

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	<ul style="list-style-type: none"> ■ Sign the attendance roster ■ Put your cell phones on silent mode
Session Expectations	<ul style="list-style-type: none"> ■ 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	<ul style="list-style-type: none"> ■ 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

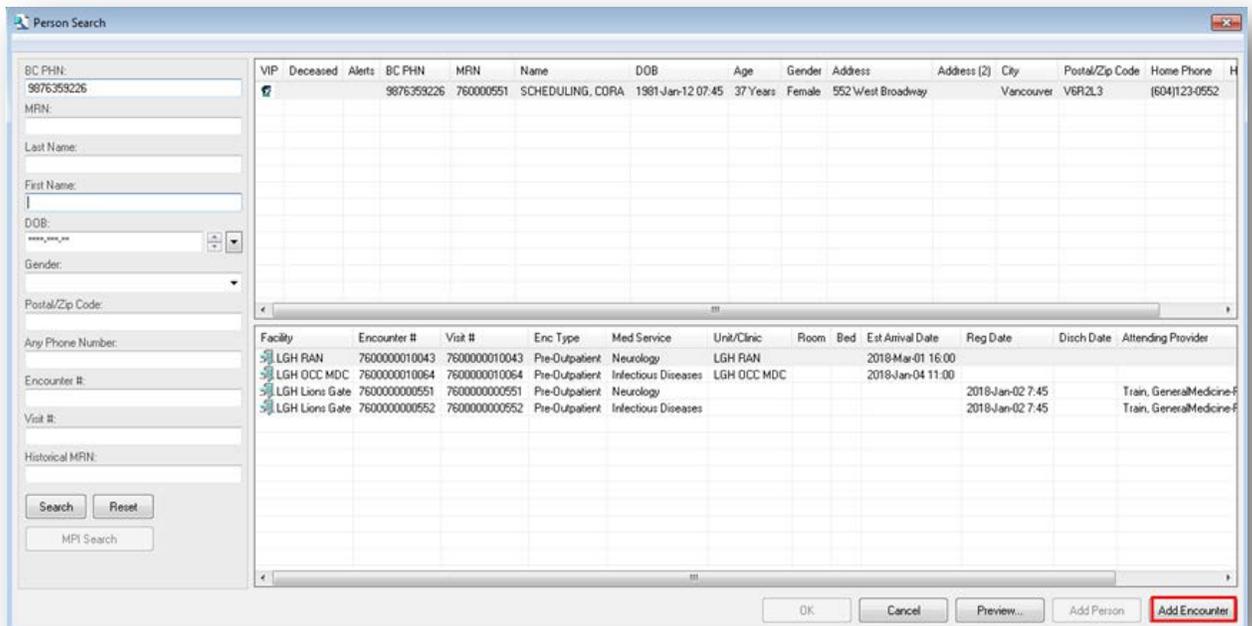
With the implementation of the Clinical Information System (CIS) within Health Authority, updates to the workflow within the surgeon's office will occur.

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

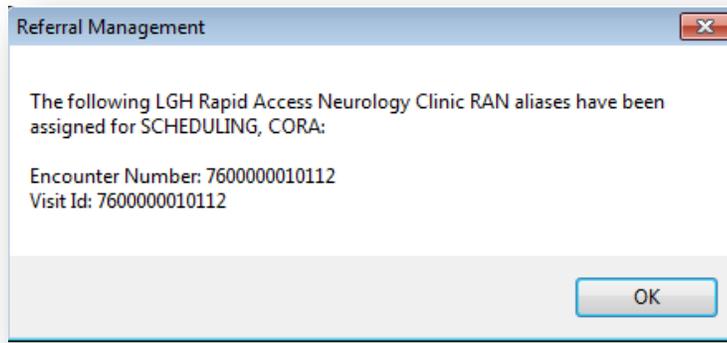
1. Open Access Management.
2. Select **Conversation**.
3. Select **Referral Management**.
4. Search for the patient by entering the **PHN** then click **OK**.
 - If you do not have a PHN, search by partial Last Name and First Name or Date of Birth and Gender
5. If you have found the correct patient, click only **ONCE** on their name to select, then click **Add Encounter**.



The screenshot shows the 'Person Search' window. On the left, there are input fields for BC PHN (9876359226), MRN, Last Name, First Name, DOB, Gender, Postal/Zip Code, Any Phone Number, Encounter #, and Visit #. Below these are 'Search' and 'Reset' buttons, and an 'MPI Search' button. The main area displays a table of search results with columns: VIP, Deceased, Alerts, BC PHN, MRN, Name, DOB, Age, Gender, Address, Address (2), City, Postal/Zip Code, Home Phone. One result is visible for SCHEDULING, CORA. Below this is a table of encounters with columns: Facility, Encounter #, Visit #, Enc Type, Med Service, Unit/Clinic, Room, Bed, Est Arrival Date, Reg Date, Disch Date, and Attending Provider. The 'Add Encounter' button at the bottom right is highlighted with a red box.

- 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.



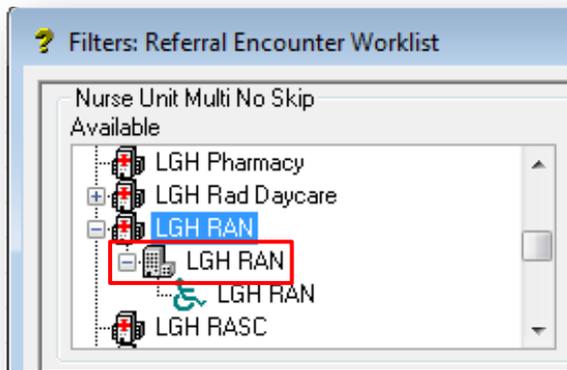
11. Click **OK** to close the “Referral Management” window.

Referral Encounter Worklist in PMSOffice

Referral Encounter Worklist in PMSOffice 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 **PMSOffice**  .
2. Click on the **Worklist** tab and double-click on the **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



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

1 Result										
Patient	Referral Received Date	Referral Status	Cancelled Reason	Appt Type	Appt Status	Service	Encounter Number	MRN	Facility	
SCHEDULING, CORA	09-APR-2018	Accepted				Neurology	760000010112	760000551	LGH F	

Viewing the Request List

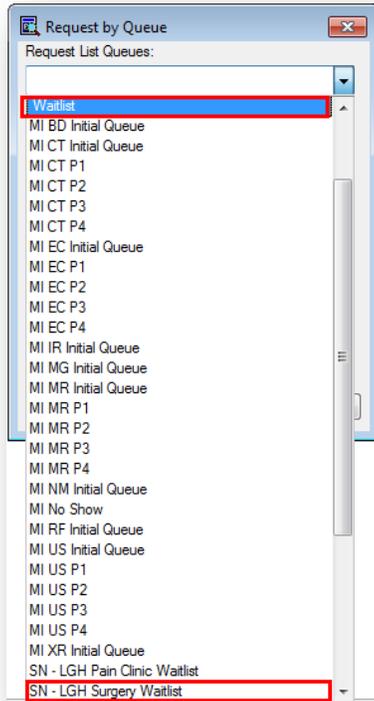
1. Select **Request by Queue**.



2. Select **Waitlist** or **Surgery Waitlist**.

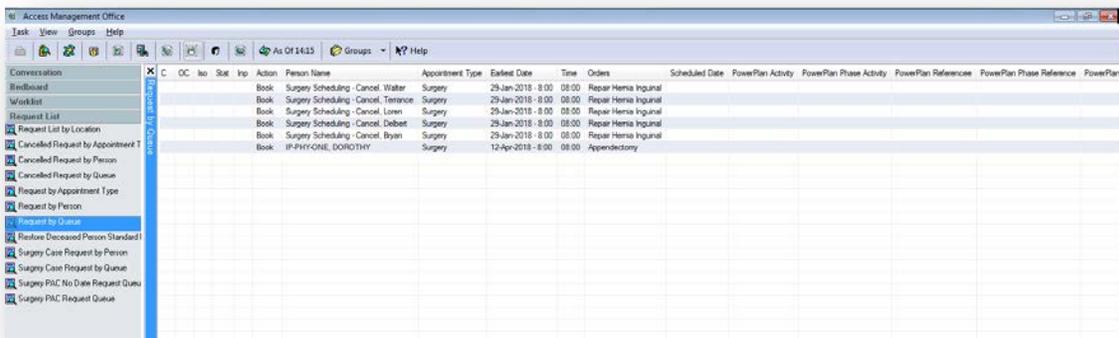


NOTE: Depends on the workflow for placing patients on the waitlist for the specified department.



3. Select **OK**.

- The request by queue list will populate



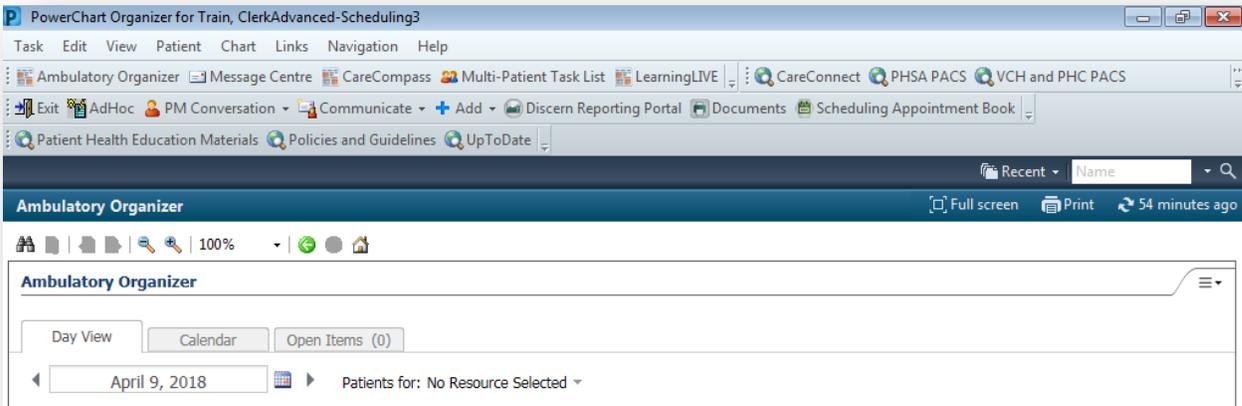
Activity 1.2 – Message Centre: Creating a Message



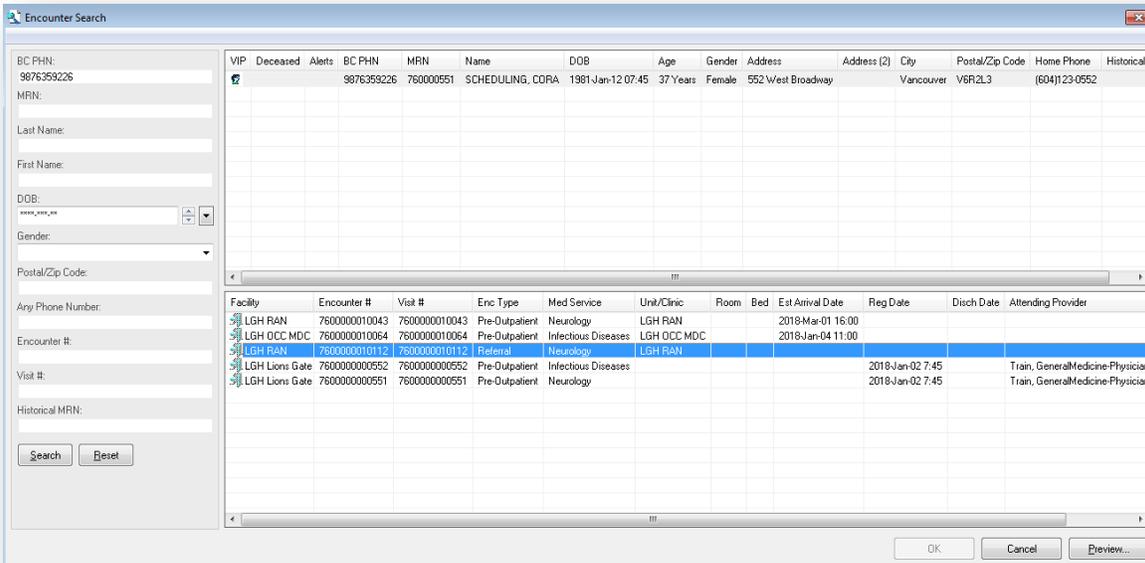
NOTE: The Message Centre is a part of the legal medical record and communication should pertain to patient chart.

CREATING A MESSAGE

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



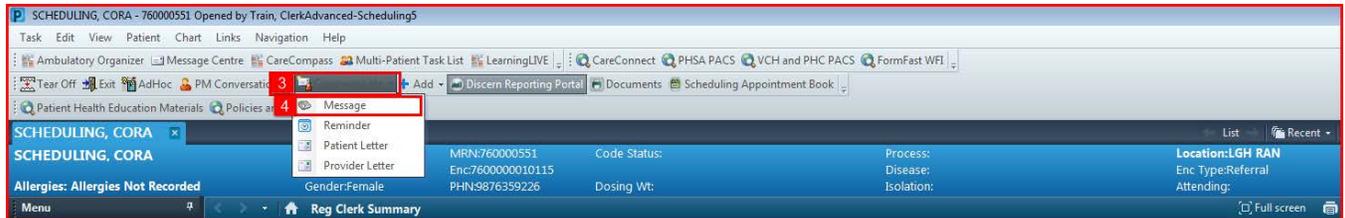
2. Select the **Referral** encounter from the list of encounters.



- The encounter type in the patient header is 'Referral'.

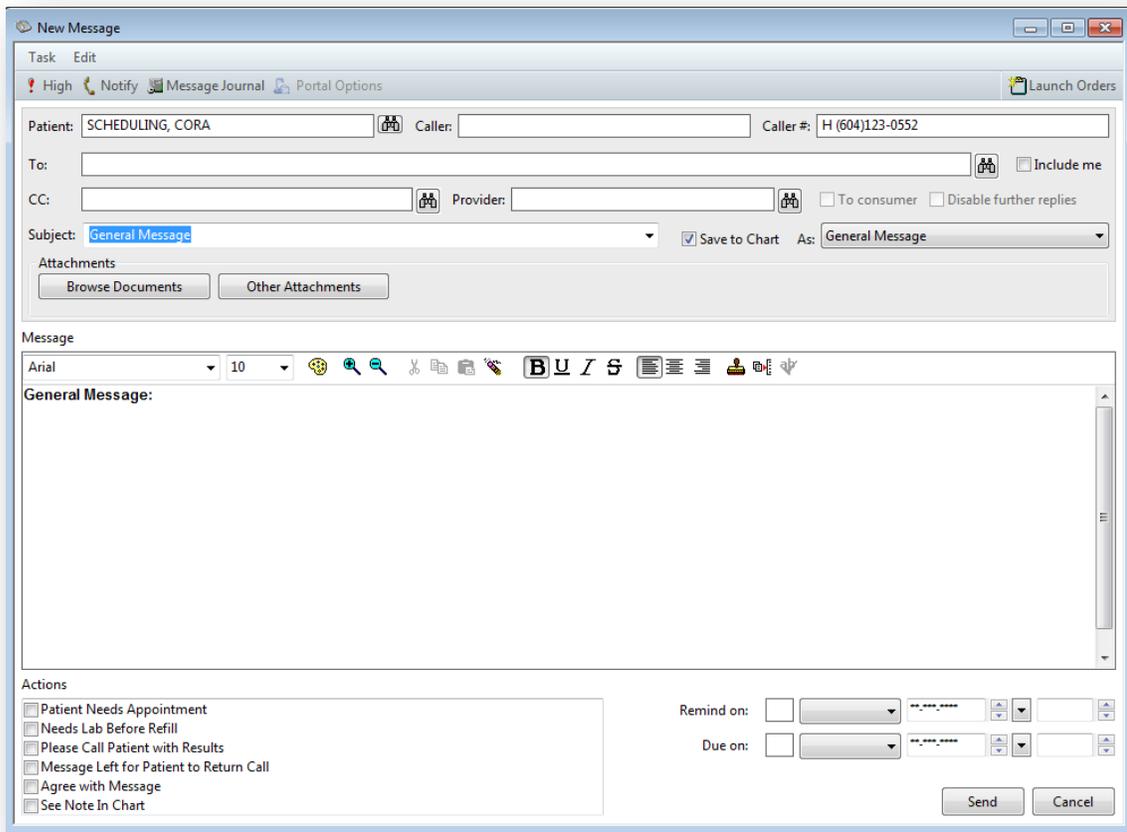
SCHEDULING, CORA	DOB:1981-Jan-12	MRN:760000551	Code Status:	Process:	Location:LGH RAN
SCHEDULING, CORA	Age:37 years	Enc:760000010112		Disease:	Enc Type:Referral
Allergies: Allergies Not Recorded	Gender:Female	PHN:9876359226	Dosing Wt:	Isolation:	Attending:

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



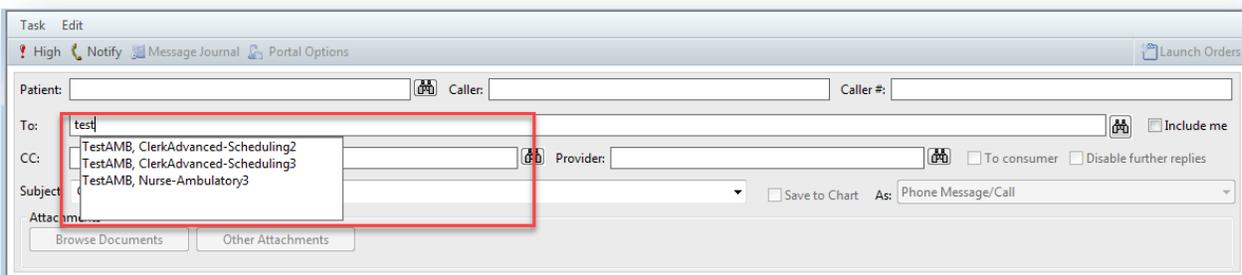
4. Choose **Message**.

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.



6. From the 'To' and 'CC' boxes, enter the **first few letters** of the recipient's last name.

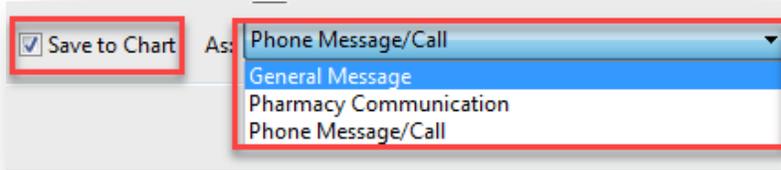
7. Click **search**  or press **ENTER**.



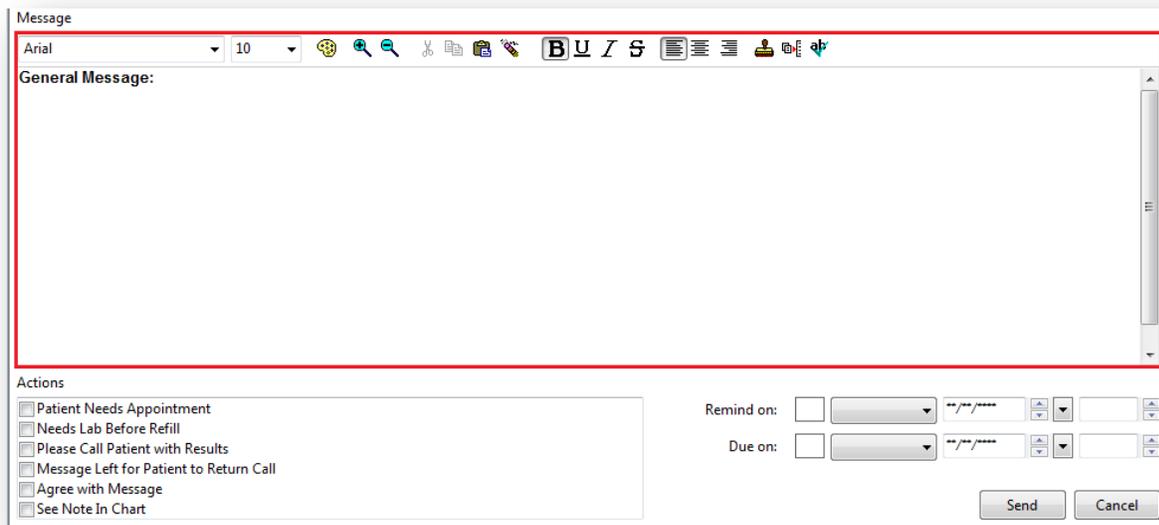
9. In the provider box, Search for the appropriate Provider.



10. Click **Save to Chart** and select the appropriate message type from the drop down menu **General Message**.



10. Compose the message within the Message box.

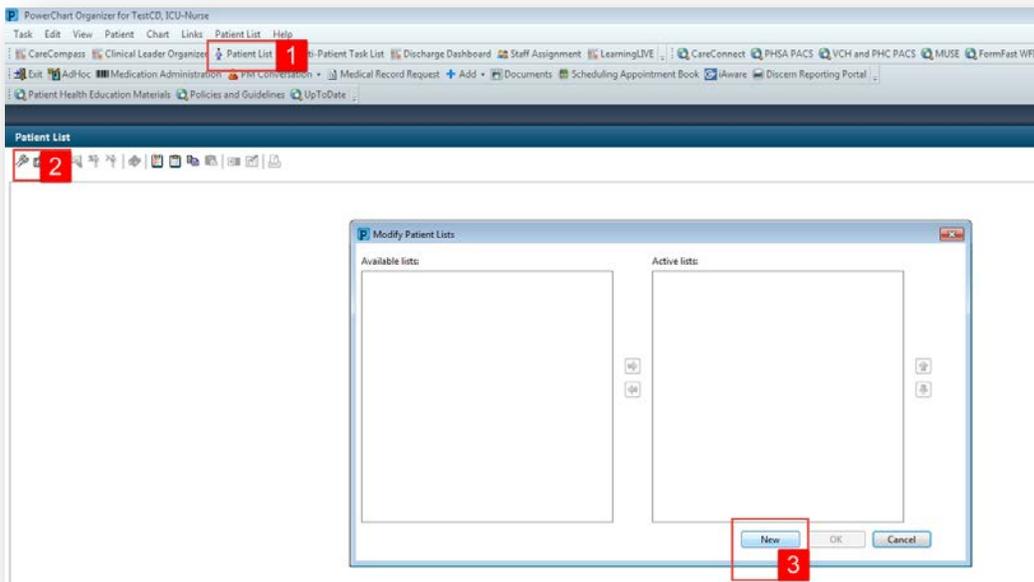


11. Click **Send**  to complete the message.

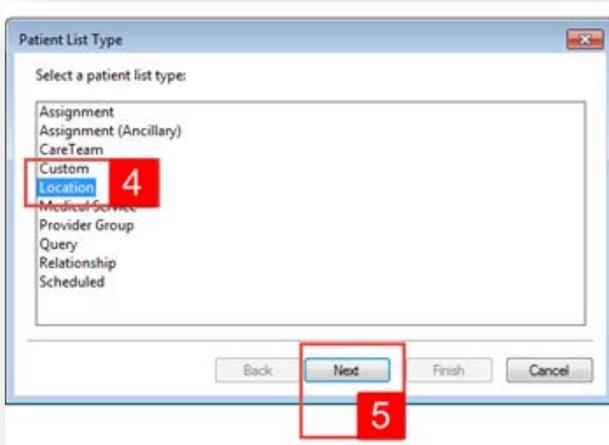
Activity 1.3 – Set Up a Location Patient List

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.

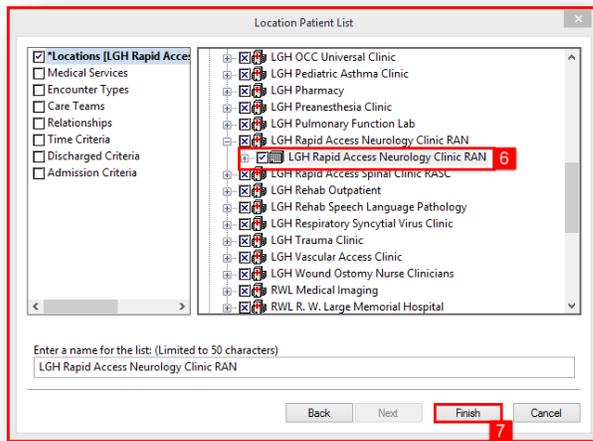
1. Select the **Patient List**  from the **Toolbar** at the top of the screen.
 - The screen will be blank
2. To create a location list, click the **List Maintenance** icon .
3. Within the **Modify Patient Lists** window, select **New** in the bottom right corner.



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



6. Select the **Location**.
7. Select **Finish**.

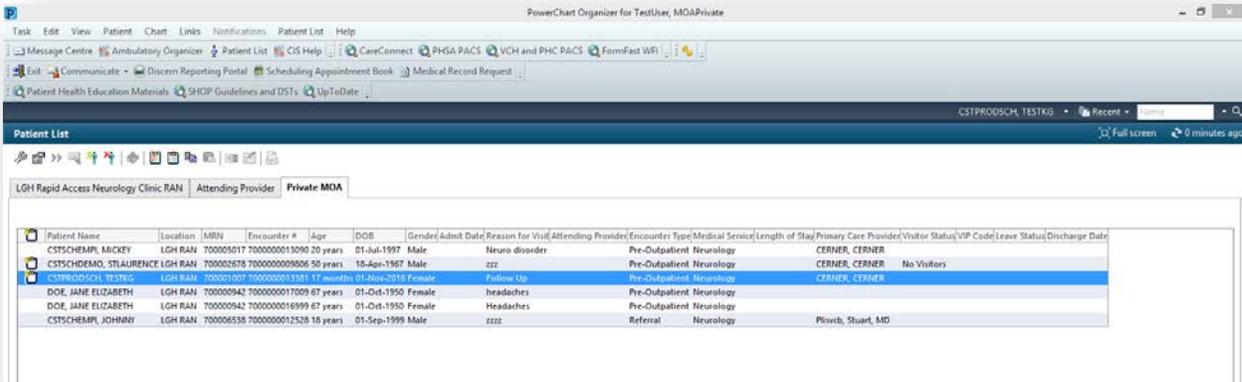


Key Learning Points

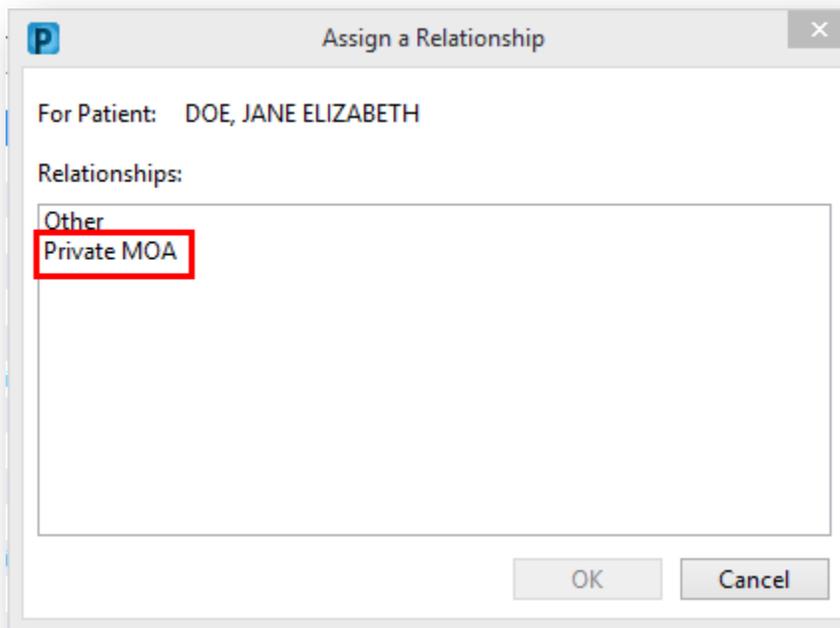
- Patient List can be accessed by clicking on the Patient List icon in the toolbar
- You can set up a patient list by location

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.

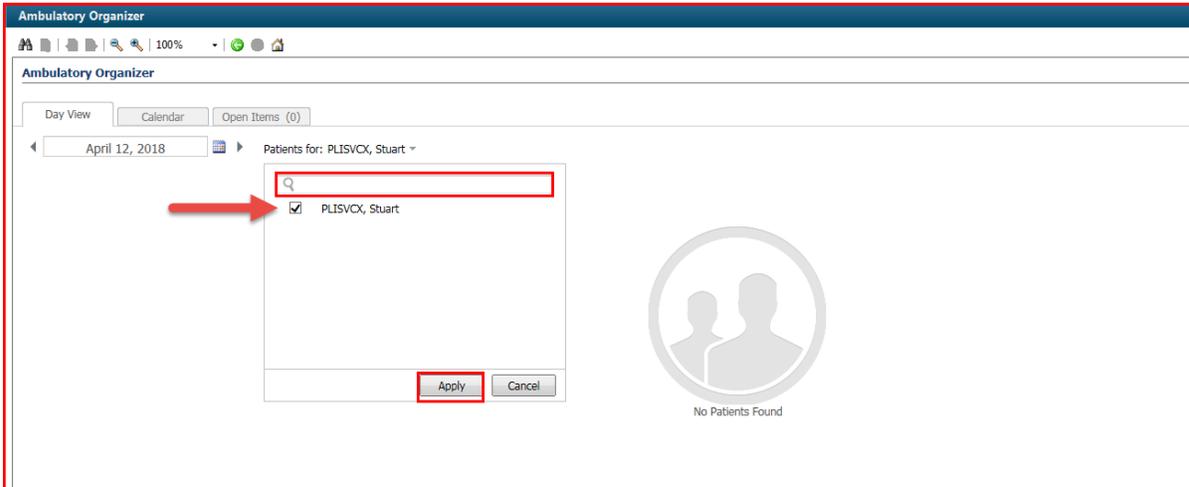


2. From the Relationship drop-down, select **MOA**.
3. Click **OK**.



Viewing the Ambulatory Organizer

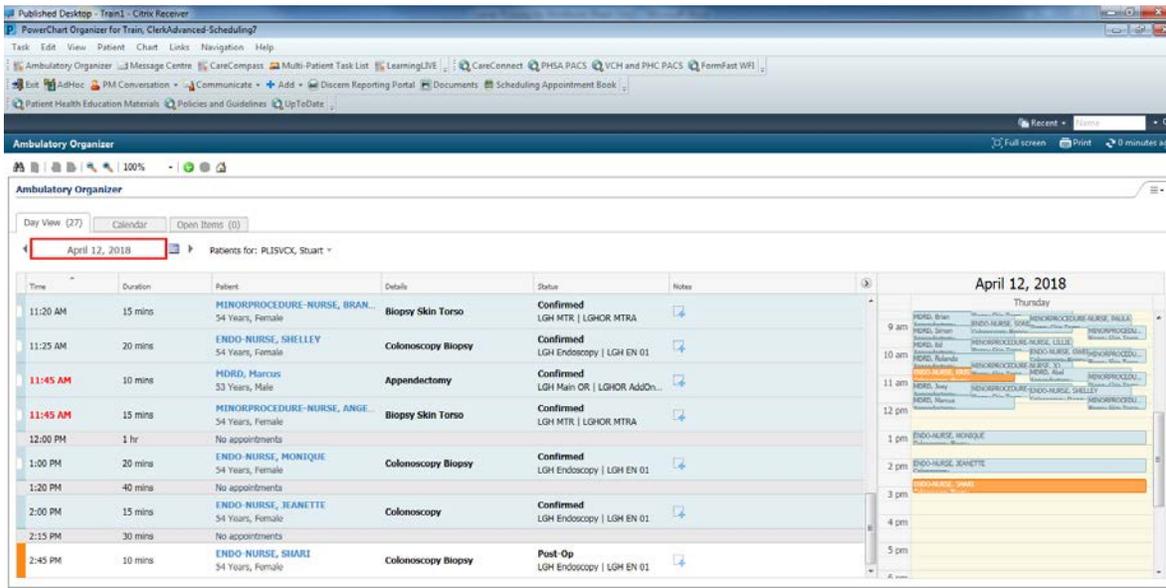
1. Search for the physician.
2. Select the box next to provider name.
3. Click **Apply**.



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.



Viewing the Patient Demographics

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

The screenshot shows the 'Patient Information' section with the 'Demographics' tab selected. The patient information is as follows:

Patient Demographics	
Name :	MINORPROCEDURE-NURSE, BRANDY
Date of Birth :	1964-Feb-13 15:10 PDT
Gender :	Female
Primary Language :	
Marital Status :	
Disease Alert :	
Preferred Name :	
Age :	54 years
VIP :	
Religion :	
Deceased Date/Time :	
Process Alert :	

Addresses		Phone Numbers		Identifiers	
Type	ADDRESS	Type	PHONE	Type	ALIAS
Home	1047 West Broadway Vancouver, British Columbia V6R2...	Home	(604)222-1133	MRN	760001046
				BC PHN	10760001046
				MRN	ALIAS POOL DE
				BC PHN	BC PHN

Viewing the Patient Documents

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



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

4. The print function will enable.

The screenshot shows the 'Documentation' section with the 'List' view selected. A document titled '* Final Report *' is highlighted. The document content is as follows:

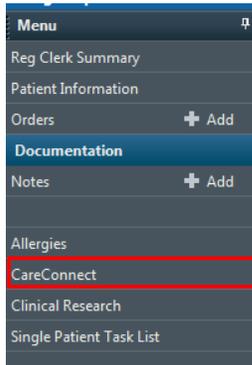
*** Final Report ***
 Basic Admission Information Entered On: 2018-Apr-12 10:43 PDT
 Performed On: 2018-Apr-12 10:43 PDT by train, Rural-Nurse1

Allergies
 Allergies (Active): penicilin (As of 2018-Apr-12 10:43:55 PDT)
 Estimated Onset Date: Unspecified ; Reactions: Rash ;
 Created By: SYSTEM, SYSTEM Center ; Reaction Status: Active ; Category: Drug ; Substance: penicilin ; Severity: Severe ; Updated By: SYSTEM, SYSTEM Center ; Reviewed Date: 2018-Apr-12 10:43 PDT

Weight
 Weight (Dosing) : 70 kg (Converted to: 154 lb 5 oz, 154.324 lb)
 Train, Rural-Nurse1 - 2018-Apr-12 10:43 PDT

Accessing CareConnect

1. Select CareConnect to access it from the menu.



Reviewing Results Using Results Review

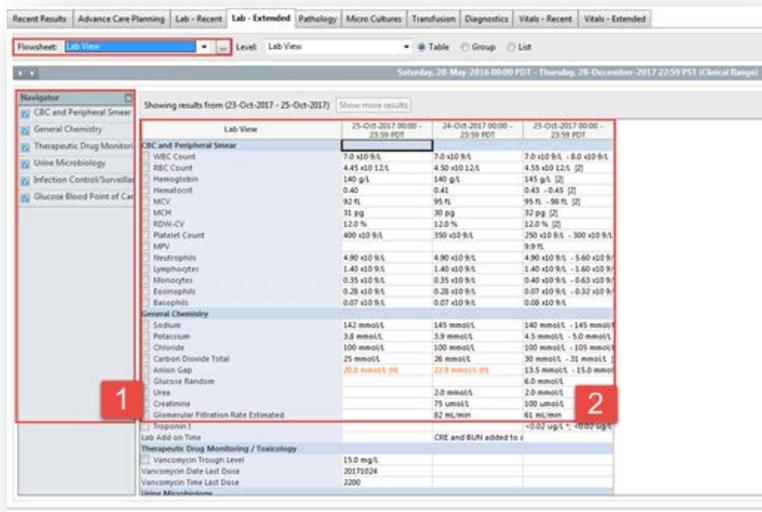
Overview

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.

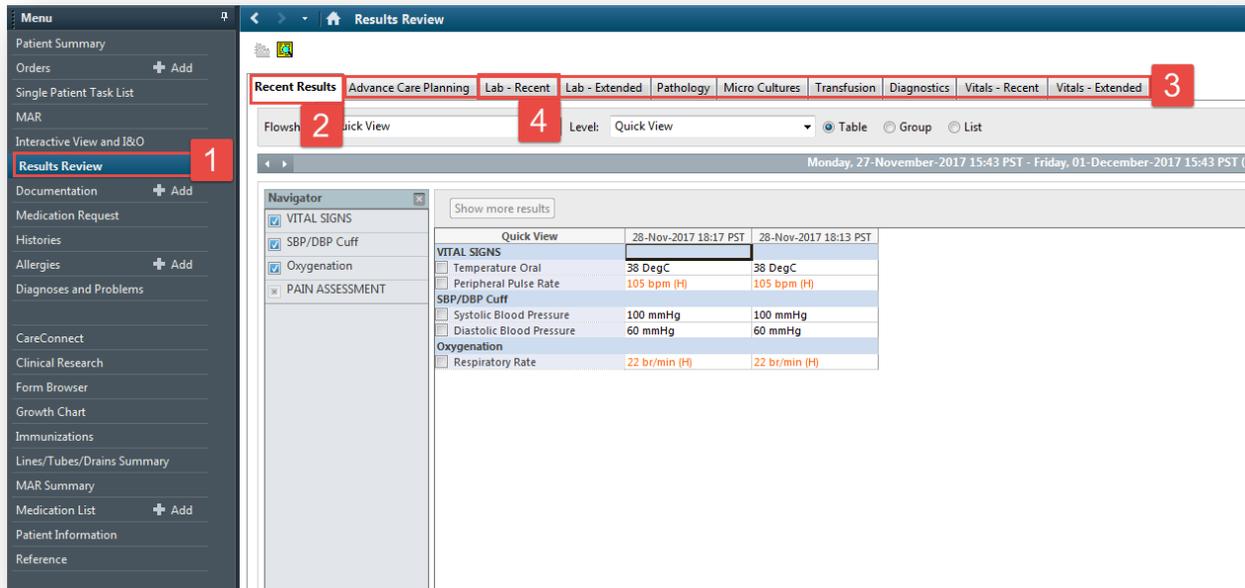
Flowsheets are divided into **two major sections**:

- 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.



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	
<input type="checkbox"/> WBC Count	1.5 x10 ⁹ /L (L)
<input type="checkbox"/> RBC Count	2.00 x10 ¹² /L (L)
<input type="checkbox"/> Hemoglobin	70 g/L (L)
<input type="checkbox"/> Hematocrit	0.15 (L)
<input type="checkbox"/> MCV	98 fL
<input type="checkbox"/> MCH	28 pg
<input type="checkbox"/> RDW-CV	15.3 % (H)
<input type="checkbox"/> Platelet Count	10 x10 ⁹ /L (L)
<input type="checkbox"/> NRBC Absolute	5.0 x10 ⁹ /L (H)
<input type="checkbox"/> Neutrophils	0.04 x10 ⁹ /L (L)
<input type="checkbox"/> Lymphocytes	0.15 x10 ⁹ /L (L)
<input type="checkbox"/> Monocytes	0.23 x10 ⁹ /L
<input type="checkbox"/> Eosinophils	0.01 x10 ⁹ /L
<input type="checkbox"/> Basophils	0.01 x10 ⁹ /L
<input type="checkbox"/> Metamyelocytes	0.73 x10 ⁹ /L (H)
<input type="checkbox"/> Myelocytes	0.23 x10 ⁹ /L (H)
<input type="checkbox"/> Promyelocytes	0.08 x10 ⁹ /L (H)
<input type="checkbox"/> Blast Cells	0.02 x10 ⁹ /L (H)
Blood Film Comment	Platelet Estimate - Decreased

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**, **double-click** 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

End Book

You have reached the end of the workbook.