SELF-GUIDED PRACTICE WORKBOOK [N71] CST Transformational Learning

WORKBOOK TITLE: UNIT CLERK: MATERNITY







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F SELF-GUIDED PRACTICE WORKBOOK

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.
	The workbook provides a compilation of different scenarios that are applicable to your work setting.
	Each scenario will allow you to work through different learning activities at your own pace to ensure you are able to practice and consolidate the skills and competencies required throughout the session.
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 to follow the steps, immediately raise your hand for assistance to use classroom time efficiently
- Ask for assistance whenever needed



PATIENT SCENARIO 1 – Patient List

Learning Objectives

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

Create a Location Patient List

SCENARIO

You arrive on the unit and begin by logging in and setting up the appropriate lists of patients that you will use throughout the day.

As a Unit Clerk you will be completing the following activities:

Set-up a Location Patient List



Activity 1.1 - Set Up a Location Patient List

1 Once you have logged into the system you will see the **Tracking Shell**. Many of your common tasks can be done through Tracking Shell without entering the patients' charts. Take a moment to review your screen and the many buttons within the top toolbar.

Many patient-related tasks are completed through Multi-Patient Task List (MPTL).

P							
Task Edit View Patient Chart Links Patient Actions Provider List Help							
Tracking Shell 🖃 Message Centre 🎬 CareCompass Å Patient List 🔐 Multi-Patient Task List							
📲 Exit 🎬 AdHoc 🔄 Communicate 👻 🗎 Medical Record Request 🍓 Result Copy 틿 Related							
🕄 Patient Health Education Materials 🕄 SHOP Guidelines and DSTs 🔇 UpToDate 🖕							
Tracking Shell							
LGH L&D LGH OB Postpartum LGH OB All Beds LGH OB Recently Discharged SGH L&D							
Patient: CSTMAT, QUEENZELDA 🝷 Filter: <none> 🔹</none>							
🚙 🖉 🎄 🛨 📽 🛊 🕿 😿 🍰 🏠 🚳 🗎 🗎							
Bed S Name G P EGA Status A RN							
LDR1,01M CSTMAT, QUEENZELD 1* C Triage O James E							
LDR2,01M CSTLGHDEMO, SARAF,1*							

Before you can use the **MPTL** you will need to set-up a patient list. The **Patient List** can be set-up by a variety of methods. In this activity we will learn to set-up a patient list based on a specific unit/floor you select.



To set-up the Patient List:

- 1. Select the **Patient List** from the **Toolbar** at the top of the screen.
- 2. The screen will be blank. To create a location list, click the **List Maintenance** icon ⁽²⁾. When you hover over the wrench it will say List Maintenance ^(List Maintenance).
- 3. Within the Modify Patient Lists window, select New in the bottom right corner.

PowerChart Organizer for TestCD, ICU-Nurse								
Task Edit View Patient Chart Links PatientList Help								
🗄 🌇 CareCompass 📲 Clinical Leader Organizer 🖕 Patient List 👖 ti-Patient	Fask List 🌃 Discharge Dashboard 🔉 Staff Assignment 🎬 L	earningLIVE 🝦 🔅 😋 CareConnect 😋 PHSA PACS 😋 VCH and PHC P	ACS 🕄 MUSE 🕄 FormFast WFI 🝦					
🗄 📲 Exit 🎬 AdHoc 💵 Medication Administration 🚡 PM Conversation 👻 🗎 Me	edical Record Request 🚦 Add 👻 📻 Documents 🖀 Schedul	ing Appointment Book 💽 iAware 📾 Discern Reporting Portal 🤤						
🕄 🔃 Patient Health Education Materials 🔍 Policies and Guidelines 🔃 UpToDate	-							
Patient List								
	P Modify Patient Lists							
	Available lists:	Active lists:	_					
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- 4. From the Patient List Type window select Location.
- 5. Click Next.

Pi	Patient List Type Select a patient list type:	X	
ist	Assignment Assignment (Ancillary) CareTeam Location Medicul Scruce Provider Group Query Relationship Scheduled		6
_	Back Next Finish Cance	*	el



6. In the **Location Patient List** window a location tree will be on the right hand side. Expand the list of locations by clicking on the tiny **plus** [+] sign next to **Locations**.

>,	Location Patient List	Contions Construct General Hospital Construct Gen	×	
		Back Next Finish Can	cel	

- 7. Scroll down until you find the location assigned to you. (You may need to further expand a facility to select your specific unit. To select check the box next to the unit name.
- 8. All patient lists need a name to help identify them. Location lists are automatically named for the location you select.
- 9. Click Finish

Location Patient List					
✓ *Locations [LGH Labour and Medical Services Encounter Types Care Teams Relationships Time Criteria Discharged Criteria Admission Criteria	 LGH 6 West LGH 7 East LGH 7 Neuro Critical Care LGH 7 West LGH 7 West LGH Ambulatory Surgical Centre ASC LGH Chemotherapy Clinic Hold LGH Daycare Pediatrics LGH Delbrook Private Clinic LGH Emergency Department LGH Emergency Department Hold LGH Endoscopy LGH Endoscopy	×			
Enter a name for the list: (Limited LGH Labour and Delivery 8	to 50 characters) Back Next Finish Ca	ncel			



- 10. In the **Modify Patient Lists** window select the **Location** list you've created.
- 11. Click the **blue arrow** icon icon to move the **Location** to the right, under **Active Lists**.
- 12. Click **OK** to return to **Patient Lists**. Your Location list should now appear.

P	Modify Patient Lists	x
Available lists: LGH Labour and Delivery 10	Active lists: LGH 3 West LDR1, LDR2, LDR3	
	■ 11	
	New OK Can	icel

Key Learning Points

Patient List can be accessed by clicking on the Patient List icon in the Toolbar.

You can set up a Patient List based on location.



PATIENT SCENARIO 2 – Multi-Patient Task List

Learning Objectives

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

- Set up Multi-Patient Task List (MPTL)
- Review and complete patient tasks in MPTL

SCENARIO

In this scenario, you will use the Multi-Patient Task List (MPTL) to identify your patients and help organize your day.

As an Unit Clerk you will complete the following activities:

Set up your view of the Multi-Patient Task List (MPTL)

- Review MPTL functionality
- Review patient tasks
- Complete patient tasks



Activity 2.1 – Set up your view of the Multi-Patient Task List

The **Multi-Patient Task List (MPTL)** displays your patient list and a list of tasks associated to the patients. Tasks are activities that need to be completed for the patients. Tasks are generated by certain orders or rules in the system and show up in a list format to notify you to complete specific patient care activities. They are meant to supplement your current paper to-do list and highlight activities that are outside of regular care.

To navigate to the MPTL:

Click on the Multi-Patient Task List SMulti-Patient Task List on the tool bar

The **MPTL** for Unit Clerks has only one tab for **Scheduled Patient Care** tasks. The tab (task category) is used to group tasks.

PowerChart Organizer for TestUser, UnitClerk										
Task Edit View Patient Chart Links TaskList Options Help										
🗄 🚨 Multi-Patient Task List 🛔 Patient List 🛄 Sched	ule 🞎 S	taff Assig	jnment 📲 LearningLi	IVE 🝦 🤅 🖏 CareConnect 🕻	💐 PHSA PACS 🔍 VCH and P	HC PACS 🕄 MUSE 🦿	🕽 FormFast WFI 🖕			
🗄 📲 Exit 🏯 PM Conversation 👻 🖹 Medical Record F	Request	🕂 Add 🤸	Documents	Discern Reporting Portal	Scheduling Appointment Bo	ok 🝦				
🔍 Patient Health Education Materials 🔍 Policies ar	nd Guide	lines 😭	UpToDate _							
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							00 D			
LGH 6 East, Assigned Tasks							09-Dec	cember-2017 00:30 Saturday PST - 09-1	Jecember-2	2017 19:45 Saturday P
Scheduled Patient Care										
Task retrieval completed										
All Patients	^		Name	Medical Record Number	Location/Room/Bed	Task Status	Scheduled Date and Time	Task Description	Mnemonic	Order Details
図 發 CSTPRODREG, TESTNEWPERSON		*	CSTCD, TESTAB	700000734	LGH 6E / 612 / 04	InProcess	16-Nov-2017 08:42 PST	Whole Blood Glucose POC AMB		
CSTCD, NEUROZERO	=		CSTPRODREG, TESTN	JE 700008424	LGH 6E / 610 / 02	Overdue	05-Dec-2017 11:07 PST	Update Encounter Isolation Information	1	
CSTCD, TESTAB										
CSTCIL, MEDREC										
CSTDEMO, PAUL										
CSTINTERFACE, TESTING VARIOUS										
CSTLABAUTOMATION, TSRIDLEY										
CSTLABAUTOMATION, TSROLF										
CSTLABAUTOMATION, TSROSWELL										
CSTLABAUTOMATION, TSRUFUS										

- The first time you log in, you will need to set up the **MPTL**. To do this you need to select the appropriate **Patient List** and **Time Frame** to display.
 - 1. Right-click on **Assigned Tasks** in the grey information bar.

2. Select Customize Patient View

PowerChart Organizer for restoser, respiratory metapist
Task Edit View Patient Chart Links Task List Options Help
🛿 🔐 Multi-Patient Task List 🔄 Message Centre 🎬 CareCompass 🎬 Clinical Leader Organizer 🎬 Ambulatory Organizer 🎍 Patient List 🎬 Discharge Dashboard 🔜 Schedule 🎕 Staff Assignment 🎆 LeaningLIVE 🚽 🕏
🗐 Exit 🦉 AdHoc 🎟 Medication Administration 🔮 PM Conversation 🖌 🔩 Communicate 🔹 💠 Add 👻 🧮 Scheduling Appointment Book 📆 Documents 🕥 Discent Reporting Portal 😇 Aware 🖕
🛱 Patient Health Education Materials 🙀 Policies and Guidelines 🙀 UpToDate 🝦
Multi-Patient Task List
✓ ⊗ 1 i i i i i i i i i i i i i i i i i i
Assigned Tasks
Customize Patient View
No Patients Found Name Medical Record Number Location/Room/Bed Task Status Scheduled Date and Time Task Description Order Details
The selected patients, time frame and filters for this view did not return any tasks



Within the Task List Properties window:

3. In the Patient List tab, ensure **Choose a Patient List** is selected and select the **Location Patient List** that you had previously created.

Note: Only choose locations for units you are working on. If you choose an entire hospital or too many locations, the system might not be able process all the tasks in the **MPTL**. Alternatively, you can set up several separate locations based lists.

- 4. Ensure View Assigned Tasks is checked as this will ensure tasks display on your MPTL.
- 5. Click the **OK** button.

P Task List Properties	
Time Frames Patient List	
Choose a Patient List Departmental View LGH Emergency Department, LGH Emergency I LGH 7 East TEastisEast LGH 2 East Ian1 I View Assigned Tasks 5	Location Filters LGH Lions Gate Hospital Given LGH Lions Gate Hospital Given LGH Lions Gate Hospital Given LGH LGE Cardiac Care Given LGH JE Cardiac Care Given LGH JE Cardiac Care Given LGH Jest Given LGH Labour and Delin Given LGH Labour and Delin Given LGH Special Care Nun Given LGH Jest Given LGH 4 East Given LGH 4 West Given LGH 4 Seast Given LGH 5 East Given LGH Endoscopy Given LGH Endoscopy Given LGH Endoscopy
	OK 6 Cancel

After selecting the appropriate Patient List you will set up **Defined Time Frame** for viewing tasks.

To select appropriate Time Frame for your MPTL:

- 6. Right-click the date range in the far right hand side of the grey information bar
- 7. Select Change Time Frame Criteria. This will open the Task List Properties window.

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Task Edit View Patient Chart Links TaskList Options Help											
📾 Multi-Patient Task List 💷 Message Centre 🕌 CeneCompass 🎬 Clinical Leader Organizer 🕌 Ambulatory Organizer 🎍 Patient List 🞬 Discharge Dashboard 🎰 Schedule 🛲 Staff Assignment 🕌 Learning LIVE 🖕 🕰 CareCompass 👫 Clinical Leader Organizer 🕌 Ambulatory Organizer 🐇 Patient List 👫 Discharge Dashboard 🕮 Schedule at Staff Assignment											
🗄 📲 Exit 🎬 AdHoc 🎟 Medication Administration 🔒 PM Conversation 🔹 🏰 Communicate	📲 Exit 🎽 Advice 💷 Medication Administration 🔒 PM Conversation - 🔒 Communicate - 🕈 Add - 🖷 Scheduling Appointment Book 🖻 Documents 🖨 Discens Reporting Portal 🚱 Aware										
🔁 Patient Health Education Materials 💐 Policies and Guidelines 💐 UpToDate 💡											
		Recent - Name - 9									
Multi-Patient Task List		(D) Full screen 🛛 👼 Print 🛛 🕹 0 minutes a									
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Departmental View, Assigned Tasks	29-November-2017/06:30 W	Channe Time Frame Criteria									
Scheduled Patient Care Ventilators Oxygen Therapy Pulmonary Procedures Ambu	tory	Change nime manie Chiena									
Task retrieval completed		8									
All Patients Name Medical Record Number	Location/Room/Bed Task Status Scheduled Date and Time Task Description Order Details										
CSTCD, TESTAD	LGH 2E / 212 / 02 InProcess 24-Jul-2017 10:44 PDT RT Evaluate and Treat										
CSTLEARNING, DEMOTHETA	USH 22 / 222 / 222 mPTOCESS 04-A0g-2017 15:05 PDT K1 CVAluate and Team (5)H 66 / 624 / 64 Pending 29-Nov-2017 16:15 PST Consult to Respiratory Therapy 29-Nov-2017 16:15 PST, Routine, Reason for Consult: COPD										
CSTPRODAC, HANHAN	LGH 6E / 627 / 01 InProcess 28-Aug-2017 10:20 PDT Blood Gas Collection										
CSTPRODAC, HANHA 700005678	LGH 6E / 627 / 01 InProcess 29-Aug-2017 09:01 PDT (Blood Gas Collection										

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Within the Task List Properties window:

- 9. Select Defined Time Frame for your shift.
- 10. Select 12 Hour Day Shift
- 11. Click the OK button

Task List Propert	ies	
- Choose one of t	the following: 1: Frame O guterval O Generic Time Frame	
Range Previous Current Next	12 Hour Day Shift 12 Hour Night Shift 8 Hour Day Shift 8 Hour Evening Shift 8 Hour Night Shift	
Show me my: 1	6:00 v PST	
From: 29-Nov-20	17 A V 1637 A PST	

The Scheduled Patient Care tab within MPTL is now set with the correct patients and their tasks.

Key Learning Points

- The Tracking Shell is the first page you will see upon logging in. Set up a custom list to view MPTL.
- The MPTL is a tool used to display tasks for multiple patients.
- You must select the location patient list and define the appropriate time frame in order to see assigned tasks for your patients.

Click Refresh to ensure you can see the most current tasks.



Activity 2.2 – Review MPTL functionality

1 Now that you have set up your view of the **Multi-Patient Task List**, you will be able to review the following:

- 1. Task list toolbar hover over the **icons** to discover their functions.
- 2. Information bar with name of the patient list (far left) and the set time frame (far right).
- 3. Task categories (tabs) to group tasks.
- 4. Navigator window displays a list of your patients
- 5. List of patient tasks. Task names are displayed on the Task Description column.

P	PowerChart Organizer for TestUser, UnitClerk										
Ta	ask Edit View Patient Chart Links Task List	0	Options Help								
8	🛿 Multi-Patient Task List 🛔 Patient List 🏢 Schedule 💲	🖁 St	taff Assignment 👫 LearningLIVE 🍦 🤅 🔾	CareConnect 🔞 PHSA P/	ACS 🔞 VCH and PHC	PACS 🕄 M	USE 🔞 FormFast WFI 🝦				
: 1	🖡 Exit 🍰 PM Conversation 👻 📄 Medical Record Reque	st •	🕂 Add 👻 🖲 Documents 🗃 Discern Rep	orting Portal Bchedulii	ng Appointment Book	🝦 🤅 😋 Patie	nt Health Education Materia	ls 🔞 Policies and Guidelines 🔇	UpToDate 👳		
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N	Iulti-Patient Task List								[□] Full screen	🖨 Print	€ 0 minutes ago
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								15 December 2017 00.50	may 151 15 beech	1001 2017	2
s	cheduled Patient Care 3										
	ask retrieval completed	_									
	All Patients	^	Name	Medical Record Number	Location/Room/Bed	Task Status	Scheduled Date and Time	Task Description	Mnemonic		Order
	🖬 🎲 CSTAMBTEST, JAMIE	Ш	10 66 CSTAMBTEST, JAMIE	/00006640	LGH 2E / 206 / 01	Overdue	13-Dec-2017 15:05 PST	Schedule Procedure/Test	Pulmonary Fur	iction Test (Complete 13-Dec
	BROWN-LEARN, HENRY	E									
	CRUZ-LEARN, MARIA	Ш									
	CSTADTJAMTHREE, ADTONE ENTRY										
	CSTADTJAMTWO, PATIENTSIXTEEN TEST MIDDLE										
	CSTCORMUFFIN, BANANACHOCOLATECHIP WHC										
	CSTDEMOALEXANDER, DONOTUSE										
	CSTDEVONC, STEPHANIE										5
	CSTDEVONC, TESTONE										
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	CSTLABAUTOMATION, TSADLER										
	CSTLABAUTOMATION, TSARNOLD										
	CSTLABAUTOMATION, TSARVEL										
	CSTLABAUTOMATION, TSWARREN										
	CSTLABAUTOMATION, TSWASHINGTON										
	CSTLABAUTOMATION, TSWAYNE 4	Ŧ	4		m						Þ

Key Learning Points

Components of the MPTL include the Task list toolbar, Information bar, Task categories, Navigator, and List of patient tasks.



Activity 2.3 – Review Patient Tasks

1 After setting up the Multi-Patient Task List you can see the patients that are on your unit with orders or tasks associated to them. Let's locate a patient and review one of their tasks.

- Under the Navigator window with patient names, locate the correct patient, <<u>OB-UC</u>, First <u>Name></u>
- 2. Review task(s) associated with your patient.
- 3. Right click on the task associated with your patient: IP Consult to Ethicist (IP=inpatient)

Multi-Patient Task List								[0] Full screen	🛱 Print	₽ 2 minutes
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LGH 2 East, Assigned Tasks							15-December-2017 06:30 Fri	iday PST - 15-Dece	mber-2017 1	19:45 Friday PS
Scheduled Patient Care										
Task retrieval completed										
All Patients	 Name 	Medical Record Number	Location/Room/Bed	Task Status	Scheduled Dat	te and Time	Task Description	Mnemonic		Orde
CSTAMRTEST JAMIE	ିଙ୍କୁ 😽 CSTAMBTEST, JAMIE	700006640	LGH 2E / 206 / 01	Overdue	13-Dec-2017	15:05 PST	Schedule Procedure/Test	Chart Done		D
	CSTPRODREG, MATINAEMPI ED	700006585	LGH 2E / 212 / 03	Overdue	12-Dec-2017	11:34 PST	Update Encounter Isolation Infor	Chart Done	(Date/Time)	
	2							Chart Not I	Done	
IN BROWN-LEARN, HENRY								Quick Char	+	
CRUZ-LEARN, MARIA	-							Chart Detai	s Is / Modify	
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CSTCORMUFFIN, BANANACHOCOLATECHIP WHO								Reschedule	This Task	
CSTDEMOALEXANDER, DONOTUSE								Print		•
CSTDEVONC, STEPHANIE								Order Info.		4
CSTDEVONC, TESTONE								Order Com	ment	
CSTEDSTALLONE, SYLVESTER								Reference	Manual	
CSTLABAUTOMATION, TSADLER								Task Info		
CSTLABAUTOMATION, TSARNOLD								Patient Sna	pshot	
CSTLABAUTOMATION, TSARVEL								Select All		
CSTLABAUTOMATION, TSWARREN								Deselect Al	I.	
CSTLABAUTOMATION, TSWASHINGTON								Open Patie	nt Chart	
1							BRODEC TEC	Sort By		3 -

Certain orders will have **Order Information** attached to it and additional information can be reviewed by the user.

4. If that option is available, select **Order Info...** to learn more about the order.

For the following steps, please review screenshot below.

5. The **Order Information** window opens. You can click the different tabs to review the order information.

6. Click the **Exit** icon ¹ to close the window when you finish reviewing the information.

P CSTM	ACHAR, ATEMATE	M BIAR - (Order Informa	tion for: Res	piratory T	herapy Followi	ing			- • ×
Task Vi	ew Help									
- 30L (6									
Unginal of Unknown Consults [der entered and el order by unknown	ectronical	ly signed by T	estCST, Resp	oiratoryThe	rapist2 ORD o	n 08-Nov-201	7 at 15:52 F	PST.	
Respira	tory Therapy	Follow	/ing							
Details	Additional Info	History	Comments	Validation	Results	Ingredients	Pharmacy	5		
Details Reques Consta	: ted Start Date/Tim nt order	e 08-No Yes	ov-2017 15:52	PST						



Key Learning Points

Certain orders or tasks will appear on your MPTL to action.

You can review additional information for certain orders by clicking on Order Information.



Activity 2.4 - Document a Patient Task as Complete

As you review patient tasks and complete orders, it is important to document tasks as complete. Documenting that a task has been completed will allow the task to be cleared from your **Multi-Patient Task List** and will declutter your MPTL with remaining tasks that you need to complete.

- Under the Navigator window with patient names, locate the correct patient and click on [patient name].
- 2. Review task(s) associated with your patient.
- 3. Right click on the task associated with your patient (IP Consult to Ethicist)
- 4. Click Chart Done (Date/Time)...

Multi-Patient Task List									[I] Full screen	Print	₽ 2 minutes ago
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LGH 2 East, Assigned Tasks								15-December-2017 06:30 Frid	lay PST - 15-Dece	mber-2017	19:45 Friday PST
Scheduled Patient Care											
Task retrieval completed											
All Patients		Name	Medical Record Number	Location/Room/Bed	Task Status	Scheduled Da	te and Time	Task Description	Mnemonic		Order
	-96	66 CSTAMBTEST, JAMIE	700006640	LGH 2E / 206 / 01	Overdue	13-Dec-2017	15:05 PST	Schedule Procedure/Test	Chart Done		De
CSTPRODREG, MATINAEMPI ED	.	CSTPRODREG, MATINAEMPI EL	700006585	LGH 2E / 212 / 03	Overdue	12-Dec-2017	11:34 PST	Update Encounter Isolation Infor	Chart Done	: (Date/Time)) 4
BROWN-LEARN, HENRY									Chart Not I	Jone	
CRUZ-LEARN, MARIA	1								Chart Detai	ls / Modify	
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CSTCORMUFFIN, BANANACHOCOLATECHIP WHO									Reschedule	his Task	
CSTDEMOALEXANDER, DONOTUSE									Print		
CSTDEVONC, STEPHANIE									Order Info.		
CSTDEVONC, TESTONE									Order Com	ment	
CSTEDSTALLONE, SYLVESTER									Reference	Vlanual	
K CSTLABAUTOMATION, TSADLER									Task Info		
CSTLABAUTOMATION, TSARNOLD									Patient Sna	pshot	
CSTLABAUTOMATION, TSARVEL									Select All		
CSTLABAUTOMATION, TSWARREN									Deselect Al	1	
CSTLABAUTOMATION, TSWASHINGTON	•			m					Open Patie	nt Chart	F
L								DRODRC TEST	Sort By		3 7.057

5. You will be asked to establish a relationship with the patient before you can open the patient's chart or proceed with completing a task. Select **Unit Clerk** in the **Assign a Relationship** window.

6. Click OK

P Assign a Relationship
For Patient: CSTAMBTEST, JAMIE
Relationships:
Quality / Utilization Review
Research
Unit Clerk 5
OK 6 Cancel



The Chart Done window opens.

7. Review the Date/Time cells in the Chart Done window and adjust details as needed.

8. Click OK



Note: The task can also be documented as Chart Not Done or Reschedule Task.

9. The task now will now have a **Chart Done** icon **r** next to it.

CSTPRODREG, MATINAEMPI ED 700006585 LGH 2E / 212 / 03 Complete 12-Dec-2017 11:34 PST Update Encounter Isolation Information

10. Click **Refresh** rear the top right corner of the screen and the task will fall off the task list.

Key Learning Points

Document the task as Chart Done in the MPTL only after you have completed the action associated to the task.

Click refresh after completing the task so it will fall off the task list.



PATIENT SCENARIO 3 – Accessing and Navigating the Patient Chart

Learning Objectives

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

Access patient chart and review information including Women's Health Overview, Orders and more

SCENARIO

After setting up the MPTL you can access your patient's chart.

As a Unit Clerk, you will be completing the following activities:

- Review patient information
- Add a Pregnancy
- Transcribe Antenatal Record
- Review the Orders Profile

1



Activity 3.1 – Introduction to Banner Bar, Toolbar, and Menu

After reviewing your patient's tasks, you will access the patient's chart directly from **Tracking Shell**.

- 1. Right click on the patient's name
- 2. Select Open Patient Chart
- 3. Select Women's Health Overview

You can also access the Patient Chart from the Patient List.

Tracking Shell			
LGH L&D LGH OB Post	partum LGH OB All B	eds LGH OB Recently Discha	rged SGH L&D SGH OB All Beds
Patient: CSTMAT, QUEE	NZELDA 🗸 Filter: <n< th=""><th>None> -</th><th></th></n<>	None> -	
au 🖊 🛔 🕇 💕 🕯) 🗟 🗭 🔂 🖉	• 🗈 🖪	
Bed S	Name 1	G 📴 GA Status	A RN Provider
LDR1,01M	CSTMAT, QUEEM	Open Patient Chart	Jame 3 nd Plisyca. F Women's Health Overview
LDR2,01M	CSTLGHDEMO,	Base Location	CareConnect
LDR3,01M	DONOTUSE, ICC	Pre-arrive Patient	Orders Allergies
LDR4,01M	CSTMATTEST, L	Attach Pre-Arrival	Diagnoses and Problems
LDR5,01M	CSTMAT, GREE	Add Order	Results Review
LDR6,01M	CSTMAT, SAMM	Set Events	Medication List
LDR6,01M	CSTMAT, PINK	Set Privacy	Patient Information
LDR7.01M	CSTLABSQ. TES	Discharge Process	Histories
LDR8,01M	CSTPRODREG,	Snapshot	MAR Summan B
LDR8,02M	CSTPRODREG,	Reactivate Patient	Clinical Research
	CSTCD TESTAL		

- 2 The patient's chart is now open to the **Women's Health Overview** page. Before we proceed any further, let's go through an overview of the general screen.
 - 1. The **Toolbar** is located above the patient's chart and it contains buttons that allow you to access various tools within the Clinical Information System.
 - 2. The **Banner Bar** displays patient demographics and important information that is visible to anyone accessing the patient's chart. Information displayed includes:
 - Name
 - Allergies
 - Age, date of birth, etc.
 - Encounter type and number
 - Code status
 - Weight
 - · Process, disease and isolation alerts
 - Location of patient
 - Attending Physician



- 3. The **Menu** on the left allows access to different sections of the patient chart. This is similar to the coloured dividers within a paper-based patient chart. Examples of sections included are Orders, Medication Administration Record (MAR) and more.
- 4. The **Refresh** icon with the patient chart with the most up to date entries when clicked. It is important to click **Refresh** frequently as other clinicians may be accessing and documenting in the patient chart simultaneously.

Note: The chart does not automatically update. When in doubt, click Refresh

Task Edit View Patient Chart	Links Navigation Help						
Tracking Shell 🖃 Message Centre 🎬	CareCompass 🖕 Patient List 🔐	Multi-Patient Task List 🛄 Sched	lule 🎎 Staff Assignment 🎬 Le	arningLIVE 🔤 🤅 🕄 CareConne	ect 🜊 PHSA PACS 🜊 VCH and F	PHC PACS 🕄 MUSE 🕄 FormFast Wi	FI _
🔀 Tear Off 🚽 Exit 🍯 AdHoc 🔄 Co	mmunicate 👻 👔 Medical Record I	Request 🥰 Result Copy 튏 Rela	ted Records 🛗 Scheduling App	ointment Book 🖲 Document	s 🔘 Conversation Launcher 🍙	Discern Reporting Portal 🚨 PM Con	Sec on
Realized Transmission Materials	🕅 Policies and Guidelines 🕥 UpT	oDate _					
CSTMAT, TRAINONE 🛛 🛛					+	List 🔶 🎢 Recent 🖌 Name	
CSTMAT, TRAINONE	DOB:1990-Dec-28	MRN:760010003 Code	e Status:	Process:		Location:LGH LD; L	
Allergies: Allergies Not Recorded	Age:27 years Gender:Female	Enc:/60000010004 PHN: Dosi	ng Wt:	Disease: Isolation:		Attending:Plisyca, Rocco, MD	
Menu [#]	< 🖂 👻 者 🛛 Women's H	ealth Overview				🗇 Full screen 🖷 🗖 🔁	2 minute
Women's Health Overview 🛕						4 –	
CareConnect	Triage/Ante/Labour	Partogram X2	Postpartum 🔀	Neonate Workflow	Discharge X3	+	
Orders 🕂 Adc							=
Allergies	Add Pregnancy						อ∣≡-
Diagnoses and Problems	Add Tregnancy						-
Results Review	The patient does not ha	ive an active pregnancy. Add a p	regnancy or Reopen last active p	pregnancy.			
Medication List 🕂 Add							
Patient Information							
Histories							
Documentation 🕂 Adc	>						
MAR Summary							
Clinical Research							
Pregnancy Summary Report							
Form Browser							
Newborn Liaison 3							

Key Learning Points

- The Toolbar is used to access various tools within the Clinical Information System.
 - The Banner Bar displays patient demographics and important information.
 - The Menu contains sections of the chart similar to your current paper chart.
 - The patient chart should be refreshed regularly to view the most up-to-date information.



Activity 3.2 – Add a Pregnancy and Antenatal Record

1 Upon accessing the patient's chart you will see the **Women's Health Overview** page open and the **Triage/Ante/Labour** tab is selected. No pregnancy data will be shown until the patient has had a pregnancy added.

Usually it is the arrival of the patient's pre-registration form and antenatal record that prompts the unit clerk to begin this process (at ~20 weeks gestation).

The pre-registration process includes:

- 1. Pre-registering a patient and creating a "Pre-Outpatient in a Bed" encounter (completed by main registration clerk when he/she receives patient's registration forms at ~20 weeks).
- 2. Attaching the BC Antenatal Record Part 1 and 2 forms from Work Queue Manager to PowerChart (completed by OB unit clerk)
- 3. Adding a pregnancy and modifying the EDD (completed by OB unit clerk)
- 4. Transcribing information from the BC Antenatal Record Part 1 and 2 to the Antenatal Record PowerForm (completed by OB unit clerk)
 - a. Obstetrical History (Section 3)
 - b. Prenatal Investigations and Results (Section 13)
 - c. Weight History (Pre-pregnant Weight and Height) (Section 14)

Let's Add a Pregnancy:



1. Click **Add Pregnancy** to open the **Add Pregnancy** window. The information entered here would be taken from the Antenatal Record Part 1 section 4.



_	0.10		Giarioa	1 e	erm	Preterm	Abortion (Indu	spontaneous) Livi	ng		CI	hildren	
	Date	Place o abor	f birth/ rtion	Hrs. in labour	Gest. age	Type of birth		Perinatal complication			Sex	Birth Weight	Breastfed	Present health
_							BC Ant Part	tenatal Record, 1, Section 4						
١.	LMP (DD/N	M/YYYY)	Menses cyc	ie Co	ontraceptiv	es When	stopped (DD/MM/YYYY)	EDD by dates (DD/MM/YYYY)	Confirmed	DD (DD/MM/YYYY)	1st U	S (DD/MM/YYYY)	GA by	US (WEEKS + DAY
	Present Pr	egnancy					7. Medical History		<u> </u>	8. Lifestyle & S	ocial			

Notice that **Onset: Date** field is yellow, meaning mandatory. All appropriate data from the Antenatal Record would be copied here.

- 2. The Add Pregnancy window opens.
- 3. In the **Onset: Date** field, choose a date about 10 months ago.

Note: In real life, you would enter the LMP date from the BC Antenatal Record Part 1, Section 4.

- 4. In the Onset Date field, select "Use as LMP Date"
- 5. Ensure the Number of Gestations = Number of Baby Labels is correct

Note: This field is defaulted to 1 = Baby A for singletons; for multiples gestations, select the appropriate number of babies.

6. Click OK



Add Pregnancy				×
Responsible provider TestMAT, Nurse-OB3	Onset: Date 11-Dec-2017	3	Onset Date Use as ART Date	Comments
Confirmation	Confirmed date		S over the over	
Confirmed	✓ 11-Dec-2017	-	Confirmation method	
Number of Gestations = Number of Baby La	bels Label(s) once created		Urine hCG Source hCG	
1 = Baby A	must be modified in I-view	,	Serum nCo	
1 = Baby A 2 = Rahy A to Rahy R			Oltrasound	
3 = Baby A to Baby C			Progesterone	
4 = Baby A to Baby D				ut
5 = Baby A to Baby E			Home pregnancy te	DI .
6 = Baby A to Baby F			Clinical pregnancy t	test
7 = Baby A to Baby G				
Unknown	0			
Add EDD Maintenance				
Method Date	of Method	Description	on	Comments
Last Menstrual Period 👻 11-D	ec-2017 🔶 💌	Norma	al Amount/Duration	
Confirmation		Abnor	mal Amount/Duration	
Confirmed 🔻 🗐 Fit	nal 🔲 Initial	🔄 Date A	pproximate	
EDD EGA		📃 Date D	efinite	
17-Sep-2018	weeks 0 days	📃 Date U	nknown	
		Other		
Characteristics and Datalia				
 Snow Additional Details 				
				OK 6 Cancel
•			11	 ,

- 7. After you click **OK**, you will be returned to the **Triage/Ante/Labour** tab of the **Women's Health Overview**. You will see that now more information is viewable on the page.
- 8. To modify the EDD, scroll to the **EDD Maintenance** component and click on **Modify EDD** (highlighted in blue).

<	> • 👬	Women's Health O	verview						[🗆] Full screen	🝙 Print	₽ 16 minutes
æ		🔍 🔍 100% 🛛 🗸	G 🖷 🗳								
<	Triage/Ante	/La 7 Partog	iram 🛛	OB Quick Orders	23 Postpartum	Neonate Workfl 🕅	Discharg	e 🛛 💙 🕇			
	Pregnar	cy Overview									∂ =-
								Cancel Pregnancy C	ose Pregnancy	Modify P	regnancy
	Curren	t Pregnancy Cont	act Info Demo	graphics							
		EDD	17/09/18 (Authori	tative)	Current Weight	-		Blood Type			
		EGA			Pre-Preg Weight						
		Gravida/Parity	G1,P0(0,0,0,0)		Height						
>		Multiple Fetuses	No, Singleton		BMI						
		Feeding Plan		7							
	EDD Ma	intenance (1) 🚦	8								∂ ≡-
	EDD		EDD Metho	d		Ultrasound EGA		Documented By		Cor	nment
	✓ 17/09	2018 Modify EDD	8 Last Mens	strual Period (11/12	2/2017)			TestMAT, Nurse-OB3			
			-								



- 9. The EDD Maintenance window will open.
- 10. In the **Method** section, select Ultrasound from the dropdown list. The **Date of Method** and **EGA by Ultrasound** fields will become mandatory fields (highlighted in yellow).
- 11. In the **Date of Method** field, select a date about 6 months ago.

Note: In real life, you would enter the 1st US date from the BC Antenatal Record (Section 4).

12. In the EGA by Ultrasound field, document 8 weeks.

Note: In real life, you would enter the GA by US from the BC Antenatal Record (Section 4).

- 13. The EDD and Current EGA will auto-calculate. Adjust the EDD as needed in the EDD field.
- 14. Click OK

Confirmation	Status	EDD	EGA on Method Date	Method	Date of Method	Description
 Confirmed 	Authoritative	17-Sep-2018 PDT	0 0/7 weeks	Last Menstrual Per	11-Dec-2017 PST	
•		III				•
odify EDD Maintenance ethod	Date of N	lethod	Description	Comments		
ltrasound	10 11-May-2	017	Crown rump length	ı 🗌		
onfirmation			cm			
onfirmed	▼ Final	Initial	Biparietal diameter			
D	EGA by U	Itrasound	cm			
-Dec-2017		okr davr 12	Head circumference	e		
	13 Current F	GA	cm			
	38	okr 4 davr 40				
		days 13				

The Pregnancy Overview will now show the updated EDD and EGA.

You will only need to add a pregnancy once for a patient. The pregnancy will remain active until it is closed.

Note that this "Pre-Outpatient in a Bed" encounter is to be used when the patient presents in labour. If this "Pre-Outpatient in a Bed" encounter is used and the patient is discharged home undelivered (for example, in early labour), then another "Pre-Outpatient in a Bed" encounter will need to be created for use when the patient returns for subsequent labour assessments.



Now you need to continue transcribing additional data from the BC Antenatal Record.

To continue transcribing data from the Antenatal Record, click the **blue arrow v** next to **Prenatal Visits** on the Triage/Ante/Labour tab.

Text will appear which says Antenatal Record. Click the text.

<	🚬 - 🔒 Wa	omen's Health	Overview								[0] (Full s
æ		🔍 100%	- 🕒 🛑									
Т	riage/Ante/Labour	🛛 Parto	gram 🛛	Postpartum	X	Neona	ate Workflow	X	Discharge	X	+	
	Pregnancy	Overview										
									(Cancel Pregnancy	Close	e Preg
	Current Pr	egnancy Co	ontact Info Demogra	aphics								
		EDD	26/10/18 (Authoritative))	Current \	Veight				Bloc	od Type	
		EGA			Pre-Preg \	Veight						
		Gravida/Parity	G1,PU(U,U,U,U)			Height						
 >		Feeding Plan				BMI						
IE.	,											
	Prenatal Vi		Decend									
	No results fo	und	Record									

The Antenatal Record window will open. Based on data from the BC Antenatal Record Part 1 and 2, Sections 3, 13, and 14, you will transcribe information into the Obstetrical History, **Prenatal** Investigations and Results and Weight History sections of the Antenatal Record PowerForm.

3. Obstetric	Obstetrical History Gravida			erm	Preterm	Abortion (Induced Spontaneous) Living		CI	hildren	
Date	Place of abo	of birth/ rtion	Hrs. in labour	Gest. age	Type of birth	Perinatal complications	Sex	Birth Weight	Breastfed	Present health
							-			
4 IMP (DD)	. I MP (DD/MM/YYYY) Menses cycle		le Co	ontracentive	es Whe	stopped (pp./www.vvvv) FDD by dates (pp./www.vvvv) Confirmed FDD (pp./www.vvvv)	1st	S (DD/MM/VVVV)	GA h	US WEEKS + DAYS)
4. Em (557	 LIVIP (UD/MM/TTTT) 			onnacopure				0 (007 mm) 1111	ar by	00 (112:10 + 54:10)



13. Investigations / Result ABO group Rh factor	Rubella titre PP vaccination i S.T.S.	ndicated	Prenatal Genetic Screening Type	Result
Antibody titre (DD/MM/YYYY) Results	HIV test done	🗌 Yes 🗌 No	Gest. diabetes screen (24-28 w (DD/MM/YYYY)	ks) <i>Result</i>
2 Rhig given (DD/MM/YYYY) 1	HBsAg done (DD/MM/YYYY)	Yes No Negative Positive	GBS screen (35-37 wks) Yes No (DD/MM/YYYY)	Result
2 Hemoglobin 1st 3rd	Partner/househo Partner/househo NB vaccination in Other tests (e.g. Hep	ld contact dicated o C, TSH,	Copy to hospital Edinburgh Postnatal Depression (28–32 weeks)	Scale
Urine C & S result	varicena)		Follow-up Yes	No

											Follow-u	ıp			Yes	🗆 No	Brea
	14. Age	Pre-preg	nant weigh	it (KG)	Heig	ht (CM)		LMP	(DD/MM/Y	YYY)		Co	nfirmed	EDD	(DD/N	M/YYYY	Pos
																	New
_	IO. Date	D.P.	Unne	WL. ((KG)	Gest.	ru,	ndus	FHR	FI	M Pres	s. and					

For your practice, enter the following (note not every box or field needs to be filled in)

Note: If the patient does not have any obstetrical history, you do not need to complete this section since the system will default her as a Gravida 1, Para 0 (G1P0).

Let's add the obstetrical history for a patient who is a Gravida 2, Term 1, Preterm 0, Abortion 0, Living 1

- 1. Click on Obstetrical History from the menu to open the section in the Antenatal Record PowerForm.
- 2. Click the ^{+ Add} icon to add details of the obstetrical history.



P	Antenatal Record	CSTMAT, PINK				- 🗆 ×
🗸 🖬 🛇 🥸 🗗 🛧 🔸 🚥 🖾 🖻						
*Performed on: 29-Jan-2018 + V 0845 + PST					By: Tes	tMAT, Clerk-OB
Alergy						^
Medication History						
Obstetrical History 1						
Mark All as Reviewed						
Prenatal Investigations and Result						
Pregnancy Risk Factors						
* ID Risk Screen	Weeks Pregnancy (Outcome Length of Lab	or Sex Weight	Anesthesia Type	Delivery Hospit	al Preterm La
Genetic Screen						
Weight History <						
Family History Gravida/Para						
Problem History Gravida Para Fullterm Para Preterm	Abortions Living	Child Living Comment				
Procedure History 1 0	0 0					
Anesthesia/Sedation						
Transfusion Reaction and Consen						
Developmental (Celitical						
Prsychosocial/spintual						
Bith Plan/Requests						
Feeding History, Plan and Educati						
Physical Examination						
Mental Status						

3. A '**Baby A'** section with mandatory fields highlighted in yellow will open. Notice that the Gravida automatically updates to '2'.

Document the following:

Delivery/Outcome Date/Time = January 31, 2016

Gestation at Birth = 40 Weeks, 0 Days

Pregnancy Outcome/Result = Vaginal

Neonate Outcome = Live Birth

4. Click OK.



🗸 🖬 🛇 🗞 👩 🛧 🕈 📾 🛙					
*Performed on: 29-Jan-2018	▲ ¥ 0845 ▲ PST				
· Allergy	Obstatrical History				
Medication History	Obstetrical History				
Obstetrical History	0 0 0	0			^
Menstrual History					
Additional Pregnancy Information	Gravida Para Fullterm Par	ra Preterm Abortions	Living		
Prenatal Investigations and Results					
Pregnancy Risk Factors	2 3 0 0	0	0		
* ID Risk Screen					
Genetic Screen	Baby A				
Weight History					
Family History	🖶 Add Baby				
Problem History	*Delivery/Outcome Date/Time	*Gestation at Bi	th	*Pregnancy Outcome / Result	Length of Li
Procedure History	· · ·	Weeks Da	vs Unknown or Approximate	v	hrs
Anesthesia/Sedation					
Transfusion Reaction and Consent			Ť		
Social History	Child's Sex Infa	nt's Weight	Anesthesia Type	Delivery Hospital	Preterm La
Psychosocial/Spiritual		lbs oz/ ams			
Domestic Violence/Patient Safety	L`L_		·		
Birth Plan/Requests	Mother Complications Feta	I Complications	*Neonate Outcome	Neonate Complications	Newborn's
Feeding History, Plan and Education	None v No	ne v	×	None v	
Physical Examination	Father of Baby - Name		Comments		
Mental Status		lark as Cansitiva			
		lark as sensitive			
Thyroid					3
Breasts					
Cardiovascular					
Respiratory			Delivery	/ Outcome Date must be in the pa	st OK
Gastrointestinal					4 V
Musculoskeletal	1				

5. The Obstetrical History will now be updated.

Next tab:

On the Prenatal Investigations and Results section:

Blood Type= A positive

P		Antenatal Record - CSTPRODR	EG, GORDONSISSUE	_ □ ×
🗸 🖬 🔕 淡 🕅 🕈 🔶 📾				
*Performed on: 19-Jan-2018	↓ 1253 ↓ PST			By: TestUser, Clerk-OB
Allergy	Prenatal Investi	gations and Results		^
Medication History			58 1	
Obstetrical History	Primary OB Provider	Prenatal Care	Proviously Documented Transcribed Prenatal Labs	
Menstrual History	i i i i i i i i i i i i i i i i i i i			
Additional Pregnancy Information		less than 20 weeks	No qualifying data available.	=
Prenatal Investigations and Results		O greater than 20 weeks		
Pregnancy Risk Factors				
* ID Risk Screen				
Genetic Screen	Prenatal Records Available	Blood Type		
Weight History	Yes	O A negative O B positive		
Family History	O No	O A positive O D negative		
Problem History		O AB negative O D positive		
Procedure History		O B negative		
Anesthesia/Sedation				
Transfusion Reaction and Consent				
Social History	Prenatal Genetic Screen Type	Prenatal Genetic Screen Result		
Psychosocial/Spiritual				
Domestic Violence/Patient Safety	LI SIPS LI NIPT			
Birth Plan/Requests	Quad Screen			
Feeding History, Plan and Educatio				
Physical Examination				



On the Weight History section enter:

- **Pre-Pregnancy Weight** = 70 kg
- Height/Length Measured= 170 cm

*Note the automatic conversations that appear to the side.

Click the green check mark \checkmark to sign your documentation. This will return you to the **Triage/Ante/Labour** tab.

P				Antenatal Record - CSTMAT, PINK
🖌 🖬 🛇 🗞 🗖 🛧 🔸 🎟	• •			
*Performed on: 29-Jan-201	8 📫 🗸 0845 📫 PST			
Allergy	Weight History			
Medication History				
Obstetrical History	Height/Length Measured and Weight Me	asured must be entered in metric units	s of measure f	or BMI Measured to calculate correctly
Menstrual History	Desire Weight			
Additional Pregnancy Information				
Prenatal Investigations and Results				
Pregnancy Risk Factors				
* ID Risk Screen				DMT Man mused
Genetic Screen	Weight Measured	Height/Length Measured		BMI Measured
Weight History	kg	170 cm 6	66.93 in 170.00 cm	
Family History			5.58 ft	
Problem History			510710	
Procedure History	Pre-Pregnancy Weight	Cumulative Weight Gain Measu	ired	Pre-Pregnancy BMI
Anesthesia/Sedation	70 kg 70.000 kg	<u> </u>		24 kg/m2
Transfusion Reaction and Consent	154.324 b 154 b 5 oz			
Social History	19110 9 01			
Psychosocial/Spiritual				
Domestic Violence/Patient Safety				

Click the **Refresh** icon $\stackrel{\frown}{}$. Notice the time since last refresh is displayed and will reset to 0 minutes $\stackrel{\frown}{}$ minut

Note: At ~36 weeks gestation when the provider sends in an updated copy of the BC Antenatal Records Part 1 and 2, the OB unit clerk will need to index/attach the updated record to the patient's chart and also transcribe any new information (primarily from the Prenatal Investigations and Results section, for example, the Gestational Diabetes Screen Result) into a new Antenatal Record PowerForm. The previously transcribed data will pull through into new PowerForms.



Key Learning Points

- Pregnancy related information will not display until Add a Pregnancy has been performed.
- Use data from the BC Antenatal Record to Add a Pregnancy and to transcribe information into the Antenatal Record PowerForm.



Activity 3.3 – Introduction to Women's Health Overview

- 1 Upon accessing the patient's chart you will see the **Women's Health Overview** page open. The **Women's Health Overview** will provide views of key clinical patient information. Remember that much of the data will not be viewable until **Add a Pregnancy** has been performed.
 - 1. There are different tabs including **Triage/Ante/Labour**, **Partogram**, **Postpartum**, **Neonate Workflow**, **and Discharge** that can be used to learn more about the patient. Click on the different tabs to see a quick overview of the patient.
 - 2. Each tab has different components. You can navigate through these using the component list on the left side of each tab.

< 🔹 📩 📩 Women's Health Overview				[0]	Full screen	🖨 Print	∂ 12 m	iinutes ago
🏔 🐚 🛋 🐚 🔍 🔍 100% 🛛 🗸 🌀 🌰 🚮								
Triage/Ante/Labour 🛱 Partogram 😫 Pos	stpartum 🔀 Neo	nate Workflow 🛛 🖾	Discharge	^۶ 1				=-
Pregnancy Overview							2	_ - ∧
Prenatal Visits Labour Assessments Delivery summary (a) Contact Info Demographics	5			Cancel Pregnancy Close	Pregnancy	Modify Pr	regnancy	
EDD Maintenance 26/10/18 (Authoritative) Pregnancy Risk Factors Histories G1,P0(0,0,0,0) Active Issues < No, Singleton	Current Weigh Pre-Preg Weigh Heigh BM	70kg 170cm 24kg/m2		Blood Type				
Vital Signs							1 2	≡•
Intake and Output Order Profile New Order Entry 2				Last 1 days Last 12 hours	lact 1 wa	ake More	- -	~

Click the **Refresh** icon . Notice the time since last refresh is displayed and will reset to 0 minutes .

Key Learning Points Women's Health Overview provides access to key information about the patient. Click the Refresh icon to get the most updated information on the patient.



1

Activity 3.4 – Orders Profile

Throughout your shift, you will review your patient's orders. The Orders Profile is where you will access a full list of the patient's orders.

To navigate to the Orders Profile and review the orders:

- 1. Select Orders from the Menu
- 2. On the left side of the Orders Profile is the navigator (View) which includes several categories including:
 - Plans •
 - **Categories of Orders** •
 - **Medication History** •
 - Reconciliation History
- 3. On the right side is the Orders Profile where you can:
 - Review the list of All Active Orders • Moving the mouse over order icons allows you to hover to discover additional information.

Some examples of icons and their meanings are:

- 60^ Order requires nurse review
- Additional reference text available
- Order is part of a PowerPlan (Order Set)
- Order requires Pharmacy verification
- 4. Notice the display filter default setting is set to display All Active Orders. This can be modified to display other order statuses by clicking on the blue hyperlink.

Menu		< 👌 - 🏦 Orders						(D) Full screen @Print 20 r	minutes ago
Provider View		Add Document Medication by He Research	listing a l Chark Interne	Tool			3	Acconciliation Status	
Results Review		T Add S Document means and y rul Mecond	and a check and a					Meds History Admission	Discharge
Orders	+ Add	Orders Medication List Document In Plan							
Medication List	+ Add 1								
Documentation	-	View	Displayed: AB Active Dider	s (All Inactive Urders (All Active Urders"	4				
and an		Orders for Signature	AB P	Order Name	Status	Dose Details *	Ston	Ordering Physician	12.4
		Plans	A Admit/Transfer/Dis	charge			Drop	[ordering regulation	
Allergies	+ Add	- Document In Plan	A MAC	Admit to Innatient	Ordered	04-Dec-2017 10:15 PST. Admit to General Internal Medicine. Admittion provider: TestORD .	04-Dec-2017 10:15 PST	TestORD GeneralMedicine-Physic	ri. Te
Diagnoses and Problem		⊖Medical	⊿ Status						
And Annual a		MED General Medicine Admission (Validated) (P	8 M 8 9	Code Status	Ordered	24-Oct-2017 13:24 PDT, 5-No CPR, Critical Care, May Intubate, Perioperative status: Attemp	and)	eLearn, Physician-General Medicin	n. el
Histories		GI General Admission (prototype) (initiated)							
MAR Summary		Suggested Plans (0)	\varTheta 🗹 😣	Insert Peripheral IV Catheter	Ordered	24-Oct-2017 13:24 PDT, Unless already in place	24-Oct-2017 13:24 PDT	eLearn, Physician-General Medicin	n eli
1440		Orders	🔁 🗹 🔁	Weight	Ordered	24-Oct-2017 13:24 PDT, Stop: 24-Oct-2017 13:24 PDT, On admission	24-Oct-2017 13:24 PDT	eLearn, Physician-General Medicin	n., el-
- Harris		Admit/Transfer/Discharge	H B H S S S	Vital Signs	Ordered	24-Oct-2017 13:24 PDT, q8h		eLearn, Physician-General Medicin	n_ eLi
Form Browser		© Patient Care	⊕ ⊠	Admission History Adult	Ordered	24-Oct-2017 13:17 PDT, Stop: 24-Oct-2017 13:17 PDT Order entered secondary to inpatient admission.	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cerner	SY
Interactive View and IA		C Activity	⊕ ⊠	Braden Assessment	Ordered	24-Oct-2017 13:17 PDT, Stop: 24-Oct-2017 13:17 PDT Order entered secondary to inpatient admission.	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cerner	SY
Lines/Tubes/Drains Sur		Continuous Infusions	⊕ ⊠	Basic Admission Information Adult	Ordered	24-Oct-2017 13:17 PDT, Stop: 24-Oct-2017 13:17 PDT Order entered secondary to institut administra	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cemer	SV [≡]
Growth Chart		Blood Products	6 M	Morse Fall Risk Assessment	Ordered	24-Oct-2017 13:17 PDT, Stop: 24-Oct-2017 13:17 PDT	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cerner	SY
Immunizations		Laboratory Diagnostic Tests	6 M	ED Readmission Risk	Ordered	24-Oct-2017 1317 PDT, Stop: 24-Oct-2017 1317 PDT Order elivered in the intertaint heims administration an inertificat in the last 20 days	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cemer	SY
CareConnect		Procedures Respiratory	₿ 🗹	Infectious Disease Screening	Ordered	24-Oct-2017 13:17 PDT Order entered secondary to institut admission	24-Oct-2017 13:17 PDT	SYSTEM, SYSTEM Cemer	SY
		Allied Health	84	Smoking Cessation Assessments	Ordered	03-Nev-2017 1341 PDT	03-Nev-2017 13:41 PDT	TestCST. CardiothoracicSurgeon-F	P., Te
		Consults/Referrals	ă 🗹	Insert Urinary Catheter (Insert Foley)	Ordered	03-Nov-2017 13:40 PDT, Indwelling	03-Nov-2017 13:40 PDT	TestCST, CardiothoracicSurgeon-F	P_ Te
		Communication Orders	a Activity						100000
		Supplies	\varTheta 🗹 😣	Activity as Tolerated	Ordered	24-Oct-2017 13:24 PDT		eLearn, Physician-General Medicin	n. el
		Non Categorized	⊿ Diet/Nutrition						1
		Medication History	⊕ ⊻ 8	General Diet	Ordered	24-Oct-2017 13:24 PDT		eLearn, Physician-General Medicin	n. eL
		Medication History Snapshot	⊕ ⊻	Advance Diet as Tolerated	Ordered	03-Nov-2017 13:41 PDT, Advance diet to Regular, Provider must order starting diet. RN or R		TestCST, CardiothoracicSurgeon-F	P Te
6		Reconciliation History	⊿ Medications						
la contra		2	9 M 70	acetaminophen (acetaminophen PRN range dose)	Ordered	dose range: 325 to 650 mg, PO, q4h, PRN pain-mild or fever, drug form: tab, start: 24-Oct-2 Maximum acetaminophen 4 g/24 h from all sources		eLearn, Physician-General Medicine1, MD	3



Key Learning Points

- The Orders page consists of the orders view (Navigator) and the order profile.
- The Orders View displays the lists of PowerPlans (order sets) and clinical categories of orders.
- The Order Profile displays All Active Orders for a patient and can be filtered.



1

Activity 3.5 – Review Order Statuses and Details

In the following activity, you will only be reviewing the screenshots that are attached.

Orders are classified by status including:

Processing- order has been placed but the page needs to be refreshed to view updated status

Ordered- active order that can be acted upon

0	9	3		8	Order Name *	Status	Dose	Details	^
	đ	51		0	Insert Peripheral IV	Processing		20-Nov-2017 11:46 PST	
	6	1		0	Insert Urinary Cath	Ordered		20-Nov-2017 11:31 PST, Indwelling	
	ĉ		/	8	Morse Fall Risk Assessment	Ordered		17-Nov-2017 14:05 PST, Stop: 17-Nov-2017 14:05 PST Order entered secondary to inpatient admission.	-
	đ			0	Vital Signs	Ordered		20-Nov-2017 11:25 PST, g4h while awake	
•	đ		1	20	Vital Signs	Ordered		17-Nov-2017 16:24 PST	
⊿N	Aedi	cati	ons						
	ĉ) 1	1) (furosemide	Ordered		20 mg, IV, as directed, order duration: 5 day, drug form: inj, start: 17-Nov Administer pre red blood cell transfusion	+
•			111					•	

Note: the start date and that orders are organized by clinical category

When new orders are placed in the chart, a nurse must acknowledge reviewing these new orders.

1. A Nurse Review icon icon appears to the left of the order. This serves to acknowledge the order needs to be reviewed by a nurse.

9 **Key Learning Points**

A Nurse Review icon is visible if the nurse has not yet reviewed by the nurse.



PATIENT SCENARIO 4 –Conversation Launcher & PM Conversation

Learning Objectives

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

- Bed Transfer: Patient Not on Tracking Shell
- Bed Transfer: Patient on Tracking Shell
 - Update Patient Information

SCENARIO

Throughout your shift, you will use the CIS to record patient transfers and discharge, amongst other activities. You will learn how to do some of these in this scenario.

As a Unit Clerk you will be completing the following activities:

- Bed Transfer: Patient Not on Tracking Shell
- Bed Transfer: Patient on Tracking Shell
- Update Patient Information



Activity 4.1 – Bed Transfer: Patient Not on Tracking Shell

1 You received notification from the charge nurse that a patient is being transferred from ED to your unit.

Note: The following steps are the procedure when the patient being transferred is *not already on Tracking Shell.*

Conversation Launcher contains the majority of the conversations you will need to perform your work, including Newborn Quick Reg, Print Specimen Labels, and Register Outpatient. Some of these conversations (such as Newborn Quick Reg) are also available directly from the Tracking Shell.

Accessing available conversations from the **Tracking Shell** (when possible, ie patient is *already on* Tracking Shell) autopopulates the selected patient's information in the conversation, whereas accessing conversations from Conversation Launcher requires you to manually search for the patient.

You will use **Conversation Launcher** Conversation Launcher to enter a **Bed Transfer**.

You will need to locate the patient in ED using **Conversation Launcher**. This is located in the toolbar above Tracking Shell.

1. Click **Conversation Launcher**. The window will open.

Task	Edit View	Patien	t Chart Links Patier	nt Actio	ns Prov	ider List	Help													
Track	ing Shell 🖃 M	lessage	Centre 🌃 CareCompass	🛉 Pat	ient List 🧯	🛿 Multi-Pat	tient Task List 🛄 Sch	edule 🔐 Staff Assig	nment 🌃 Learning	gLIVE	🛓 ! 🕄 Ca	reCo	nnect 🦿	PHSA PAC	s 🕰 vo	CH and PHC PAC	s 🜊 Muse	🔍 FormFas	t WFI 🝦	
Exi	t 🎦 AdHoc 🕻	Com	municate 👻 🗎 Medical R	lecord F	Request 🧯	Result Co	py 🗓 Related Record	ds 🛗 Scheduling Ap	pointment Book 📻	Doc	uments 🤅	Co	nversatio	n Launcher	1 sc	ern Reporting Po	rtal ଌ PM	Conversation	*	
i 🕄 Pa	tient Health Ed	ucation	Materials 🕄 SHOP Guid	elines a	nd DSTs 🤇	👌 UpToDat	e –				_									
														CS	ТМАТ,	QUEENZELDA	- 🛛 🚰 Rece	nt 👻 🛛 Name		- Q
Track	ing Shell															<u>(</u>	Full screen	n Print	2 0 minu	utes ago
LGHI	&D LGH OB	Postpa	rtum	LGH)B Recently	y Discharge	d SGH L&D SGH	OB All Beds SGH L	&D Nurses SGH C)B Red	cently Discl	harge	d							
Patie	ent: CSTMAT,	QUEEN	ZELDA 🔹 Filter: <none< td=""><td>></td><td></td><td>•</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></none<>	>		•														
-	🖉 🛦 i 🕂 🖻	? \$	髦 👿 🔒 🔕 🚳 🎚	0																
	Bed 📩	S N	lame	GΡ	EGA	Status	A RN	Provider	Consult	Dil	Length	Sta	ROM	Color	GBS	Epidural	To Do	Communi	ations 1	NR L
•	LDR1,01M	(CSTMAT, QUEENZEL	01*	0	Triage	🧿 James Bond	Plisvca, Rocco	, Dodo	10*	3.0 cm*	+1*	Bulginę	Cloudy*	P	Requested*	R		è É S Positive	ž
	LDR2,01M		CSTLGHDEMO, SARA	61*	9		Q	TestUser, Midv		10*	2.5 cm*	2*			Ρ			۵ 🔊 🔄 电	1 🖸	1
	LDR3,01M	C	ONOTUSE, ICONTES	11*	43 2/7		o	Plisvel, Antonie	1						Р		R 🕂	* _ ∆ ⊠@	#	1
	LDR4.01M		STMATTEST, BERYL	(1*	41 0/7	Triage	0	Plisycl. Antonio	1									L.S.	Ľ	7

- 2. Click Bed Transfer
- 3. Click OK



e			Person Mgm	nt: Convers	ation Launch	er		- 🗆 🗙
£		×	X	×	×	X	3]	<u> </u>
Add/Modify Person		2 Scharge	Lancel Encounter	Lancel Pending	Lancel Pendi	Lancel Transfer	Discharge Encounter	Facility Transfer
Leave of Absence	 Modify Discharge	Newborn Modify	Newborn Quick Reg	Pending Discharge	Pending Facilit	Pending Transfer	∏ Pre-Register Outpatient	₩ Pre-Register Patient To
Print Specimen	Process Alert	Nuick Reg	N Beferral	Perioter	S Begister	Stillborn	Undate Patient	Mieur
Labels	The case with the case of the	QUICK HOg	Management	Outpatient	Patient To	Salbon	Information	Encounter
🔮 View Person	WH Quick Reg					_		
						3	OK	Cancel

- 4. The **Encounter Search** window will open. Search for <<u>OB-UC-ED</u>, First Name> by typing in their name.
- 5. Click Search
- 6. Click on the name of the correct patient and verify MRN number to ensure correct patient.
- 7. If a patient has more than one encounter in their file, the correct encounter may need to be selected.
- 8. After ensuring the correct encounter is selected, double-click the patient's name.

Note: Due to limitations in the training environment, not all new changes in the software can be reflected immediately. In the future, rather than double-clicking the patient's name, you will be selecting the correct encounter and clicking the OK button.

3				Encou	nter Search								×
BC PHN: VIP De	ceased Alerts	BC Pł	-IN	MBN	Name			DOB		Age	Gender	Address	
1				700000016	MATERNITY,	BEYONCE		01-Jar	-1985	33 Years	Female		
MRN:	Process	Alert 9876	781029	700005211	MATSITTWE	NTYONE, BAB'	r BOY	18-Jul-	2017 14:00	6 Months	Male	1420 Eas	sy Street
		98767	738295	000070000	MATTESTING	i, BABY		17-Au	2017 14:00	5 Months	Unknown	123 TES	TST
Last Name: 4 2 Yes	5			700006260	MATTESTING	TRACKER, ST	ILLBORN GIRL	28-Au	-2017 15:13	00:00 Hour:	Female		
mat		9876	716039	700006306	MATTEST, BA	ABY AMY		29-Au	p-2017 10:05	4 Months	Female	509 w 8t	hst
First Name:		98764	424061	700008431	MATTEST, IC	UNS		27-No	-2000 - 2017 00.00	1/Years	Female	509 8th s	at W
		38754	408447	700008835	MATTEST, BA			11-De	3-2017 08:00	T Months	Female	509 8th s	at w
DOB: 6,8	3	9876	407030	700000074	MATTEST, SA			01-luz	-1980 -	27 Teals	Female	590 8th v	w st
	-	9876	397559	700003000	MATTYSPON	GEBOB BABY		18-De	>2013	4 Years	Male	1604 Spr	nn defun Way
		98763	397534	700009007	MATSANDYC	HEEKS, BABY		19-Jur	-2017	7 Months	Female	2005 Spd	onginess Way
Gender:		98763	394291	700009081	MATERNITY,	DEMO		01-Jar	-1989	29 Years	Female	590 8th \	√ ST
				700009150	MATERNITY,	BABY GIRL		04-Jar	-2018 09:45	2 Weeks	Female	590 8th \	√ ST
Postal/Zip Code:													>
Exaily	Enco	unter tt	Y Goode #	En	Tuno	Mod Conviso	Linit/Clinic D	oom P	ad EatAming	J D sto I	Rog Disto	Disch Disto	Attonding Pro
Any Phone Number:	Enco		VISIC #		, rype	Med Service		ooni b	Bu Est Aniva		ieg Date	Discribate	Altending Flo
	ions Gate 7000	JUUU16778	/0000000	ль//8 Р/е	-Outpatient OB	Ubstetrics	LGHLD		18-Dec-2	017 14:00			
Encounter #:	•												
Visit #:													
Historical MRN:													
Search 5 Reset													
<													>
										ок	Cancel		Preview



- 1. The Bed Transfer window will open. Yellow fields are mandatory. Please enter:
 - Medical Service= Obstetrics
 - Unit/Clinic= LGH LD
 - Attending Provider= Plisvcl, Antonio (begin typing and it will auto-complete)
 - Acommodation Reason= Equipment in Room
- 2. Click Bed Availability. The window will open.

m	Bed	Transfer	_ 🗆 🗙
Medical Record Number: 700007753	Encounter Number: 700000012700	Full Name: EDCSTTEST, LUANNE	Date of Bith: 06-Feb-1994
Age: 23Y	Gender: Female	BC PHN: 9876502459	
 Current Encounter Information — Encounter Type: Emergency 	Medical Service: Emergency		
Current Location Data Facility: LGH Lions Gate	Building:	Unit/Clinic:	Room:
Bed:	Accommodation:	Accommodation Reason:	Patient Accom Requested:
 New Encounter Information Encounter Type: Inpatient 	Medical Service: Obstetrics		
 New Location Data Building: LGH Lions Gate 	Unit/Clinic:	Bed Availability	2 oom:
Bed:	1 Accommodation:	Accommodation Reason: Equipment in Room	
Current Physician Information Attending Provider: Pisvel, Antonio, MD	Admitting Provider: Plisvof, Dillon, MD		1
Iransfer Information Transfer Date:	Transfer Time:	Bed Transfer User Name:	· · · · · · · · · · · · · · · · · · ·
Ready		P0783 TES	Complete Cancel T.OBCLERK 24-Jan-2018 12:46

3. Select a bed that is either **Available** or **Dirty**. Click **OK**.

Bed Types:

- M = Mom bed
- A = Baby A bed
- B = Baby B bed
- C = Baby C bed



•				Bed Availability				- 6	×
Facility: LGH L	ions Ga	ite							
Building: LGH	Lions G	ate							
Room	Bed	Nurse unit	Isolation	Person	Bed status	In	Out	Sex	Medic 🔺
🚔 LDL	01A	LGH LD		CSTMAT, BABY GIRL A	Assigned			Female	70002
🚔 LDL	01B	LGH LD		CSTMAT, BABY BOY B	Assigned			Male	70002
🚔 LDL	01C	LGH LD							
🚔 LDL	01M	LGH LD			Assigned				
🚔 LDL	02A	LGH LD			Dirty				
🚔 LDL	02B	LGH LD		CSTPRODREG, BABY GIRL	Assigned			Female	70002
🚔 LDL	02C	LGH LD							
🚔 LDL	02M	LGH LD		CSTPRODREG, FREETEXTMOM	Assigned			Female	70002
🚔 LDL	03A	LGH LD							
🚔 LDL	03B	LGH LD							
🚔 LDL	03C	LGH LD							
🚔 LDL	03M	LGH LD		CSTPRODREG, RIGHTMOM	Assigned			Female	70002 🗸
<									>
						OK		C.	ancel

If you selected a bed that is listed as Dirty, you will get a **Location Information** window asking you to confirm the selection. Click **Yes**.

Location Inf	formation	
? This bed has a status of: Dirty. /	Are you sure you want	to select it?
	Yes	No

You will now be returned to the Bed Transfer window. Note that the **Room** and **Bed** mandatory fields are now filled in. Now you need to complete the transfer.

1. Enter the following:

Transfer Date: type "T" as a shortcut for *Today*

Transfer Time: type "N" as a shortcut for Now

2. Click Complete



- New Location Data				-
Building:	Unit/Clinic:		Room:	
LGH Lions Gate 🗸 🗸	LGH LD 🗸	Bed Availability	LDL 🗸	
Bed: 02A	Accommodation: Ward V	Accommodation Reason: Equipment in Room		1
Attending Provider: Plisvel, Antonio, MD Transfer Information	Admitting Provider: Plisvcf, Dillon, MD			_
Transfer Date:	Transfer Time: 13:08	Bed Transfer User Name: TestUser, Clerk-OB		*
Ready		P0783 TES	Complete Cancel	

The patient will now viewable from the Maternity Tracking Shell.

Key Learning Points

Use Conversation Launcher from the Tracking Shell toolbar to transfer patients that are not on Tracking Shell yet



Activity 4.2 – Bed Transfer: Patient on Tracking Shell

1 You are informed that your first patient <<u>OB-UC</u>, first name> needs to be moved to another bed on your unit due to isolation precautions. As this patient is currently on Tracking Shell, you can do this

as 🗸

from Conversation Launcher, the rocketship icon

The **rocketship** can accomplish two tasks: Bed Transfer and Discharge Encounter.

To begin, locate your assigned patient in Tracking Shell and click their name to select.

Click the **rocketship** and select **Bed Transfer**.

Tracking	Shell	
LGH L&D	LGH OB Postpartum	LGH OB All B
Patient:	CSTLABSQ, TESTONE	▼ Filter: <n< p=""></n<>
- 7	🚺 🛨 🕜 🛊 🕿 🖉	7 🗟 🖄 🚳
B	Bed Transfer	
L	Discharge Encount	er (EEN/2

- 4. The **Bed Transfer** window will open. Yellow fields are mandatory. As you did before for a patient not on Tracking Shell, please enter:
 - Medical Service= Obstetrics
 - Unit/Clinic= LGH LD
 - Attending Provider= Plisvcl, Antonio (begin typing and it will auto-complete)
 - Acommodation Reason= Equipment in Room
- 5. Click Bed Availability. The window will open.



#	Be	ed Transfer	- 🗆 🗙
Medical Record Number: 700007753	Encounter Number: 7000000012700	Full Name: EDCSTTEST, LUANNE	Date of Birth: 06-Feb-1994
Age: 23Y	Gender: Female	BC PHN: 9876502459]
 Current Encounter Information - Encounter Type: 	Medical Service:		
Emergency V	Emergency		
Current Location Data Facility: LGH Lions Gate	Building:	Unit/Clinic:	Room:
Bed:	Accommodation:	Accommodation Reason:	Patient Accom Requested:
 New Encounter Information — 		1	
Encounter Type: Inpatient	Medical Service: Obstetrics	_	
— New Location Data ———			
Building: LGH Lions Gate	Unit/Clinic:	✓ Bed Availability	2 oom:
Bed:	Accommodation:	Accommodation Reason:	1_
 Current Physician Information 	1		1
Attending Provider: Plisvol, Antonio, MD	Admitting Provider:	R	_
I ransfer Information Transfer Date:	Transfer Time:	Red Transfer User Name:	
			Complete Cancel
Ready		P0783 TE	ST.OBCLERK 24-Jan-2018 12:46

1. Select a bed that is either **Available** or **Dirty**. Click **OK**.

L				Bed Availability				_ C	×
Facility: LGH L Building: LGH	ions Ga Lions G	ate ate							
Room	Bed	Nurse unit	Isolation	Person	Bed status	In	Out	Sex	Medic 🔺
🚔 LDL	01A	LGH LD		CSTMAT, BABY GIRL A	Assigned			Female	70002
🚔 LDL	01B	LGH LD		CSTMAT, BABY BOY B	Assigned			Male	70002
🚔 LDL	01C	LGH LD							
🚔 LDL	01M	LGH LD			Assigned				
🚔 LDL	02A	LGH LD			Dirty				
🚔 LDL	02B	LGH LD		CSTPRODREG, BABY GIRL	Assigned			Female	70002
🚔 LDL	02C	LGH LD							
🚔 LDL	02M	LGH LD		CSTPRODREG, FREETEXTMOM	Assigned			Female	70002
🚔 LDL	03A	LGH LD							
🚔 LDL	03B	LGH LD							
🚔 LDL	03C	LGH LD							
📫 LDL	03M	LGH LD		CSTPRODREG, RIGHTMOM	Assigned			Female	70002 🗸
<									>
						OK		С	ancel



If you selected a bed that is listed as Dirty, you will get a **Location Information** window asking you to confirm the selection. Click **Yes**.

Location Information	
This bed has a status of: Dirty. Are you sure you want to select it?	
Yes No]

You will now be returned to the Bed Transfer window. Note that the **Room** and **Bed** mandatory fields are now filled in. Now you need to complete the transfer.

3. Enter the following:

Transfer Date: type "T" as a shortcut for *Today*

Transfer Time: type "N" as a shortcut for Now

4. Click Complete

— New Location Data ——								-
Building:		Unit/Clinic:				Room:		
LGH Lions Gate	~	LGH LD	~	Bed Availability		LDL	~	
Bed:		Accommodation:		Accommodation Reason:				
02A	~	Ward	\sim	Equipment in Room	~			
Current Physician Informa	tion —							-
Attending Provider:		Admitting Provider:						
Plisvel, Antonio, MD	٩,	Plisvof, Dillon, MD	٩					
 Transfer Information 								-
Transfer Date:		Transfer Time:		Bed Transfer User Name:				
****	≑⊻	13:08	-	TestUser, Clerk-OB				
J. 		1						~
						2 Complete	Cancel	
Ready				P0783	TES	F.OBCLERK 24-Jan-2018	13:08	
_								

Click **Refresh** . The patient location will be updated on the Maternity Tracking Shell.

Key Learning Points

Use the rocketship from the Tracking Shell toolbar to transfer patients that are on Tracking Shell



Activity 4.3 – Update Patient Information

1 During the patient journey, patient can have a changeover of attending physician, medical service, isolation status and such.

Some of this information will display on the banner bar and you will need to update this information so that other clinicians or departments are aware of any changes. In this activity, we will learn how to update the isolation precaution for a patient but note that this same Conversation (Update Patient Information) can be used to update the Attending Physician and Medical Service.

From the Patient Chart, do the following:

- 1. Click **Conversation Launcher** ^{Conversation Launcher} in the **Toolbar**.
- _ 0 0 х Person Mgmt: Conversation Launcher X ≤¶ × × 5 ŝ х х Add/Modify Bed Transfer Cancel Cancel Discharge Cancel Cancel Cancel Facility Discharge Person Encounter Pending. Pendi... Transfer Encounter Transfer 10 -⇒[• **⊴**[7 0 Ý 77 5 Pending Pending Pre-Register Leave of Modify Newborn Newborn Pendina Pre-Register Absence Discharge Modify Quick Reg Facilit. Transfer Outpatient Patient To ... Discharge ל 9 角 G. Print Specimen Process Alert Quick Reg Referral Register Register Stillborn View Management Encounter Labels Outpatient Patient To .. 0 ß WH Quick View Person Reg ОΚ Cancel
- 2. Select Update Patient Information.

The Encounter Search window opens.

- Type your patient's first and last name and click the **Search** button.
- Click the appropriate encounter and click the **OK** button.

The Update Patient Information window opens.

- 3. Click the Encounter Information tab
- 4. From the Isolation Precautions dropdown, select Contact Plus.
- 5. Yellow fields are mandatory fields that need to be entered. Review any yellow fields and click **Complete**.



Jpdate Patient Information	n					
dical Record Number: 10006585	Encounter Number: 7000000016045	Last Name: CSTPRODREG	First Name: MATINAEMPI	Middle Name: ED	Preferred Name:	Previous Last Name: CSTPRODREG
te of Birth: 5-Sep-2005	× Age:	Gender: Female	BC PHN: 9876703548			
LERTS Patient Information	Encounter Information 3 ura	nce Insurance Summary Additiona	al Contacts			
Encounter Type: Inpatient	ALC Categories:	ALC Date:	ALC Time:	ALC Decompensation Dat	e: ALC Decompensation Time:	Medical Service:
Admit Category: Urgent/Emergent	Admit Source:	Arrival by Ambulance:	Reason for Visit: Chest Pain	Disaster Flag:	¥	
Location Facility:	Building:	Unit/Clinic:	Room:	Bed:	Accommodation:	Accommodation Reason:
Patient Accom Requested: Private	Accom Form Signed:	Isolation Precautions:				
Care Providers Admitting Provider: Plisvcb, Stuart, MD	Attending Provider:	Airborne Airborne and Contact Airborne, Droplet, and Conta Contact	ct CP Verified?:	Consulting Provider 01:		
Additional Information		Droplet Droplet and Contact Droplet and Contact Plus				
Comment	• 	Thecave	4			
Comment:						•
Previous Comments:						A
						Complete 5 Cano
y					PRODBC T	EST.UNITCLERK 15-Dec-2017 10:2

Document Selection window opens.

6. Click **OK** if no new specimen labels are needed.

Document Selection		— ×	
Document	Printer	Copies	1
🐼 Lab Blood Specimen Label	590_1stfl_t8	1	1
🐼 Lab Non-Blood Specimen Label	590_1stfl_t8	1	
🔽 Do not print documents		E dit OK	6

Key Learning Points

Isolation Precautions are updated via the PM Conversation in the toolbar.

Isolation Precautions can be located in the Encounter Information tab of Update Patient Information.

SELF-GUIDED PRACTICE WORKBOOK CST Transformational Learning

WORKBOOK TITLE: UNIT CLERK: RURAL ADD-ON



Activity 1.1 – Introduction to Patient Summary

Like Women's Health Overview, the **Patient Summary** will provide views of key clinical patient information. **Patient Summary** is meant for the majority of patients you will encounter whereas Women's Health Overview is primarily for maternity patients including some newborn documentation used in Labour and Delivery.

- 1. Patient Summary is located on the Menu.
- 2. There are different tabs including **Handoff Tool**, **Summary**, **Assessment**, and **Discharge** that can be used to learn more about the patient. Click on the different tabs to see a quick overview of the patient.
- 3. The **Handoff Tool** tab and **Discharge** tab have navigation menus which can be expanded to quickly locate components on the page. To access those menus, click the arrow button.

Task Edit View Patient Chart	Links Notifications Navigation Help				
🗄 Tracking Shell 🖃 Message Centre 🎬 CareConnects 🚡 Patient List 👪 Multi-Patient Task List 🔚 Schedule 🔹 Staff Assignment 🎬 LearningLIVE 😓 🕯 😋 CareConnect 🔃 PHSA PACS 🔃 VCH and PHC PACS 🕲 UCH Star Connect 🕲 Connect Region (Connect Region (Co					
😰 Tear Off 📲 Exit 🎬 AdHoc 🏣 Communicate 🖷 🗃 Medical Record Request 職 Result Copy 🌄 Related Records 🚆 Scheduling Appointment Book 🗃 Documents 🕽 Conversation Launcher 📾 Discern Reporting Portal 🔒 PM Conversation -					
🗄 😋 Patient Health Education Materials 🕲 SHOP Guidelines and DSTs 🕲 UpToDate 🖕					
CSTRHOMAT-MOVEENCOU	ITER, TO JEN 🛛 🛛	← List → 🏻 🍋 Recent + 🔹 Name			
CSTRHOMAT-MOVEENCOU	TER, DOB:02-Oct-1990 MRN:700020912 Code Status:Attempt CPR, Full Code21-Fi	eb-2 Process: Location:LGH LD; LDR1; 01M			
Allergies: penicillin	Age:27 years Enc:7000000201462 Gender:Female PHN:9876296204 Dosino Wt:75 kg	Disease: Enc Type:Inpatient Isolation: Attending:TestMAT, OBGYN-Physician, MD			
Menu P	A Patient Summary	🛄 Full screen 🛛 😭 Print 🛛 🍣 1 hours 9 minutes ago			
Women's Health Overview					
CareConnect	Handoff Tool St Summary St Ascessment St Discharge				
Orders 🕂 Add	Humon Tool & Summary & Assessment & Discharge				
Allergie:					
Diagnoses and Problems					
Results Review	Add new action	Add new comment			
Medication List 🕂 Add					
Patient Information	No actions documented	No comments documented			
Histories	All Teams	All Teams			
Documentation 🕂 Add	3				
MAR Summary					
Clinical Research	Active issues	Classification: Medical and Patient Stated 💌 All Visits 🔍 —			
Labour and Birth Summary		Add new as: This Visit 🝷 🔍			
Form Browser					
Newborn Liaison	Name	Classification Actions			
Postpartum Liaisón	Group B streptococcal infection in pregnancy	S Medical This Visit Chronic			
Newborn Record	Pregnant	Medical This Visit Chronic			
Patient Summary	Preterm labor	S Medical This Visit Chronic			

2 Remember to **Refresh** to view the most up to date information.

Key Learning Points

- Patient Summary provides access to key information about the patient.
- Click the Refresh icon to get the most updated information on the patient.



End of Workbook

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