SELF-GUIDED PRACTICE WORKBOOK [N99] CST Transformational Learning

WORKBOOK TITLE: Private MOA



Last update: April 13, 2018

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***** SELF-GUIDED PRACTICE WORKBOOK

Duration	2 hours
Before getting started	Sign the attendance rosterPut 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 to follow the steps, immediately raise your hand for assistance to use classroom time efficiently
- Ask for assistance whenever needed



PATIENT SCENARIO

Learning Objectives

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

- Search for the patient
- Create a referral encounter
- Send messages within Message Center
- Set-up a patient list

SCENARIO

With the implementation of the Clinical Information System (CIS) within Health Authority, updates to the workflow within the surgeon's office will occur.

Surgeons are referred patients from GPs to determine if surgery is appropriate. Once surgery has been deemed necessary, a referral encounter is required in order for the Surgeon to enter orders into CIS for the patient. Messages created by you within Messages Centre will help streamline how orders can be entered by the surgeon.

You will be provided with remote access into CIS.



Activity 1.1 – Creating an Encounter in PMOffice

- 1. Open Access Management.
- 2. Select Conversation.
- 3. Select Referral Management.
- 4. 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
- 5. If you have found the correct patient, click only ONCE on their name to select, then click **Add Encounter**.

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Phone Number	Faci	By	Encoun	nter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room	Bed	Est Arrival Date	Reg	Date	Disch Date A	ttending Provider
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ounter #:	31	.GH UCC MDC .GH Lions Gate	760000	0010064	7600000000551	Pre-Outpatient Pre-Outpatient	Infectious Diseases Neurology	LGH UCC MD			2018Jan-04 11	2018-	Jan-02 7:45	T	rain. GeneralMedicine
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- The Organization window appears
- 6. Enter the "Facility Name" in the Organization window.
- 7. Click **OK**.
 - The EMPI window briefly launches to open the "Referral Management" conversation window
- 8. Click the Encounter Information tab to complete the below mandatory fields:
 - Encounter Type = Referral (auto-defaults)
 - Medical Service = Select an option from the list Reason for Visit = Add a reason for visit
 - **Referring Provider** = Select a Referring Provider
- 9. Click the Referral Info tab to complete the below mandatory fields:



- **Referral Received Date** = Type "*T*" for today's date
- **Referral Status** = Accepted

10. Click the **Complete** to close the "Referral Management" conversation.

• The "Referral Management" window opens with an Encounter Number and Visit ID.



11. Click **OK** to close the "Referral Management" window.

Referral Encounter Worklist in PMOffice

Referral Encounter Worklist in PMOffice displays a list of all the open referral encounters for a selected location. The various functions performed by a scheduling clerk in this worklist are reviewed below.

Open the Referral Encounter Worklist:

- 1. Log onto **PMOffice**
- Click on the Worklist tab and double-click on the Referral Encounter Worklist
 Referral Encounter Worklist
- 3. In the "Filters: Referral Encounter Worklist" window, select a clinic location.
 - Expand the list to select the clinic name prefixed with wheelchair sign



Nurse Unit Multi No Skip	
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🗄 폙 LGH Rad Daycare	
🖨 🖶 LGH BAN	_
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- 4. Click the **Copy** button to move the clinic to selected box.
- 5. Click OK.
 - A list of the open referral encounters for this clinic is displayed





Viewing the Request List

1. Select **Request by Queue**.





2. Select Waitlist or Surgery Waitlist.



NOTE: Depends on the workflow for placing patients on the waitlist for the specified department.

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		-
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	MI MR Initial Queue	
	MI MR P1	
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	MI MR P3	
	MI MR P4	
	MI NM Initial Queue	
	MI No Show	
	MI RF Initial Queue	
	MI US Initial Queue	
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	MI US P3	
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	SN - LGH Pain Clinic Waitlist	
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- 3. Select OK.
 - The request by queue list will populate

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Activity 1.2 – Message Centre: Creating a Message





NOTE: The Message Centre is a part of the legal medical record and communication should pertain to patient chart.

CREATING A MESSAGE

1. In Power Chart using the Patient Search window, search for the patient.

Task Edit View Patient Chart Eniks Navigation Thep		
🎬 Ambulatory Organizer 🖃 Message Centre 📲 CareCompass 🔉 Multi-Patient Task List 🎬 Learn	ingLIVE 🝦 🕄 🖏 CareConnect 🖏 PHSA PACS 🖏 VCH and PHC PACS	
🖞 Exit 🏙 AdHoc 🔒 PM Conversation 👻 🔤 Communicate 👻 🕂 Add 👻 📾 Discern Reporting Port	al 🕞 Documents 🖺 Scheduling Appointment Book 🖕	
🐧 Patient Health Education Materials 🐧 Policies and Guidelines 🐧 UpToDate 🝦		
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Ambulatory Organizer		
Day View Calendar Open Items (0)		

2. Select the **Referral** encounter from the list of encounters.

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ostal/Zip Code:	•															
nv Phone Number:	Faci	lity	Enco	unter #	Visit #	Enc Type N	fed Service U	nit/Clinic	Room	Bed	Est Arrival Dat	e Reg D	late	Disch Date /	Attending Provider	
	3) L	GH RAN	7600	000010043	760000001004	3 Pre-Outpatient N 4 Pre-Outpatient II	leurology L nfectious Diseases	GH RAN	r .		2018-Mar-01 1 2018-Jan-04 1	6:00				
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isit #:	SIL SIL	.GH Lions Gate .GH Lions Gate	e 7600 e 7600	000000552 000000551	760000000055 760000000055	2 Pre-Outpatient II 1 Pre-Outpatient N	nfectious Diseases leurology					2018- 2018-	Jan-02 7:45 Jan-02 7:45		Train, GeneralMedici Train, GeneralMedici	ne-Physici ne-Physici
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• The encounter type in the patient header is 'Referral'.



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SCHEDULING, CORA	DOB:1981-Jan-12	MRN:760000551	Code Status:	Process:	Location:LGH RAN
	Age:37 years	Enc:7600000010112		Disease:	Enc Type:Referral
Allergies: Allergies Not Recorded	Gender:Female	PHN:9876359226	Dosing Wt:	Isolation:	Attending:

3. Select the **Communicate** tab from the toolbar.

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Allergies: Allergies Not Recorded	Gender:Female	PHN:9876359226	Dosing Wt:	Isolation:	Attending:
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- 4. Choose Message.
- 5. The patient's name is automatically entered in the Caller box. If the message is a phone message, fill the appropriate details otherwise leave the caller boxes empty.



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📍 High	🕻 Notify 📓 Message	Journal 🦾	Portal Opti	ons								i	🗂 Launch	Orders
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- 6. From the 'To' and 'CC' boxes, enter the first few letters of the recipient's last name.
- 7. Click **search** or press **ENTER**.

Task E	dit 🖞 Notify 🐨 Message Journal 🖧 Portal Option	ie.	·에Launch Orders
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To: CC: Subject	test TestAMB, ClerkAdvanced-Scheduling2 TestAMB, ClerkAdvanced-Scheduling3 TestAMB, Nurse-Ambulatory3 m	(đ) Provider:	Include me Image: Save to Chart As: Phone Message/Call
B	owse Documents Other Attachments		



9. In the provider box, Search for the appropriate Provider.

Provider:				M
	•	📝 Save to Chart	As: Phone Message/Call	
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10. Click **Save to Chart** and select the appropriate message type from the drop down menu **General Message**.

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10. Compose the message within the Message box.

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Activity 1.3 – Set Up a Location Patient List

At the start of your first shift (or when working in a new location), you will create a **Location List** that will consist of all patients assigned to your unit.

- 1. Select the **Patient List** from the **Toolbar** at the top of the screen.
 - The screen will be blank
- 2. To create a location list, click the List Maintenance icon $\overset{\checkmark}{\swarrow}$.
- 3. Within the **Modify Patient Lists** window, select **New** in the bottom right corner.





- 4. From the Patient List Type window select Location.
- 5. Click Next.

Assignment (Ancil	lary)			
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- 6. Select the **Location**.
- 7. Select Finish.

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Cocations [LGH Rapid Acces	EGH OCC Universal Clinic
I Medical Services	EGH Pediatric Asthma Clinic
Encounter Types	EGH Pharmacy
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	Shift LGH Trauma Clinic
	I GH Vascular Access Clinic
	I GH Wound Ostomy Nurse Clinicians
	RWL Medical Imaging
< >	H- XI RWL R. W. Large Memorial Hospital
Enter a name for the list: (Limited LGH Rapid Access Neurology Cl	to 50 characters) Inic RAN
	Back Next Finish Cancel

🔦 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 by location



Now that you have created your department list, you must establish a relationship with your patient in order to view more patient information or access their chart.

1. Double click a patients name to open the chart.

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sk Edit View Patient Ch	art Links Notifications Patient List Help	¢							
Message Centre 🙀 Ambulator	ry Organizer 🎍 Patient List 🌇 CIS Help 📜 🗐	CareConnect 👩 PHSA I	PACS Q VCH and PHC PACS	Q FormFast WFI	.				
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	LGH RAN 700000942 7000000017009 67 years	01-Oct-1950 Female	headaches	Pre-Outpatien	Neurology				
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DOE, JANE ELIZABETH DOE, JANE ELIZABETH	LGH RAN 700000942 700000016999 67 years	01-Oct-1950 Female							

- 2. From the Relationship drop-down, select MOA.
- 3. Click OK.

P	Assign a	Relationship	×
For Patient:	DOE, JANE ELIZABETH		
Relationships:			
Other Private MOA]		
		OK	Cancel



Viewing the Ambulatory Organizer

- 1. Search for the physician.
- 2. Select the box next to provider name.
- 3. Click **Apply**.

Ambulatory Organizer	
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Ambulatory Organizer	
Day View Calendar Open Items (0)	
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PLISVCX, Stuart	No Patients Found

- 4. Verify the date.
 - The calendar listed next to the date may be used to change the date

NOTE: The ambulatory organizer allows visualization of the providers scheduled patients for the day.

	- Itaint - Citrix Receiver						
PowerChart Organ	izer for Train, ClerkAdvan	ced-Scheduling7					
ask Edit View	Patient Chart Links	Navigation Help					
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Viewing the Patient Demographics

- 1. Select the patient from the ambulatory organizer to open the patient chart.
- 2. Select Patient Information.
- 3. Select Demographics.

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	Date of Birth :	1964 Feb-13 15:10 PST		Age :	54 years				
Allergies	Gender :	Fenale		VIP :					
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Single Patient Task List	Haritan Status .			beceased bace/ nine .					
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	Home 104 Va	17 West Broadway ncouver, British Columbia V6R2	Home	(604)222-1133	MEN BC PHN	760001046 10760001046	MRN BC PHN		
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Viewing the Patient Documents

- 1. Select **Documentation**.
- 2. Display ALL.
- 3. Select document to view.

E

NOTE: Highlighting the document to view will display the document in the window.

4. The print function will enable.

Published Desktop - Train1 - Othic R	neiver		Designation of the local division of the loc	ALL AND DESCRIPTION OF A DESCRIPTION OF		
P IP-NURSE, CONRAD - 760000234 Op	ened by Train, ClerkAdvanced-Scheduling7				3	5 GB 🗮
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Averges	Are-11 16:06:00 P. Patient Discharge Summ	Bischarge Summary	8	asic Admission Information Entered (n: 2018-Apr-12 10:43 PDT	£.
CareConnect	Apr-11 12:07:29 P XR Chest	XR Chest		Performed On: 2018-Apr-12 10:43 PE	T by Train, Rural-Nurse1	
Clinical Research						
Single Patient Talk List						
			Allergies			
					(As Of 2018-Apr-12 1043:55 PDT)	
			Allergies (Active).	Estimated Onset Date: Unspecified : R	eactions: Rash:	
				Created By: SYSTEM, SYSTEM Ceme	r, Reaction Status:	
				Active : Category: Drug : Substance: p Severe : Undated By: SYSTEM SYST	enicilin ; Seventy: EM Cemer	
				Reviewed Date: 2018-Apr-12 10:43 PD	ſ	
			Weight			
			Weight Dosing : 70 kg(Com	verted to: 154 lb 5 oz, 154.324 lb)		
	*				Train, Rurat-Nurse1 - 2018-Apr-12 10:43 PDT	
	<< Previdue Next >>					



Accessing CareConnect

1. Select CareConnect to access it from the menu.

Menu		ņ
Reg Clerk Summary		
Patient Information		
Orders	🕇 Add	
Documentation		
Notes	🕇 Add	
Allergies		
CareConnect		
Clinical Research		
Single Patient Task List		
		_

Reviewing Results Using Results Review

Overview

In the event you are asked to help find patient test/lab results, you can do so through Results Review.

Results are presented using **flowsheets**. Flowsheets display clinical information recorded for a patient including labs results, iView entries (e.g. vital signs), cultures, transfusions and diagnostic imaging.

Flowsheets are divided into two major sections:

- The left section is the Navigator. By selecting a category within the Navigator, you can view related results, which are displayed within the grid to the right.
- The grid to the right is known as Results Display.

and/or				
10.0		Selunda	nj, 28. Maj -2018 00:00 1	[1] - Dianulag, 20 Occumber 2017 2759 PS1 (Clescar Ba 2017) (Clescar Ba
Navigator	Showing results from (23-Oct-2017 - 25-Oct-2017)	Show more results		
General Chemistry	Lab View	25-0-8-2017-00-00 -	24-0-0-2017-00-00 -	23-0:d-2017 00:00 -
Therease dir Ones Monitor	CBC and Emissional Security	12.0110	- Control	23 29 100
C membran may merid	11 WBC Count	7.0 40 9.5	7.0 x10 9.5	7.0 x10 91 +8.0 x00 91
🙀 Usine Microbiology	T BBC Count	#45 x10 124	4 50 (10 12.5	4.55 x10 12.5 121
Control Control Conveillant	Memoglobin	140 m3	140 ml	145 et [2]
M	Hematoott	0.40	0.41	0.43 -0.45 (2)
Course Blood Paint of Car	MCV	92 11	95.1%	95 R - 98 R 12
	MOR	31 00	30 p.a	12 pa (2)
	RDW-CV	120%	12.0 %	12.0 % (2)
	Platelet Count	400 x00 9/L	350 +00 9.1	250 x20 9.1 - 300 x50 9.1
	1 MPV			9.9 %
	1 Nestrophia	4.90 x10 9.5	4.90 x10 9.%	4.90 x10 % - 5.60 x10 %
	Umphootes	1.40 x10 9.1	1.45 x10 9.5	1.40 x10 9/L -1.60 x10 9/
	Monorghes	0.35 x10 9.1	0.35 x10 9.0	0.40 x10 9.0 - 0.63 x10 9.1
	Eosinophils	0.25 x10 9.1	0.35 x10 9.5	0.07 x10 9.4 -0.32 x10 9/1
	Batophili	0.07 x30 9.5	0.07 x10 9.6	0.08 ×10 9.5
	General Chemistry			Contraction of the second s
	Sodum	142 mmol/L	145 minol/L	140 mmol/L - 145 mmol/L
	Potassium	3.3 mmol/L	3.9 mmol/L	4.5 mmol/L - 5.0 mmol/L
	Chloride	100 mmol/1	100 mmiol/L	100 mmolt - 105 mmol/
	Carbon Dioxide Total	25 mmol/L	26 mmol/L	30 mmoil - 31 mmoil 1
	Anion Gap	20.2 mmeth 74	22.9 mmol/s #5	13.5 mmol/L + 15.0 mmol
	Glucose Random			6.0 mmol/L
	Uves		2.0 minol/5	2.0 mmol1
	Creatinine		75 umal-t	100 umol 1
	Giomerular Fitzation Rate Estimated		82 mL/min	45 ML/min
	I liaponin 1			<0.02 up4 * <0.02 up4
	Lab Add on Time		CRE and BUN added to	4
	Therapeutic Drug Monitoring / Traicology			
	Vancosycin Trough Level	15.0 mg/L		
	Vancomytin Date Last Dose	20171024		
	Vancomycin Time Lact Doce	2200		· · · · · · · · · · · · · · · · · · ·
	Litina Microhiolom			



To review the most recent results for your patient:

- 1. Navigate to **Results Review** from the Menu.
- 2. Review the Recent Results tab.
- 3. Review each individual section within to see related results.
- 4. Select Lab Recent.



5. Review your patient's recent lab results.

CBC and Peripheral Smear			
WBC Count	1.5 x10 9/L (L)		
RBC Count	2.00 x10 12/L (L)		
Hemoglobin	70 g/L (L)		
Hematocrit	0.15 (L)		
MCV	98 fL		
🖻 мсн	28 pg		
RDW-CV	15,3 % (H)		
Platelet Count	10 x10 9/L (!)		
NRBC Absolute	5.0 x10 9/L (H)		
Neutrophils	0.04 x10 9/L (L)		
Lymphocytes	0.15 x10 9/L (L)		
Monocytes	0.23 x10 9/L		
Eosinophils	0.01 x10 9/L		
Basophils	0.01 ×10 9/L		
Metamyelocytes	0.73 x10 9/L (H)		
Myelocytes	0.23 x10 9/L (H)		
Promyelocytes	0.08 x10 9/L (H)		
Blast Cells	0.02 x10 9/L (H) 5		
Blood Film Comment	Platelet Estimate - Deen		



Note the colors of specific lab results and what they indicate:

- Blue values indicate results lower than normal range
- Black values indicate normal range
- Orange values indicate higher than normal range
- Red values indicate critical levels

To view additional details about any result, for example a **Normal Low** or **Normal High value**, **doubleclick** the result.

Key Learning Points

- Flowsheets display clinical information recorded for a patient such as labs, cultures, transfusions, medical imaging, and vital signs
- The Navigator allows you to filter certain results in the Results Display
- Bloodwork is color coded to represent low, normal, high and critical values
 - View additional details of a result by double-clicking the value





You have reached the end of the workbook.