SELF- GUIDED PRACTICE WORKBOOK [N43] CST Transformational Learning

WORKBOOK TITLE:

Nursing: OR Manager/Team Lead (Perioperative Dashboard)



Last update: February 20, 2018 (v2)



TABLE OF CONTENTS

| • | SELF-GUIDED PRACTICE WORKBOOK | 3 |
|---|---|----|
| • | Using Train Domain | 4 |
| • | PATIENT SCENARIO – Access and Set-up | 5 |
| | Activity 1.1 – Access the Perioperative Dashboard | 6 |
| | End of Workbook | 14 |



\$ SELF-GUIDED PRACTICE WORKBOOK

| Duration | 1 hour |
|------------------------|---|
| Before getting started | Sign the attendance roster (this will ensure you get paid to attend the session)Put your cell phones on silent mode |
| Session Expectations | This is a self-paced learning session A 15 min break time will be provided. You can take this break at any time during the session The workbook provides a compilation of different scenarios that are applicable to your work setting Work through different learning activities at your own pace |
| Key Learning Review | At the end of the session, you will be required to complete a Key Learning Review This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios. |



Using Train Domain

You will be using the train domain to complete activities in this workbook. It has been designed to match the actual Clinical Information System (CIS) as closely as possible.

Please note:

- Scenarios and their activities demonstrate the CIS functionality not the actual workflow
- An attempt has been made to ensure scenarios are as clinically accurate as possible
- Some clinical scenario details have been simplified for training purposes
- Some screenshots may not be identical to what is seen on your screen and should be used for reference purposes only
- Follow all steps to be able to complete activities
- If you have trouble to follow the steps, immediately raise your hand for assistance to use classroom time efficiently
- Ask for assistance whenever needed



PATIENT SCENARIO – Access and Set-up

Learning Objectives

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

- Access the Perioperative Dashboard
- View Components and use filters to change the display of data
- Export data to Excel
- Copy Images of dashboards

SCENARIO

In this scenario, a review of how to access the Perioperative Dashboard will be able to complete the following tasks:

- Access the Perioperative Dashboard
- View Components and use filters to change the display of data
- Export data to Excel
- Copy Images of dashboards



Activity 1.1 – Access the Perioperative Dashboard

Overview of Dashboards

The Perioperative Operational Dashboards are a set of real-time, graphical views that display key performance measures. There are two available, Day view and Historical View.

The **Day of Surgery** dashboard provides proactive information during the current day on correctable trends so you can better manage the department and maximize operational efficiency. This allows you to see problems as they are developing and address them before they can significantly impact the rest of the day.

The Historical dashboard allows users to view trends across time and determine areas of opportunity for improving departmental workflows. It can help you to analyze areas of sub-optimal performance and help pinpoint key factors (for example, specific days, times, specialties, and so on).

Access Perioperative Dashboard 2

1. Log into PowerChart

Views of Perioperative Dashboards are based off security and login privileges. Only certain roles will have access to the Historical View and Day of Surgery View Dashboards.

To access the Historical View Dashboard:

| PowerChart Organizer for TestSX. ORManagement-Perioperative |
|--|
| Task Edit View Patient Chart Links Patient List Help |
| Perioperative Tracking 🖃 Message Centre 🛓 Patient List. Dynamic Case Tracking 🎬 Pref Card Picklist. 🔯 Case Selection 👫 Time-Critical Procedures. 🎬 Day of Surgery View 🎬 Historica |
| 📲 Exit 🎬 AdHoc 💵 Medication Administration 🔒 PM Conversation 👻 🔓 Communicate 🗸 🖹 Medical Record Request 💠 Add 🗸 🖺 Scheduling Appointment Book 🗐 Documents 🎇 |
| 🔇 Patient Health Education Materials 🔇 Policies and Guidelines 🔇 UpToDate 🖕 |
| 2. Select Historical View in the toolbar |

- **Historical View Displays**

| Historical View | | | | | |
|--|----------|------------------|---|-------------|--|
| 🏔 📄 🛋 🖿 🔍 🖏 100% 🛛 🖌 💮 🏠 | | | | | |
| Date Range Start: 12/19/2017 End: 12/19/2017 | Location | LGH Lions Gate | ~ | select area | |
| | 3 | Case Progression | 4 | 4 | |

- 3. Select Today's Date range if not already displayed. Select LGH Lions Gate in the Location Field drop-down list
- 4. Click select area
 - Area drop-down list displays
- 5. Select the surgical area = LGH Main OR from the drop-down list
- 6. Click select room
 - Room drop down list displays.



- 7. Select the room LGHOR GAR from the dropdown list.
- 8. Click the Refresh button to update the information

To access the Day of Surgery View Dashboard:

| PowerChart Organizer for TestSX, ORManagement-Perioperative | |
|---|---------|
| Task Edit View Patient Chart Links Patient List Help | |
| Perioperative Tracking 🖃 Message Centre 🛓 Patient List. Dynamic Case Tracking 🎬 Pref Card Picklist. 🖗 Case Selection 🎬 Time-Critical Procedures 🎬 Day of Surgery View 🧱 F | Histori |
| 📲 Exit 🎬 AdHoc 💵 Medication Administration 🍰 PM Conversation 🗸 🔓 Communicate 🗸 🖹 Medical Record Request 🕂 Add 🗸 🖺 Scheduling Appointment Book 🕞 D タ | ts 🕌 |
| 🔍 Patient Health Education Materials 🔍 Policies and Guidelines 🔍 UpToDate 🖕 | |

- 9. Select **Day of Surgery** For Surgery View in the Toolbar.
- 10. Select Today's Date range if not already displayed. Select LGH Lions Gate in the Location Field drop-down list
- 11. Click select area
 - Area drop-down list displays
- 12. Select the surgical area = LGH Main OR from the drop-down list
- 13. Click select room
 - Room drop down list displays.
- 14. Select the room LGHOR GAR from the dropdown list.

15. Click the Refresh

button to update the information

Dashboard Components Display

3 Dashboard Components for Perioperative Day View and Historical View

Components display data pertaining to a key performance indicator. Each view displays a different set of components.

Dashboard Components for Day of Surgery View



| Day of Surgery View | (□) Full screen 👘 🖗 | rint 🛛 🍣 0 minutes ago |
|--|---|------------------------|
| 👫 📄 🖶 🔍 🖏 100% 🔹 🌑 🖬 🚮 | | |
| Day to View 12/17/2017 Location LGH Lions Gate LGH Main OR LGH | GHOR KC Refr | esh 🥝 🔺 |
| Case Prog | ogression 1 | |
| First Case On-time Starts | Add-on Cases 4 Case Cancelled on D | 5 |
| No data found No data found | No data found | |
| Anticipat | ated Stops | |
| | | |
| 10:45 11:15 11:45 | 12:15 12:45 13:15 | 13:4! |
| Number of Cases with Late Starts No data found | Number of Minutes Cases Started Late No data found | |

Note: The following are components displayed this view:

- 1. Case Progression
- 2. First Case On-time Starts
- 3. Subsequent On-time Starts
- 4. Add-on Cases
- 5. Cases Canceled on Day of Surgery
- 6. Anticipated Stops
- 7. Number of Cases with Late Starts
- 8. Number of Minutes Case Started Late

Historical View Dashboard:

| Historical View | | | 🖸 Full screen 🛛 🗍 Print | € 6 minutes ag |
|--|--|----------------|-------------------------|----------------|
| 👫 🐘 🖶 🗎 🔍 🔧 100% 🛛 - 🌑 🜑 🟠 | | | | |
| Date Range Start: 12/17/2017 End: 12/17/2017 | Location LGH Lions Gate LGH Main OR | select room | Refresh | 0 |
| Case Pro | ogression 10 | | Case Cancelled on DOS | 14 |
| First Case On-time Starts | On-time Starts 12 Add-on Cases | 3 | No data found | |
| No data found No dat | a found | | | |
| 1 0 0:15 0:45 1:15 1:45 2:15 2:45 3:15 3:45 4:1 m | Patients entering PACU 4:45 5:15 5:45 6:15 6:45 7:15 7:45 1 Number of Cases with Late Starts | 8:15 8:45 9:15 | 9:45 10:15 10:45 11:15 | E 11:45 |
| | 16 No data found | | | |

9. Click Historical View from the toolbar. Note: The following are components displayed in



this view:

- 10. Case Progression
- 11. First Case On-time Starts
- 12. Subsequent On-time Starts
- 13. Add-on Cases
- 14. Cases Canceled on Day of Surgery
- 15. Patients Entering PACU
- 16. Number of Cases with Late Starts

You will now access data on the First Case On-time Starts component on the Historical View:

| Historical View | 🗇 Full screen 👘 Print | 2 0 minutes ag |
|---|-----------------------|----------------|
| AA 🗎 🖶 🗎 🔍 100% 🌑 🗭 🚰 | | _ |
| Date Range Start: 11/17/2017 End: 12/17/2017 Location LGH Lions Gate LGH Main OR LGHOR KC | Refresh | 0 1 |
| Case Progression Case C | Cancelled on DOS | |

17. Change the start and end dates to span 1 month (e.g. 11/17/2017 to 12/17/2017)

- 18. Click Refresh
 - The data refreshes to match the date filter you applied

| Location LGH Lions Gate LGH Main OR | LGHOR GAR |
|-------------------------------------|-----------|
|-------------------------------------|-----------|

19. Click LGH Main OR

20. Click Refresh

• The data refreshes to match the date filter you applied



21. Select the details icon

on the First Case On-time Starts component

- A table populates with additional information about the cases which are contributing to the displayed graphic.
- The information in each Details table varies depending on the related content available.



| Details | | | | | | | |
|-----------------|-----------|------------------------|----------------------------------|--------------------------------|--------------|--|--|
| Case Number 📥 | Room | Surgeon | Anticip. Patient In Room Time | Actual Patient In Room Time | Minutes Late | | |
| LGHOR-2017-418 | LGHOR GAR | Queh, Peter | 11/14/2017 08:05 | | 50634 | | |
| LGHOR-2017-1679 | LGHOR GAR | Baggoo, Alan Kieth | 12/4/2017 08:23 | | 21816 | | |
| LGHOR-2017-1677 | LGHOR GAR | Sadeghi Tehrani, Susan | 12/5/2017 08:40 | | 20359 | | |
| LGHOR-2017-1678 | LGHOR GAR | Lipp, Michele Marie | 12/6/2017 08:05 | | 18954 | | |
| LGHOR-2017-1753 | LGHOR GAR | Plisvcw, Tyler, MD | 12/18/2017 08:45 | | 1634 | | |
| ρ¢ò | | Ia 🖂 Page 1 | of 1 🕨 🕬 | | | | |

Note: Data can be sorted by clicking any of the column headers.

22. Click Search icon et filter criteria

| Details | | | | | |
|------------------|----------------|-----------------------------|----------------------------------|--------------------------------|--------------|
| Case Number 📥 | Room | Surgeon | Anticip. Patient In Room Time | Actual Patient In Room Time | Minutes Late |
| LGHOR-2017-1578 | LGHOR LON | Plisvcw, Tyler, MD | 11/20/2017 11:05 | | 41938 |
| LGHOR-2017-1596 | LGHOR AddOn 01 | Plisvcw, Tyler, MD | 11/21/2017 13:15 | | 40368 |
| LGHOR-2017-1598 | LGHOR KC | Plisvcw, Tyler, MD | 11/22/2017 10:15 | 11/22/2017 08:45 | -90 |
| LGHOR-2017-1599 | LGHOR KC | Plisvcw, Tyler, MD | 11/22/2017 11:15 | 11/22/2017 08:50 | -145 |
| LGHOR-2017-1600 | LGHOR KC | Plisvcw, Tyler, MD | 11/22/2017 12:15 | 11/22/2017 08:59 | -196 |
| LGHOR-2017-1601 | LGHOR KC | Plisvcw, Tyler, MD | 11/22/2017 13:15 | 11/22/2017 09:07 | -248 |
| LGHOR-2017-1607 | LGHOR KC | Plisvcw, Tyler, MD | 11/22/2017 15:15 | | 38808 |
| LGHOR-2017-1633 | LGHOR KC | Plisvcw, Tyler, MD | 11/27/2017 15:45 | 11/28/2017 13:58 | 1333 |
| LGHOR-2017-1642 | LGHOR KC | Plisvcw, Tyler, MD | 11/29/2017 10:15 | 11/29/2017 13:27 | 192 |
| LGHOR-2017-1644 | LGHOR KC | Plisvcw, Tyler, MD | 11/29/2017 11:15 | 11/29/2017 10:42 | -33 |
| LGHOR-2017-1648 | LGHOR WHS | Plisvcw, Tyler, MD | 11/29/2017 13:15 | 27 | 28848 |
| LGHOR-2017-1 Sea | arch | | | × | 28758 |
| LGHOR-2017-1 | 7360D | contains | Dieven | | 28698 |
| LGHOR-2017-1 | iyeon | | Plisvew | 20 | 28638 |
| LGHOR-2017-1 🐤 | Reset | 23 | 24 | ind 🔎 | 28578 |
| ይ ወ ር | | I≪ Page <mark>1 </mark> (| of3 ►> ►I | 26 | |

• Search Window displays

Choose the options from the drop-down menus

- 23. The first column Choose Surgeon (this is your type of filter)
- 24. The second column Choose contains (this is your qualifier of the filter)
- 25. The third column enter Plisvca (this is the specified filter)
- 26. Click Find
- 27. Close the box
 - Information is displayed based on criteria chosen from the dropdown menus





28. Click Reload Grid to remove any filtering that has been applied using the Find Records search and refresh the displayed data.

4 Use Copy to export to Excel file

Complete the following steps to copy the contents of the Details table to the Microsoft Clipboard for use in other applications:

| Details | | | | | | | |
|-----------------|-----------|--------------------------|----------------------------------|--------------------------------|--------------|--|--|
| Case Number 📥 | Room | Surgeon | Anticip. Patient In Room Time | Actual Patient In Room Time | Minutes Late | | |
| LGHOR-2017-418 | LGHOR GAR | Queh, Peter | 11/14/2017 08:05 | | 50634 | | |
| LGHOR-2017-1679 | LGHOR GAR | Baggoo, Alan Kieth | 12/4/2017 08:23 | | 21816 | | |
| LGHOR-2017-1677 | LGHOR GAR | Sadeghi Tehrani, Susan | 12/5/2017 08:40 | | 20359 | | |
| LGHOR-2017-1678 | LGHOR GAR | Lipp, Michele Marie | 12/6/2017 08:05 | | 18954 | | |
| LGHOR-2017-1753 | LGHOR GAR | Plisvcw, Tyler, MD | 12/18/2017 08:45 | | 1634 | | |
| ۹ ¢ 🖸 👝 | | i⊲ ≪ Page <mark>1</mark> | of 1 🗠 🕞 | | | | |

- 1. Click Copy to Clipboard.
- 2. The Explorer User Prompt is displayed.



3. Press CTRL + C on your keyboard.



| F | | - 5 | | | | Book1 - Excel | | | | | | | |
|-------------|----------|------------|-------------------------|------------------------------|-----------------|---------------|------------|--|---|---|-----------|--|--|
| F | ile | Home | Inser | t Page L | ayout Fo | ormulas | Data | Review | View | ♀ Tell me w | hat you v | | |
| Pas Clip | te | Calib B | ri [<u>U</u> → F | • 11 • ⊞ • 🖉 | A A A A | Alignment | | General \$ - % 0 .00 00 →.0 Number | Cor Cor For Coll Coll Coll Coll Coll Coll Coll Co | nditional Form mat as Table Styles - Styles | matting • | | |
| A1 | | - | : | × 🗸 | fx C | aseNuml | per | | | | | | |
| | А | | В | С | D | E | | F | G | Н | I | | |
| 1 | CaseNum | ber | Room | Surgeon | | AnticipIn | T00-05-005 | ActualIn | MinutesLate | | | | |
| 2 | LGHOR-20 |)17-418 | LGHOR G | AR Quen, Per AR Baggoo, A | er lan Kieth | 2017-11-14 | T08:05:002 | | 21832 | | | | |
| 3 | LGHOR-20 | 17-1677 | LGHOR G | AR Sadeghi T | ehrani, Susan | 2017-12-05 | T08:40:002 | ! | 20375 | | | | |
| 4 | LGHOR-20 | 17-1678 | LGHOR G | AR Lipp, Mich | ele Marie | 2017-12-06 | T08:05:002 | ! | 18970 | | | | |
| 5 | LGHOR-20 | 17-1753 | LGHOR G | AR Plisvcw, T | yler, MD | 2017-12-18 | T08:45:002 | 2 | 1650 | | | | |
| 6 | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | |
| 8 | | | | | | | | | | | | | |
| 9 | | | | | | | | | | | | | |
| 10 | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | |
| 14 | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | |

4. Open an excel spreadsheet and paste the data.

| Explorer User Prompt | | | | | | | | | | |
|--|--------|--|--|--|--|--|--|--|--|--|
| Script Prompt: | ОК | | | | | | | | | |
| To copy to clipboard, press [Ctrl]+C, then paste into Excel. | Cancel | | | | | | | | | |
| DR GRS McConkey, Mark Owen 2017-12-13T10:30:00Z | 53 | | | | | | | | | |

- 5. Return to PowerChart
- 6. Click **OK** to close the Explorer User Prompt.
- 7. Click the icon to close the Details Window
- 5 Image Window Icon

From each component, an image window can be opened which contains a copy of the displayed graphic.

| Patients entering PACU | | | | | | | | | | | | | | 7 |
|------------------------|------|------|------|------|------|------|------|------|------|-------|-------|-------|-------|---|
| | | | | | | ~ | - | - | | | | | | |
| 5:15 | 5:45 | 6:15 | 6:45 | 7:15 | 7:45 | 8:15 | 8:45 | 9:15 | 9:45 | 10:15 | 10:45 | 11:15 | 11:45 | |

1. Select the **Image** button and the **Patients Entering PACU** component



| Location LGH Lie Cancel/Resched psequent On-time Starts 3 | | | | | Save E-ma Print Go to Set a Cut Copy Paste Select Add Prop | picture as ail picture picture b My Pictu s backgro // s hortcut e. t all to favorite erties | 3 3 ures und | SHOR KC nplete 5 3 10 5 3 10 10 | | | |
|---|------|------|------|------|--|--|-----------------------|---|------|------|------|
| | 0:15 | 0:45 | 1:15 | 1:45 | 2:15 | 2:45 | 3:15 | 3:45 | 4:15 | 4:45 | 5:15 |
| L .C | | | | | | | | | | | |

- 2. Right-click within the graphic
- 3. Select **Save picture as...** and store the image in the appropriate file location OR
- 4. Select Copy and insert to desired application (e.g. Word)

Note: If you use the Copy option, the image cannot be directly pasted into Microsoft Word. Select **Insert > Object** to paste it in Word. Standard Copy/Paste actions work in Microsoft Excel.

- Key Learning Points
- You can access the Perioperative Dashboard based off security of login and role.
- You can view components within the Day of Surgical View and Historical View.
 - You can use filters to change the display of data.
- Ability to copy the image of a component and paste it into word or excel to use for presentations.
- You can export data to an Excel or Word file.



End of Workbook

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