SELF-GUIDED PRACTICE WORKBOOK [N47]
CST Transformational Learning

WORKBOOK TITLE:

Unit Clerk: Emergency

Last update: March 8, 2018

TABLE OF CONTENTS

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

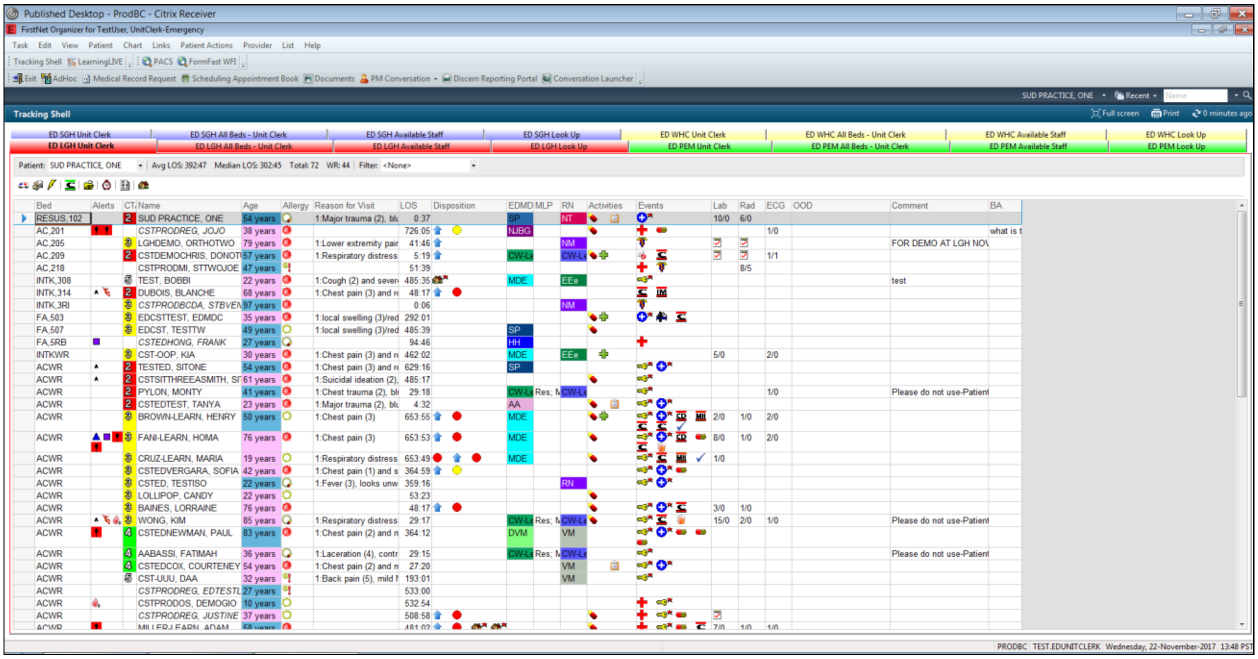
You work as an Emergency Department unit clerk at Lions Gate Hospital. Before you begin your shift, you will need to set up your workstation and understand how to navigate through the tracking shell and understand what each icon means.

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:

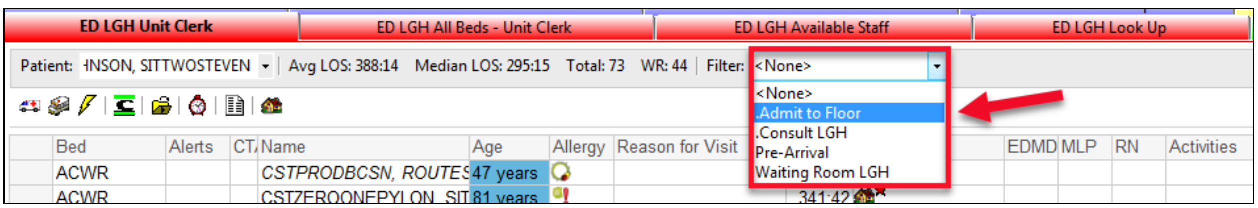


Activity 1.2 Navigating through Tracking Shell

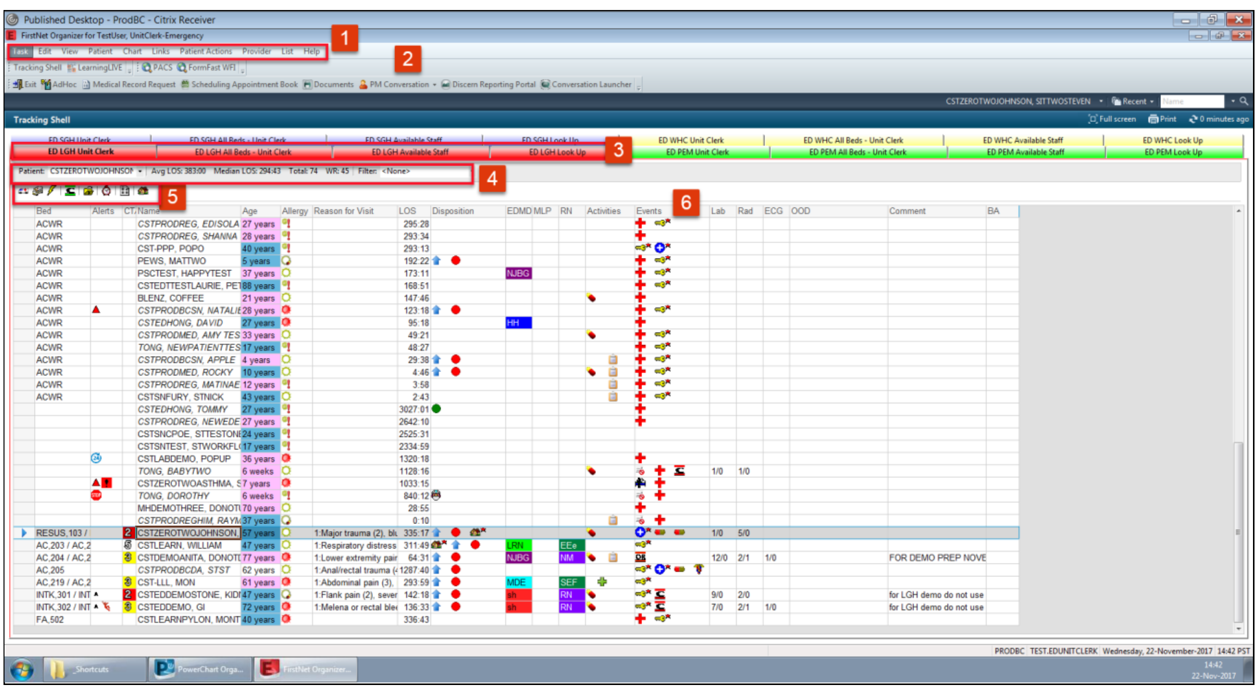
1 Depending on the location (hospital) of where you work, the ED tabs will already be set to your location.

You can click on each tab to change your filters:

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



2



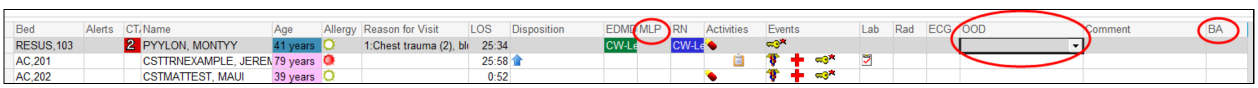
Note: There is a **Refresh**  icon on the top right hand corner. For this Tracking Shell screen only, this page updates automatically every 60 seconds. Therefore, you do not have to click this **Refresh** icon each time.

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

conversation, Scheduling Appointment Book, FormFast WFI)

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

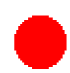
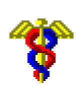
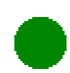
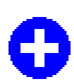
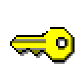
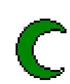
3 Most of these **Tracking List Columns** are self-explanatory. However, there are a few acronyms that are not as obvious such as:
-**MLP** (Mid-Level Provider)-Medical students, NPs, Residents
-**OOD** (Out of Department)-There is a drop down menu to choose from when you click on the individual cell.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



Bed	Alerts	CT	Name	Age	Allergy	Reason for Visit	LOS	Disposition	EDMD	MLP	RN	Activities	Events	Lab	Rad	ECG	OOD	Comment	BA
RESUS,103		2	PYYLON, MONTYY	41 years		1:Chest trauma (2), bl	25:34		CW-Le		CW-Le								
AC,201			CSTTRNEXAMPLE, JEREN	79 years			25:58												
AC,202			CSTMATTEST, MAUI	39 years			0:52												

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

Standard Icons and their Meanings

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

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		Document Home Meds	
Isolation		Readmission Risk	
Certified		Falls Risk	
ADE Risk Positive		Medically Cleared	
Interdisplinary Activities		Urine collection	
	Admit to Day Surgery		Familiar Faces Shared Care Plan

Other Icons by Column	**Screen Tips that appear when you hover over the icon**
Alerts Column 72	Time 2017-Aug-28 11:34 / Event 72 Hour Return / Status Request
CTAs indicators 4	Acuity: 4 - Less Urgent
EDMD column	Grafstein, Eric - EG
Alerts Column	Time 2017-Aug-25 13:39 / Event Hosp High Utilizer / Status Request

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 A	Time / Event / Status 2017-Aug-25 13:44 / ADE Risk Positive / Request
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 C	Event Consult Request
Events column MH	Time / Event / Status 2017-Jul-04 15:08 / Consult Psych Reques / Request
Events column	Registration overdue by 30 minutes
Events column	Registration overdue by 15 minutes
Events Column	Time / Event / Status 2017-Aug-25 14:11 / Perform BPMH / Request
Events Column	RN Exam overdue by 30 minutes
Allergy column	Allergy / Update PENICILLIN / 2017-Jun-28 12:49
Allergy column	No Known Allergies
Bed Column	Dirty bed
Bed column	Held bed
Age Column 46 years	Blue background indicates Male.

Key Learning Points

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

PATIENT SCENARIO 2 – New Patients arrive to ED

Learning Objectives

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

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

SCENARIO

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

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

You will be completing the following activities:

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

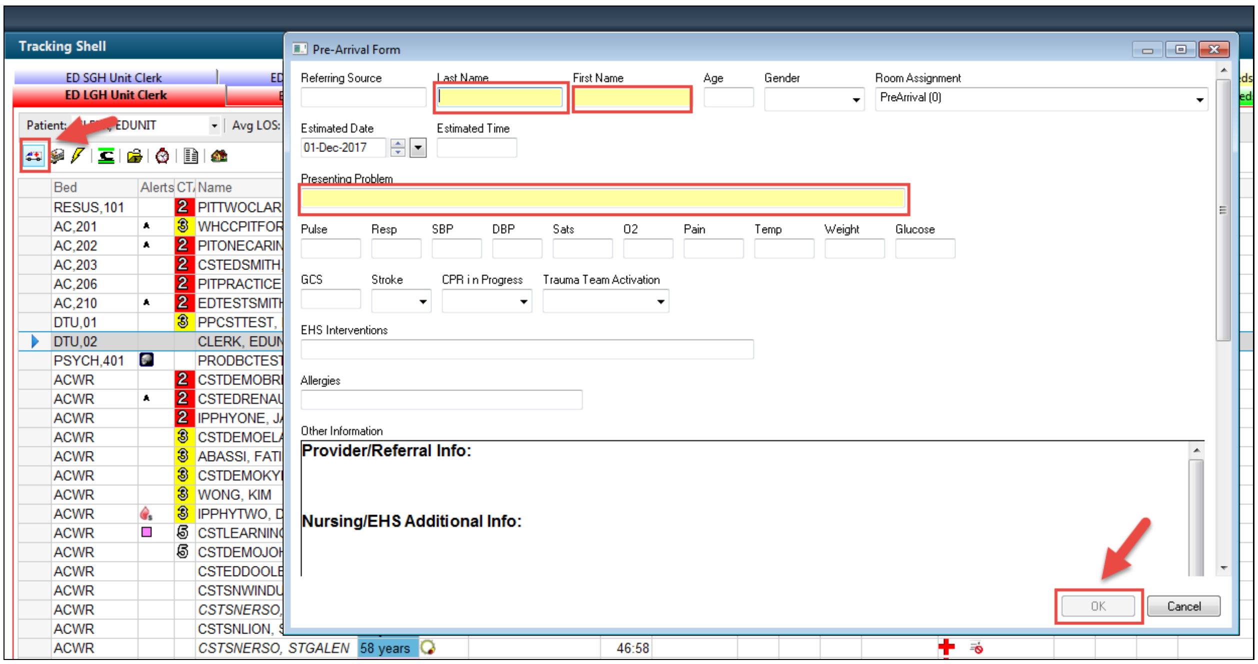
- Complete a Medical Equipment request
- Search for a patient then complete a Quick Registration for a deceased patient

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.

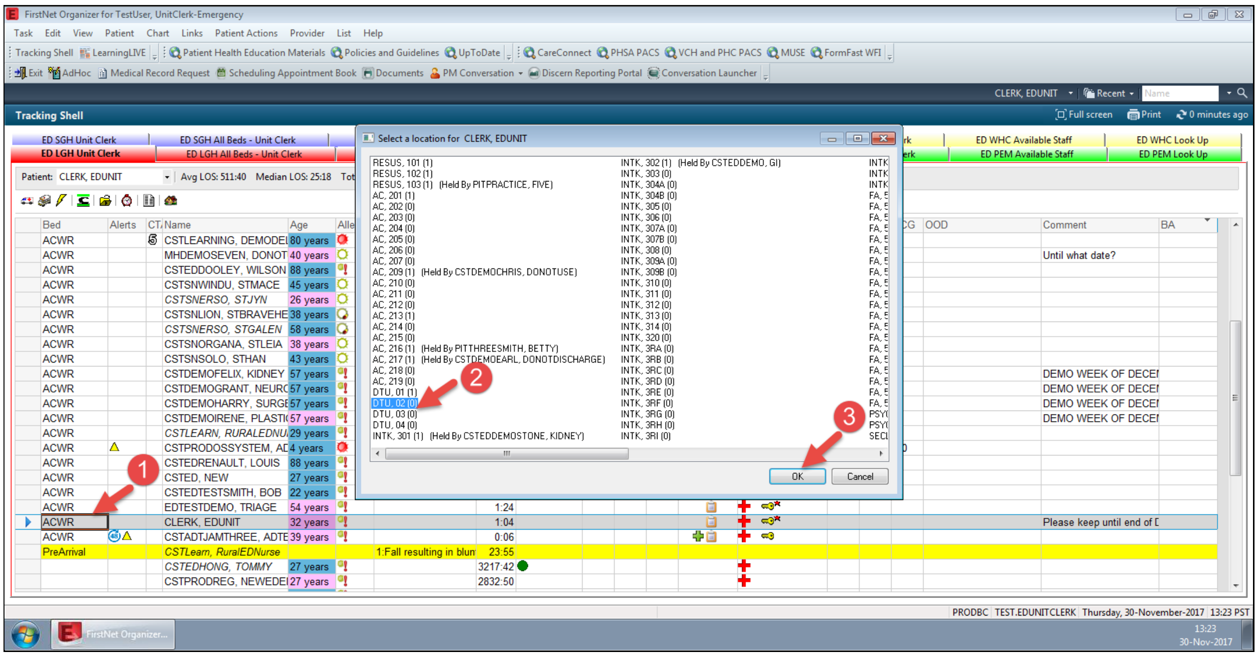
Fill in [Any last name, Any first name] and Presenting Problem: Chest Pain



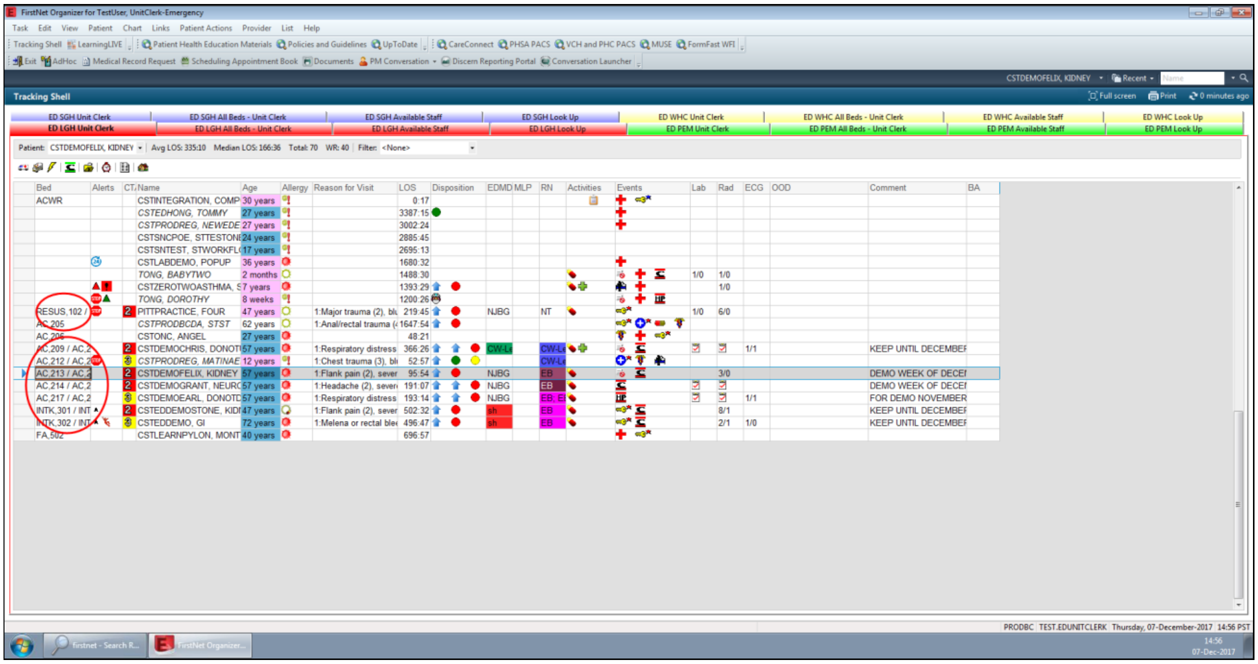
Activity 2.2 Assign a patient to a bed

1. 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: **<u>ED-UC-B, Kelly/Sonia/Gladys</u>** given to you for the following activities.



2. **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:

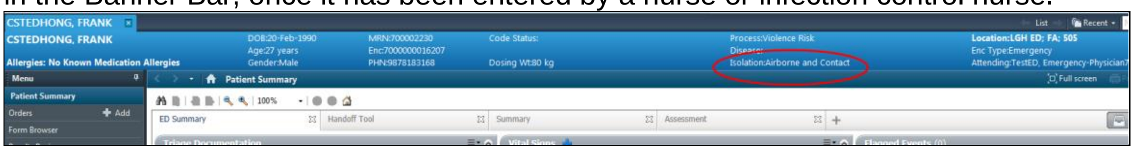

FirstNet Organizer for TestUser, UnitClerk-Emergency
Tracking Shell

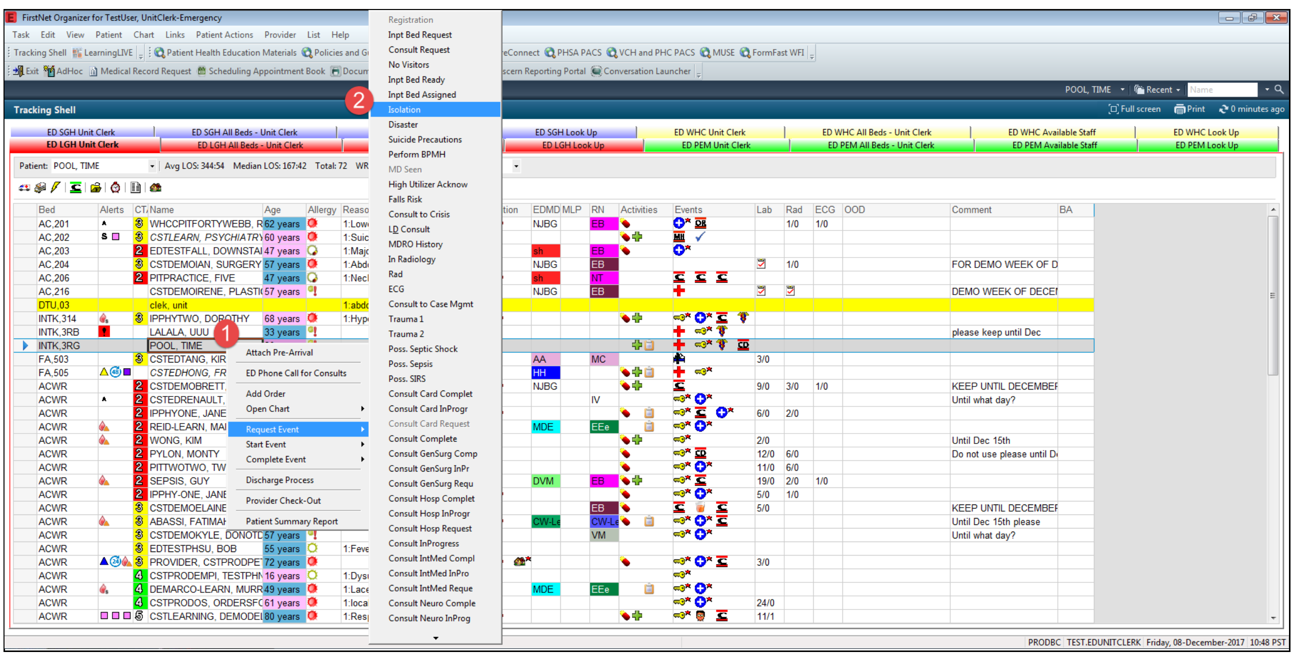
Activity 2.3 Request Event/Complete Event (Isolation Alert, Falls Risk)

1

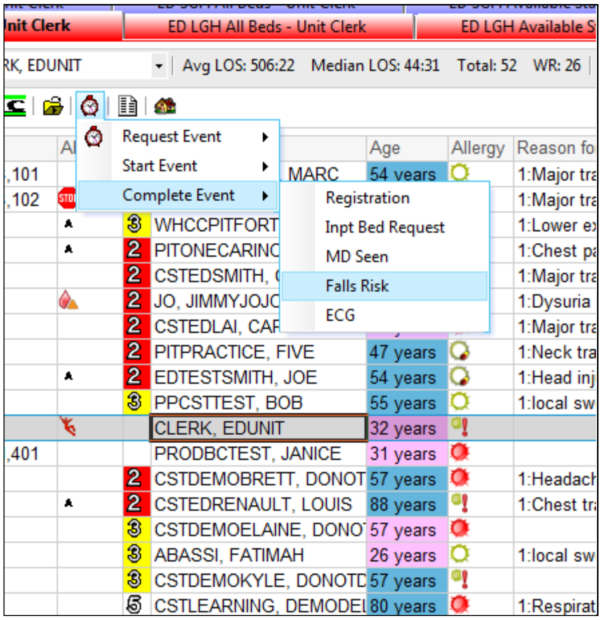
1. Click on a patient **ED-UC-B, Kelly/Sonia/Gladys** so that it is hilighted, then right click and scroll to **Request Event**. There is a selection of functions listed, for example, inpt bed request, consult request, inpt bed ready, inpt bed assigned, suicide precautions, and many more.

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.



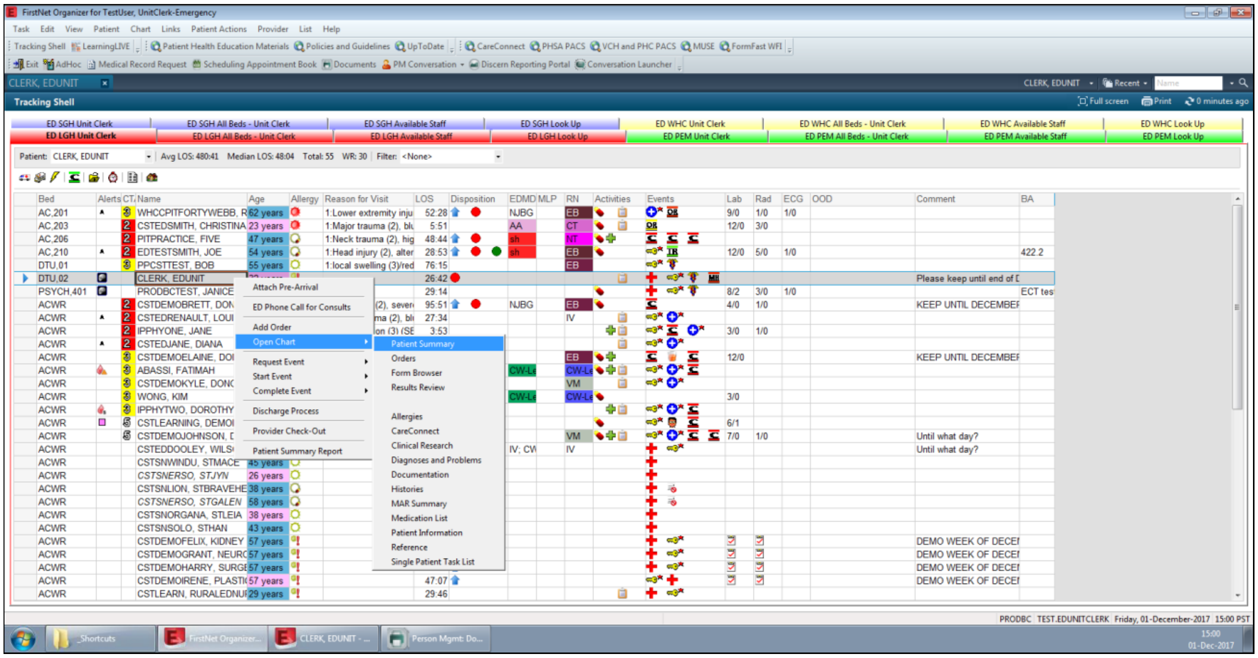


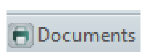
Let's also add in a **Falls Risk.** After you have selected it, you realized it was for the wrong patient. To remove this alert click on the clock icon on the FirstNet Toolbar. Select **Complete Event,** then **Falls Risk**. **Note:** you can also click on the clock icon to request an event as well, then the corresponding icon will appear in the appropriate column.

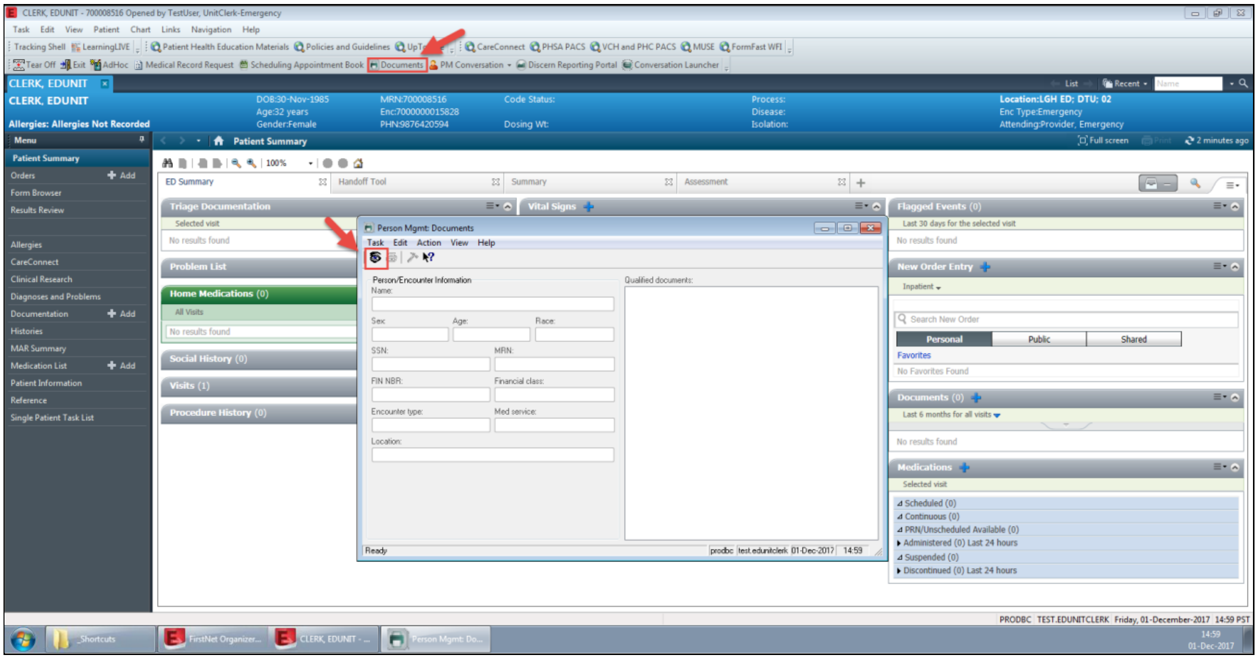

ED LGH All Beds - Unit Clerk
Avg LOS: 506:22 Median LOS: 44:31 Total: 52 WR: 26
Request Event
Start Event
Complete Event
Registration
Inpt Bed Request
MD Seen
Falls Risk
ECG
Age
Allergy
WHCCPITFORT
PITONECARINC
CSTEDSMITH,
JO, JIMMYJOJC
CSTEDLAI, CAR
PITPRACTICE, FIVE
EDTESTSMITH, JOE
PPCSTTEST, BOB
CLERK, EDUNIT
PRODBCTEST, JANICE
CSTDEMOBRETT, DONOT
CSTEDRENAULT, LOUIS
CSTDEMOELAINE, DONO
ABASSI, FATIMAH
CSTDEMOKYLE, DONOTD
CSTLEARNING, DEMODEI

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

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

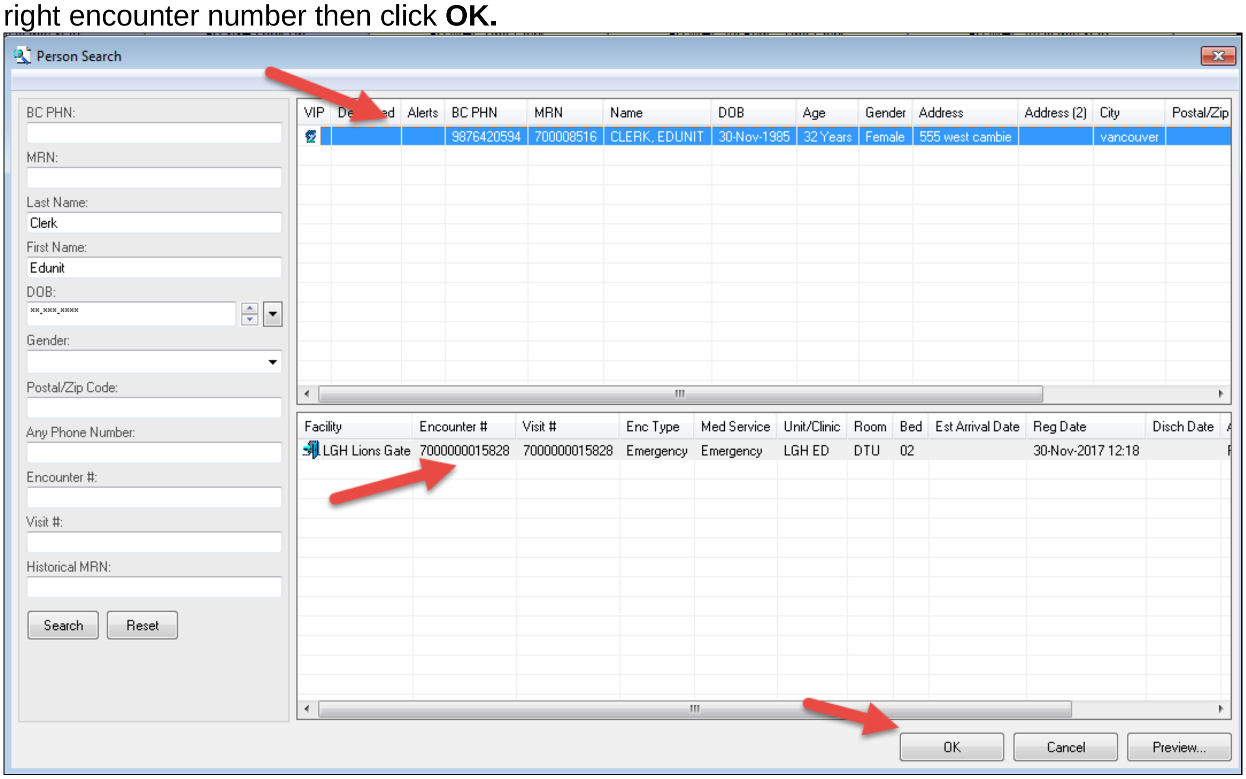


2 From the Toolbar, select the **Documents**  icon. The Person Mgmt: Documents window will open. Click on the **Eye**  icon.



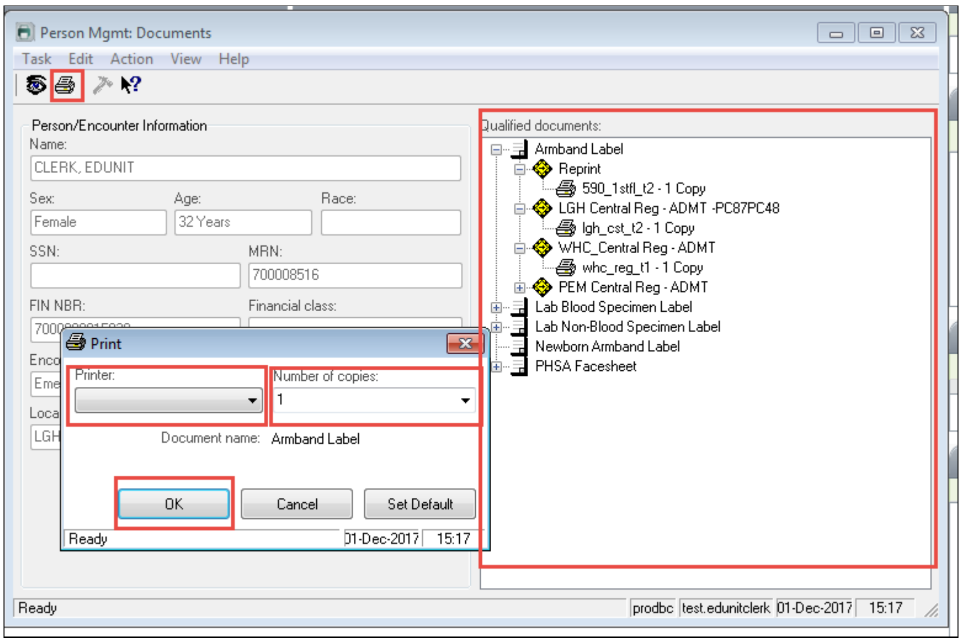
3

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



4

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



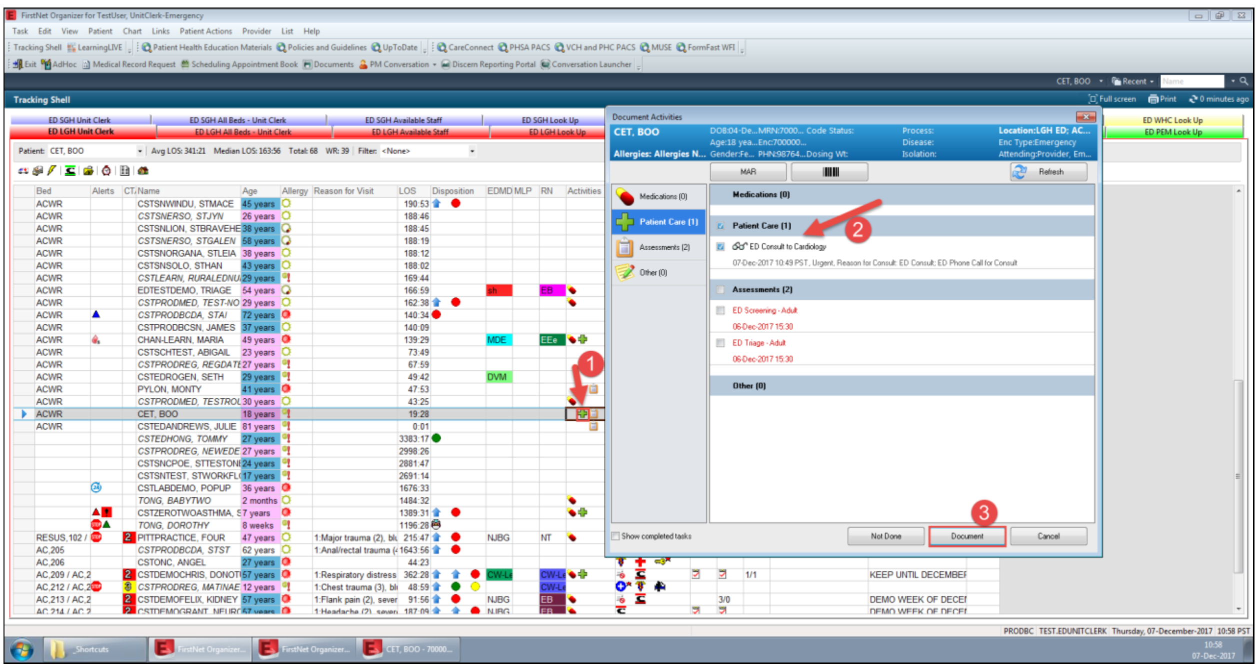
Activity 2.5 Record ED Phone Calls for Consults

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

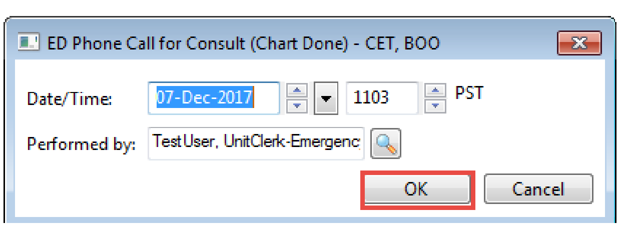
Select patient: **ED-UC-B, Kelly/Sonia/Gladys**

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

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

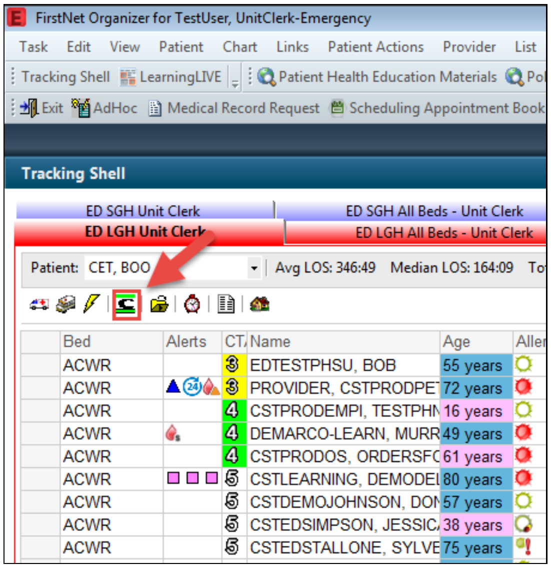


2 Enter "t" for today's date, and "n" for now (time). Then click **Ok**. You have successfully completed and taken the Patient Care task off of the Activities column for the Phone Call for Consults.

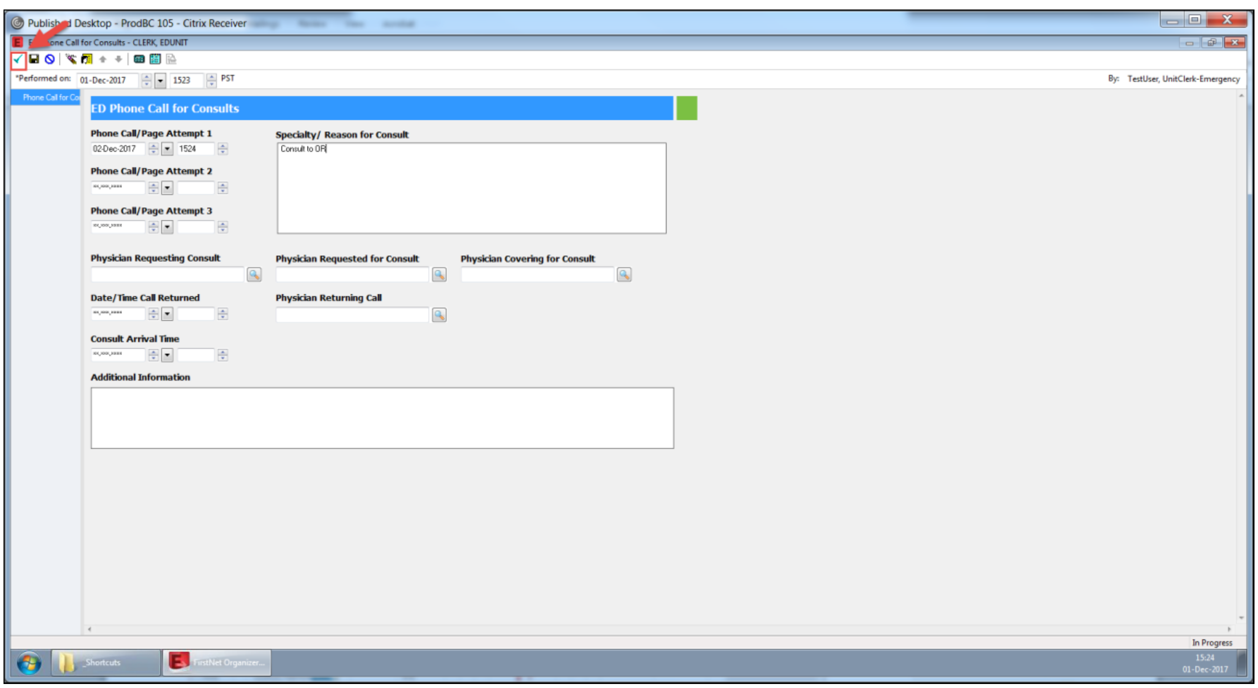


3 Second Attempt Phone Call:

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



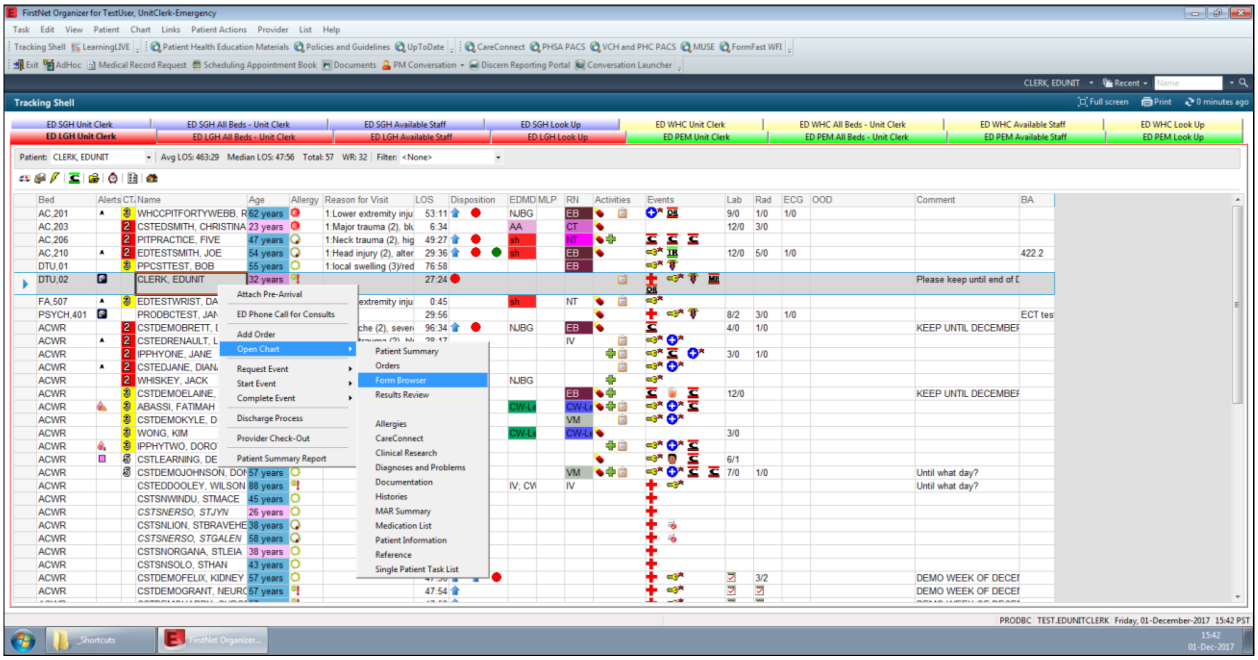
2. The **ED Phone Call for Consults** window will open. Fill in the fields as necessary. For today's date, type "t" and "n" for now (time). Click the green checkmark icon at the top left hand corner to save your documentation.



4

Third Attempt Phone Call:

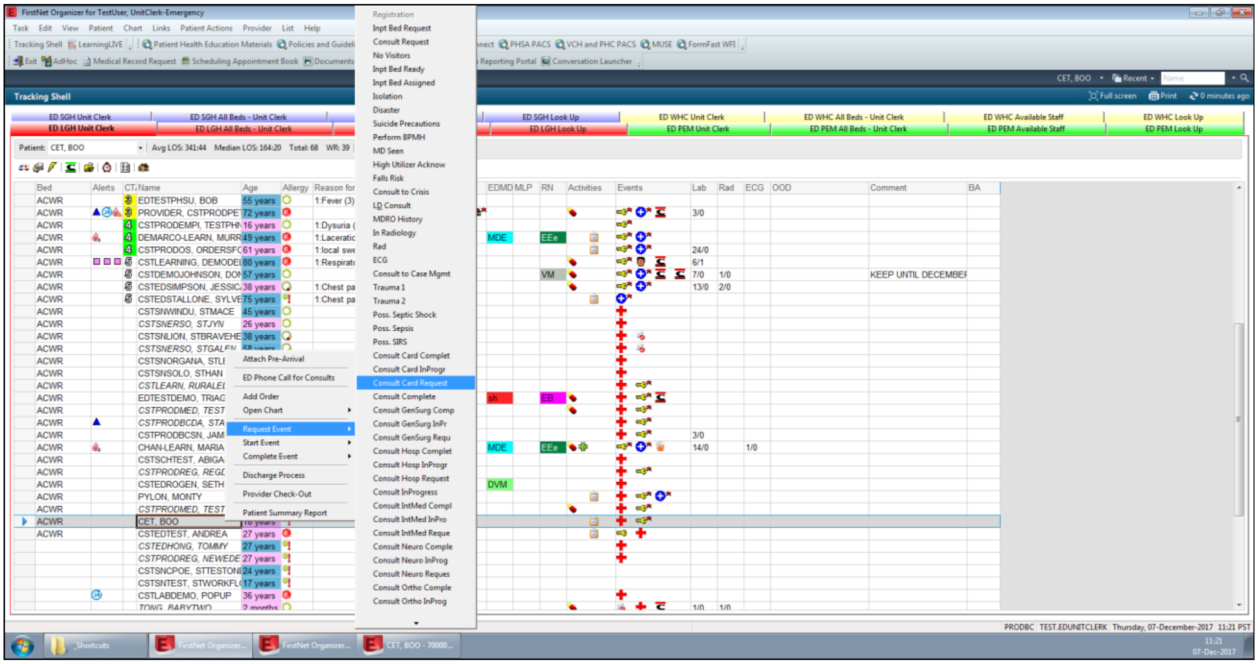
1. This time you will open the pateint's chart and document in the Form Browser. This way, you will continue to document on the same form as the previous attempts. **Note:** If you click on the ED Phone Call for Consults icon, you will open up a brand new blank form.



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

5

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

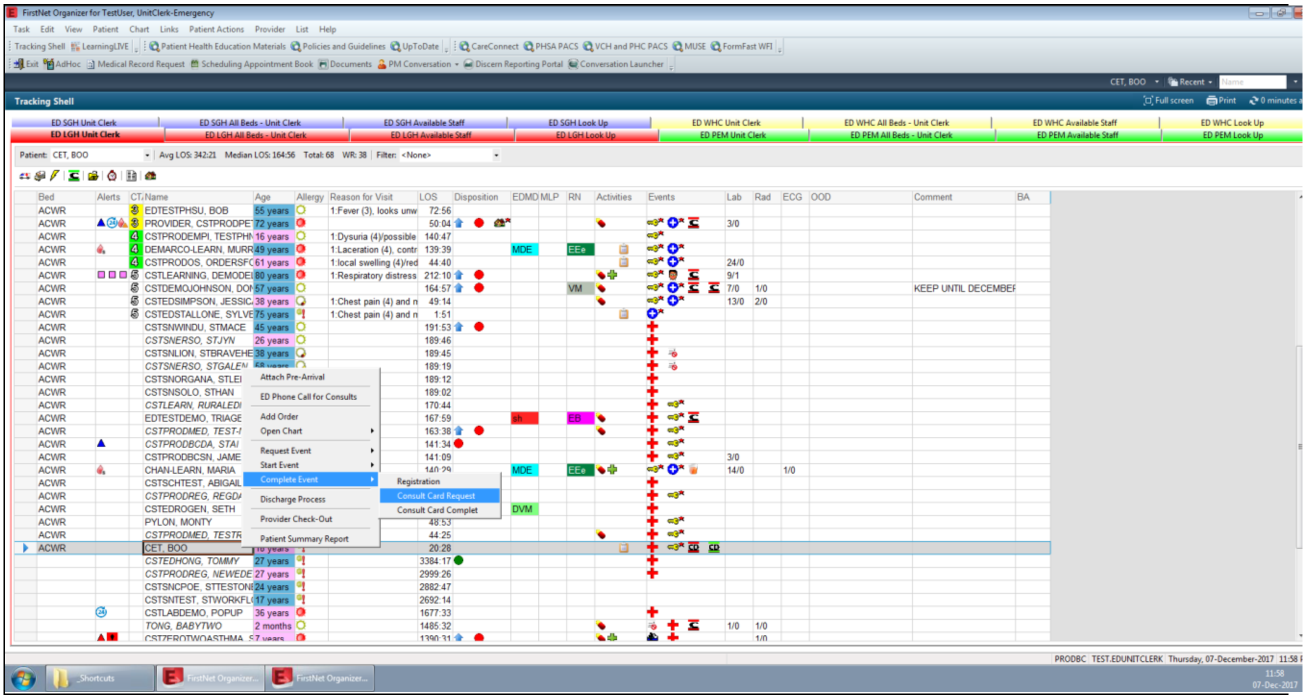


You will now see the icon in the Events Column. **Note:** If the provider already entered the Consult order, the corresponding icon will already have appeared in the Events column.

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

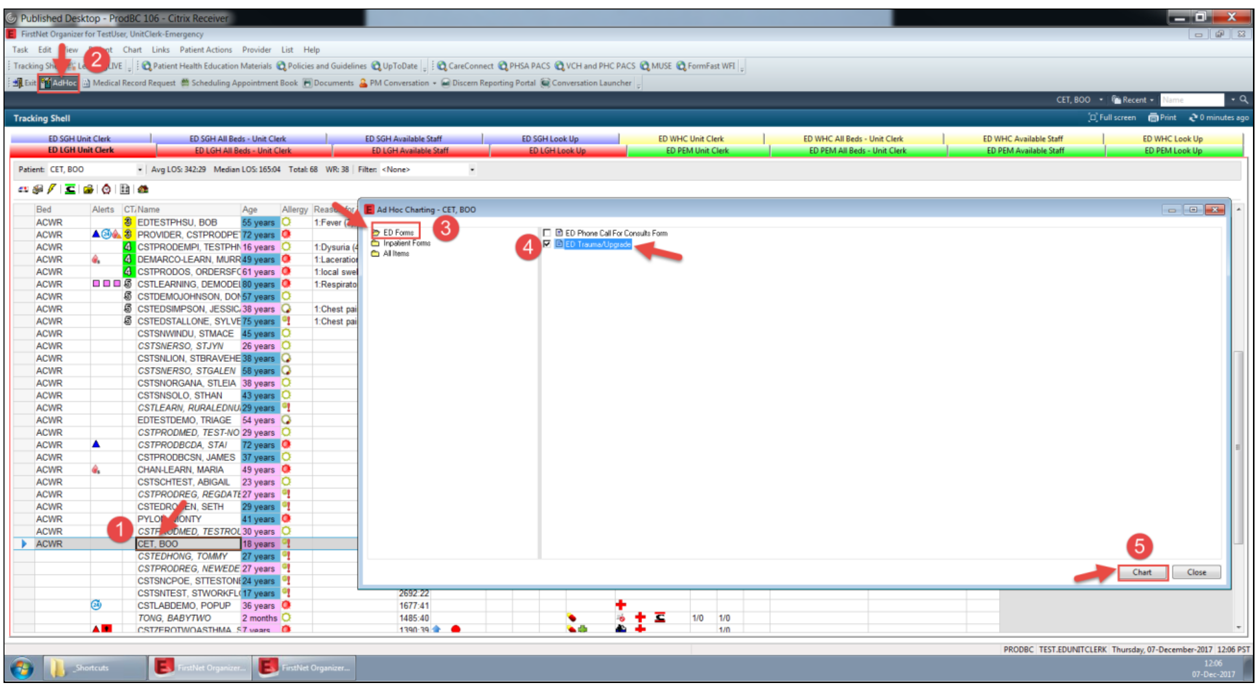


Activity 2.6 Complete AdHoc PowerForm (Trauma Initiate/Upgrade)

1

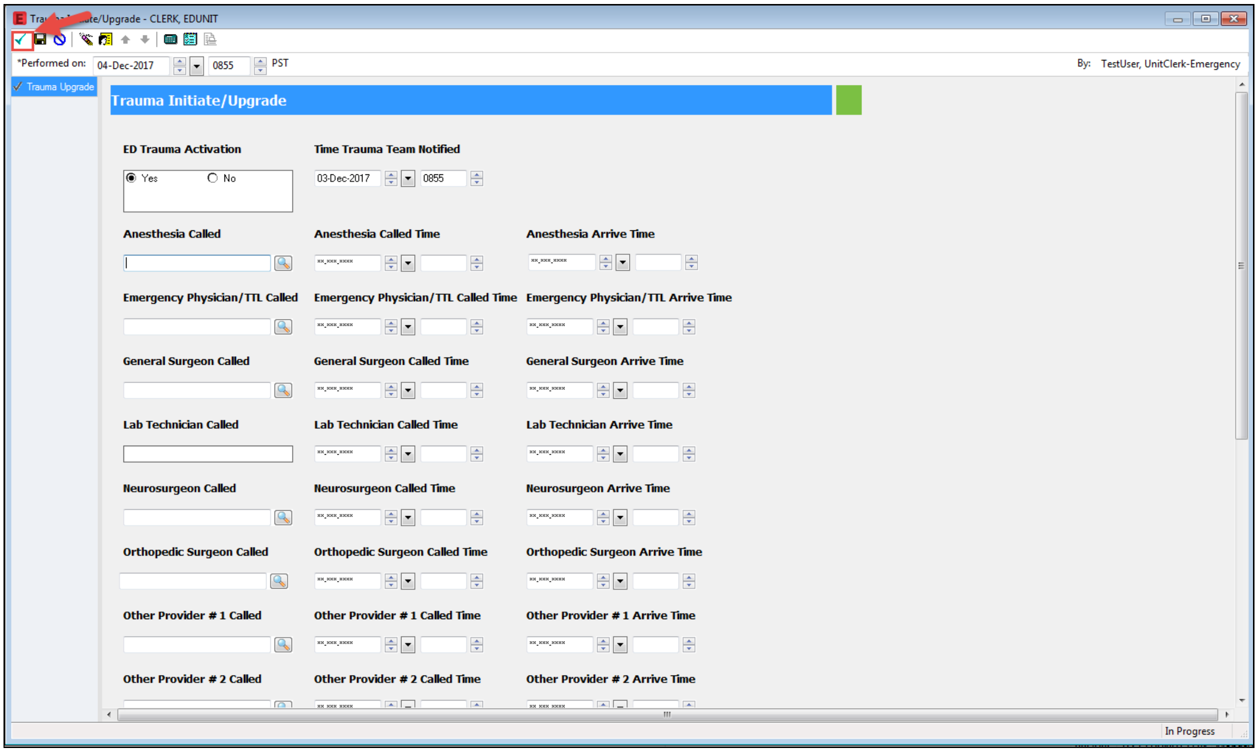
1. Select the patient: **ED-UC-B, Kelly/Sonia/Gladys**
2. Click on the AdHoc AdHoc icon in the Toolbar.
3. Select ED Forms. There should be the ED Trauma/Upgrade and ED Phone Call for Consults Form only listed.
   Note: You may have access to chart on other forms in the other folders, however, it does not mean this 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.**

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.


*Performed on: 04-Dec-2017 0855 PST
By: TestUser, UnitClerk-Emergency
Trauma Upgrade
Trauma Initiate/Upgrade
ED Trauma Activation
Yes
No
Time Trauma Team Notified
03-Dec-2017 0855
Anesthesia Called
Anesthesia Called Time
Anesthesia Arrive Time
Emergency Physician/TTL Called
Emergency Physician/TTL Called Time
Emergency Physician/TTL Arrive Time
General Surgeon Called
General Surgeon Called Time
General Surgeon Arrive Time
Lab Technician Called
Lab Technician Called Time
Lab Technician Arrive Time
Neurosurgeon Called
Neurosurgeon Called Time
Neurosurgeon Arrive Time
Orthopedic Surgeon Called
Orthopedic Surgeon Called Time
Orthopedic Surgeon Arrive Time
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
In Progress

Activity 2.7 Complete a Medical Record Request

1

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**.

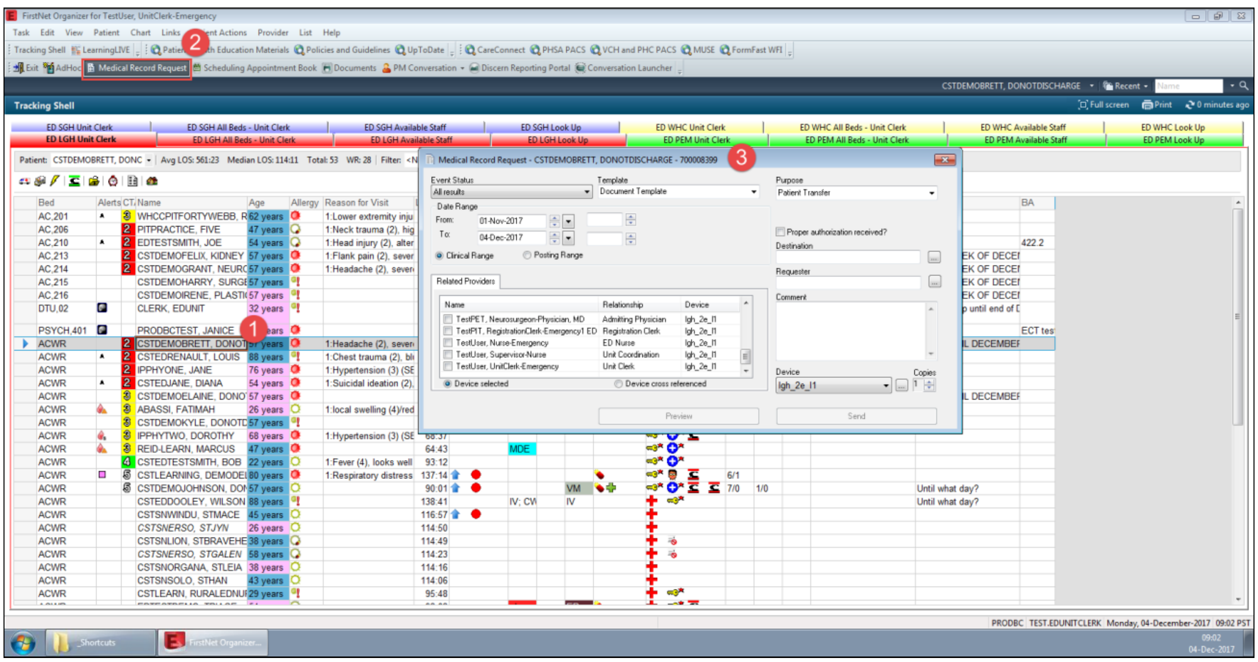
   Event Status: All results

   Template: Document Template

   Purpose: Patient Transfer

   Date Range: Leave Blank

   Related Providers: Provider, Emergency



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

Vancouver CoastalHealth
Promoting wellness. Ensuring care.

LGH Lions Gate Hospital

231 E. 15th Street
North Vancouver, British Columbia V7L 2L7

MRN: **700008505** BC PHN: 9876421421
Patient: **CSTEDRENAULT, LOUIS**
DOB: 29-Jun-1929 Gender: Male
Admit Date: 30-Nov-2017
Discharge Date:
Encounter #: 7000000015817
Encounter Type: Emergency

Emergency Documentation

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

ED Pre Arrival Note

Pre-Arrival Summary

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

Age: 88

ETA: 30-Nov-2017 10:34:00 PST

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

Referring Source: EHS
Room Assignment: PreArrival
Allergies: Demerol

Provider/Referral Info:

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

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

This record contains confidential information which must be protected. Any unauthorized use or disclosure is strictly prohibited.

Report Tracking ID: **3668040** Page 1 of 2 Print Date/Time: **04-Dec-2017 09:05**
Name of Printee: TestUser,UnitClerk-Emergency

Vancouver CoastalHealth
Promoting wellness. Ensuring care.

LGH Lions Gate Hospital

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

Emergency Documentation

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

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

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

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

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

Diagnoses(Active)

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

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

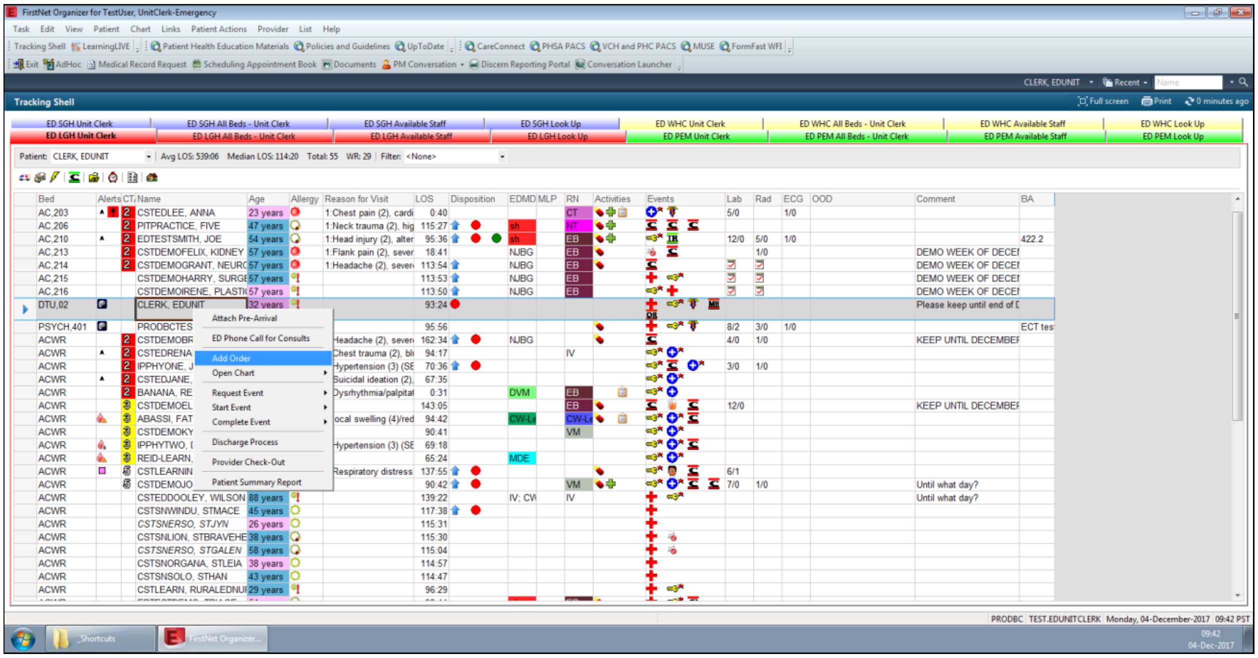
ED ADE Risk Screen
ED ADE Past two weeks meds : Yes
ED ADE Prior Medical Issue Abx : Yes
ED ADE Age 80 Meds Change : No
TestED, Nurse-Emergency6 - 30-Nov-2017 13:50 PST

This record contains confidential information which must be protected. Any unauthorized use or disclosure is strictly prohibited.

Report Tracking ID: **3668040** Page 2 of 2 Print Date/Time: **04-Dec-2017 09:05**
Name of Printee: TestUser,UnitClerk-Emergency

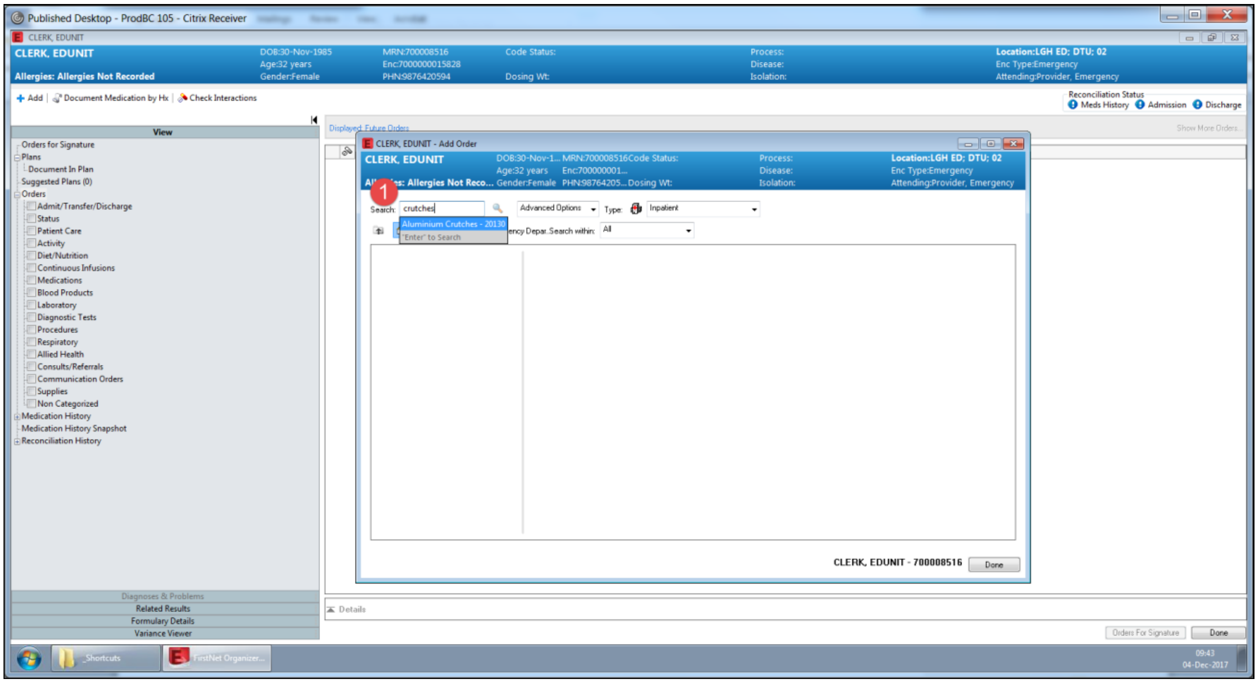
Activity 2.8 – Complete a Medical Equipment request

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

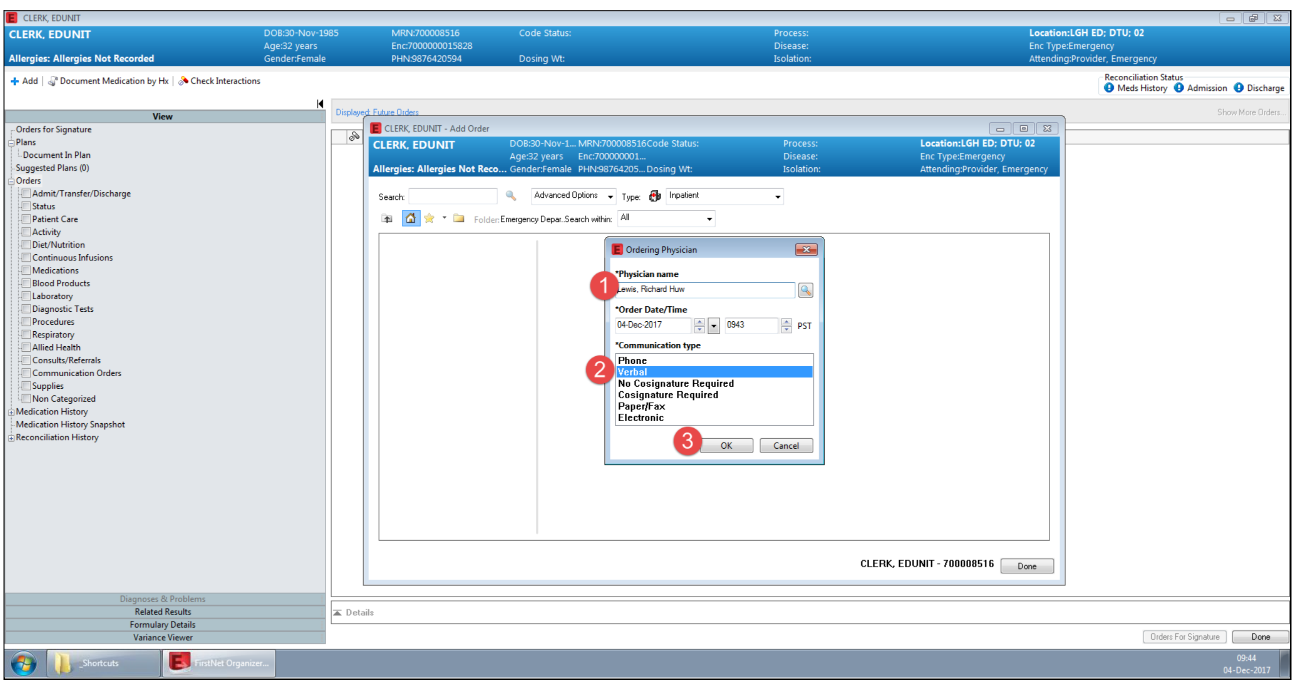


2 The Add Order window will open. Type in the equipment name in the search box. A dropdown list will appear and select the appropriate equipment.

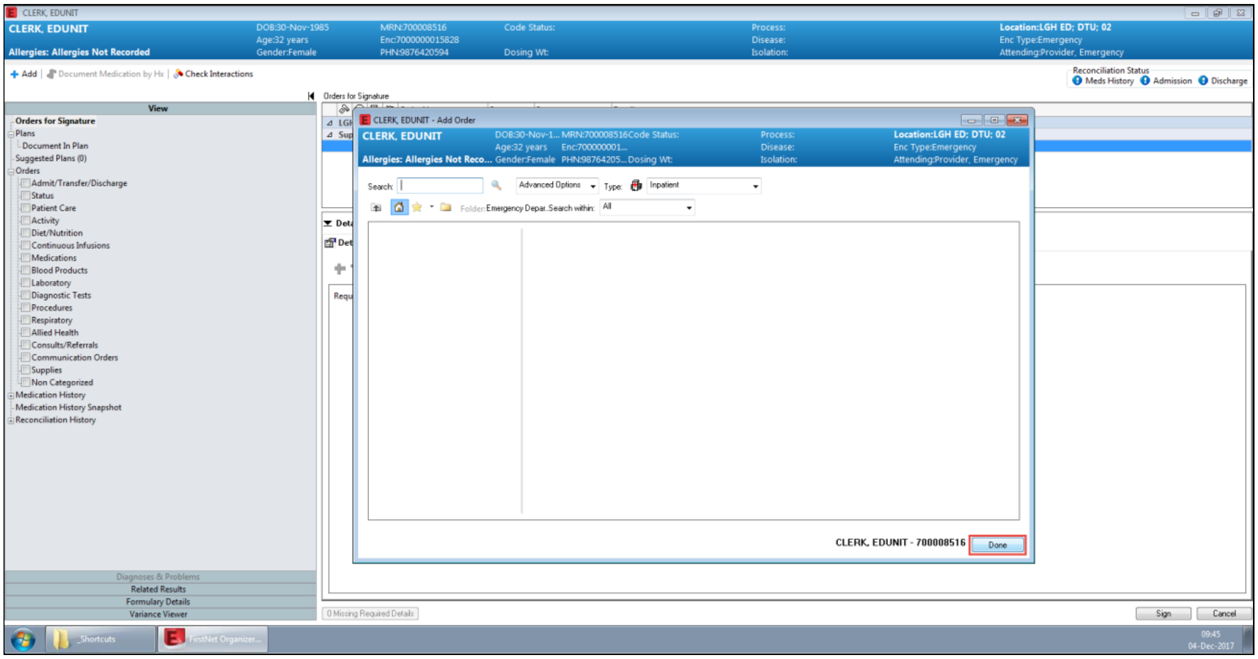
Ex. Aluminum Crutches



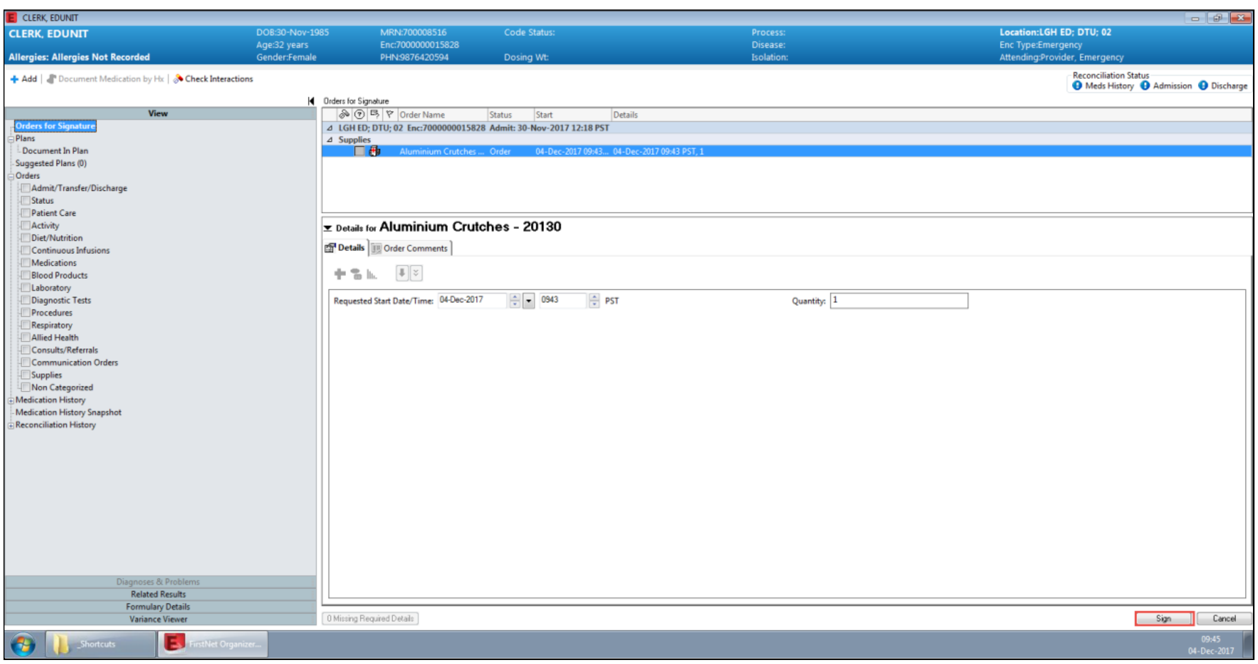
3 The Ordering Physician window will open. Fill out all fields as required (physician name, communitcaion type). For this example, we will use physician: **Test, Alex**. Then click **OK**.

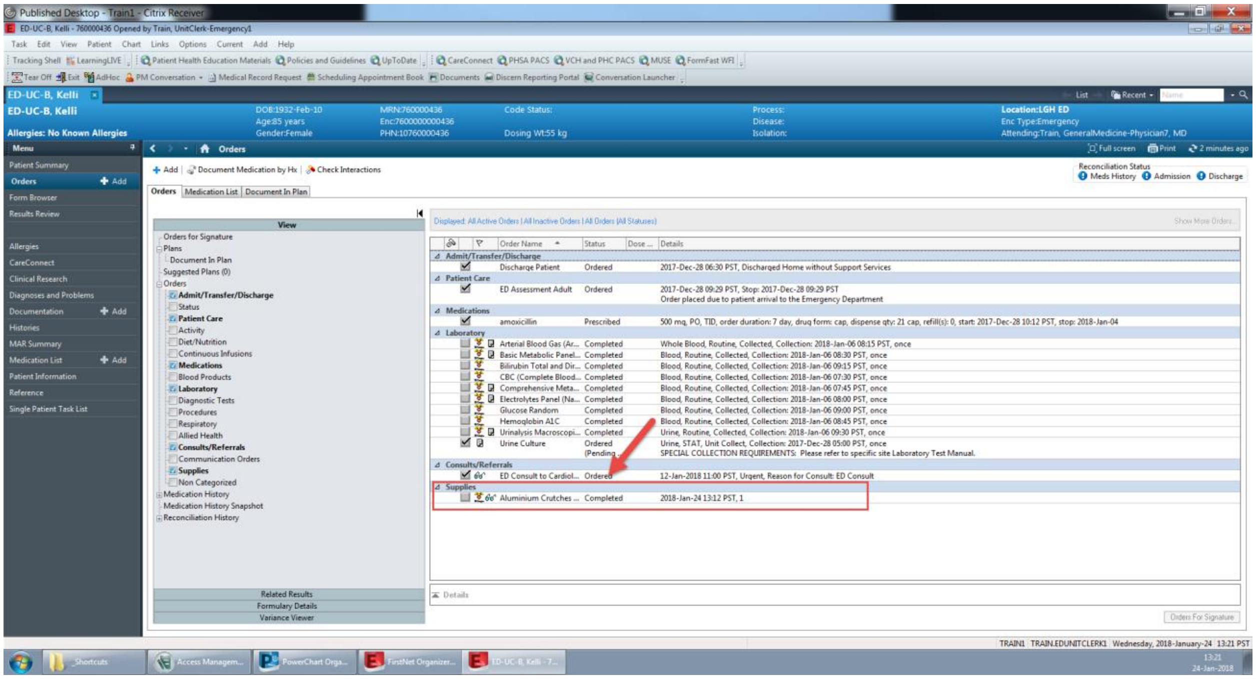


Click **Done**.



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





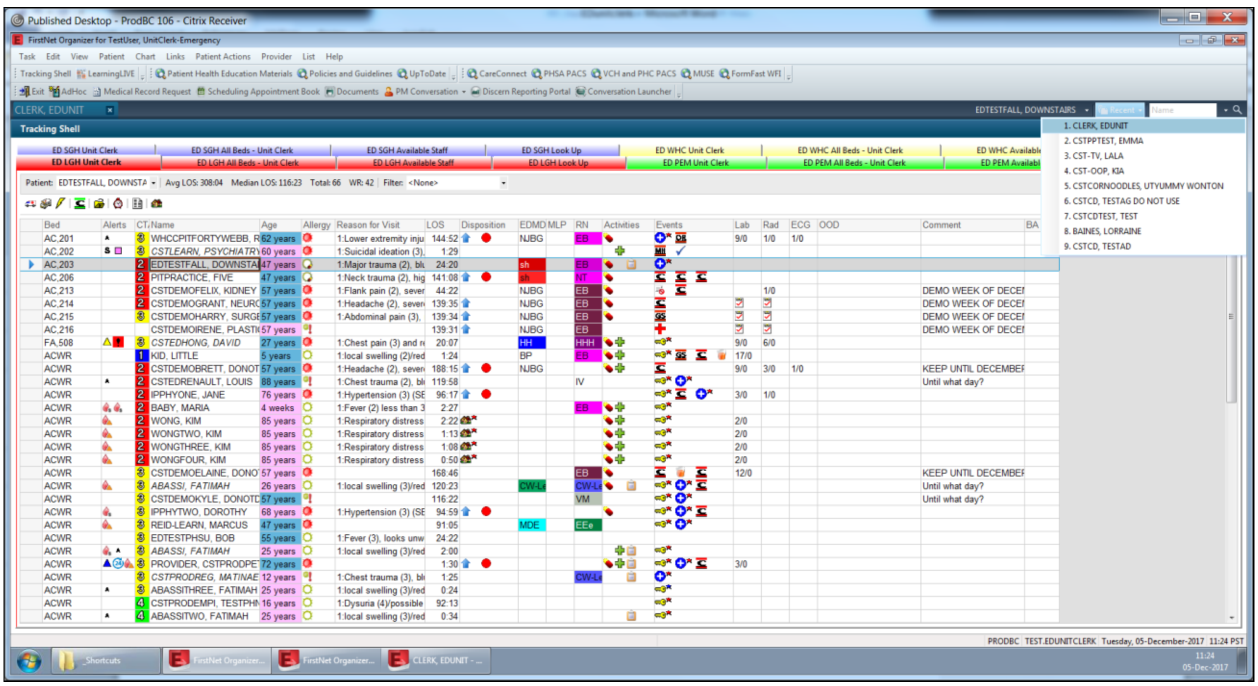
Note: Ensure your filter is set to: **Displayed All Active Orders**

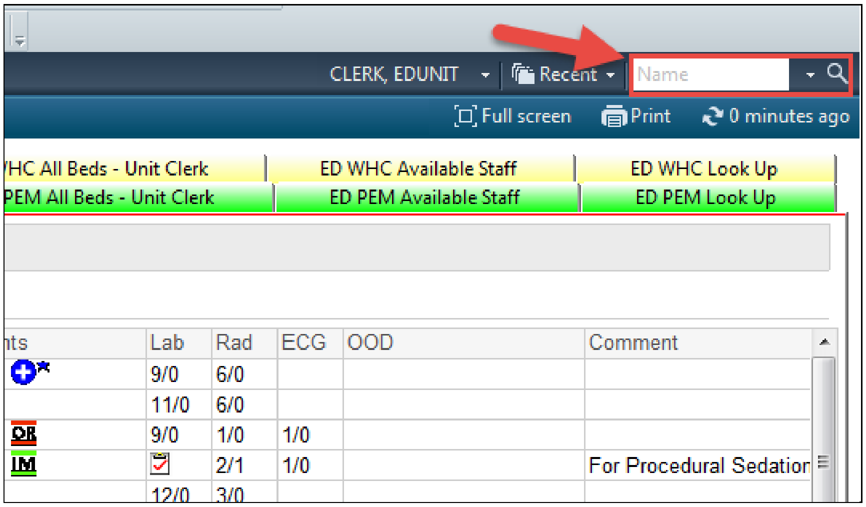
Activity 2.9 – Search for a patient then complete a Quick Registration for a deceased patient

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

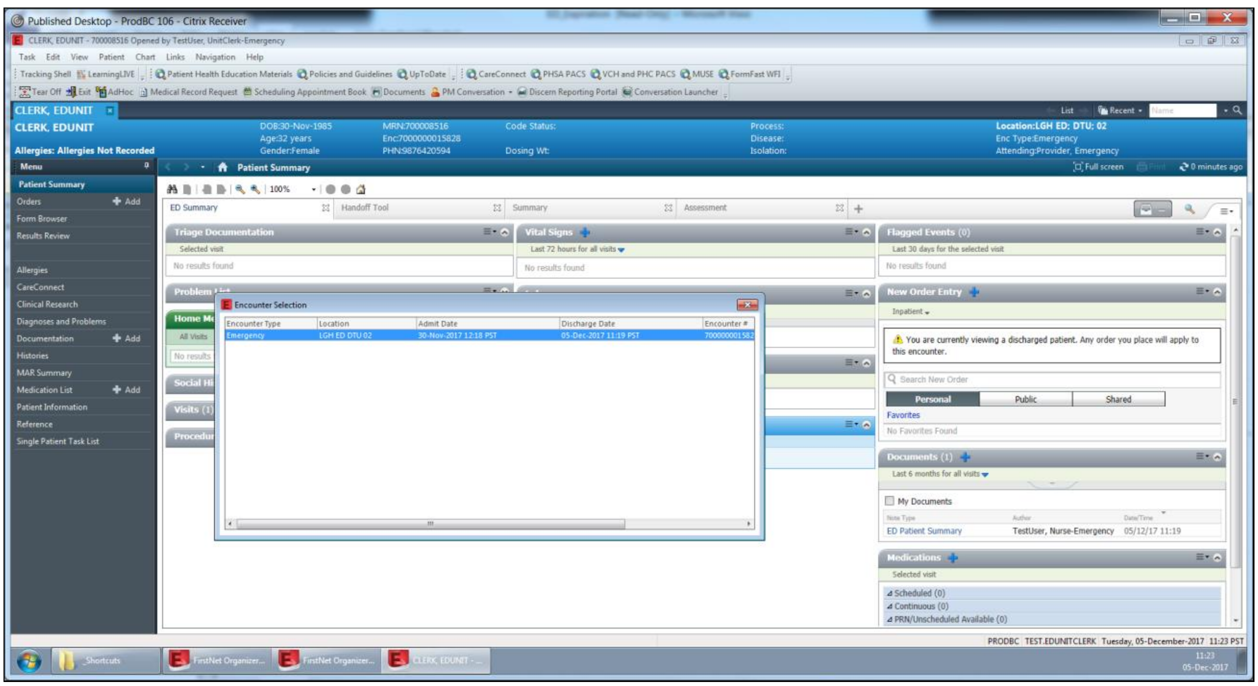
Click on **Recent** on the top right hand corner of your screen. Select the deceased patient. If you don't see the patient here, type in the seach toolbar beside the **Recent** tab. Click the **Enter** Key. **Note:** you can click on the down arrow next to the **Search** box to search for patient using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

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



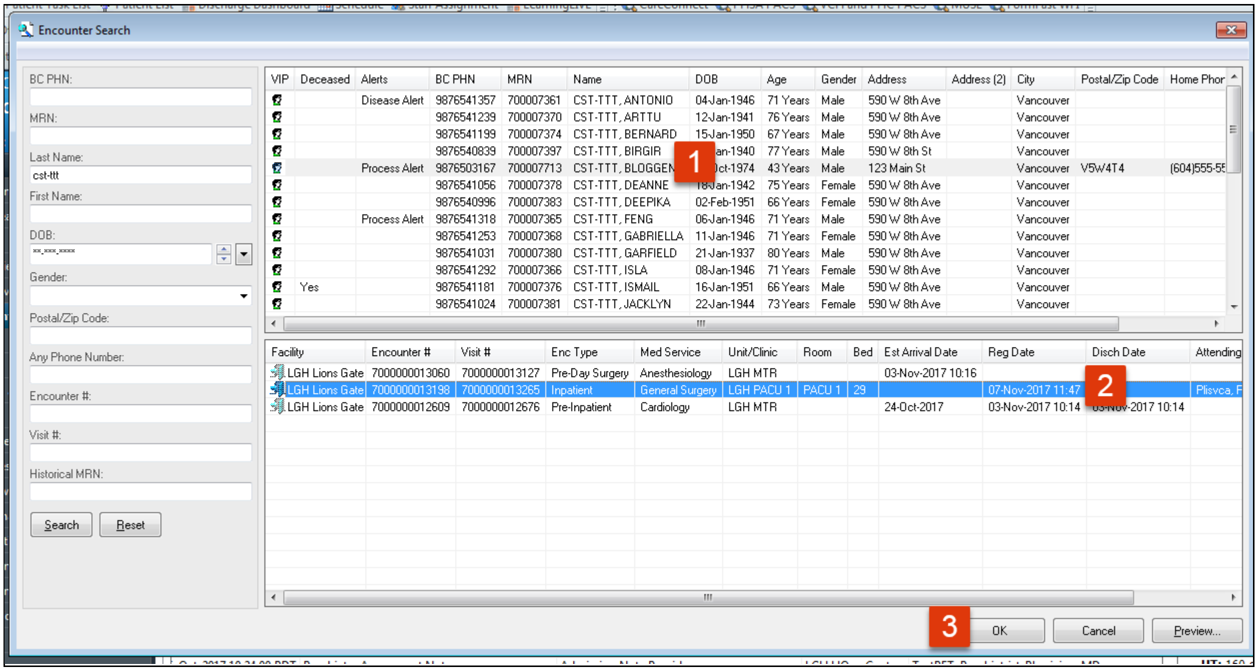


The Encounter Selection window will open. Click the  to close the window after you verified the right encounter number.

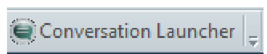


Or if there are multiple encounters/patients:

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

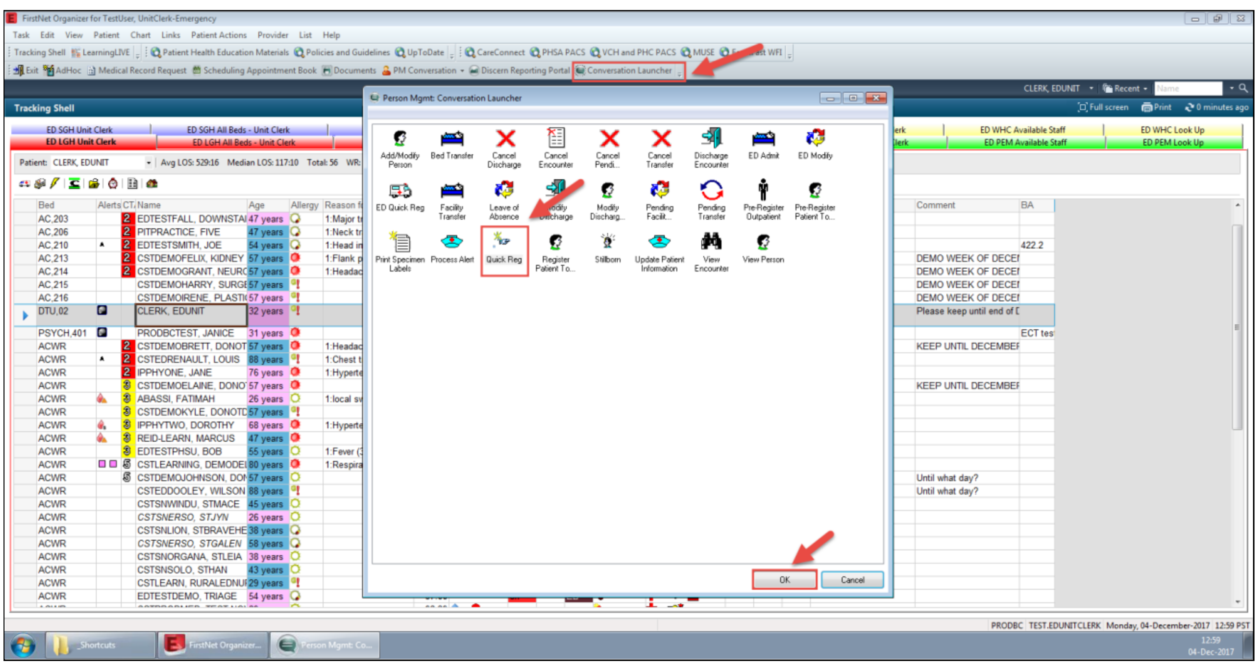


2

Click the **Conversation Launcher** 

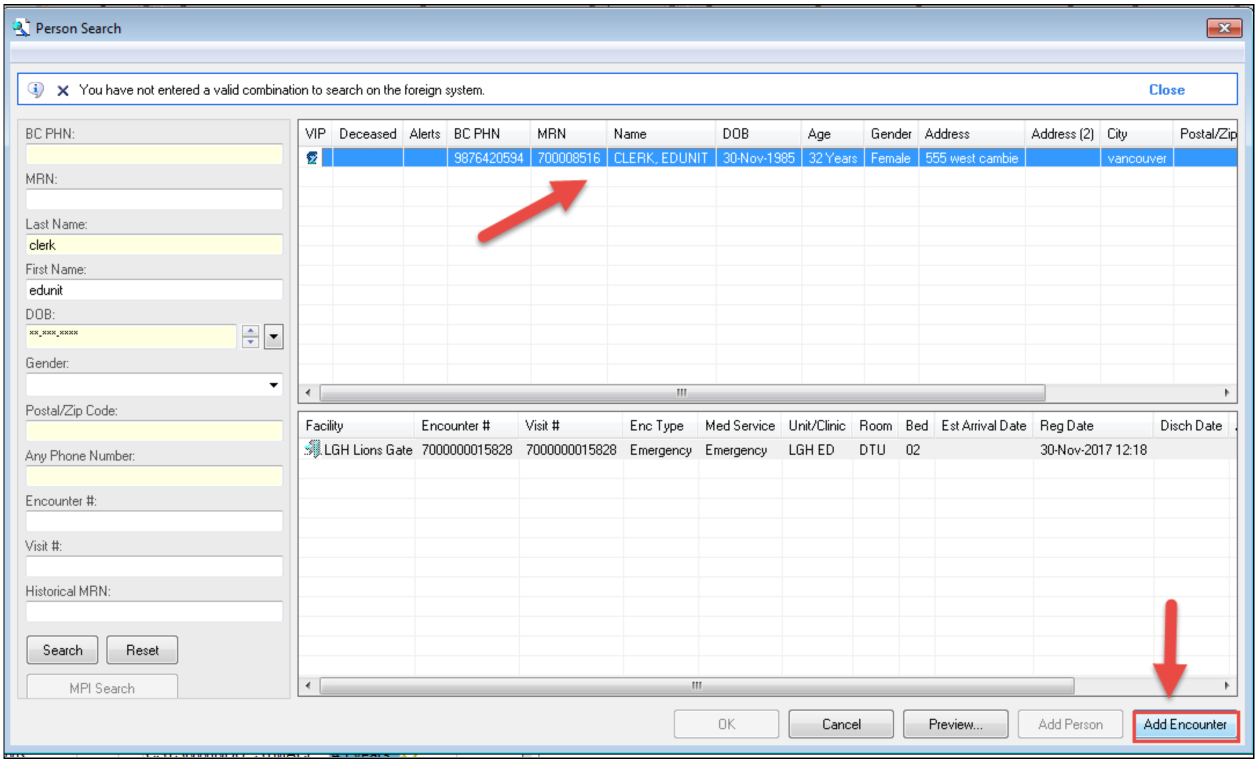
in the Toolbar. Find and select the **Quick Reg** 

icon. Then click **OK**.

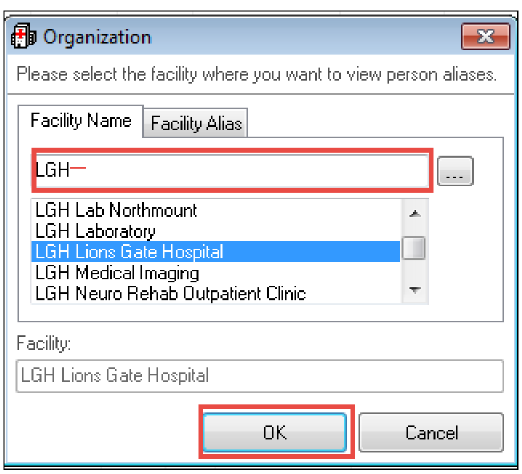


The Person search window opens. Enter the patient's first and last name (unless you know the

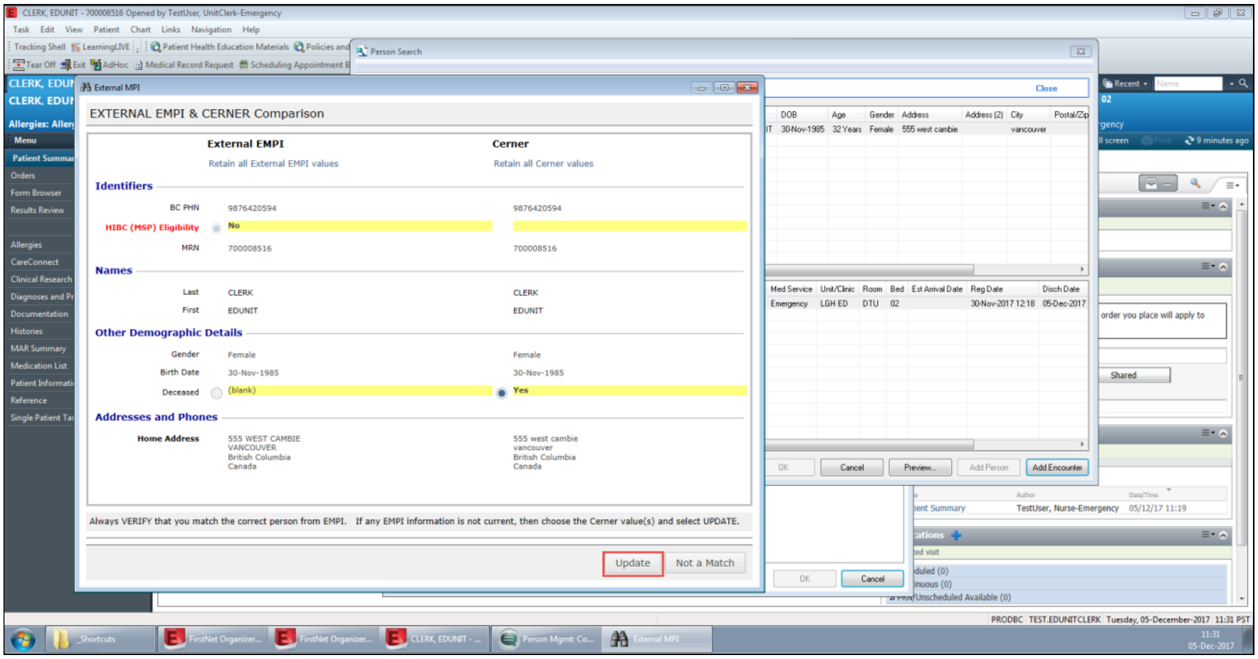
MRN/PHN). Click on the right patient and click **Add Encounter**.



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



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



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

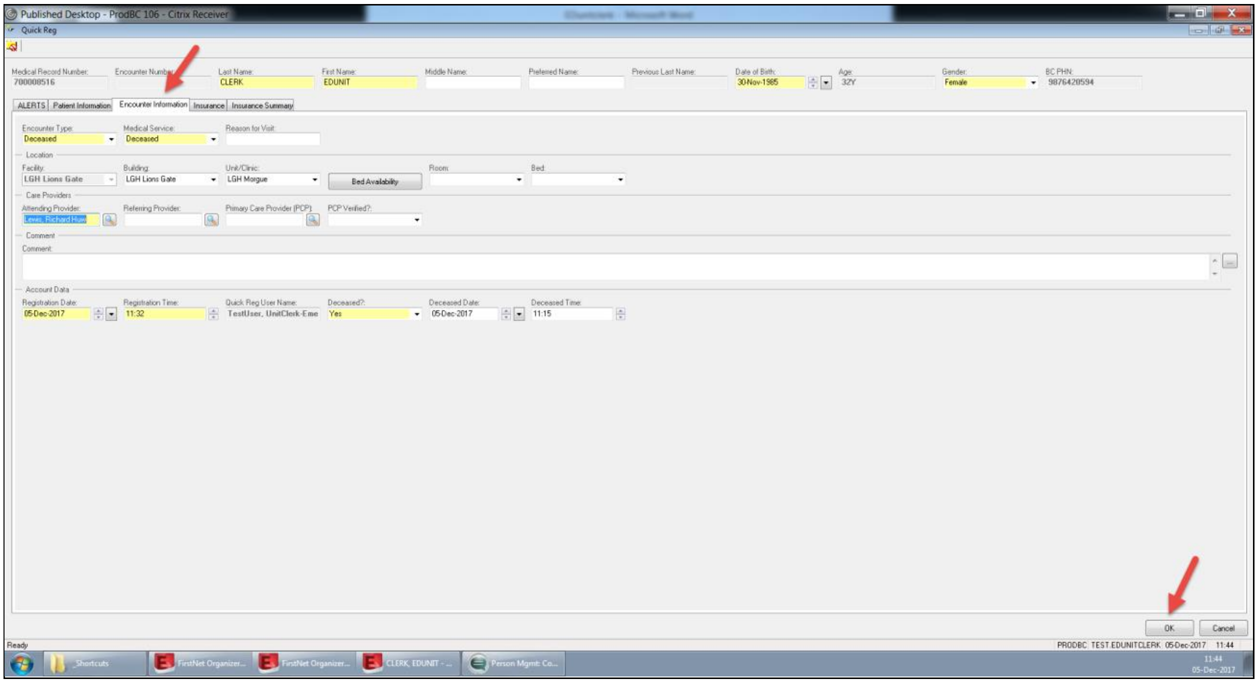
Encounter Type: Deceased

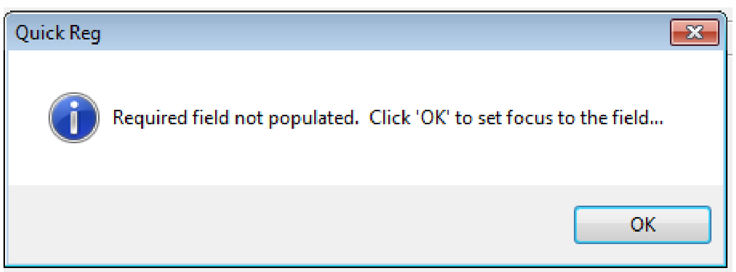
Medical Service: Deceased

Unit/clinic: LGH Morgue

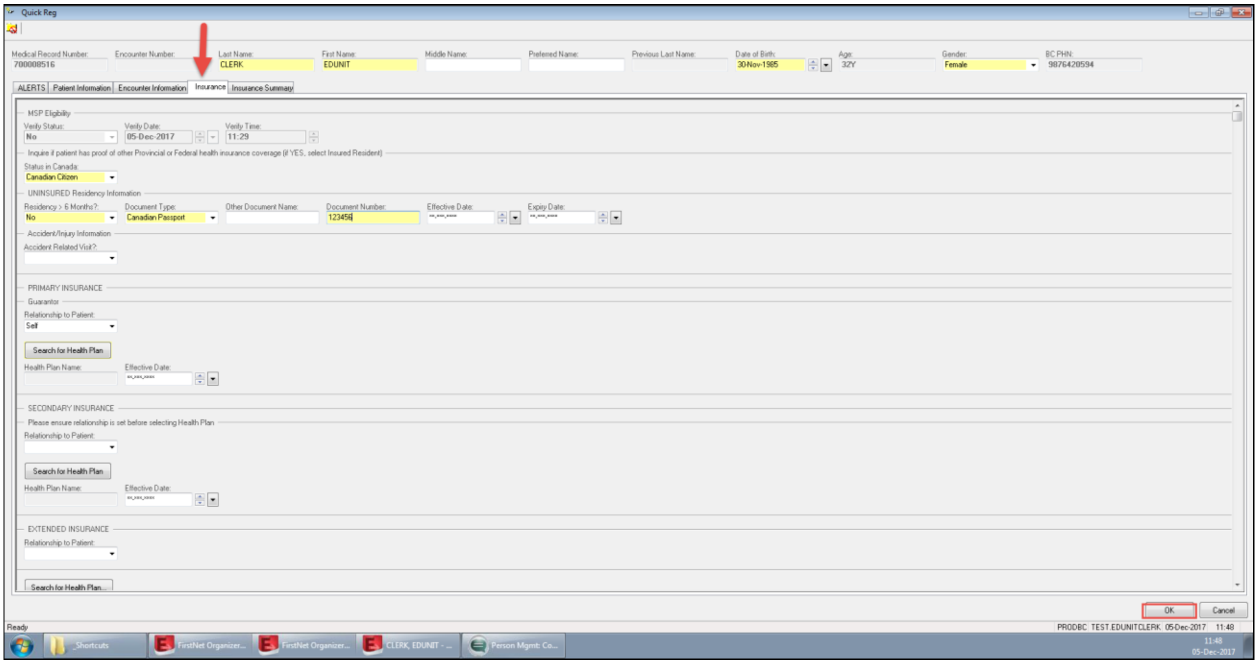
Attending Provider: Current attending provider

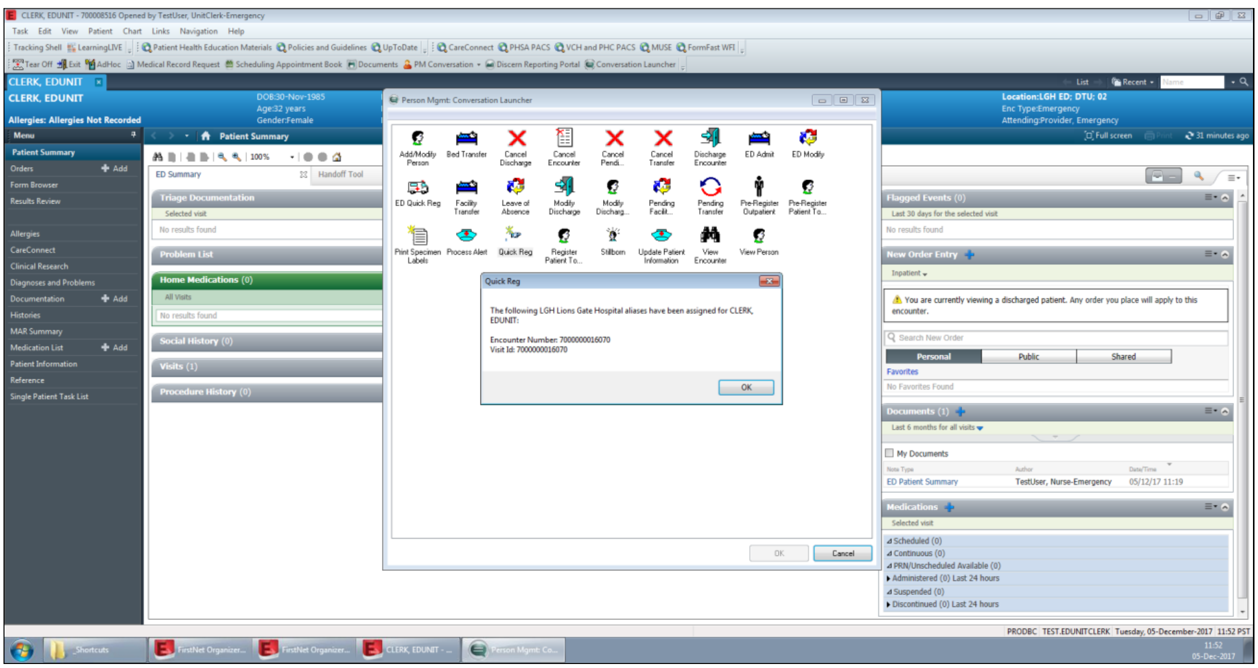
Go through each tab and fill in necessary information that is relevant to your role. Then click **OK**.





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**.





Select **OK** to close the window.

Key Learning Points

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

PATIENT SCENARIO 3 – FormFast WebForm Imprint (WFI)

Learning Objectives

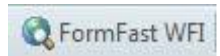
At the end of this Scenario, you will be able to:

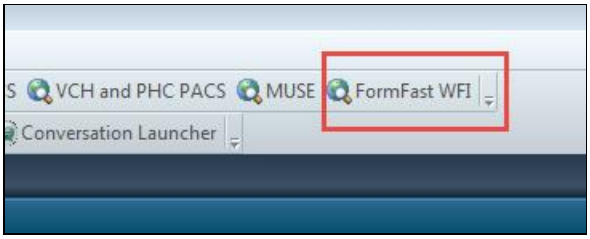
- Log into WFI from FirstNet or from the WFI icon from your desktop
- Search/Select the Patient(s) and their Encounter(s)
- Refresh the Patient Information Screen
- Search/Select Forms and Labels
- Print Forms and Labels
- Correctly Apply Labels to Forms

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

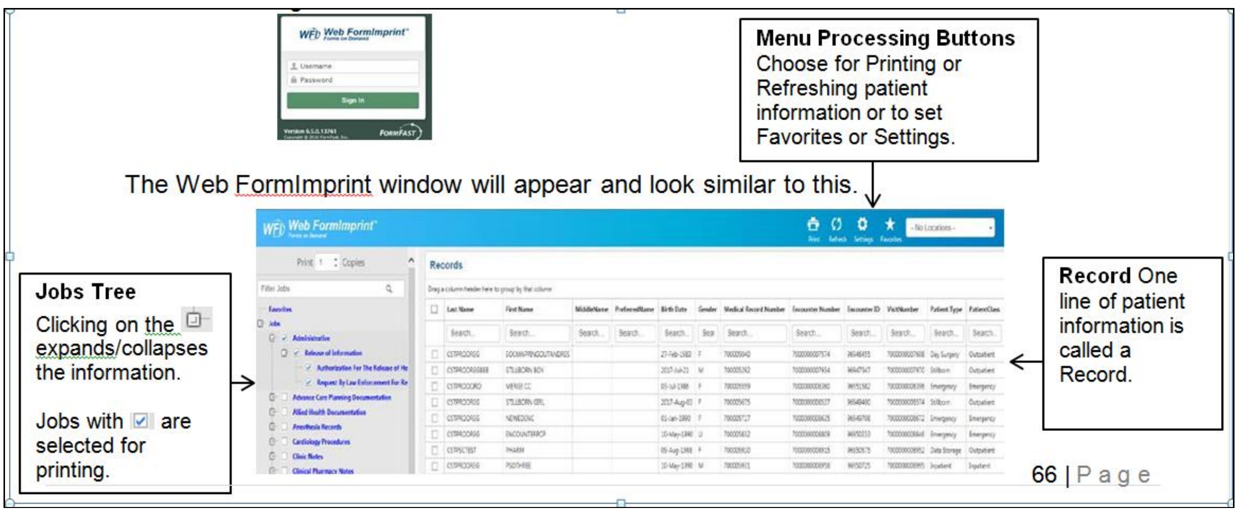
Activity 3.1 – Getting Started

1 There are 2 ways to access FormFast WebForm Imprint:

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

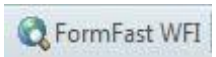


2. From the Web FormImprint (WFI)  icon on your desktop. It is recommended to open this application in Google Chrome. This will take you to the WFI logon screen where you will enter your Network logon again.



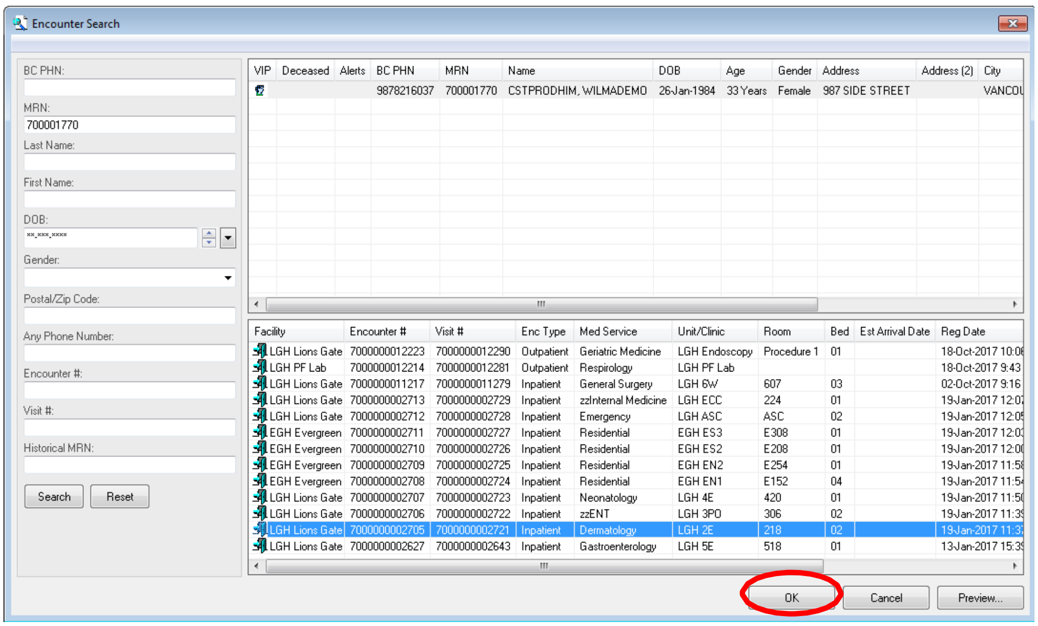
Activity 3.2 Selecting the patient

1 There are few different ways to locate patients.

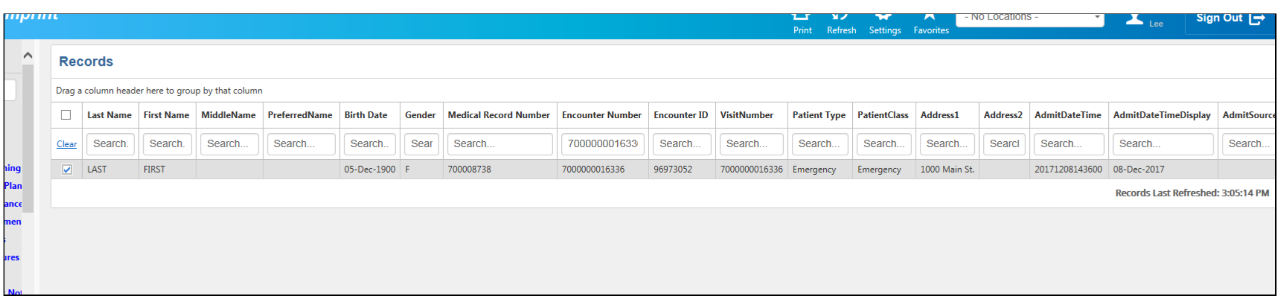
1. Highlight the patient from the list on Tracking Shell. Then, click the FormFast 

icon from the Toolbar.

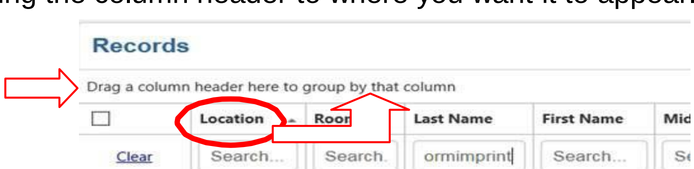
2. Search by typing the patient's name, MRN, PHN, encounter, etc. in the box located in the top right hand corner. Or, search by clicking on the magnifying glass  . Select the appropriate encounter then click **OK.** Click on the **FormFast** icon in the Toolbar. **Note:** This search option is not available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



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

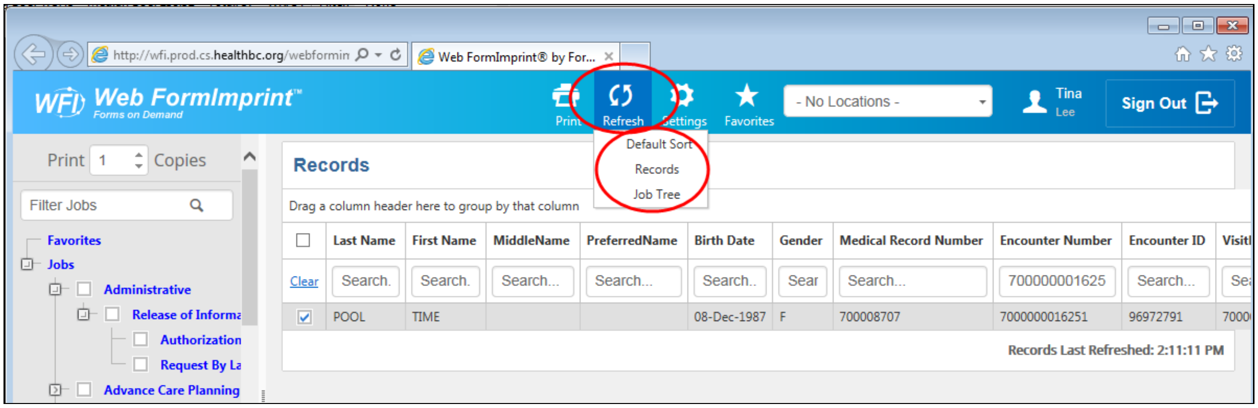


Note: You can drag any of the headers for your preferred view by dragging and dropping the column header to where you want it to appear.



Activity 3.3 Updating patient information using Refresh

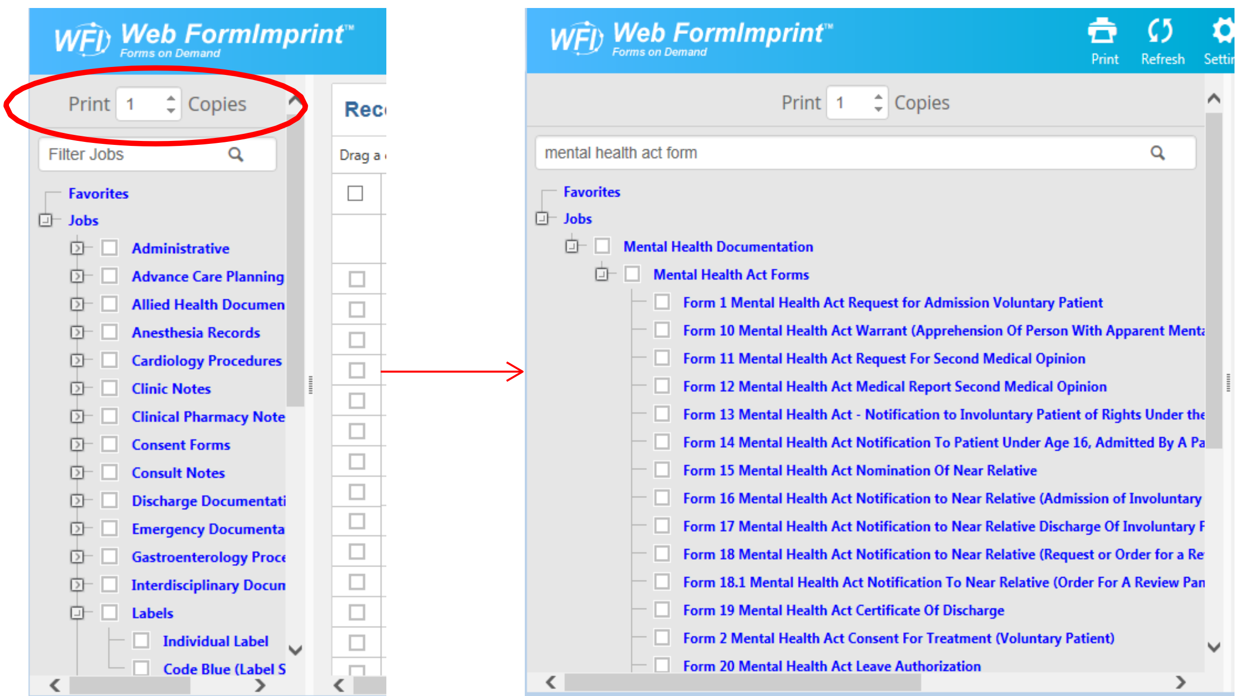
1 The database updates the names of patients admitted and discharged within two weeks each time the application is opened. To update information while the application is open, click the **Refresh** button then select appropriate filter.



Activity 3.4 Searching for and selecting forms/labels

1

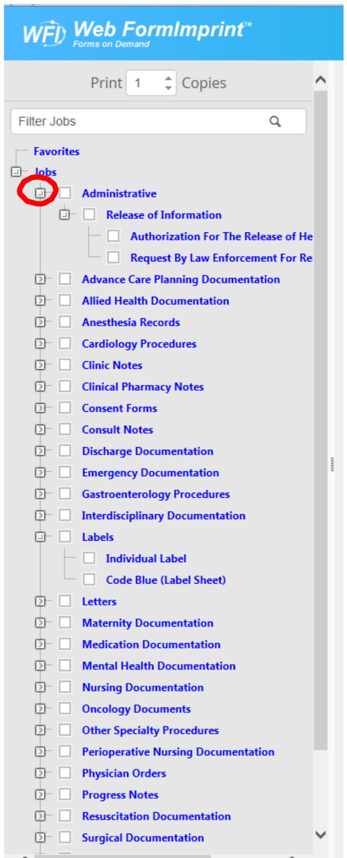
1. In the WFI window, under the Filter Jobs field on the left Jobs pane, enter a keyword or the title of the form you are searching for in the space provided. Press **"Enter"** or click on the search icon
2. All forms with that keyword or title will then appear in the jobs pane.



2

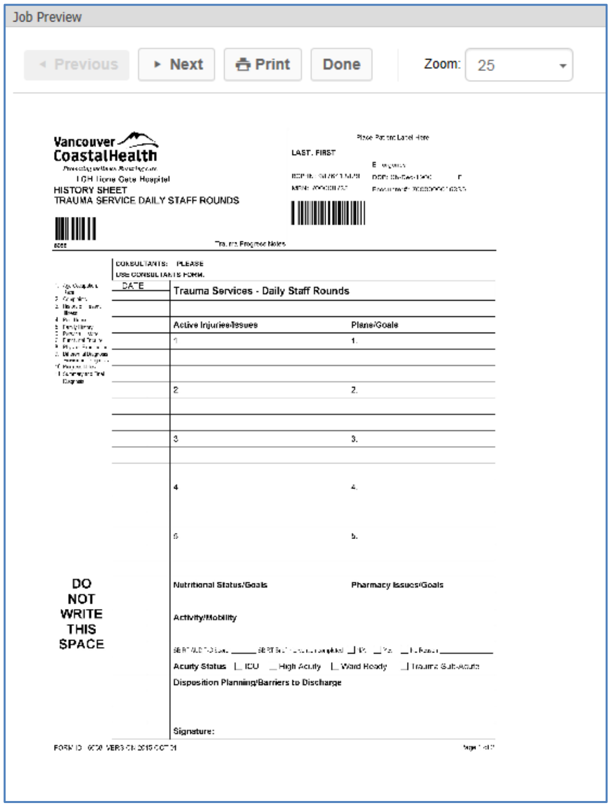
To view the full form/label names, you can:

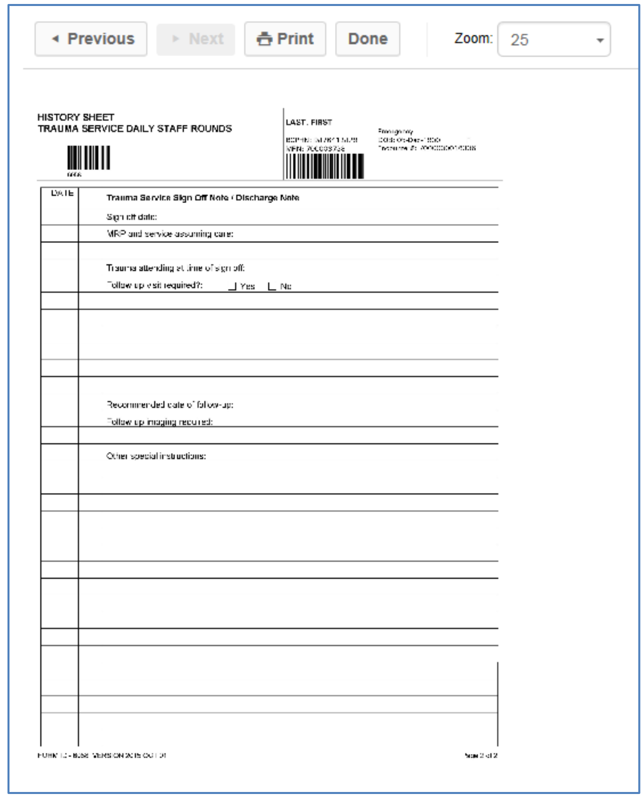
1. Use the scroll bars to the left and on the bottom of the job pane.
2. Expand the pane size by hovering between the two window panes and click and drag
3. You can also search the forms/labels by clicking on the arrow keys next to the document headings listed in the Jobs Pane to expand all the forms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



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

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





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

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

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

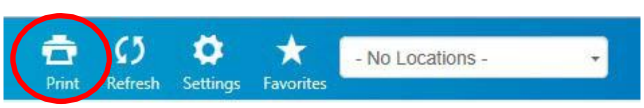
Activity 3.5 Printing

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

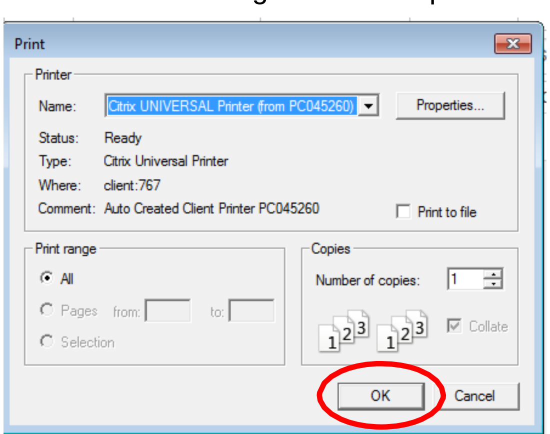
1. After selecting all the form(s)/label(s) you want to print from the Jobs pane by clicking on the box  to the left of the form/label name, use the up and down arrow keys to select how many copies you want

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

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



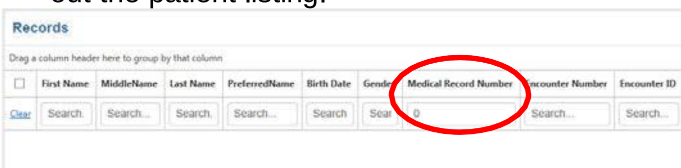
The **Print** dialogue box will open. Click



Activity 3.6 – Printing blank forms

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

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



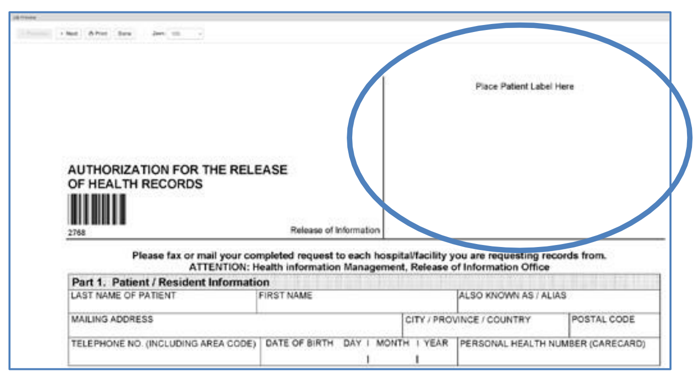
2. Select the form(s)/label(s) you want to print from the Jobs pane by placing clicking on the box  to the left of the form/label name.

Click the Print button 

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

<u>Form with Patient ID</u>

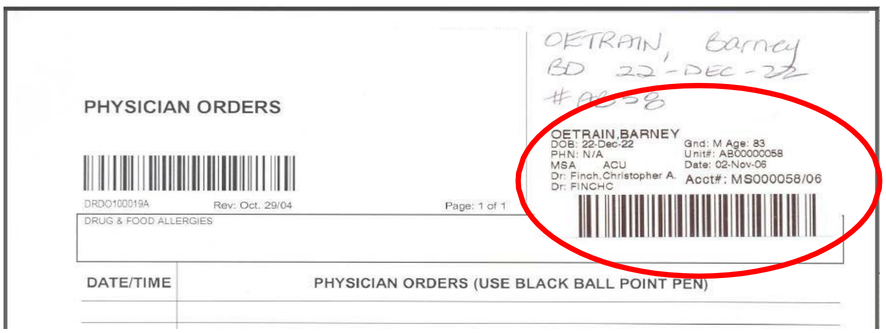
<u>Blank Form</u>



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).



PHYSICIAN ORDERS

OETRAIN, Barney
BD 22-DEC-22
#AB58

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

DRDO100019A Rev: Oct. 29/04 Page: 1 of 1

DRUG & FOOD ALLERGIES

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

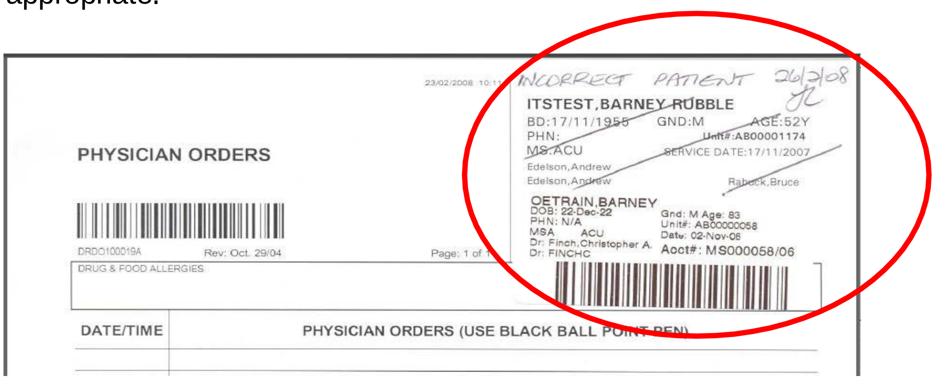
Activity 3.8 - Correct application of labels to forms with incorrect patient identification

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 10:11
INCORRECT PATIENT 26/2/08
JL
ITSTEST,BARNEY RUBBLE
BD:17/11/1955 GND:M AGE:52Y
PHN: Unit#:AB00001174
MS:ACU SERVICE DATE:17/11/2007
Edelson,Andrew
Edelson,Andrew Rabuck,Bruce
PHYSICIAN ORDERS
OETRAIN,BARNEY
DOB: 22-Dec-22 Gnd: M Age: 83
PHN: N/A Unit#: AB00000058
MSA ACU Date: 02-Nov-06
Dr: Finch,Christopher A.
Dr: FINCHC Acct#: MS000058/06
DRDO100019A Rev: Oct. 29/04 Page: 1 of 1
DRUG & FOOD ALLERGIES

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

PATIENT SCENARIO 4 – Accessing a patient's chart

Learning Objectives
At the end of this Scenario, you will be able to: - Review the Banner Bar, Organizer Toolbar, and Menu (Table of Contents) - Review Patient Summary - Results Review - Review Orders - Review Single Patient Task List - Review MAR Summary - Review Documentation

SCENARIO
Let's now open up the patient's chart. We will do an overview on this screen. You will be completing the following activities: - Reviewing the Banner Bar, Organizer Toolbar, and Menu (Table of Contents) - Reviewing Patient Summary - Results Review - Reviewing Orders - Reviewing Single Patient Task List - Reviewing MAR Summary - Reviewing Documentation

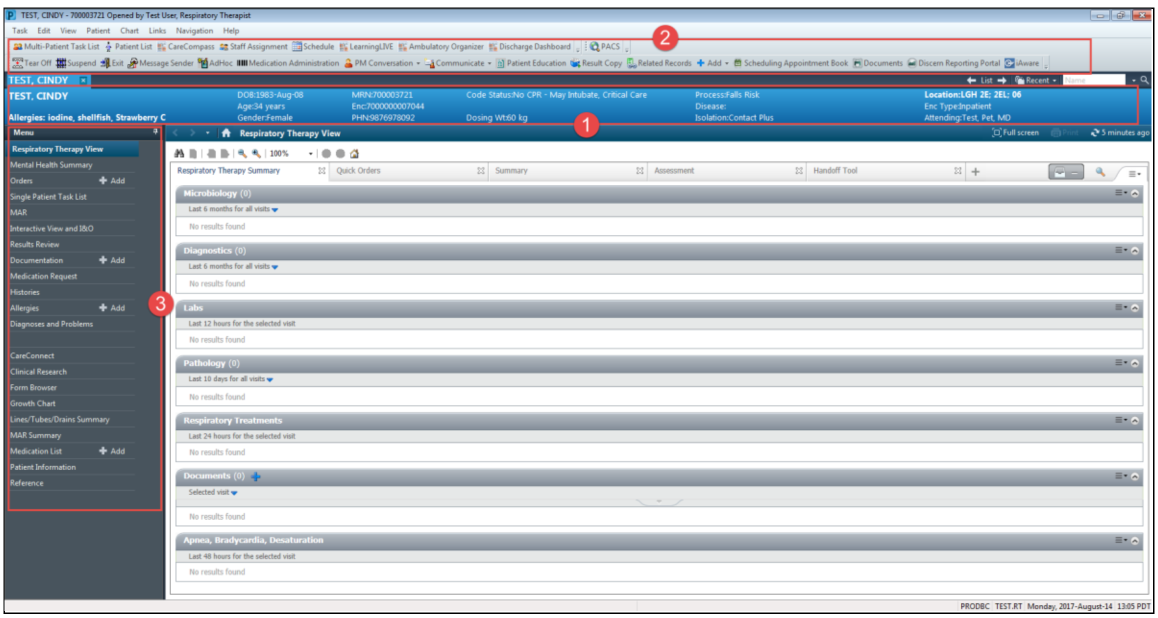
Activity 4.1 – Reviewing the Banner Bar, Organizer Toolbar, and Menu (Table of Contents)

1

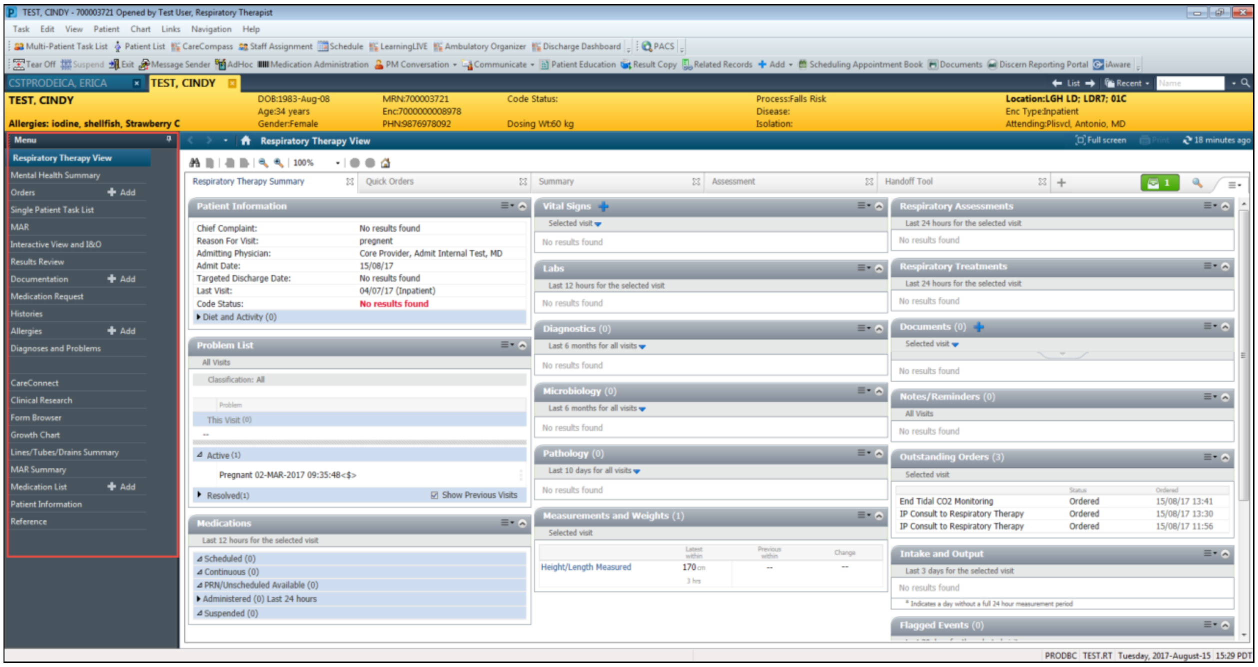
Select a patient **<u>ED-UC-B, Kelly/Sonia/Gladys.</u>**

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**
   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.

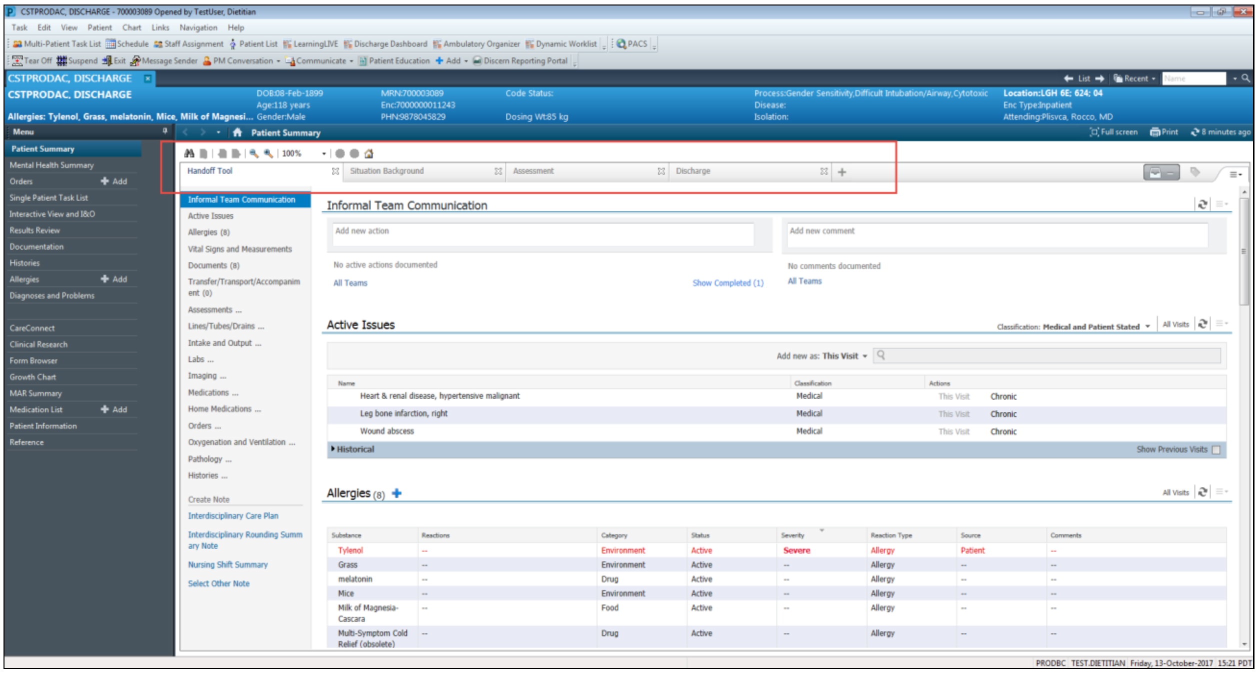


The **Menu** on the left side of the screen allows you to view detailed specific patient information under each tab. Click on the tabs in the **Menu** to access the information.


TEST, CINDY - 700003721 Opened by Test User, Respiratory Therapist
Task Edit View Patient Chart Links Navigation Help
TEST, CINDY
DOB:1983-Aug-08
Age:34 years
Gender:Female
MRN:700003721
Enc:7000000008978
PHN:9876978092
Code Status:
Dosing Wt:60 kg
Process:Falls Risk
Disease:
Isolation:
Location:LGH LD; LDR7; 01C
Enc Type:Inpatient
Attending:Plisvcl, Antonio, MD
Allergies: iodine, shellfish, Strawberry C
Menu
Respiratory Therapy View
Mental Health Summary
Orders
Single Patient Task List
MAR
Interactive View and I&O
Results Review
Documentation
Medication Request
Histories
Allergies
Diagnoses and Problems
CareConnect
Clinical Research
Form Browser
Growth Chart
Lines/Tubes/Drains Summary
MAR Summary
Medication List
Patient Information
Reference
Respiratory Therapy Summary
Quick Orders
Summary
Assessment
Handoff Tool
Patient Information
Problem List
Medications
Vital Signs
Labs
Diagnostics (0)
Microbiology (0)
Pathology (0)
Measurements and Weights (1)
Respiratory Assessments
Respiratory Treatments
Documents (0)
Notes/Reminders (0)
Outstanding Orders (3)
Intake and Output
Flagged Events (0)

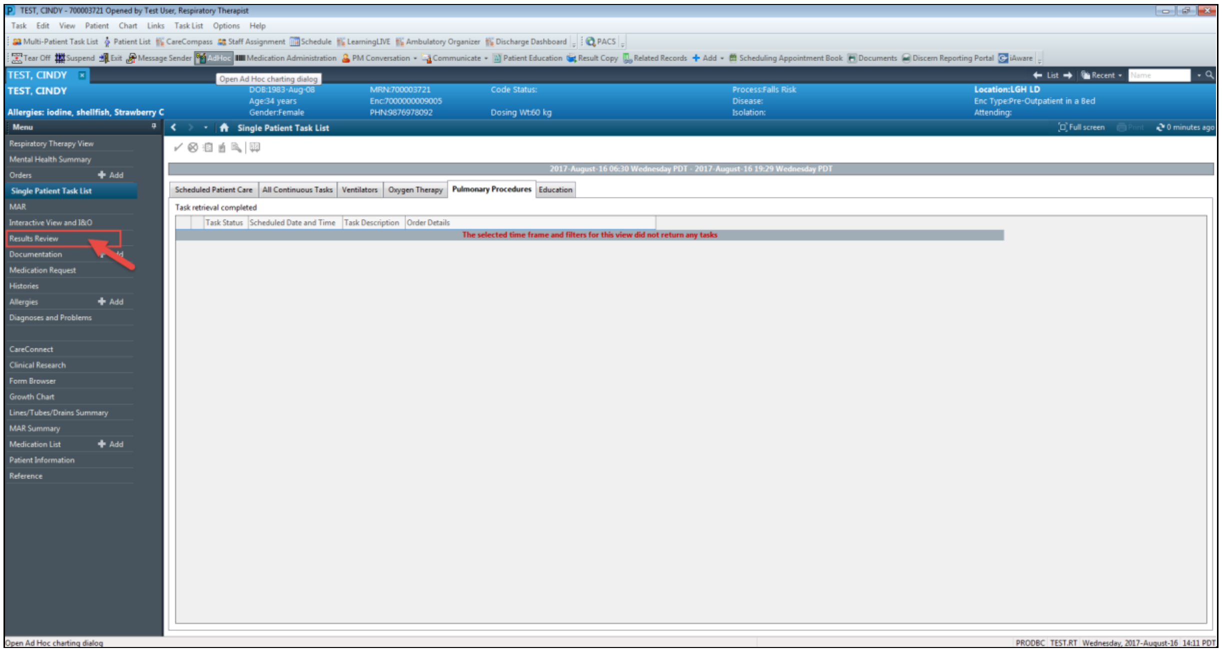
Activity 4.2 – Reviewing Patient Summary

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



Activity 4.3 – Results Review

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



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

1. **Tabs**

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

2. **Navigator**

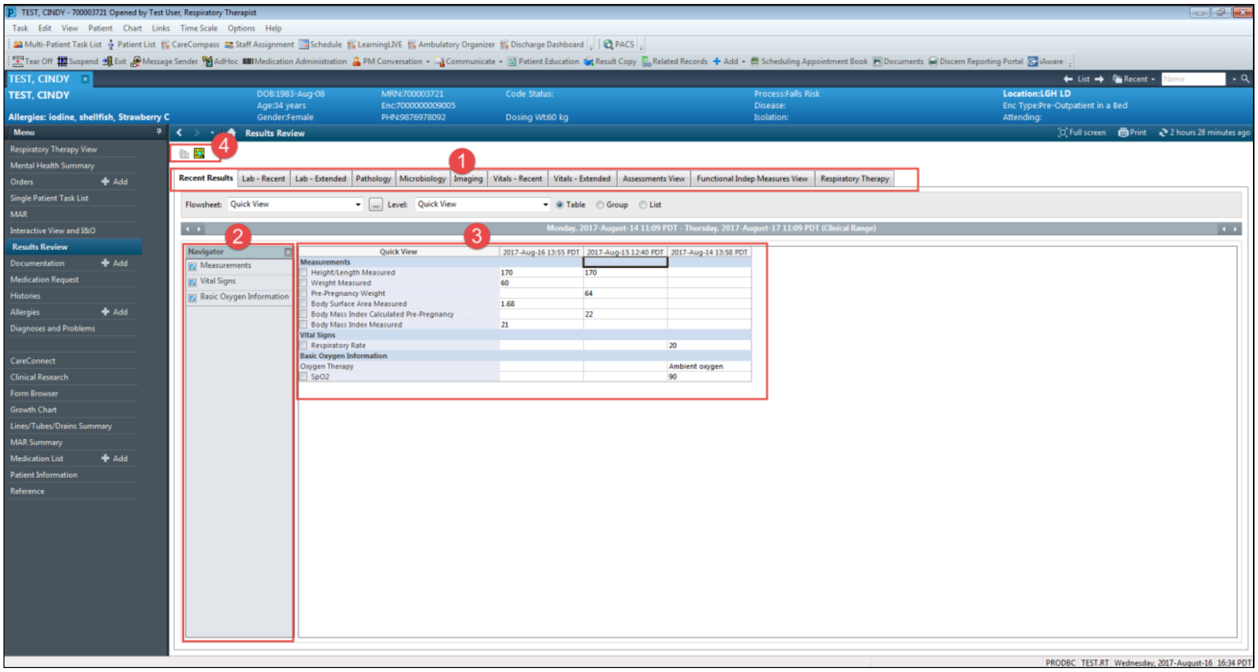
The Navigator is a list of categories that serves as an electronic index. The index will only display items with available results.

3. **Results Display**

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

4. **Graph** and **Flowsheet Seeker** icon

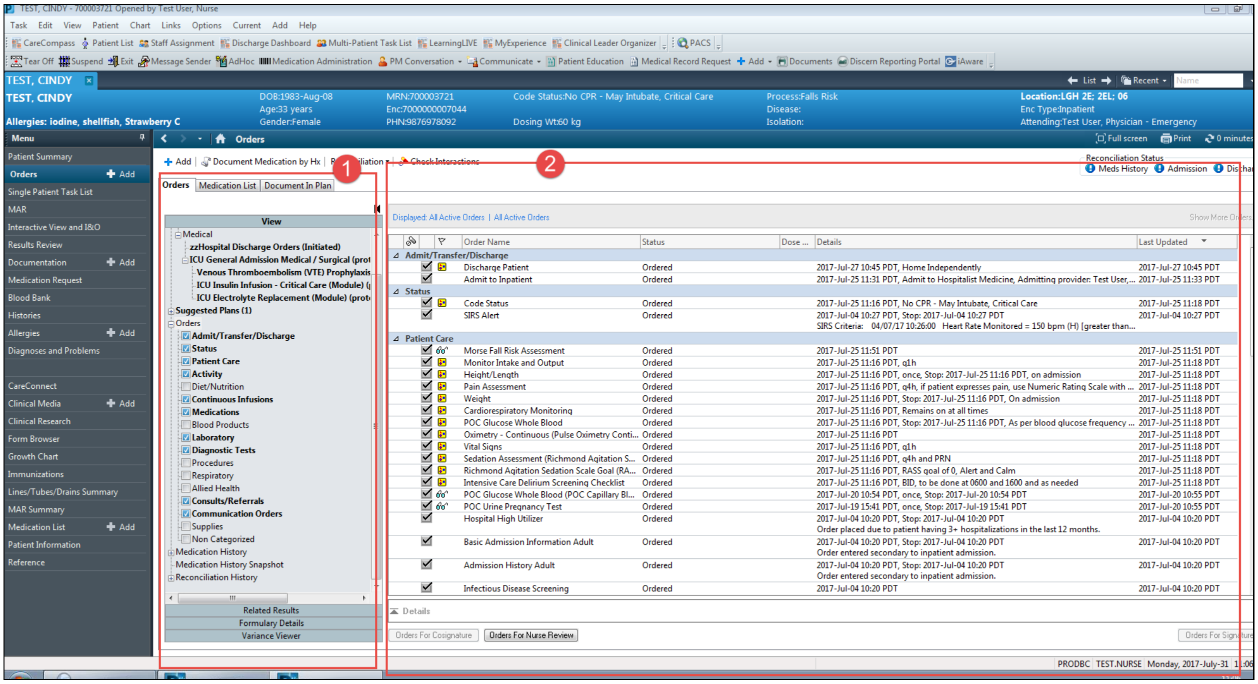
Click on the different **Tabs** to learn more about the patient.



1
2
3
4

Activity 4.4 – Reviewing Orders

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



1. The **View** window on the left displays the different types of orders.

   The items with a **Checkmark** and **Bolded** have an order in that category. There are various categories of Orders which may be displayed including **Suggested Plans** (orders in a planned state), **Orders for Signature** (orders requiring a sign off), and then a listing of **Orders** (active orders on the patient profile).

2. The window on the right displays the list of orders. When you hover your pointer ("**Hover to Discover")** over specific icons, a message will appear telling you their functionality.

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

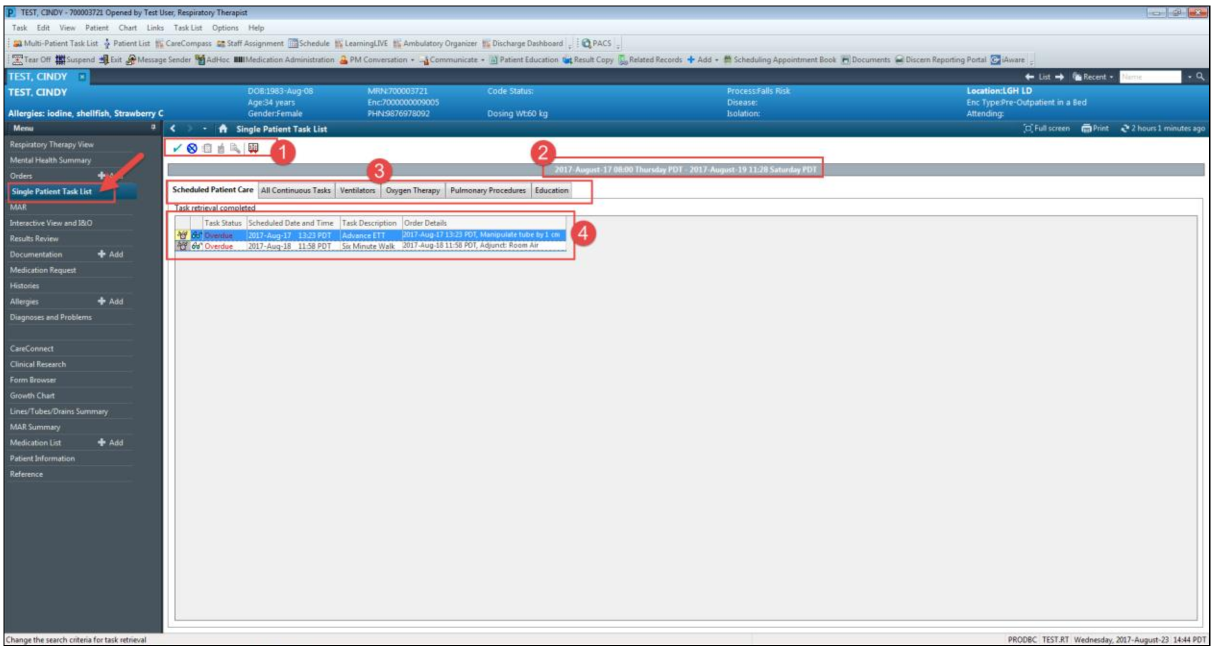
 This order is part of an Order Set

 This order is yet to be reviewed by clinician

Activity 4.5 – Reviewing Single Patient Task List (SPTL)

1 The **Single Patient Task List** (**SPTL**) is a list of tasks for an individual patient. When you open **SPTL** you will see:

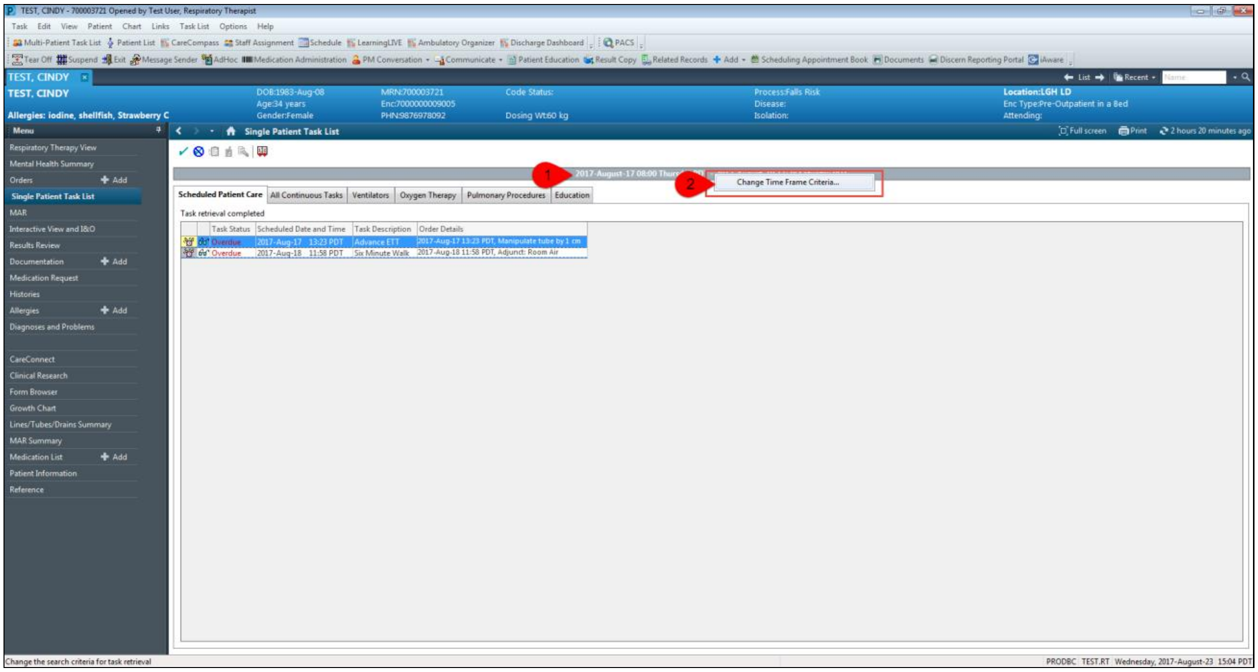
1. **Task List toolbar**
2. **Time Frame** for the tasks to be displayed.
3. **Task Tabs**
4. **Task List**



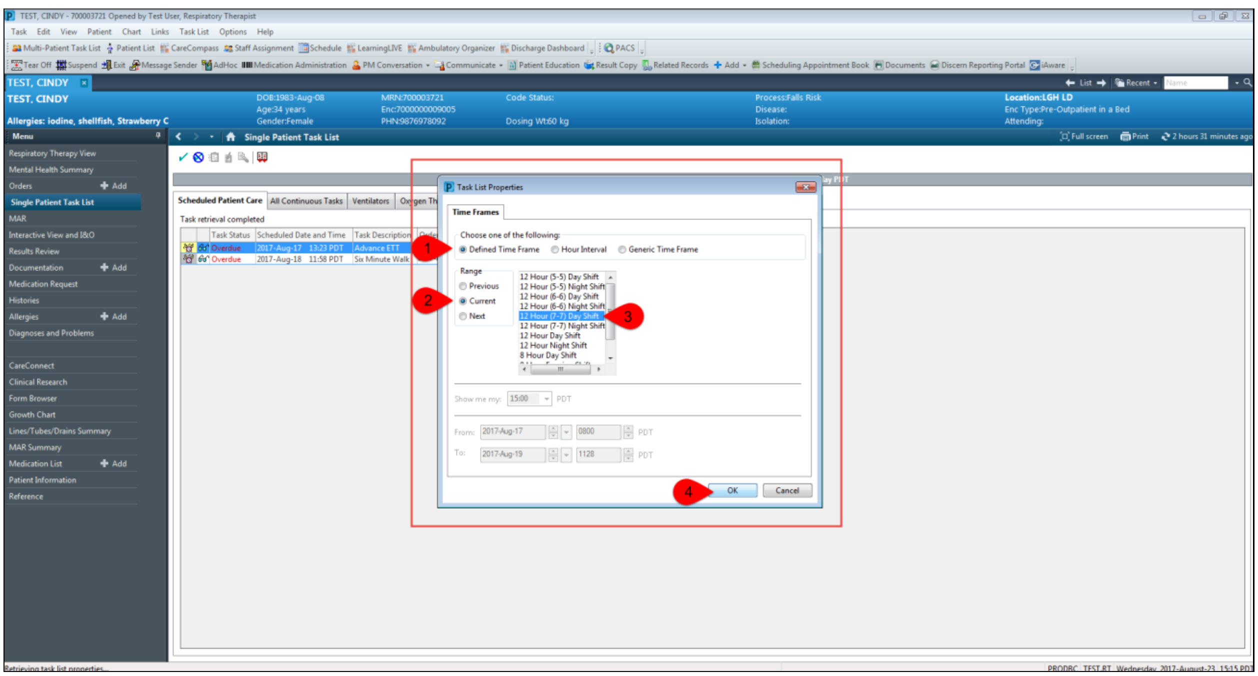
Note: Hover over the different icons and to find out more and what you may need to do. Hover over the below icons to learn about what it refers to.

This order is yet to be reviewed.

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

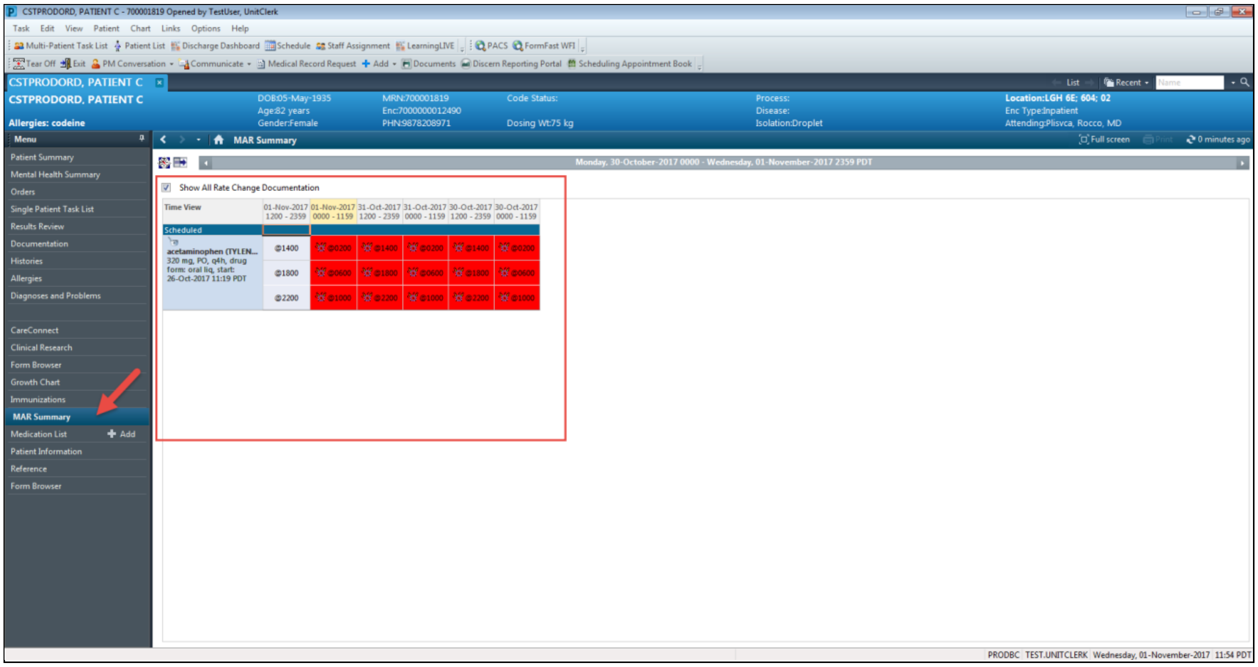


The **Task List Properties** window opens and you can change or update the criteria.



Activity 4.6 – Reviewing MAR Summary

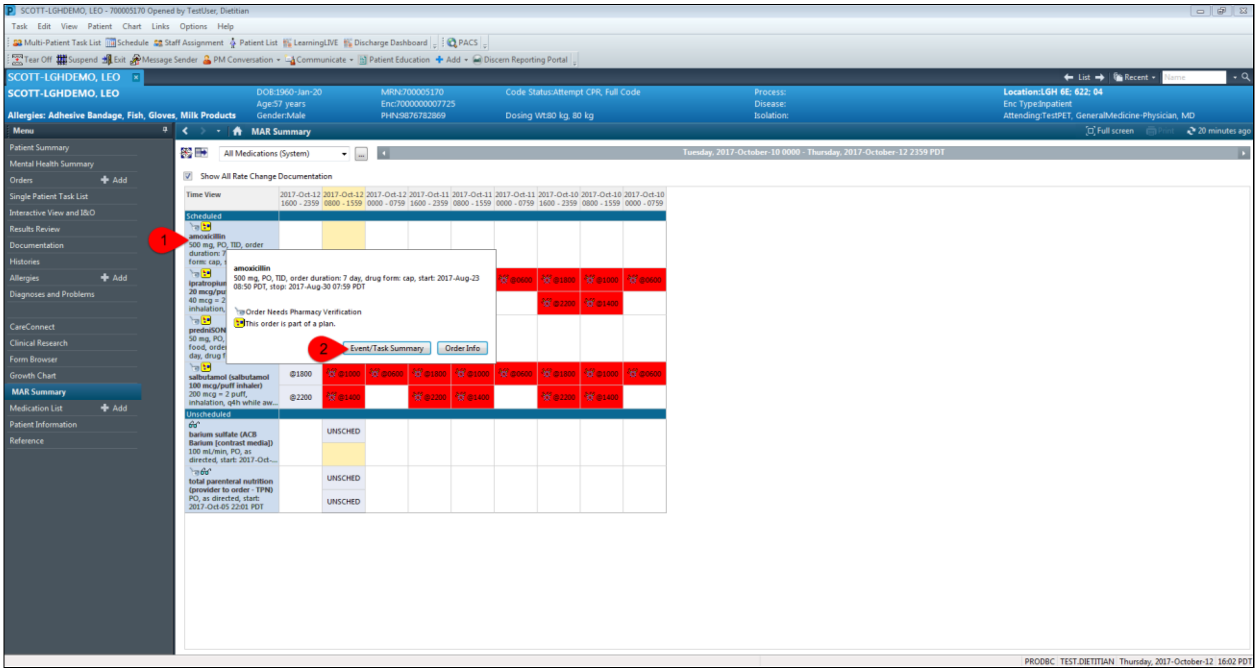
1 Click **MAR Summary** in the **Menu List** to access **Medication Administration Record** (**MAR**) **Summary**. **MAR Summary** displays a condensed view of medication administration information so that you can view a high-level overview of the medications that are prescribed for the patient.



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

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

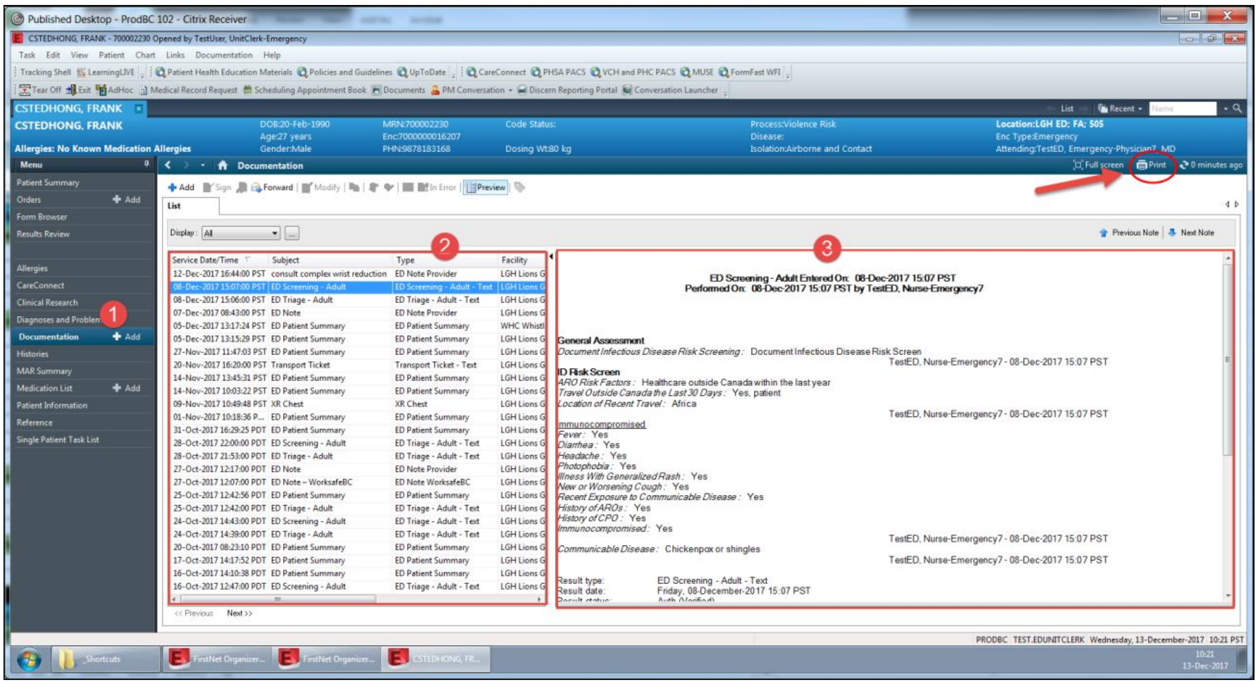
Note: You can click on the **Navigator** button to change the time frame.



Activity 4.7 – Reviewing Documentation

1 Documentation can include provider notes, nurse notes, clinician notes, completed forms, assessments, and more. Click on **Documentation** in the **Menu List** to open the screen.

1. Select the document that you want to review under the **List** tab and the document will open in the window to the right.
2. Select any document in the **List** box and
3. review what was documented on the patient. You can also print the document by clicking on the printer icon just underneath the Banner Bar, on the top right hand corner.



Key Learning Points

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

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

Learning Objectives

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

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

SCENARIO

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

You will be completing the following activities:

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

Activity 5.1 – Log in and out of SchApptBook

1 Logging in:

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

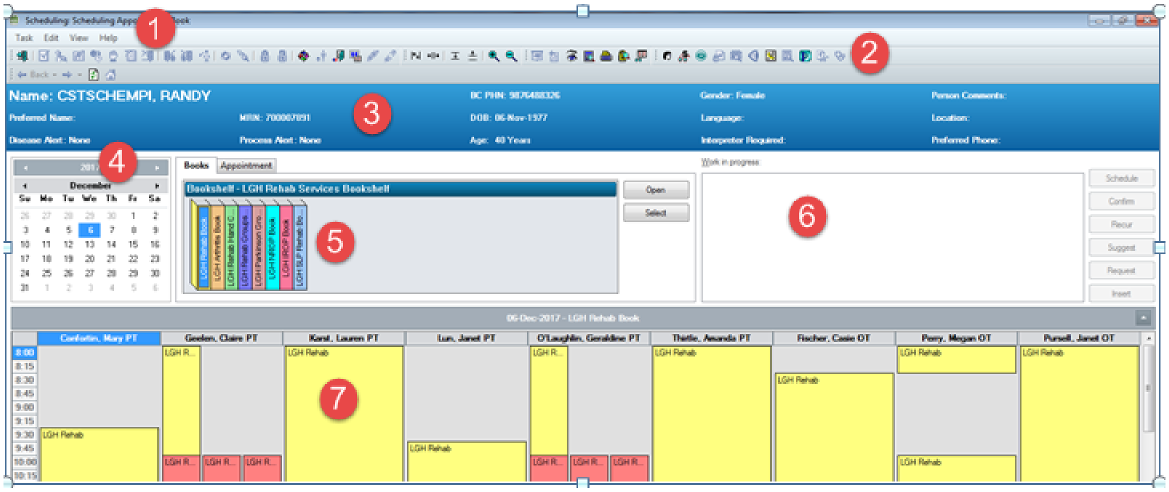
2 Logging out:

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

1. From the toolbar, you may select the **Exit** icon (recommended to avoid locking the patient record).
2. You may also click the in the upper right hand corner of your screen.

Activity 5.2 – Overview of SchApptBook interface

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



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

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

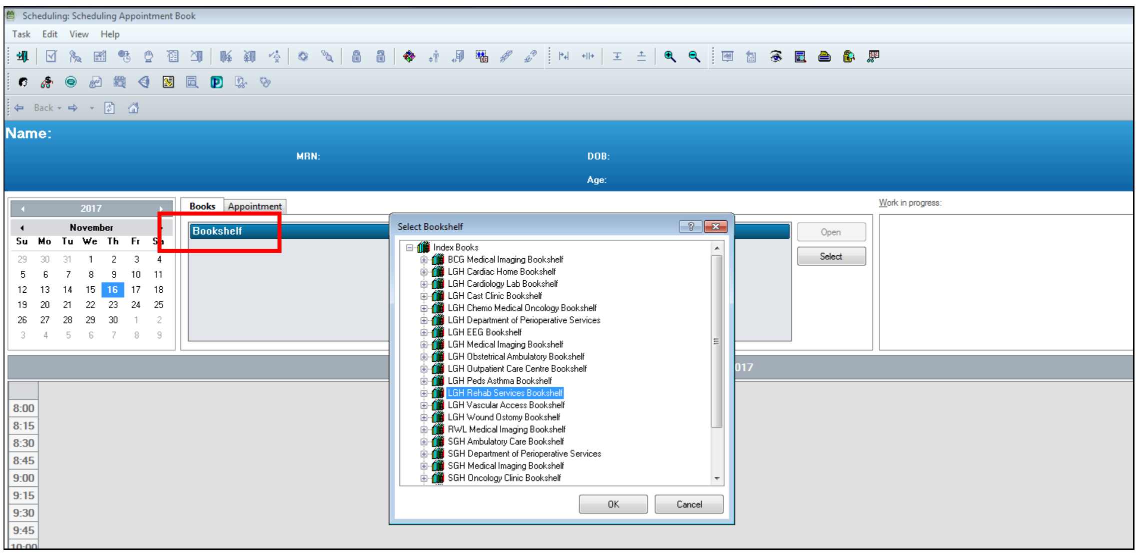
1

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

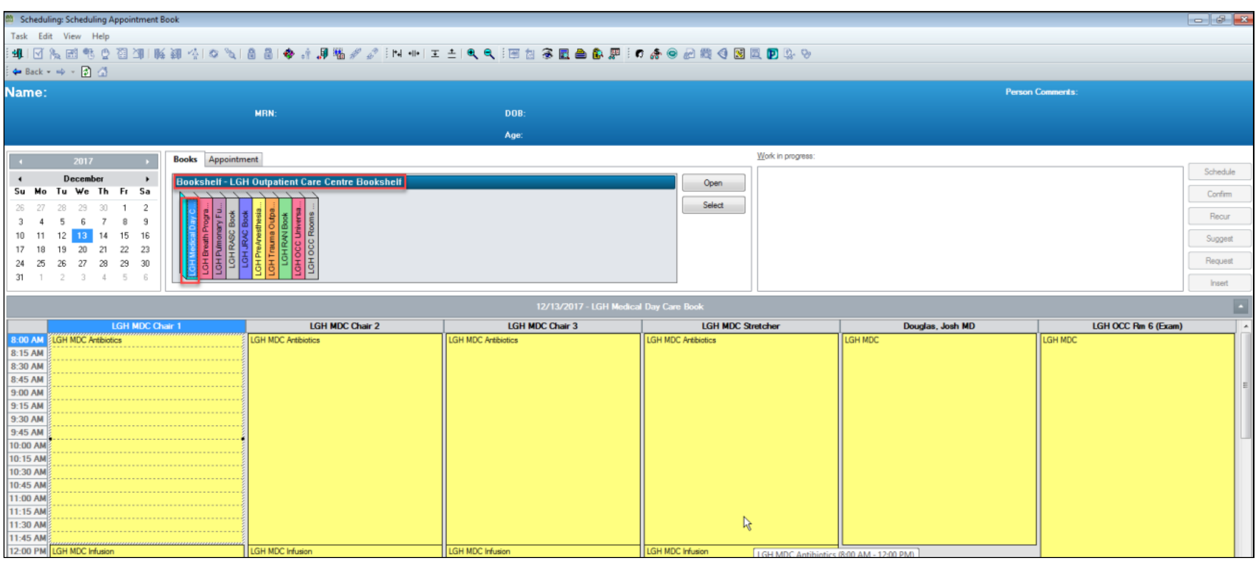
Pre-requisite Steps for Booking an Appointment

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

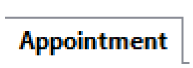
1. Click on the **Bookshelf** banner to select a Bookshelf.
2. Select the appropriate **Bookshelf** and click **OK**.



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



4.Click the Appointment tab



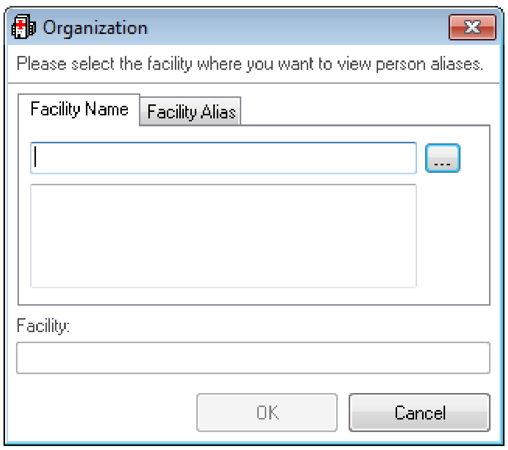
5. The first few fields of required information appear in the window. You may begin to schedule the appointment here.

   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.

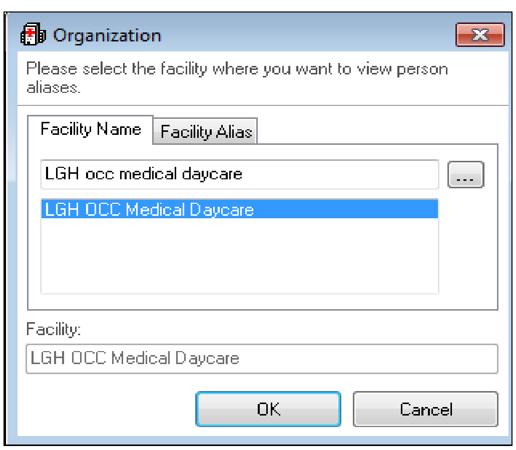
6. Click the **Ellipsis** button beside the Person name field 
7. Search for the patient, by entering the **PHN**, then click **OK** (if you do not have a PHN, search by partial last name and first name or date of birth and gender).
8. If you have found the correct patient, click only ONCE on their name 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.

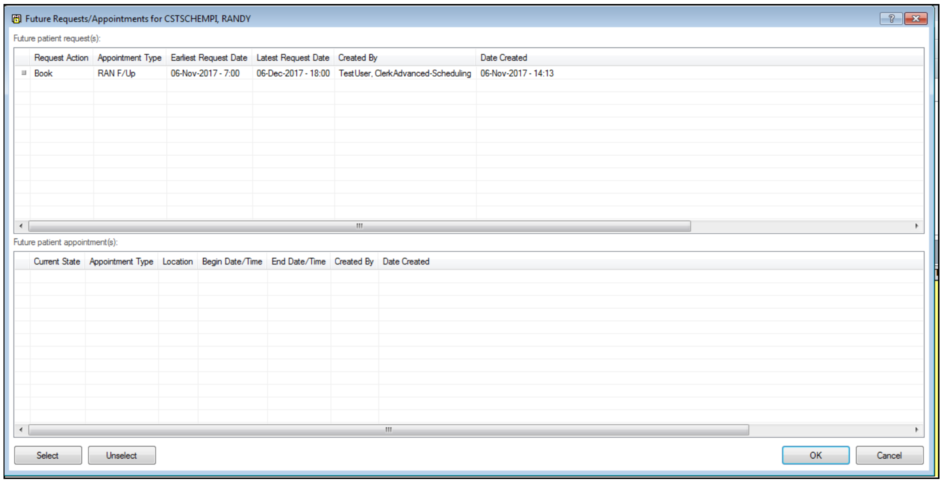
9. The Organization window appears. Click the ellipsis.



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



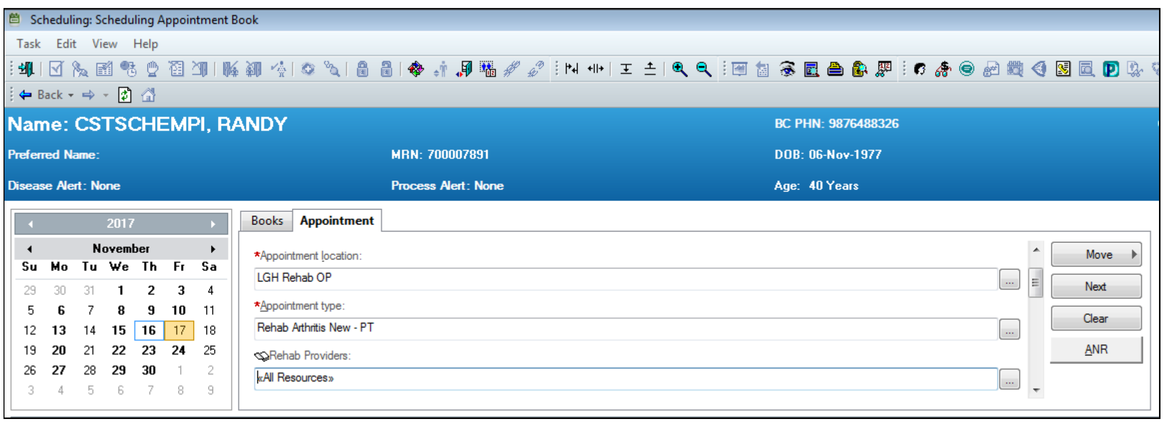
11. The EMPI window will appear momentarily as your patient is checked against the EMPI database.
12. The Future Requests/Appointments window will appear for the patient if they have appointments that are booked in the future. Click **OK** to close the window.



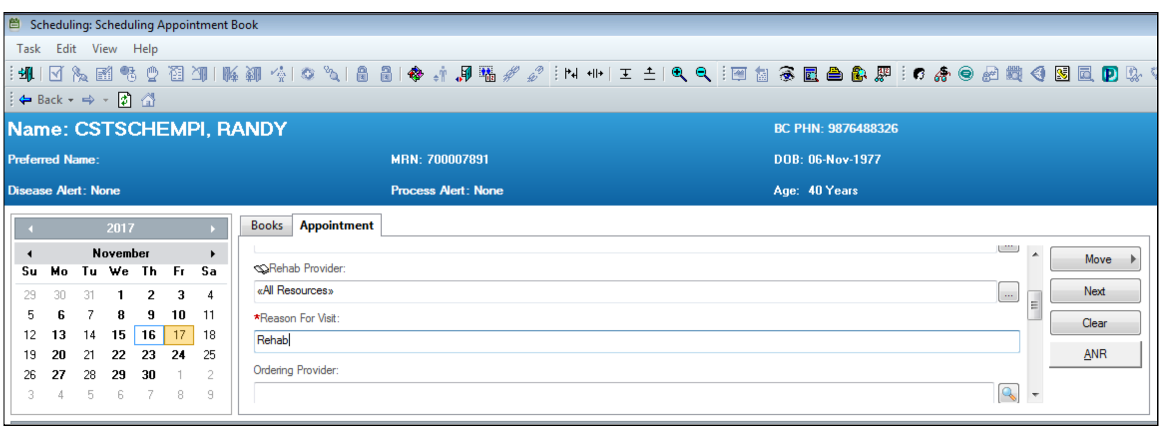
13. The patient's name will now display in the **Person Name** field.
14. Click the **ellipsis** button beside the **Appointment Location** field and double click on your clinic location name to select as the appointment location.

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

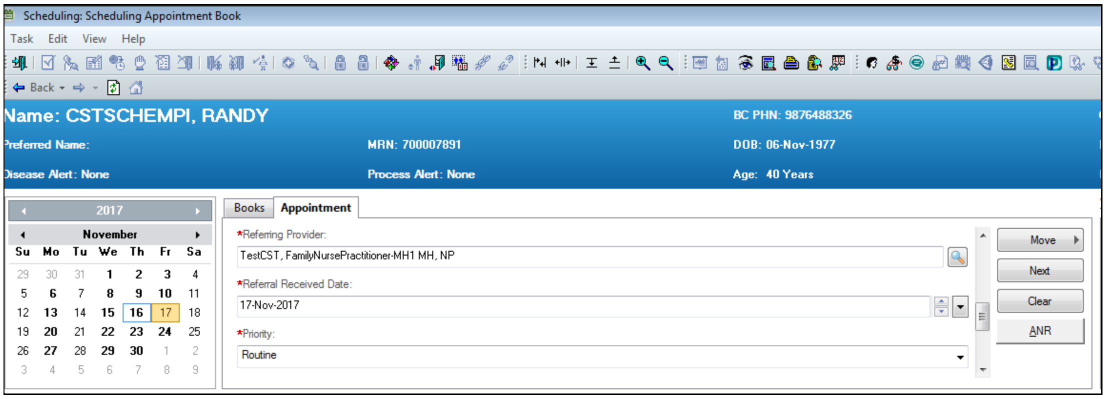
15. Select the **ellipsis** beside the **Appointment Type** field and double click on an appointment type to select.



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



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



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

19. Click on the **Move** button 

to move the appointment request information in **Work In Progress (WIP)** area.

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

1

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

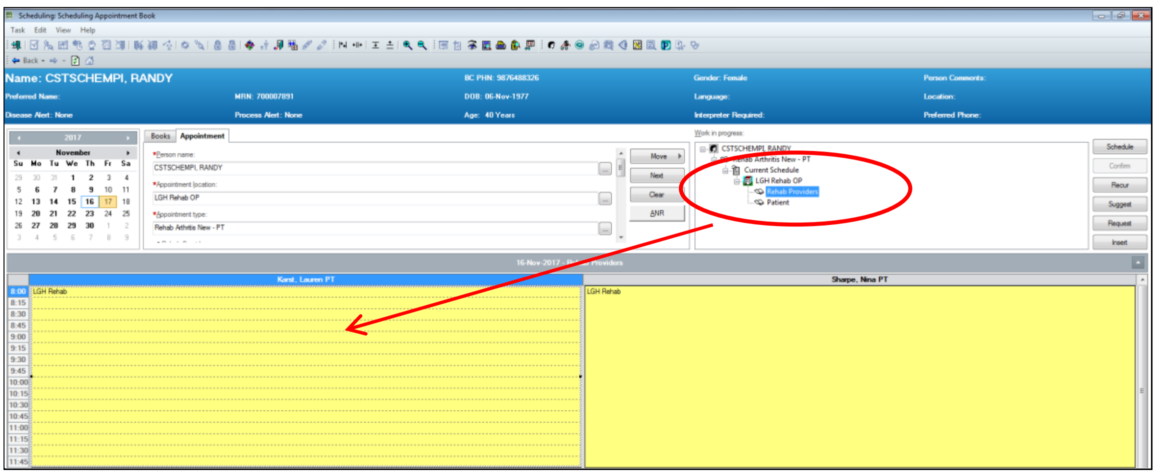
Drag and Drop Method

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

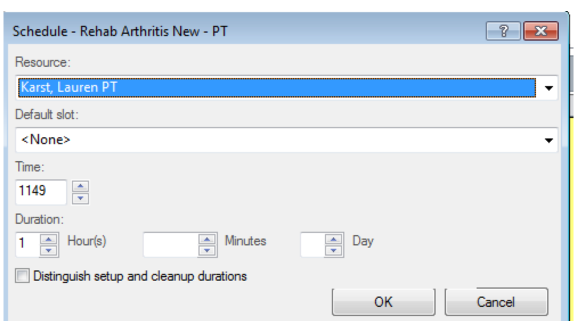
Highlights:

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

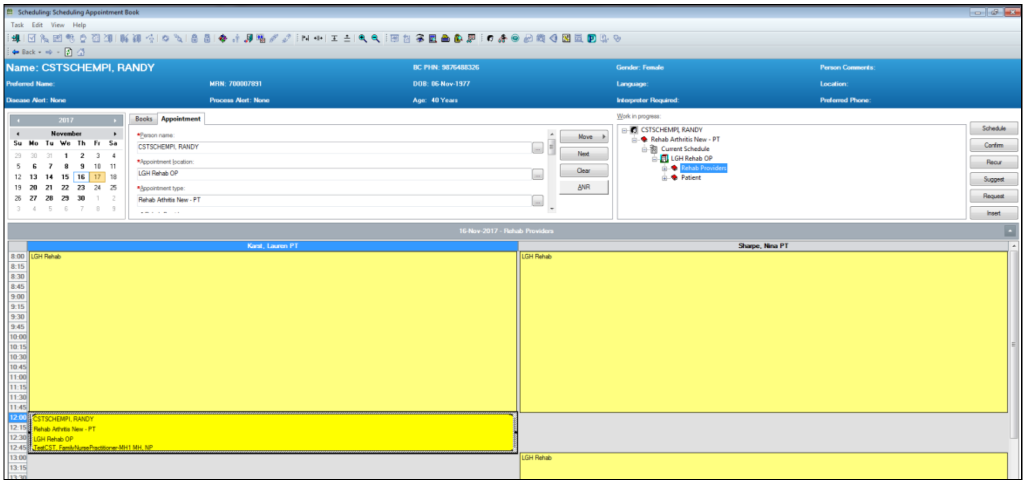
Left click on the selected resource (the resource directly below the clinic name) and drag the cursor to the appropriate resource and start time.



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



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



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

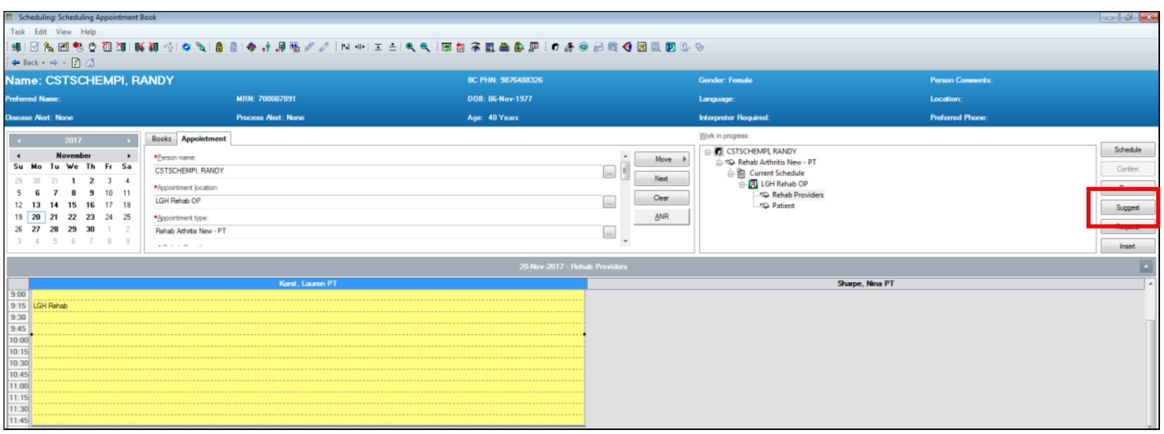
2 Suggest Scheduling Method

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

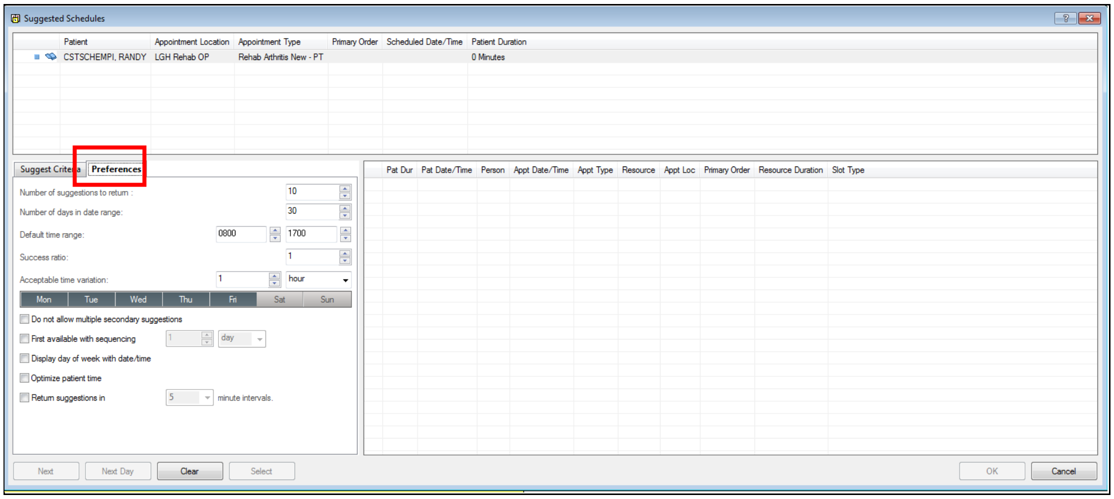
Highlights:

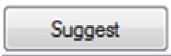
- Helps you to find the FIRST available appointment at the clinic.
- Allows you to set a date range for the appointment search.
- Avoids scheduling conflicts (resources/patients will never be double-booked).
- Results in the least amount of booking errors.

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



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



Click 

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

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

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

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

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

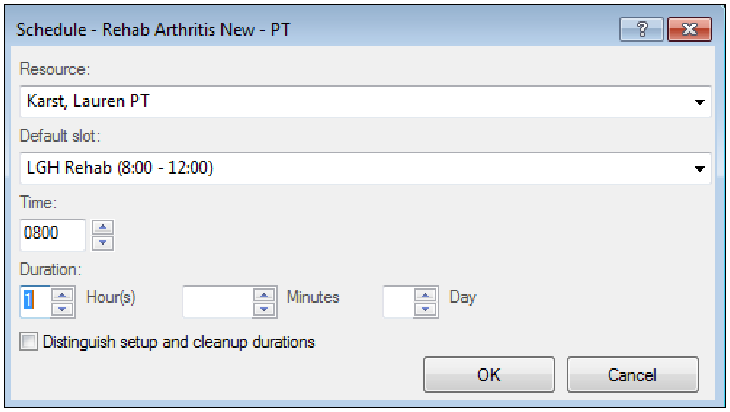
3 **Schedule Button Method**

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

Highlights:

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

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



If necessary, modify any of the fields (Resource, Default Slot, Time and Duration) and click **OK**.

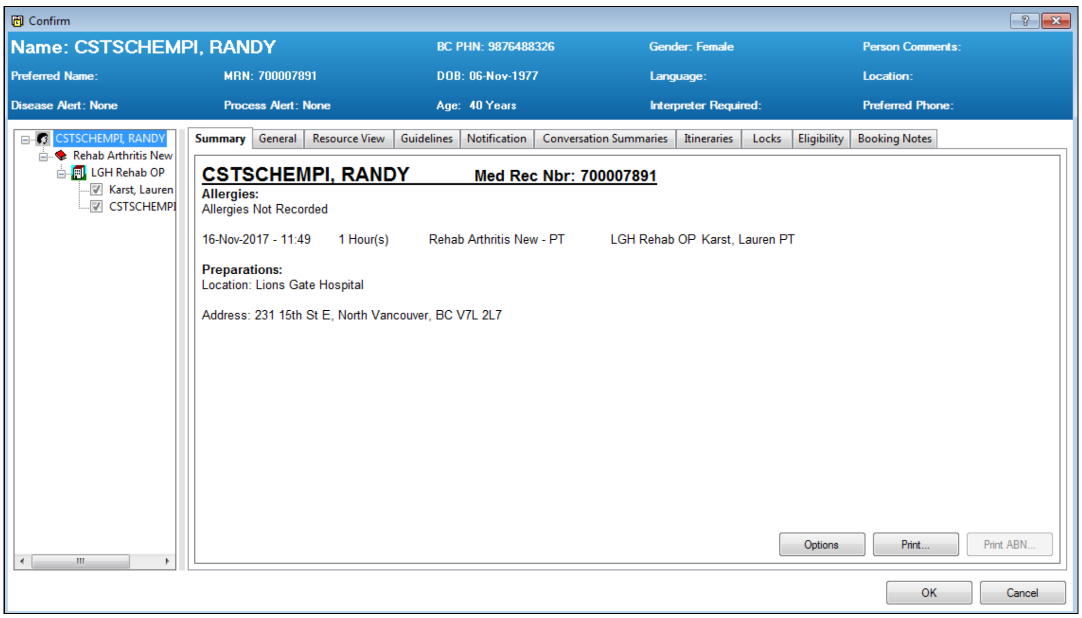
The appointment will appear in the scheduling grid in a Pending state.

Activity 5.5 – Confirming an appointment

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

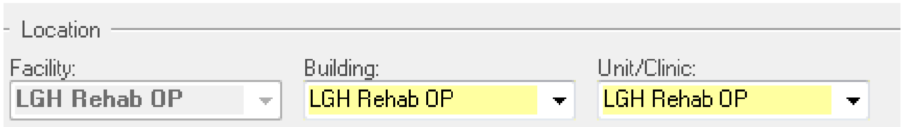
1. Click the Confirm button to confirm the appointment. The Confirm window will display a summary of the appointment including any patient preparations/instructions.
2. Click **OK** in the Confirm window.

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



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 pre-registration.
6. Leave the Pre-Reg Status as Incomplete Pre-Reg Status: Incomplete, since you do not have the patient here with you at this time, nor are you able to reach them by phone.
7. In the Patient Information tab Patient Information verify the demographic information on every visit as much as possible.
8. Click on the Encounter Information tab.
9. In the Location section, the Facility is auto-populated. Verify the Building and Unit/Clinic

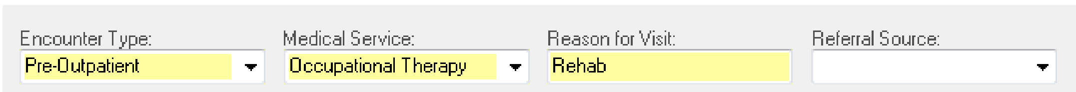
are correct.



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

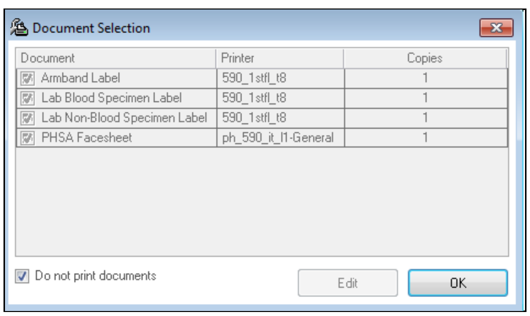


Note: the Reason for Visit carries over from the appointment.

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.



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

Activity 5.6 – Request Lists

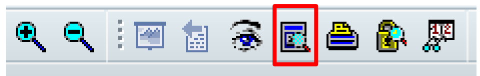
1 Request Lists are a type of Inquiry that allow for a listing of appointment requests. Request lists are different than regular inquiries because they display requests for appointments rather than the booked appointments.
The requests for appointments can be generated automatically through an Order 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.

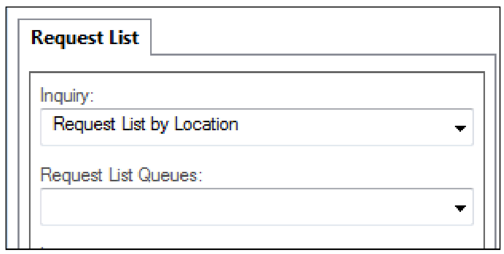
2 Open a Request List

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

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

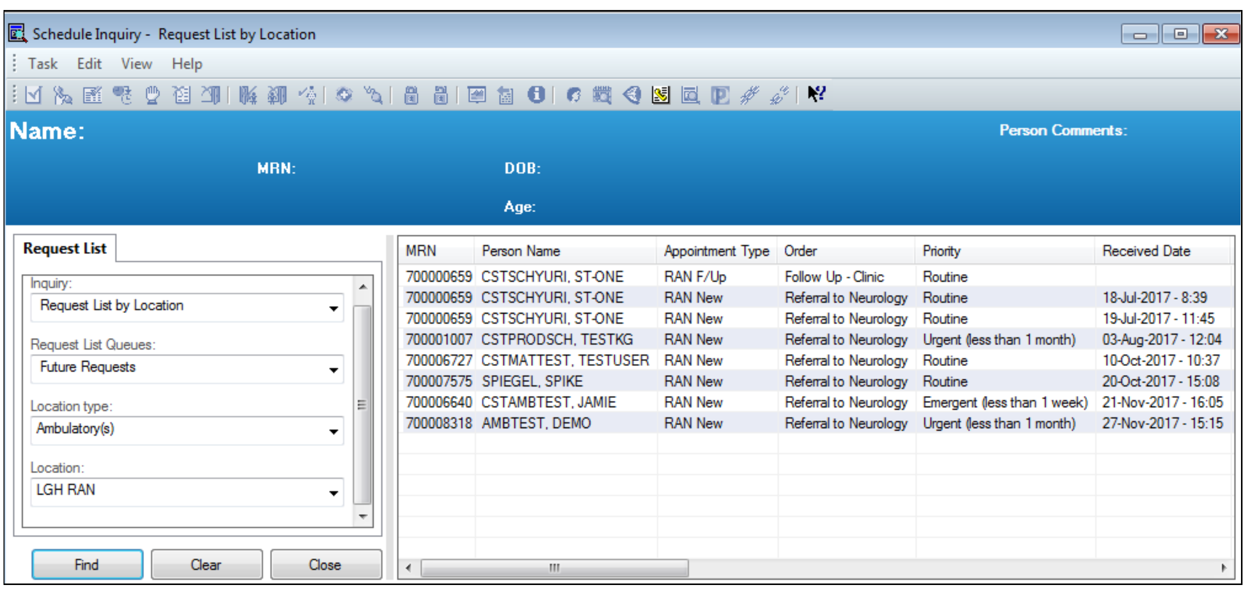


2. The Inquiry field should default to "Request List by Location." Keep this Inquiry to run a Request List for a specific clinic. The other Inquiries do not filter by Location so they could be very long.



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.



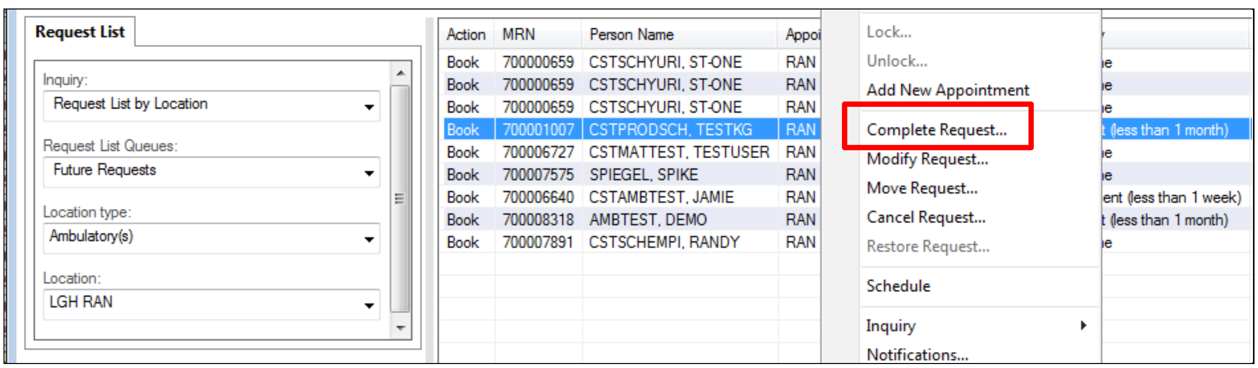
3 Requests Generated Through Orders-to-Scheduling

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

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

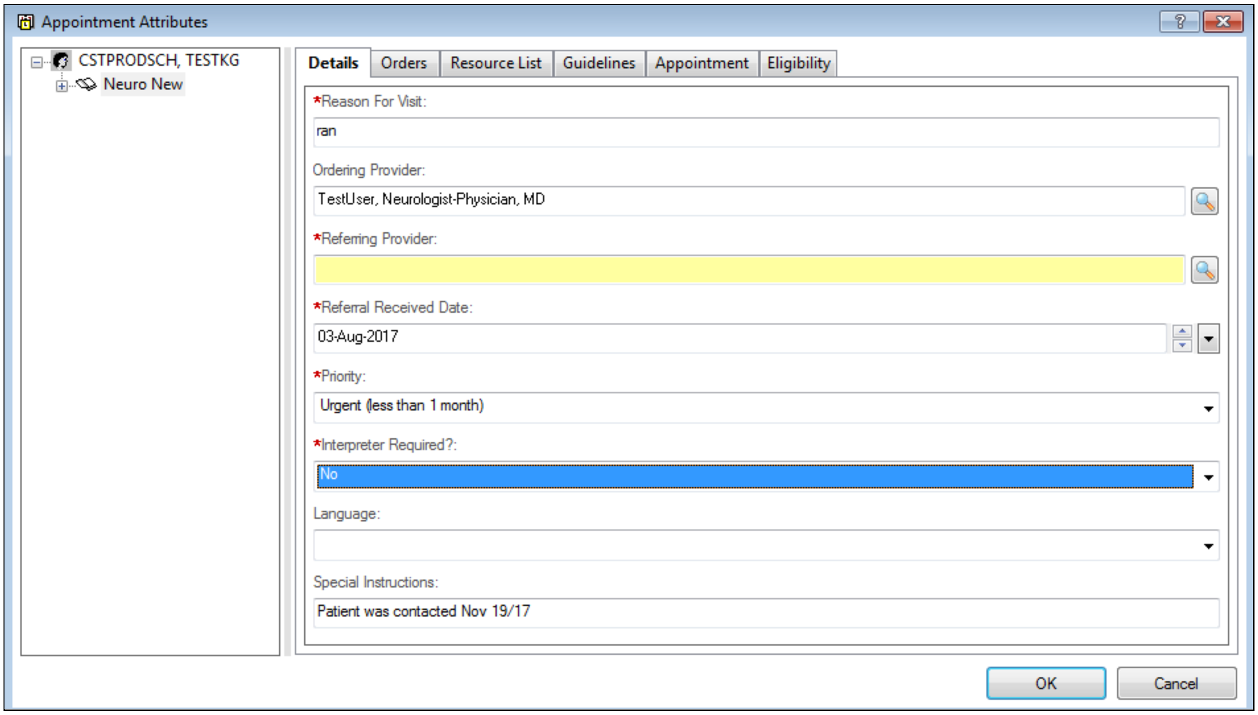
4 Schedule an Appointment from a Request List

1. Follow the steps outlined in the "Open Request List" section above.
2. Right-click the person you want to schedule and select **Complete Request.**

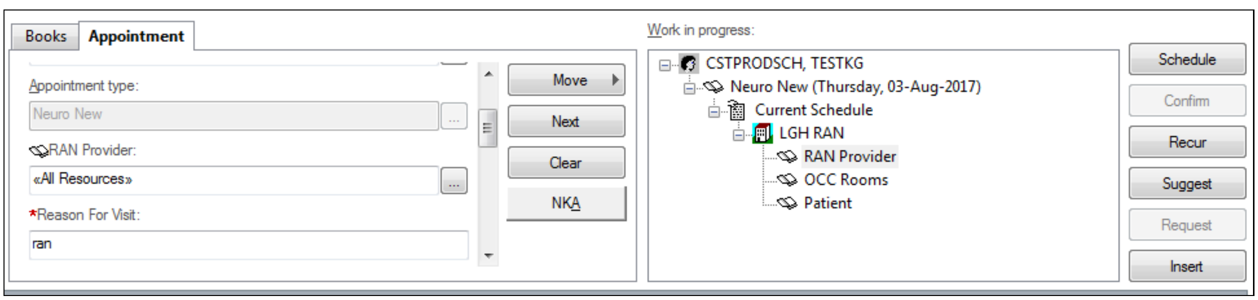


3. If the "Future/Requests/Appointments" window opens, click **OK**.
4. The "Appointment Attributes" window will open if there are mandatory fields that have not been entered. Fill in the fields and click **OK**.

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



5. The appointment opens in the WIP.



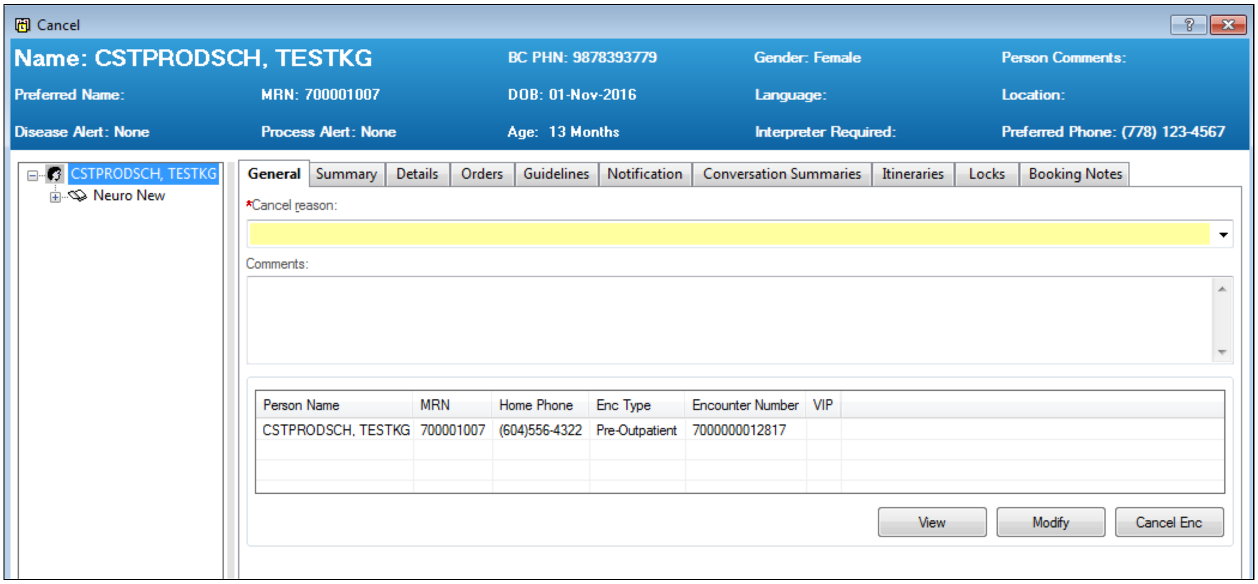
6. From this point, any of the scheduling methods can be used to complete the booking. However **Suggest** is recommended because the date range will default to the dates entered by the ordering Provider.

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.



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.