**WORKPACKAGE** CST Transformational Learning

# CURRICULUM TRACK: Mental Health: Psychometrist

Within this work package you will find:

Self-Guided Practice Workbook



Last update: February 1, 2018



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# **\*** SELF-GUIDED PRACTICE WORKBOOK

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



# **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



## **FATIENT SCENARIO 1** – Introduction to Consults and Patient Chart

#### **Learning Objectives**

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

- Create Patient Lists
- Navigate Multi-Patient Task List
- View Consults
- Navigate the Patient Chart

## **SCENARIO**

In this scenario, you begin your day by receiving a consult from your unit. To start, log into the Clinical Information System (CIS) with your provided username and password.

As a Psychologist, you will be completing the following activities:

Create a Location List

Customize the Departmental View

Review consults from the Multi-Patient Task List

Review the patient's electronic chart



# Activity 1.1 – Create a Location List

1

Upon logging in, you will land on **Message Centre**. We will be reviewing the functionality of Message Centre with an eLearning module. First, you may want to review any consults that have been sent to you.

Before you can view consults, you will need to set up a **Patient List**. The **Patient List** is a view of all the patients that are on a specific unit.

- 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 <sup>(2)</sup> When you hover over the wrench it will say List Maintenance
- 3. Click the New button in the bottom right corner of the Modify Patient Lists window

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2			
	D Modify Patient Lists		
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- 4. From the Patient List Type window select Location
- 5. Click the Next button in the bottom right corner



itient List Type		- ×
Select a patient list type:		
Assignment Assignment (Ancillary) Care Team Custom Mode a School Provider Group Query Relationship Scheduled		

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

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Finish Canc	Back	

- 7. Scroll down until you find the location assigned to you. Expand the location and select your unit by checking the box next to it
- 8. Patient Lists need a name to differentiate them. Location lists are automatically named by the Location
- 9. Click the Finish button in the bottom right corner



Location Patient List		<b>—</b> ×
<ul> <li>✓ *Locations [LGH 2 East]</li> <li>Medical Services</li> <li>Encounter Types</li> <li>Care Teams</li> <li>Relationships</li> <li>Time Criteria</li> <li>Discharged Criteria</li> <li>Admission Criteria</li> </ul>	GH Loboratory     GH Loboratory     GH LGH Lions Gate Hospital     GH LGH Lions Gate Hospital     GH LGH Lions Gate Hospital     GH LGH LGH LGH LGH LGH LGH LGH LGH L	* III
Enter a name for the list: (Limited LGH 2 East	I to 50 characters) Back Next Finish C	Cancel

- 10. In the Modify Patient Lists window select your Location list
- 11. Click the **blue arrow** icon icon to move the **Location** to the right **Active List**
- 12. Click the **OK** button in the bottom right corner to return to **Patient Lists**. Your Location list should now appear

LGH2 East 10	Active lists:	
	(a) 11	(P) (A)
	New	OK Carcil

The Patient List is now set with patients that are on the specific unit that you selected. You can go back to Patient List any time to access a patient's chart on your selected unit by doubleclicking on the patient's name.

## 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



## Activity 1.2 – Customize the Multi-Patient Task List

The **Multi-Patient Task List (MPTL)** provides a list of the patients and consults from your department.

The first time you log in, you will need to set up the **MPTL** to view consults from your unit. To do this you will select the appropriate **Patient List** and **Time Frame** to display. Let's do this now.

- 1. Click on Multi-Patient Task List <sup>23</sup> Multi-Patient Task List in the Organizer Toolbar
- 2. Right-click on the words "Assigned Tasks" in the grey information bar
- 3. Select Customize Patient View

	🖃 Message Centre 📲 Clinical Leader (	Org	ganizer 🎍	Patient List	88 Multi-Patient	: Task List	1 rapeut	ic Note 🧱 Schedule 📲 Le	arningLIVE 🔡 🔇	CareConnect 🔞 PHSA PACS 🐧 VCH and PHC PACS 🐧 MUSE 🐧 FormF
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	Assigned Task Customize Patient	t Vi	ew	2						
	Consults Scheduled Patient Care									
	Task retrieval completed									
	No Patients Found		Nar	me Medica	l Record Number	Location	Task Status	Scheduled Date and Time	Task Description	Order Details

Within the Task List Properties window:

- 4. In the Patient List tab, select **Choose a Patient List** and select **Departmental View** in the list below
- 5. Select the appropriate location using the location filter
  - Double-click the All Locations folder
  - Double-click LGH HOpe Centre
  - Double-click LGH HOpe Centre sub-category
  - Click on the checkbox beside the unit you are assigned to in this class

Note: Only choose locations for the department 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.

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

2



After selecting the appropriate Patient List you need to set up the **Defined Time Frame**.

- 1. Right-click the words "(no time frame defined)" in the information bar
- 2. Select Change Time Frame Criteria

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The Task List Properties window opens.

- 3. In the Time Frames tab select the Defined Time Frame option
- 4. Select Current
- 5. Select the time from the list = 12 hour day shift
- 6. Click the **OK** button
- 7. Click on the **Refresh** button **Refresh** button **Refresh** hear the top right corner of the window to ensure you can



see the most current orders and tasks

Task List Properties         Time Frames       Patient List         Choose one of the following:         3 <ul> <li>Defined Time Frame</li> <li>Hour Interval</li> <li>Generic Time Frame</li> <li>Range</li> <li>Previous</li> <li>Hour Day Shift</li> <li>Ourrent</li> <li>Hour Night Shift</li> <li>Next</li> <li>Hour Night Shift</li> <li>Hour Night Shift</li> <li>Next</li> <li>Hour Night Shift</li> <li>Next</li> <li>Hour Night Shift</li> <li>Hour Night Shift</li> <li>Next</li> <li>Hour Night Shift</li> <li></li></ul>	2 Q 2 0 minutes age 7 1e frame defined)
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The MPTL is now set to view consults for your unit.

## Key Learning Points

- You must select the appropriate time frame in order to see assigned tasks for your patients
  - Ensure you set up the correct view for each tab in the MPTL so you can see all of your tasks
  - Click refresh to ensure you can see the most current tasks



## Activity 1.3 – Access and Navigate the Multi-Patient Task List

You can find consults listed in your MPTL. Electronic consults are sent to the psychologist to give basic information about the patient and will replace any paper consult forms.

1. Locate the new Consult Order and notice the various information located within a consult

indicates that the consult has not been reviewed

3. A consult becomes overdue 24 hours after it is entered. The alarm clock symbol indicates a task is overdue, or that the psychologist has not marked the task as complete

Message Centre 🎬 Clinical Lea	der Organizer 🍦 Patient List	AMulti-Patient Task List	Therapeutic Note Sched	ule 👫 LearningLIVE 🍦 🤅 🔾	CareConnect 🔍 PHS/	A PACS 💐 VCH and PHC PACS 🧃 MUSE 💐 FormFast WFI 🖕 👯	Abnor: 0 Criti: 0 Gener: 0
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M							

**Note:** At times, you may see a Following Order rather than a Consult Order. This indicates that the psychologist has completed their initial consult and will continue to consult on the patient on an ongoing basis. With the following order, the patient will stay on the Multi-Patient Task List as long as the order is active and will never have a status of overdue.

You can enter the patient's chart through the consult or following order by right clicking on it. Let's practice entering the chart.

- 1. Right click on the consult to open the right click menu
- 2. Hover over **Open Patient Chart** near the bottom of the right-click menu. Another menu appears with various chart components which you can navigate to directly.
- 3. Select Psychologist Workflow

<sup>2.</sup> The glasses symbol





**Note:** You must establish a relationship with a patient in order to access the patient chart. A relationship will last for 16 hours, after which the nurse will need to re-establish the relationship. Select **Psychometrist** as your relationship from the drop-down menu.

You are brought directly the Psychologist Workflow Page within the patient's chart.

### Key Learning Points

- Consults are located in the Multi-Patient Task List
- Consults contain information including status of consult
- You can access the chart from the Multi-Patient Task List through the right-click menu



## Activity 1.4 – Access and Navigate the Patient Chart

1 The patient's chart is now open. Let's review the key parts of this 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, gender
- 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 is updates the patient chart with the most up to date entries when clicked. The time displayed in this icon is the time since you last refreshed your screen. It is important to click the **Refresh** icon frequently especially as other clinicians may be accessing and documenting in the patient chart simultaneously.
- 5. Use the navigation buttons to return to the previous view



takes you back one screen

takes you to your default view - the Inpatient Workflow

displays a list of recently visited screens for an easy jump back



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Note: The chart does not automatically refresh! When in doubt, click Refresh

- 2 The patient's chart opens to the **Psychologist Workflow** which is your default screen when accessing the patient's electronic chart. It is organized into two tabs.
  - 1. Inpatient Workflow = used for daily chart review and information input

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3 On the left side of the screen there is a **list of components** representing workflow steps specific for your specialty. Click the component or use the scroll bar to display the content of the patient's chart.



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Each component has a heading. Place the cursor over the heading. This icon  $\sqrt[n]{h}$  means it is a

link. This acts as a quick link to the respective Menu component. For example, the Documents link outlined below will take you to the Documents component in the Menu. We will discuss the Documents Menu component later on in this workbook.

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MAR Summary		Diagnostics (0)	-	Medical History	(0)	Procedure H	istory	(0)	Family History	(0)	Social History	(0)	
Medication List 🛛 🕂 🗸	Add	Labs	=			u							
Patient Information		Vital Signs & Measuremer	nts	Name			^				Classification		-
Reference		New Order Entry		△ Chronic Prob	lems (0)								

4 The **Informal Team Communication** Tool can be used to add actions or comments to handover to your colleagues, similar to leaving a note in the chart.

**Note**: The **Informal Team Communication** is NOT part of the patient's legal chart. This is not to be used for legal documentation purposes.

- 1. Navigate to the Informal Team Communication component
- 2. Type the following = *Patient's family will come to visit this evening*



#### 3. Click Save

<> - 🏠 Psychologist Workflow								
A 🗎   🛋 🖿   🔍 🔍   100%	-   • • <b>\alpha</b>							
Inpatient Workflow	83 Mental Health Summary 83 +							
Informal Team Communication	Informal Team Communication							
Active Issues	Patient's family will come to visit this evening	Add new comment						
Home Medications (4)	2							
Subjective/History of Present Illness	Available to All Save Cancel	No comments documented All Teams						
Documents (3) Histories	No actions documented							
Inpatient/ In Office Medications	All Teams							
Diagnostics	Chief Complaint							
Labs								
Vital Signs & Measurements	Enter Chief Complaint							
New Order Entry								
Micro Cultures								
Allergies	Active Issues		Classification: 🖡					
Order Profile								
Forms and Results		Add new as: This Visit						
Create Note	Name	Classification Actions						
Psychology Assessment	1 Major depressive disorder, recurrent episode, severe	Medical This Vi	sit Chronic					
Psychology Note	Major depressive disorder, recurrent episode, moderate with anxious distress	Medical This Vi:	sit Chronic					
Select Other Note	COPD without exacerbation	Medical This Vi:	sit Chronic					

You may complete or delete these informal team communications when they no longer apply.

To complete a task in Informal Team Communication:

4. Click the checkbox to the left of the note. The task will appear as completed, and is still viewable.

To delete a task in Informal Team Communication:

5. Click the small circle with the x to the right of the note

**Note:** It is important to remove/delete these informal team communications when they no longer apply.

Informal Team Communication	
Add new action	
No active actions documented	
Patient's family will come to visit this evening FestMH, Nurse-MH 15/12/17 11:27	∕ ⊗
All Teams	Hide Completed (1)

5 Scroll down to the **Documents** component on the Inpatient Workflow page. You can view certain documents directly on your Inpatient Workflow tab. Review the latest document by the Psychiatrist for your patient.

1. Locate and click on Psychiatry Assessment Note





## 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 Psychologist Workflow view provides access to various workflow tabs
- The Informal Team Communication component is a way to leave a message for another clinician, but is NOT part of the patient's legal chart
- Remember to refresh your screen frequently to view the most up-to-date information



## PATIENT SCENARIO 2 - PowerForm

#### **Learning Objectives**

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

- Document in PowerForms through AdHoc Charting
- View and Modify Existing PowerForms

## **SCENARIO**

In this scenario, we will review another method of documentation.

As a psychometrist, you will be completing the following activities:

- Opening and documenting on PowerForms
- Viewing a completed PowerForm
- Modifying an existing PowerForm
- Uncharting an existing PowerForm



## Activity 2.1 – Open and Document on PowerForms

PowerForms are the electronic equivalent of standardized documentation forms. Data entered in PowerForms can flow between the histories components, allergy profile, and medication profile. The AdHoc folder is an electronic filing cabinet that holds any PowerForms you may need to document.

Let's explore the different components of a PowerForm:

- 1. The title of the PowerForm and the patient you are documenting on is located in the top grey bar
- 2. A list of sections that can be documented is located on the left-hand side of the PowerForm
- 3. Sections that have a red asterisk contain required field(s) that are mandatory
- 4. The mandatory field(s) within the PowerForm will be highlighted in yellow. In some cases, you will be unable to sign a PowerForm unless all required fields are completed



2 In this example we are going to document on the **GAD 7** PowerForm.

To open and document on a new PowerForm:

- 1. Click the **AdHoc** button <sup>MAdHoc</sup> from the **toolbar**
- 2. Select the GAD 7 PowerForm by selecting the title
- 3. Click Chart



Message Centre 🎬 Clinical Leader	Organize	🛉 Patient List 🚘 Multi-Patient Task List	Therapeutic Note Schedule	e 👫 LearningLIVE 🛫 🖸 🖓 CareConnect 🝳 PHSA PACS 🕯	🞗 VCH and PHC PACS 🐧 MUSE 🐧 FormFast WFI 💡	🔩 Generati Abnorati Critiati 💡
Tear Off ALEAR AdHoc 1	Convers	ation - 🚽 Communicate - 💠 Add - 📷	Documents 🗃 Discern Reporting I	Portal 💡		
2 Q Patient Health Education Ma	2 Polici	es and Guidelines Q UpToDate				
CSTLEARNING, DEMODELTA		DOB111-120-1937	MPN/20008217	Code Status Attempt CBR Full Code	Process Salls Rick	Location 1 GH
CSTLEARNING, DEMODELTA		D Ad Hos Charling - CSTLEARNING DEN	MODELTA			
Allergies: Citrus, Pollen		Parter channing concernance, per	NODEL IN			
Menu 4	8.3	MH Assessments     MH Other Assessments	B MH Treatment and Disc	charge Planning		
Psychologist Workflow	25 B	All Items	Brief Psychiatric Rating	s Scale (BPRS)		
Results Review	Inpatie		CAGE AID Assessment			
Documentation + Add	-		CAPS-5 Past Month	50		
Orders 🕈 Add	Inform		CRAFFT Assessment			
Single Patient Task List	chief (		C B COSHS U			
	Action		P D007 2	1712		
Allergies	Monre	1	Genatic Depression Sc	ale - 15 sale - 30		
CareConnect	Protine		E Michigan Alcohol Scree	ening Test (MAST)		
Diagnoses and Problems	Illness		B Modified Overt Aggress     Montreal Cognitive Asse	ion Scale estreent Score (MoCA)		
Form Browser	Docum		П В РНQ 2/РНQ 9			
Growth Chart	Hetori		Problem Gambling Seve     Problem Gambling Seve     Problem Gambling Seve	erity Index M-5 (PCL-5)		
Histories	Inpatie		T B Standardized Mini-Ment	tal State Examination (SMMSE)		
Immunizations	Medica		C D Violence Risk Alert Scr	pen .		
MAR Summary	Diagno	•				
Medication List 🕂 Add	Labs .					
Patient Information	Vital S					
Reference	Measu					
	New O					
	Micro					3 Chart Clove
	Order					ciuse

**Note:** The Ad Hoc window contains two panes. The left side displays folders that group similar forms together. The right side displays a list of forms within the selected folder.

- 4. Fill in the following fields:
  - **1. Feeling nervous, anxious, or on edge** = Over half the days
  - 3. Worry too much about different things = Over half the days
  - 5. Being so restless that it's hard to sit still = Over half the days
  - **Problem Severity** = Somewhat difficult
  - For all other fields = Not at all

**Note:** Some PowerForms contain auto calculated score boxes that score based on values completed in the form. The score will only calculate once all of the values have been entered.

5. To complete PowerForm, click the **green checkmark** to sign  $\checkmark$  and then refresh the screen



D-7 - CSTLEA	RNING, DEMODELTA			
rmed on: 1	8-Dec-2017 🚔 💌 1056	🍨 PST		By: TestMH, Psycholog
5-7	GAD-7 Anxiety	y Severity		
	Nervousness	Unable to Control Worrying	Worrying too Much	Trouble Relaxing
	O Not at all sure	O Not at all sure	O Not at all sure	O Not at all sure
	C Several days	O Several days	O Several days	O Several days
	O over half the days	O uver half the days	O over half the days	O Over half the days
	Nearly every day	O Nearly every day	O Nearly every day	O Nearly every day
	Restlessness	Irritable	Fear	Score
	Not at all sure	O Not at all sure	Not at all sure	
	O Several days	O Several days	O Several days	
	O Over half the days	O Over half the days	O Over half the days	
	O Nearly every day	O Nearly every day	O Nearly every day	
	If you checked off any problem	ns, how difficult have these made it for you	to do your work, take care of thing	gs at home, or get along with other people?
	Problem Severity			
	O Notatall			
	O Somewhat difficult			
	O Very difficult			
	O Extremely difficult			
	Copyright© Cerner Corporation. A	All rights reserved.		

**Note:** using the Save Form ■ icon is discouraged because no other user will be able to view your documentation until it is signed using the Sign Form ✓ icon.

## Key Learning Points

- PowerForms are the electronic equivalent of standardized documentation forms
- The AdHoc button in the toolbar is one way to locate a new Powerform
- PowerForms may be broken up into several sections. Section headings are displayed to the left side of PowerForm
- Documents that are saved will not be viewable to anyone except the author. Using the Save Form icon is discouraged for this reason



# Activity 2.2 – Modify an existing PowerForm

Existing PowerForms can be found in **Form Browser**. Here, you can view, modify or unchart PowerForms. It may be necessary to modify PowerForms if information was entered incorrectly.

**Note:** to document or update information, it is recommended to start a new PowerForm and not to modify an already existing PowerForm

Let's modify the GAD 7 form:

1. Navigate to Form Browser from the Menu

**Note:** For a PowerForm that has been completed and signed  $\checkmark$  (Auth (Verified)) appears next to the title of the document. A saved PowerForm that has not been signed will display (In Progress) will appear next to the title.

- 2. Right-click on the most recently completed GAD 7 form
- 3. Select Modify



- 4. Change the value for 3. Worrying too much about different things = Several days
- 5. Click **green checkmark** icon ✓ to sign and complete the documentation and then refresh the screen.



P GAD-7 - CSTLEARNING, DEMODELTA			
🗸 🖬 🛇   🥸 🛐 🛧 🕂   💷 🖾	<u><u><u></u></u></u>		
5 rmed on: 18-Dec-2017 🗬 💌	1050 PST		By: TestMH, Psychologist-MH
GAD-7 An	xiety Severity		
Nervousness	Unable to Control Worry	ing Worrying too Much	Trouble Relaxing
<ul> <li>Not at all sure</li> <li>Several days</li> <li>Over half the days</li> <li>Nearly every day</li> </ul>	Not at all sure     Several days     Over half the days     Nearly every day	<ul> <li>Not at all sure</li> <li>Several days</li> <li>Over half the days</li> <li>Nearly every day</li> </ul>	Not at all sure     Several days     Over half the days     Nearly every day
Restlessness	Irritable	Fear	Score
<ul> <li>Not at all sure</li> <li>Several days</li> <li>Over half the days</li> <li>Nearly every day</li> <li>If you checked off an</li> <li>Problem Severity</li> <li>Not at all</li> <li>Somewhat difficult</li> <li>Very difficult</li> <li>Extremely difficult</li> </ul>	Not at all sure     Several days     Over half the days     Nearly every day	Not at all sure     Several days     Over half the days     Nearly every day	3 gs at home, or get along with other people?
Copyright© Cerner Co	rporation. All rights reserved.		*
		m	Auth (Verified)

**Note:** A form that has been modified will display (Modified) next to the title of the document in Form Browser

Key Learning Points
Existing PowerForms can be accessed through the Form Browser
A document can be modified if needed
A modified document will show up as (Modified) in the Form Browser



# Activity 2.3 – Unchart an Existing PowerForm

1

It may be necessary to **Unchart** an existing PowerForm, for example, if the PowerForm was completed on the wrong patient or it was the wrong PowerForm. Let's say the **GAD 7** PowerForm was documented in error.

To unchart the PowerForm:

- 1. Right-click on GAD 7 in Form Browser
- 2. Select Unchart

🗄 🖃 Message Centre  🎬	Clinical Leade	r Organizer	Patie	nt List 🔉 Multi-Patient Task List 📳	Therapeutic Note 🧰 Schedule 🎬	LearningLIVE 🝦 🗄 😋 CareConnect 🔇 PHSA PACS	🕄 VCH and PHC PACS 🕄 MUSE 🔍 Form		
🔀 Tear Off 📲 Exit 🎽	🖾 Tear Off 📲 Exit 🎬 AdHoc 🔮 PM Conversation 🔹 🚰 Communicate 🔹 💠 Add 👻 🔚 Documents 📾 Discern Reporting Portal 🖕								
🗘 Patient Health Education Materials 🕲 Policies and Guidelines 🕲 UpToDate 🍦									
CSTLEARNING, DE	MODELTA	\ 🗵							
CSTLEARNING, DE	MODELT	4		DOB:01-Jan-1937	MRN:700008217	Code Status:Attempt CPR, Full Code	Process:Falls Risk		
Allergies: Citrus, Polle	en			Age:80 years Gender:Male	PHN:9876469817	Dosing Wt:75 kg	Disease: Isolation:		
Menu		< > -	l 🏠	Form Browser					
Psychologist Workflow						Fridav. November 17. 2017 PST- Monda	/. December 18. 2017 PST(Admission - Cu		
Results Review									
Documentation	🕂 Add	Sort by:	Date	•					
Orders	🕂 Add	All Form	15						
Single Patient Task List		E 7 Mon	iday, 18	-December-2017 PSI					
			.0:50 PS	T GAD-7 (Modified) - TestMH	View				
Allergies					Modify				
CareConnect					Unchart 2				
Diagnoses and Problems					History				
Form Browser					Change Date/Time				
Growth Chart									
Histories									
Immunizations									
MAR Summary									
Medication List	🕂 Add								
Patient Information									
Reference									

- 3. The Unchart window opens. Enter a reason for uncharting in the **Comment** box = *Wrong PowerForm*
- 4. Click sign ✓ and then refresh your screen

**Note:** Uncharting the form will change the status of all the results associated with the form to (In Error). A red strike-through will also show up across the title of the PowerForm.

## Key Learning Points

- A document can be uncharted if necessary
- An uncharted document will show up as In Error in the Form Browser



## **PATIENT SCENARIO 3 – Dynamic Documentation**

**Learning Objectives** 

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

Create a Dynamic Document

Modify a Dynamic Document

## **SCENARIO**

In this scenario, you will be creating a progress note for your patient.

As a psychometrist, you will be completing the following activities:

Create a new document

Access Documentation from the Menu

Modify your document



# Activity 3.1 - Dynamic Documentation

1 Dynamic Documentation is similar to written progress notes. In a dynamic document, you have the ability to enter free text to document narrative information such as one-to-one sessions or family meetings.

- 1. Select **Documentation** from the Menu. This is another way to view certain documents by the interdisciplinary team including both Dynamic Documents and PowerForms
- 2. Click Add <sup>+ Add</sup> near the top of the Documentation page
- 3. Select Psychometrist Note from the Type drop-down list
- 4. Select Free Text Note from Note Templates list
- 5. Click OK





- Click in the top left of the text field to activate the text input. Type = Assessment requested for concerns of anxiety.
  - 2. Click Sign/Submit

**Note:** You have also an option to click Save or Save & Close to continue to work on this document later. Saved documents are not visible to other care team members. For this reason, saving documentation is discouraged.

Menu		C 🗦 + 🛱 Documentation	🖄 full screen 👘 👘 🕹 11 minutes ago-
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Single Patient Task List			
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Documentation	+ Add		
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CareConneit			
Cinical Research			
Form Browner			
Growth Chart			
Medication List	+ Add		
Patient Information			
Rdennie			
			1
		Note Details Numbing Namative Note, TestUser, Nume-Nith, 26-Non-2017 1347 FSC, Iree Test Note	Sign/Submit 2 Save & Close Cancel

3 In the **Sign/Submit window**, the note type is already populated. The Date box auto-populates with the current date. Always ensure this information is the correct time and date of the assessment.

**Note:** You can forward dynamic documents to select users by entering the user's name into the **Provider Name** text box

- 1. Title the note = Psychometrist Assessment
- 2. Click Sign to complete the process



Гуре:	Note Type List Filter:			
sychometrist Note	Position	~		
Author:	Title:	Date:		
estUser, Psychologist-MH	Psychometrist Assessment	08-Jan-2018	1404 PST	
Forward Options 🔲 Create provider letter	-			
Favorites Recent Relationships	ovider Name			
ontacts	Recipients			
🚖 Default Name	Cefault Name	Comment	Sign	Review/CC

After signing the note, you are transferred back to the Psychologist Workflow view. Remember to click the **Refresh** button to be able to see your document under the Documents component. The Psychometrist Assessment Note is now listed and is visible to the entire care team.

# Key Learning Points Dynamic Documentation is similar to written progress notes You can send notes to other users when you have completed your note If necessary, you can save your note for completion at a later time. Saved notes are only visible to the author of the note



# Activity 3.2 – Add An Addendum to a Completed Note

1

Once a note is signed, you cannot edit the existing text of a final report directly. You can, however, add an addendum. Let's make add an addendum to your Psychometrist Assessment note (the saved note, not the signed note).

- 1. Navigate to the Documentation component in the Menu
- 2. Select Psychometrist Assessment from the list
- 3. Click the **Modify** icon Modify in the toolbar

3	D08:01-lan-1937	MRN/700008217	Code Children					
		Enc/700000016846			Disease:			Location:LGH MU: M018: 01 Enc TypeInpubert
and the second second	GenderMale	PHN0467540381/	bosing were kg		Bouborc			Abenong Penerg Lineood, MD
N H Deci	amentation							A reasons and S
+ Add III's an an a	Forward I Provider Letter Mo	addy 🖄 🖓 🗣 📰 🔡 In Evor	Preview 🦻					
List	3							
Distance All								10 Participant 1 - 10-
copey. In								A contraction 1 de ten
Service Date/Time	Subject	Туре	-	Facility	Author; Contributor(3)	Status 14		
20-Dec-2017 10.15-00 P	97 Psychology Assessment	Psychology Asiese ner	2	LGH100pe Centre	TestM1, Psychologish N11	Modified	Reason for Refe	rral/Presenting Problem
20 Dec 2017 14:55:00 P	ST Paychology Asseptment	Parcheleon Assessment		LGH HOpe Centre	TestMH, Psychologial MH TestED, Name Engenesis & Test Inc. Manufactures 1844	Auth (Verified)	Assessment requi	sted for concerns of anoxity
19-Dec-2017 11:16:00 P	ST Psychiatry Assessment Note	Admission Note Provid	er	LGH Lioni Gate	TestUser, Psychiatrist-Physician, MD	Auth (Verified)	Problem List/P.	ast. Medical History
18-Dec-2017 10:50:00 P	ST GAD-7	G4D-7 - Text		LGH Lions Gate	TestMH, Psychologist-MH	Modifed	Historical	
14-Dec-2017 15:54:00 P	ST ED Disposition Documentation	ED Disposition Docum	initation - Text	LGH Lions Gate	TestED, Nurse-Ersergerscy4	Auth (Verified)	Medications	proceems
							No active modical	tond
							Allergias	
							Polen	
							Signature Line	and in 20-Dec-17 16-14
							Enternances A and	HIG IN TO-CALLY LATER
							TestMH, Psychol	ogist MH
							Result type: Result date: Result status: Result title: Performed by: Verified by: Encouncer mfo:	Psychology Assessment Markondrag, 20-Coremba-2012 (J. 16:55 PST Auth (Virthe) Psychology Assessment Psychology Assessment and 7 In 14:1957 2012 (J. 14:1957) 2012 (J. 14:1957)
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You are brought back to the original note. Notice that the headings are not modifiable, but there is a section at the bottom of the note for an appendix.

- 4. Click the area directly below **\*Insert Addendum Here.** It becomes active and you can select the text to add or delete as needed
- 5. Enter freetext = *Patient ended session abruptly.*
- 6. Click Sign. You are brought back to the Documents component in the Menu



+ Add 14. 🔲 12	
List Psychometrist Assess ×	4.6
Tahoma •] 11 •]	
* F	inal Report *
Assessment requested for concerns of anxiety.	
*Insert Addendum Here:	
Patient ended session abruptly. 5	
Note Details: Psychometrist Note, TestMH, Psychologist-MH, 17-Jan-2018 11:02 PST, Auth (Verified), Psychometrist Assi	esiment 6 Sign Save & Close Cancel

- 7. Refresh your screen
- 8. View your note in the preview window on the right-hand side of the screen. The addendum is stamped by the electronic signature and the document is marked with **Document Contains Addenda**

List					41
Display : All	<b>v</b>				👚 Previous Note   👃 Next Note
Time 🔽	Subject	Туре	Facility	Author; Contributo	8 * Final Report *
11:02:00 P	Psychometrist Assessment	Psychometrist Note	Pending Refresh	TestMH, Psycholog	Document Contains Addenda
10:32:00 P	GAD-7	GAD-7 - Text	LGH HOpe Centre	TestMH, Psycholog	
16:13:00 P	Free Text Note	Psychology Assessment	LGH HOpe Centre	TestMH, Psycholog	Assessment requested for concerns of anxiety.
15:44:00 P	Psychiatry Assessment Note	Psychiatry Progress Note	LGH HOpe Centre	TestPET, Psychiatris	Signature Line
15:01:00 P	Pediatric Growth	Pediatric Growth - Text	LGH HOpe Centre	TestPET, Psychiatris	Electronically Signed on 17-Jan-18 11:07
					TestMH, Psychologist-MH
					Addendum by TestMH, Psychologist-MH on 17-January-2018 11:07 PST (Verified) Patient ended session abruptly.
					Signature Line Electronically Signed on 17-Jan-18 11:11
					TestMH, Psychologist-MH
<		ш		>	×
<< Previous	Next >>				

## Key Learning Points

Documents that are signed cannot be directly edited but can be updated by adding an addendum

Notes with addenda are clearly marked and include the electronic signature with the author name, date, and time



# End of Self Paced Workbook

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