 40 Years	Interpreter Required:	Preferred Phone:
Contraction Contra	nt		Work in progress:	
1 November > Person party		A	CSTSCHEMPI, RANDY	Schedule
Su Mo Tu We Th Fr Sa	Y	MOVE	Rehab Arthritis New - PT	Confirm
29 30 31 1 2 3 4		Next	E-B Current Schedule	
5 6 7 8 9 10 11 */ppointment (ocation:			- Rehab Providers	
12 13 14 15 16 17 18 LGH Rehab OP		in Cea	- SQ Patient	Suppost
19 20 21 22 23 24 25 *gppointment type:		ANR		
26 27 28 29 30 1 2 Rehab Athritis New - F	PT			
3 4 5 6 7 8 9				Inset
		20-Nov-2017 - Rehab Providers		
	Kanst, Lauren PT		Sharpe, Nina PT	
9:00				
9:15 LGH Rehab				
9.30				
10.00				
10:15				
10:30				
10:45				
11:00				
11:15				
11:30				
11:45		<u></u>		-

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



🔞 Suggest	ed Schedules																? ×
	Patient	Appointment Location	Appointment Type	P	rimary Order	Scheduled Date	/Time	Patient Dur	ation								
= %	CSTSCHEMPI, RANDY	LGH Rehab OP	Rehab Arthritis Nev	v - PT				0 Minutes									
-																	
-																	
				_													
Suggest (Critera Preferences					Pat Dur Pat Da	ste/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order	Resource Duration	Slot Type		
Number of	suggestions to return :		10		*												
Number of	days in date range:		30		*												
Default tim	e range:	080	0 🚔 1700)	-												
Succession	atio		1														
		1	-														
Acceptable	e time variation:			0	-												
Mon	Tue Wed		a Sat	Sun	_												
Do not	allow multiple secondary su	ggestions															
First av	allable with sequencing	· v day	Ϋ́, Υ														
Display	day or week with date/time	•															
Optimiz	e patient time																
Return	suggestions in	5 v minu	te intervals.														
Next	Next Day	Clear	Select													0	Cancel

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.

PATIENT SCENARIO 5 – Scheduling appointments to Medical Day Care (MDC) CLINICAL+SYSTEMS TRANSFORMATION Our path to smarter, seamless care

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

Schedule Rehab Arthinds New 11		
Resource:		
Karst, Lauren PT		-
Default slot:		
LGH Rehab (8:00 - 12:00)		•
Time:		
0800		
Duration:		
Hour(s)	Day	
Distinguish setup and cleanup durations		
	ОК	Cancel

If necessary, modify any of the fields (Resource, Default Slot, Time and Duration) and click $\ensuremath{\textbf{OK}}$.

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



Activity 5.5 – Confirming an appointment

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.

1

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.



- 3. The Encounter Selection window will open with the patient's previous and current encounters. Click on the Add Enc 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 preregistration.

Pre-Reg Status:

- 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.
- 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:	Building:	Unit/Clinic:	
LGH Rehab OP	 LGH Rehab OP 	 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:		Medical Service:		Reason for Visit:	Referral Source:	
Pre-Outpatient	•	Occupational Therapy	•	Rehab		•

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.

Locument Selection		×
Document	Printer	Copies
🐼 Armband Label	590_1stfl_t8	1
🕼 Lab Blood Specimen Label	590_1stfl_t8	1
🕼 Lab Non-Blood Specimen Label	590_1stfl_t8	1
PHSA Facesheet	ph_590_it_11-General	1
Do not print documents	E	idit OK

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





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										
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1										
Name: Person Comments:										
MBN:		DOB:								
		Age:								
Request List	MRN	Person Name	Appointment Type	Order	Priority	Received Date				
Inquiry:	70000659	CSTSCHYURI, ST-ONE	RAN F/Up	Follow Up - Clinic	Routine					
Request List by Location	70000659	CSTSCHYURI, ST-ONE	RAN New	Referral to Neurology	Routine	18-Jul-2017 - 8:39				
	70000659	CSTSCHYURI, ST-ONE	RAN New	Referral to Neurology	Routine	19-Jul-2017 - 11:45				
Request List Queues:	700001007	CSTPRODSCH, TESTKG	RAN New	Referral to Neurology	Urgent (less than 1 month)	03-Aug-2017 - 12:04				
Future Requests	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				
Location type:	700006640	CSTAMBTEST, JAMIE	RAN New	Referral to Neurology	Emergent (less than 1 week)	21-Nov-2017 - 16:05				
Ambulatory(s)	700008318	AMBTEST, DEMO	RAN New	Referral to Neurology	Urgent (less than 1 month)	27-Nov-2017 - 15:15				
Location:										
LGH RAN 👻										
▼										
Find Clear Close	•	III				۴				



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.

Schedule an Appointment from a Request List

4

- 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.

Request List	Acti	on MRN	Person Name	Арроі	Lock	
	Boo	k 70000659	CSTSCHYURI, ST-ONE	RAN	Unlock	ie
Inquiry:	Boo	k 70000659	CSTSCHYURI, ST-ONE	RAN	Add New Appointment	e
Request List by Location 👻	Boo	k 70000659	CSTSCHYURI, ST-ONE	RAN	Add Herr Appointment	le
	Boo	k 700001007	CSTPRODSCH, TESTKG	RAN	Complete Request	t (less than 1 month)
Request List Queues:	Boo	k 700006727	CSTMATTEST, TESTUSER	RAN	Modify Request	e
Future Requests 🗸 🗸	Boo	k 700007575	SPIEGEL, SPIKE	RAN	M. D.	e
=	Boo	k 700006640	CSTAMBTEST, JAMIE	RAN	Move Request	ent (less than 1 week)
Location type:	Boo	k 700008318	AMBTEST, DEMO	RAN	Cancel Request	t (less than 1 month)
Ambulatory(s)	Boo	k 700007891	CSTSCHEMPI, RANDY	RAN	Restore Request	ie .
Laurian					· · ·	
					Schedule	
LGH RAN 👻						_
-	·				Inquiry •	
	_				Notifications	

- 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.



Appointment Attributes							? ×			
CSTPRODSCH, TESTKG	Details Orders	Resource List	Guidelines	Appointment	Eligibility					
	*Reason For Visit:									
	ran									
	Ordering Provider:									
	TestUser, Neurologi	ist-Physician, MD								
	*Referring Provider:									
	*Referral Received Date:									
	03Aug-2017									
	*Priority:									
	Urgent (less than 1	month)					•			
	*Interpreter Required	d?:								
	No						•			
	Language:									
							•			
	Special Instructions:									
	Patient was contact	ed Nov 19/17								
						ОК	Cancel			

5. The appointment opens in the WIP.

Books Appointment		Work in progress:	
Appointment type: Neuro New RAN Provider: All Resources> *Reason For Visit: ran	Move Move Move Move Move Move Move Move	CSTPRODSCH, TESTKG CSTPRODSCH, TESTKG Current Schedule Current	Schedule Confim Recur Suggest Request Insert

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: 98	BC PHN: 9878393779		Gender: Female		Pe	Person Comments:		
Preferred Name:	MRN: 700001007		DOB: 01-Nov-2016		Language:			Location:		
Disease Alert: None	Process Alert: None		Age: 13 Months		Interpreter Required:		ired:	Preferred Phone: (778) 1		778) 123-4567
■ CSTPRODSCH, TESTKG	General Summary Det *Cancel reason: Comments:	tails Orde	rs Guidelines	Notification	Conversation Su	immaries	Itineraries	Locks	Booking Notes	•
	Person Name CSTPRODSCH, TESTKG	MRN 700001007	Home Phone (604)556-4322	Enc Type Pre-Outpatient	Encounter Number 700000012817	VIP	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.



End of Workbook One

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