SELF- GUIDED PRACTICE WORKBOOK [N35]
CST Transformational Learning

Nursing: PAC Screening

Last Update: January 29, 2018 (v2)

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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. - 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 Learning Review. - This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios. - Your instructor will review and assess these with you.

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 - PAC Screening Nurse

Learning Objectives

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

- Look up and verify patient information on the Request List for patients that need screening and scheduling
- Locate and open a patient's Booking Package
- Access CareConnect
- Document Pre-Anesthesia Screening
- Suggest and place Orders
- Document allergies
- Set and remove patient alerts
- Place patients in the correct PAC queue

SCENARIO

Overall Scenario:

A 54-year-old male with an inguinal hernia meets with a General Surgeon and is scheduled for an elective right inguinal hernia repair. The patient has a medical history of seizure disorder and a surgical history of appendectomy. Following his appendectomy he had a violent episode upon emergence, which was associated with the anesthetic drugs he received.

His chart is screened by the PAC nurse and he is booked for a Nurse and Anesthesia PAC Appointment. He attends his PAC appointment and is determined fit for surgery. Surgery is scheduled three weeks from the date of the PAC appointment.

Focus of this Scenario:

The OR booking form has been submitted to the booking office and an OR date has been scheduled. As a PAC Screening Nurse you will perform a chart review to determine if a PAC appointment is required.

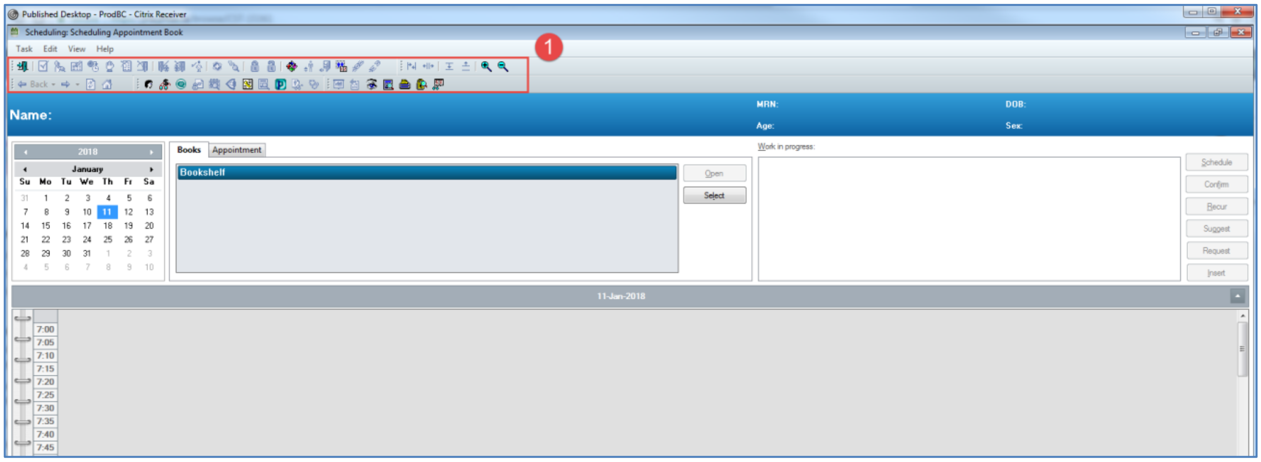
You will complete the following 9 activities:

- View the PAC screening Request List
- Open and review the patient's Booking Package
- Access CareConnect
- Complete the Pre-Anesthesia Chart Screening form
- Suggest orders for PAC to the Anesthesiologist pool
- Place orders for PAC
- Set an Event
- Document Allergies
- Place the appointment in the correct PAC queue

Activity 1.1 - View the PAC Screening Request List

1 Ensure you are logged into the schapptbook application with the appropriate username and password.

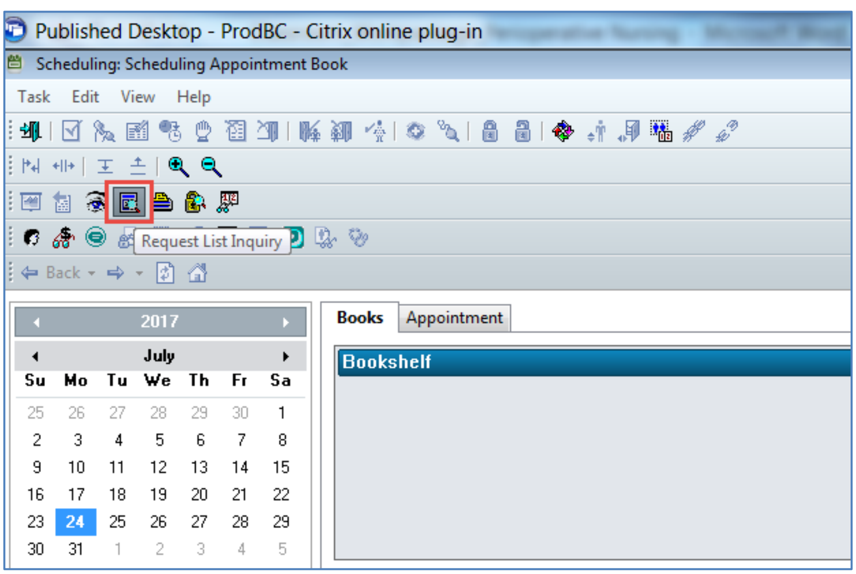
2 The Schapptbook application is where cases are scheduled and managed.



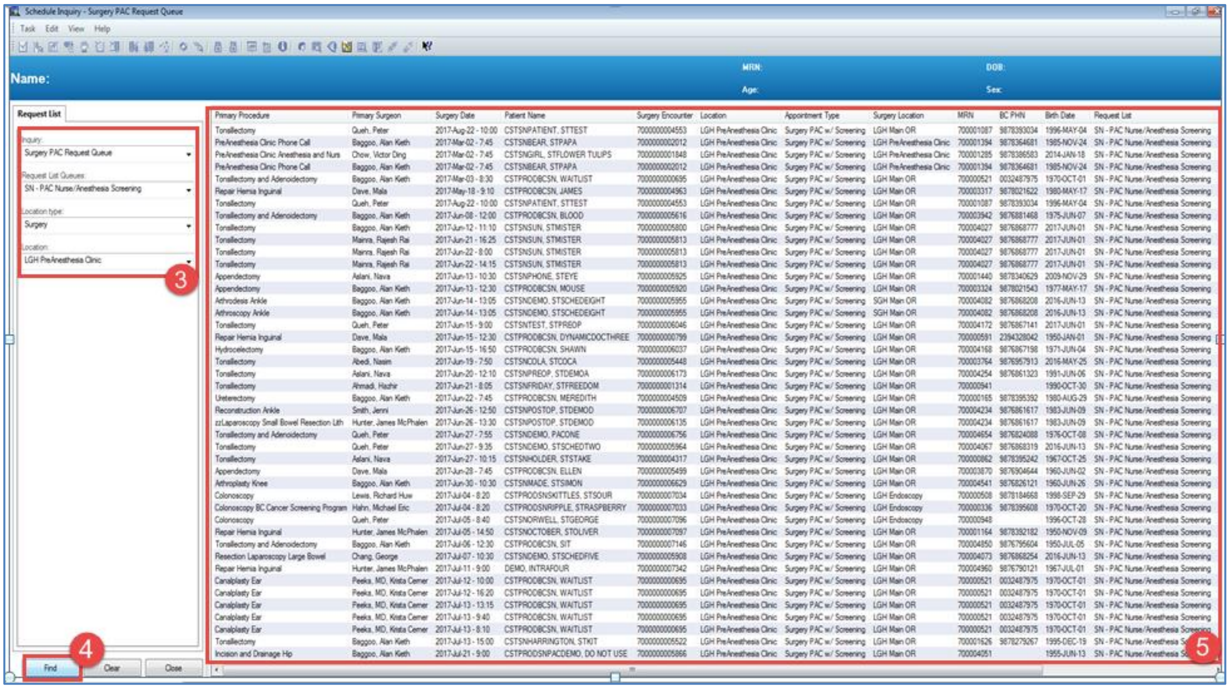
1. **Toolbar** which includes icons that allow quick access to various sections of the chart or additional system functionality

3 As a PAC Screening Nurse, you will be looking up and verifying the patient's information in the PAC Request List. To do so:

1. Click **Request List Inquiry**  icon from the toolbar



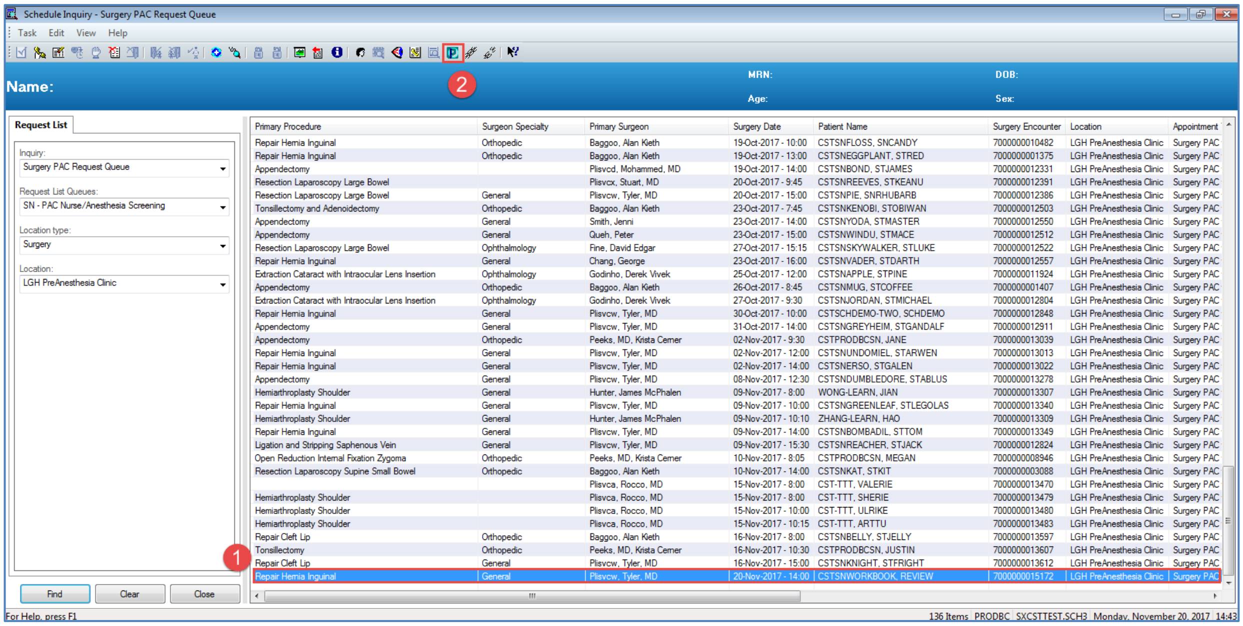
2. The Schedule Inquiry – **Request List by Location** box will open



3. Make the following selections using the appropriate drop-down menus:
    - Inquiry field: **Surgery PAC Request Queue**
    - Request List Queue: **SN - PAC Nurse/Anesthesia Screening**
    - Location Type: **Surgery**
    - Location: **LGH PreAnesthesia Clinic**
4. Click **Find**
5. Verify that the patient is on the list (located on the right-hand section of the screen).

Note: Clicking on each of the column headers will enable you to sort the list accordingly. For example, to sort the patient lists based on their surgery dates and times, simply click on the column header **Surgery Date** once.

4

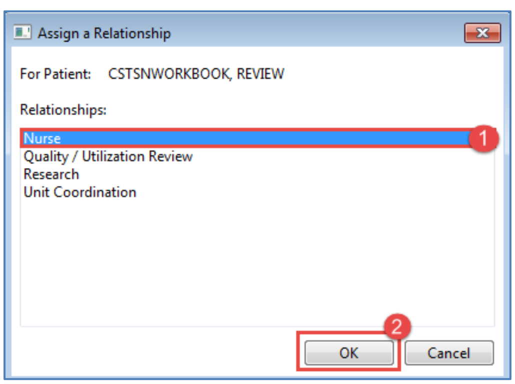


1. Click on the row where your patient's name is displayed. (Ensure you have the correct patient selected.)

2. Click on the **Launch PowerChart**  icon. (This will open the patient's chart.)

If this is the first-time logging in a patient's chart, the Assign a Relationship window will display, verify this is the correct patient. Select **Nurse** to assign relationship.

Note: If this is the wrong patient, click the cancel button to return to Tracking View



1. Select **Nurse**
2. Click **OK**

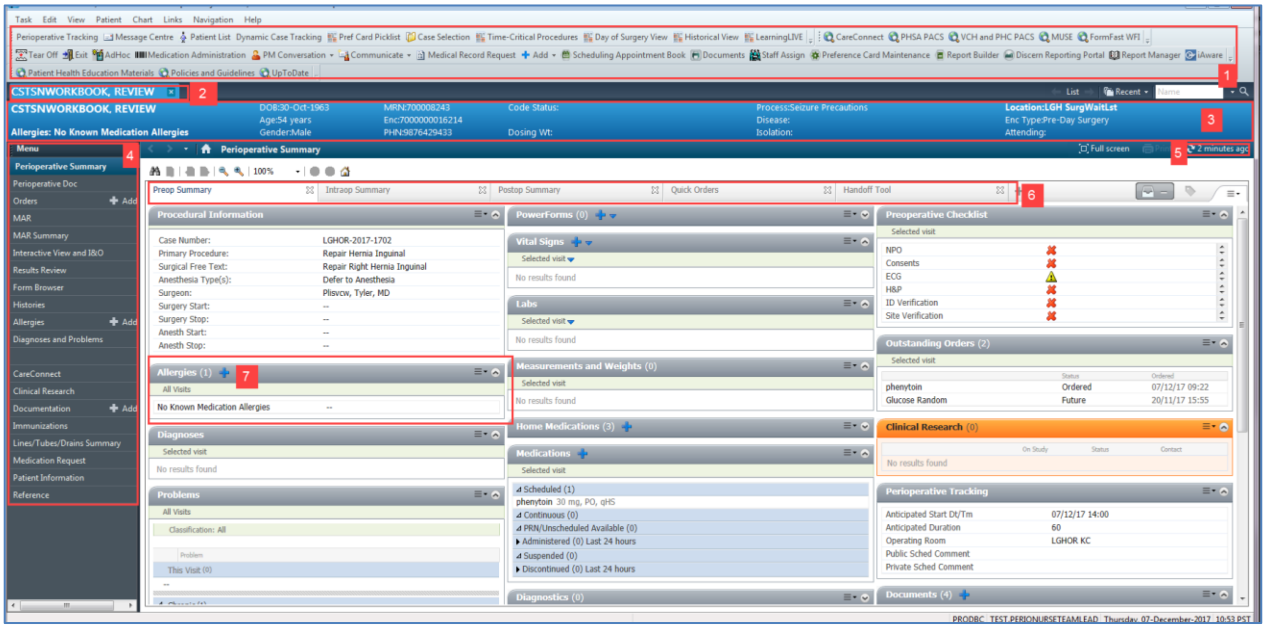
Key Learning Points

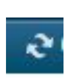
- Log into the scheduling application Schapptbook to access the Request List Inquiry tool
- Remember to verify the patient details generated on the list
- You must assign a relationship to a patient in order to access their patient chart

Activity 1.2 – Open and Review the Patient's Booking Package

1 Upon accessing the patient's chart you will see the Perioperative Summary page open. The summary will provide views of key clinical patient information.

2 Let's review the key features of your screen:



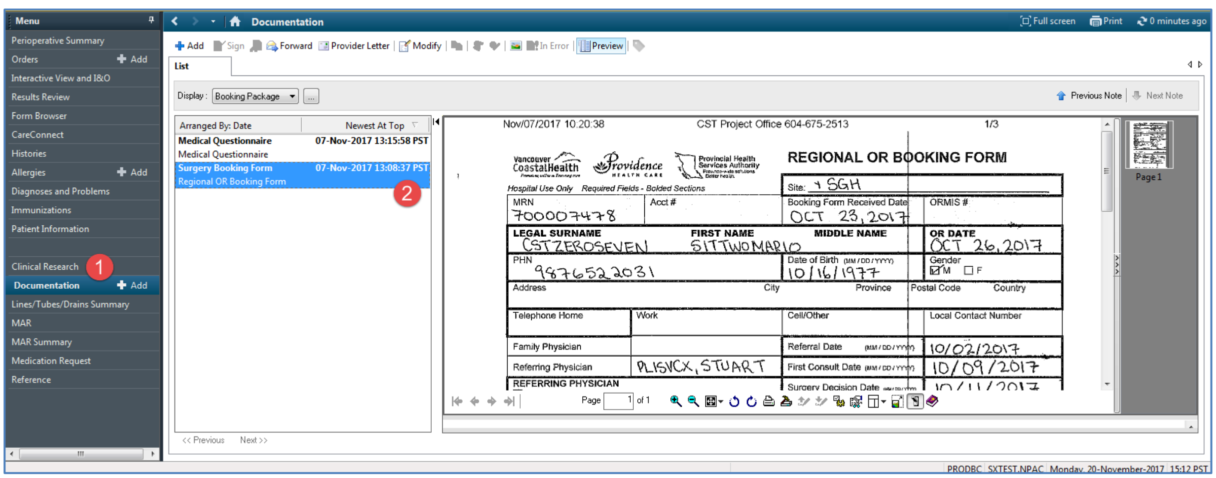
1. The **Toolbar** is located above the patient's chart and it contains buttons that allow you to access various tools within the Clinical Informatics System.
2. Patient tab – displays patient's name and clicking on  will close the chart.
3. The **Banner Bar** displays patient demographics and important 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
4. 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.
5. The **Refresh** icon  updates the patient chart with the most up to date entries when

clicked. It is important refresh the chart frequently especially as other clinicians may be accessing and documenting in the patient chart simultaneously.

6. There are different tabs (e.g. Preop Summary, Intraop Summary, Postop Summary, Quick Orders, Handoff Tool, 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.
7. Each tab has different components. You can navigate to different sections of the chart by clicking on the component link(s) e.g. clicking on the Allergies link Allergies (1) or Add is the same as clicking on the Allergies band in the Menu.

3 Now, you will be opening the patient's **Booking Package** to review the following details:

- Regional Booking Form
- Consult Form
- Consent Form
- Medical Questionnaire (includes Home Medications)



Note: the scanned booking form being used as an example will not match your patient.

To view the Booking Package:

1. Click **Documentation** from the Menu (or from the **Perioperative Summary** view click on the **Documents** component title)
2. Click the appropriate form - **Regional Booking Form**. The Regional Booking Form will be displayed to the right.

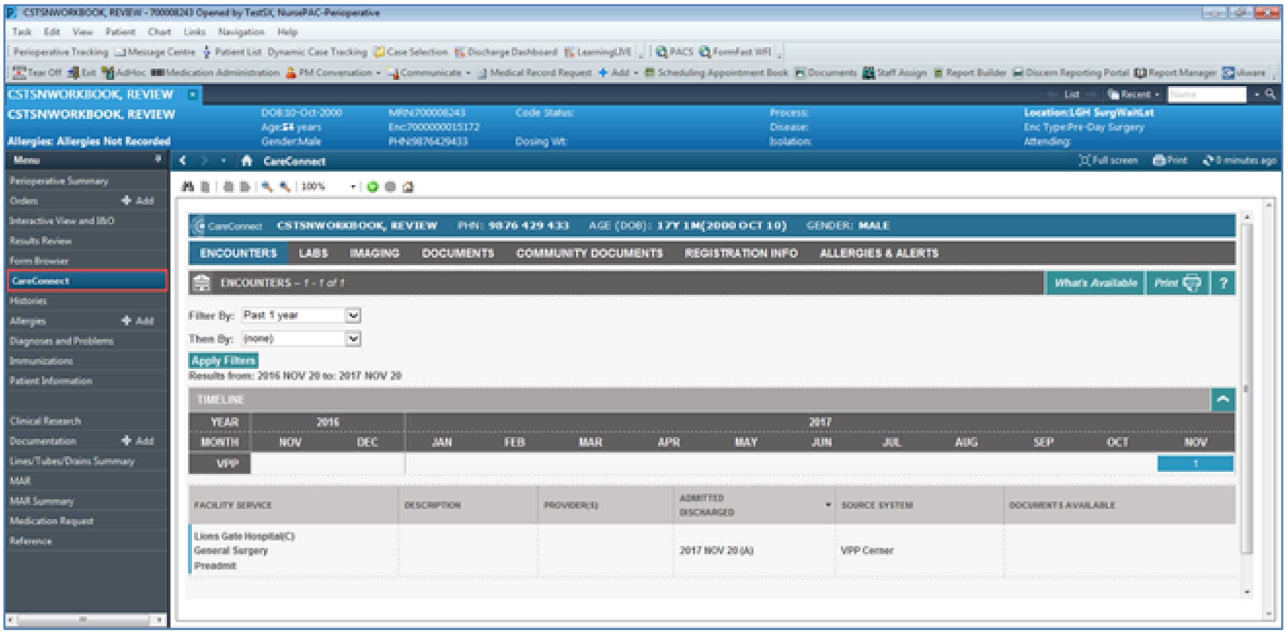
Note: These forms may not be present for viewing during training.

Key Learning Points

- The Booking Package can be accessed via Documentation under the Menu

Activity 1.3 – Accessing CareConnect

1 To Access CareConnect:



Click on **CareConnect** from the Menu

- This will automatically log you into CareConnect
- Patient's CareConnect chart will open

You will be able to access results

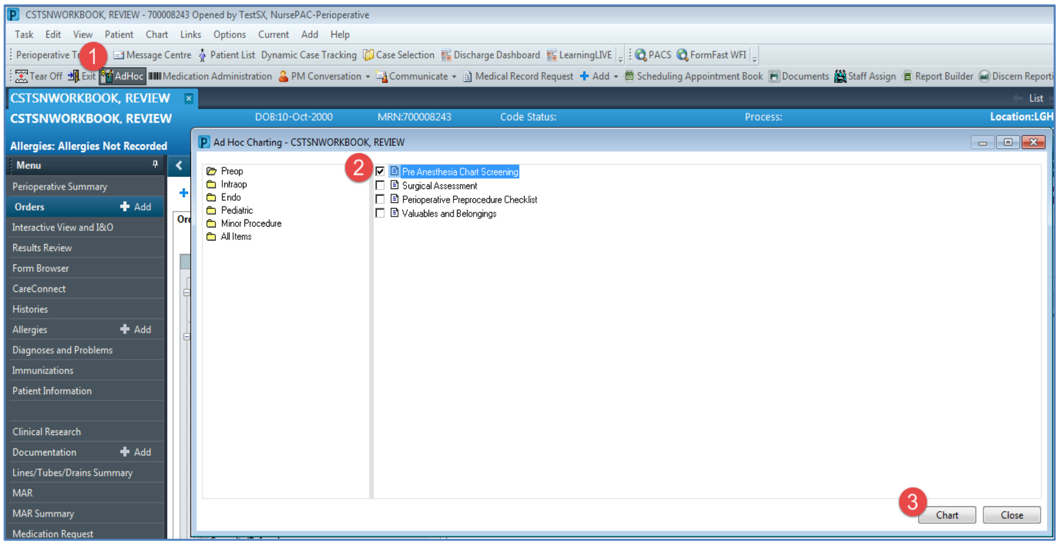
Key Learning Points

- You can access CareConnect by clicking on the appropriate section within in the Menu

Activity 1.4 – Complete the Pre-Anesthesia Chart Screening Form

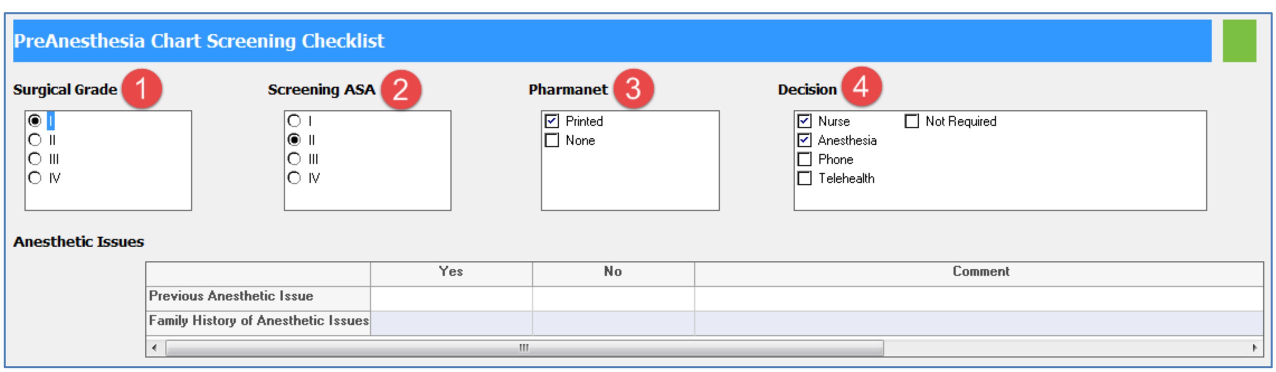
1 As a PAC Screening Nurse, you will now navigate to the Pre-Anesthesia Chart Screening form, and complete the screening checklist to flag any abnormal results (if applicable).

2 To open the Pre-Anesthesia Chart Screening Form:



1. Click the **Adhoc** button on the toolbar
2. Select the **Pre-Anesthesia Chart Screening Form**
3. Click **Chart**
   - The Pre-Anesthesia Chart Screening window will display.

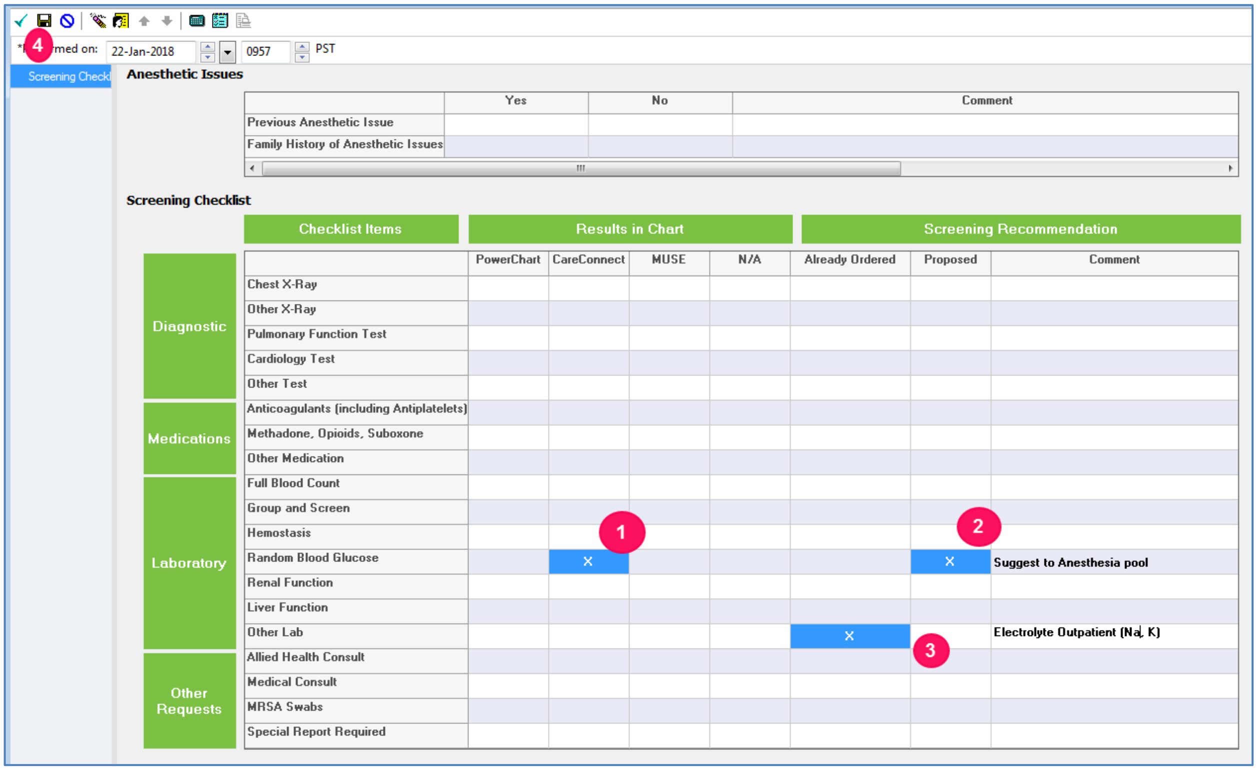
3 Completing the Pre-Anesthesia Chart Screening Form:



Make the appropriate selections on the form as outlined below:

1. **Surgical Grade:** I
2. **Screening ASA:** II
3. **Pharmanet**: Printed
4. **Decision**: *Nurse and Anesthesia*

Then complete the **Screening Checklist:**



Under **Laboratory** > **Random Blood Glucose:**

1. Click the cell under **CareConnect** to mark it with an "X".
   (Marking an X under CareConnect indicates that there are historical results available in the CareConnect.)

2. Click the cell under **Proposed** to mark it with an "X".
   (A mark under Proposed indicates you have suggested an order.) Next, under the **Comment** cell type in *Suggest to Anesthesiologist Pool.*

Under **Laboratory** > **Other Labs**

3. Click the cell under **Already Ordered** to mark with an "X" and add a comment of *Electrolyte Outpatient (Na, K)*

4. Click **Sign** (green checkmark in top left corner)

Key Learning Points

- Specify additional details for checklist items using the Comments column
- Remember to sign the form by clicking on the green checkmark to the top left of the screen

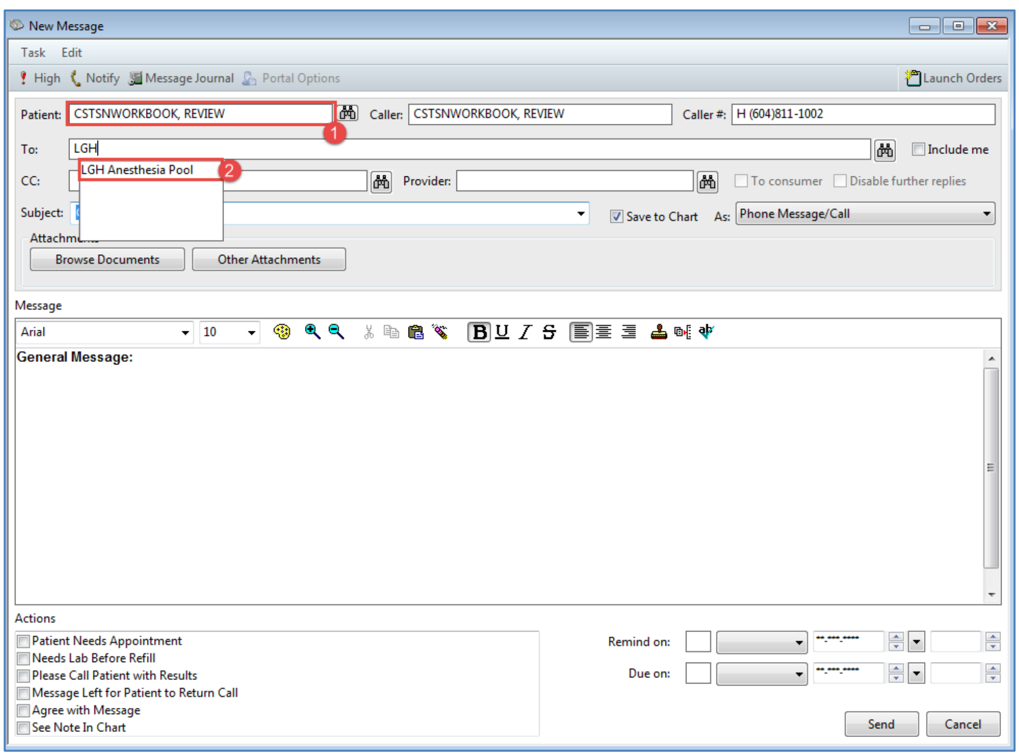
Activity 1.5 – Suggest orders for PAC to Anesthesiologist Pool

1 As a PAC Screening Nurse you will suggest orders based on protocol to the Anesthesiologist pool. To suggest orders you will send a message within the system to the pool. A pool is a group that can receive communications within the system and the Anesthesiologist pool is used when the Anesthesiologist is unknown.

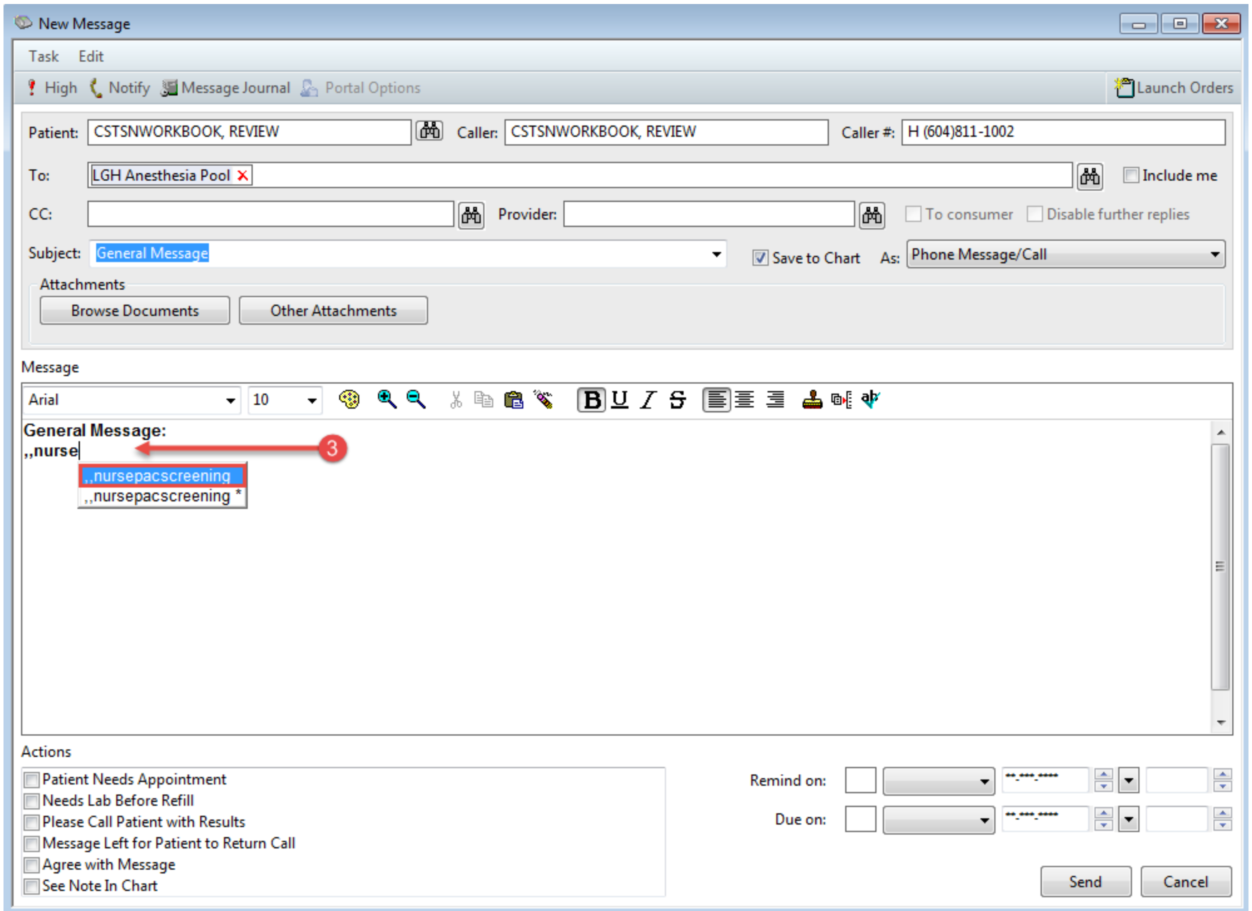
2 To send a message:

1. Click on the **Communicate** drop-down box from the toolbar
2. Click **Message**

3 Enter the message details:



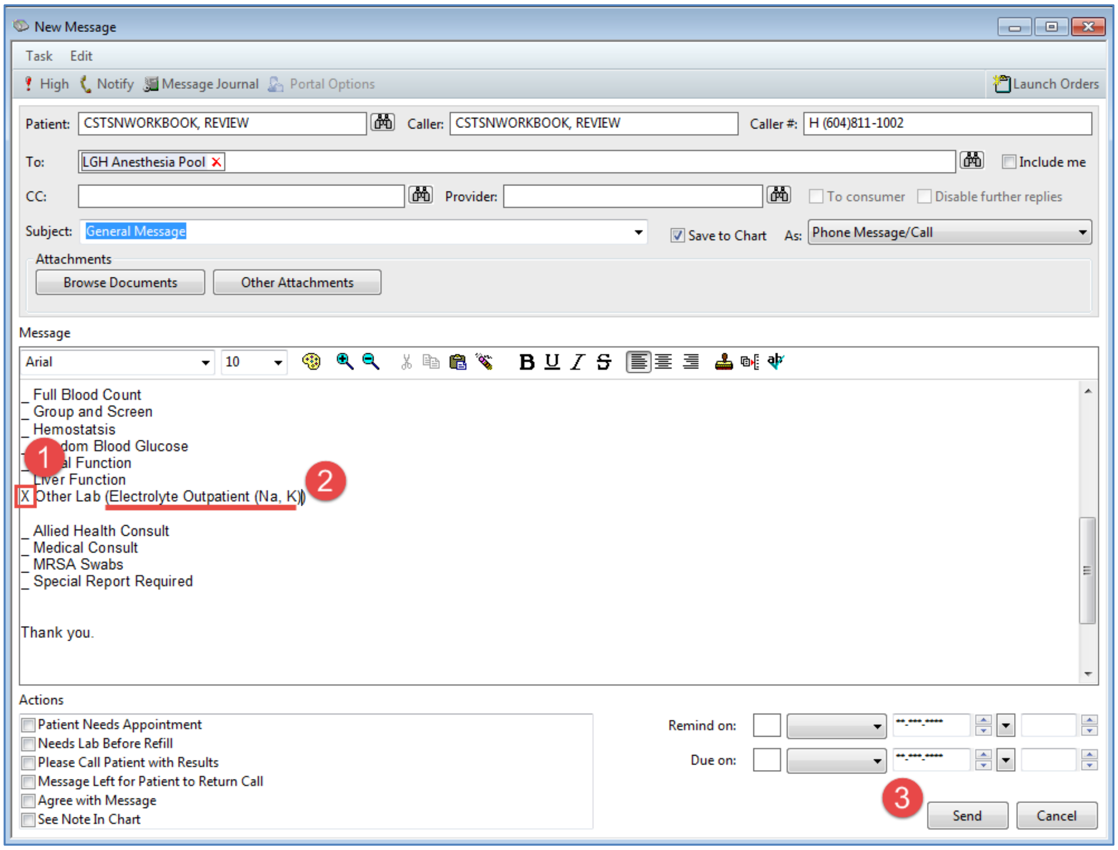
1. Verify that the patient's name is populated in the **Patient** field
2. In the **To:** field type *LGH Anesthesia Pool* (a drop-down will appear, double-click to select **LGH Anesthesia Pool**)



3. Enter in the body of the message = *,,nursepacscreening*

   (,, denotes an autotext smart template which is a standardized documentation template that can be used for documentation. When smart templates are used data from other areas of the chart can be automatically pulled into your documentation as appropriate.)

4. Press **Enter** on your keyboard



The ,,nursepacscreening smart template appears and you can now suggest orders.

1. Press **F3** (on your keyboard) to navigate through the template until you reach **Other Lab**
2. Enter an **X** in front of **Other Lab**, press F3 again then enter the name of the lab test inside the bracket, in this case type in *Electrolyte Outpatient (Na, K)*
3. Select **Send**

Note*: Pressing send will send the message to all Anesthesiologists who are a part of the Anesthesiologist pool.*

Key Learning Points

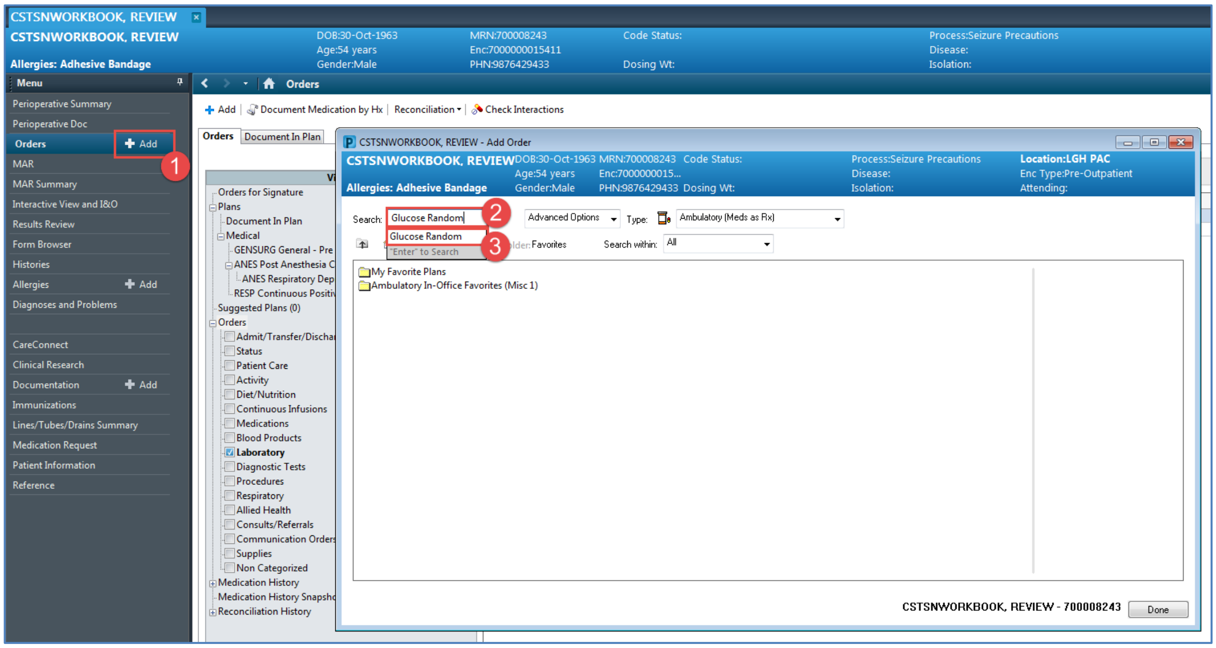
- Remember to verify the patient’s name in the message
- Once the Anesthesiologist pool is selected, pressing send will send the message to all Anesthesiologists who are a part of the Anesthesiologist pool
- Smart templates allow standardized content to appear and the ability to pull data from other areas of the chart into your clinical notes.

Activity 1.6 – Placing Orders for PAC

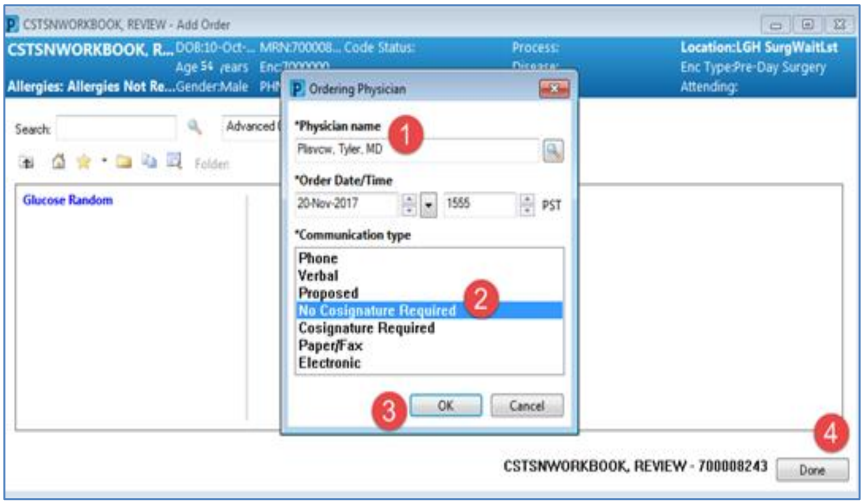
1 Nurses can place the following types of orders:

- Orders requiring cosignature by the provider e.g. telephone and verbal orders
- Orders that do not require cosignature e.g. orders within nursing scope, Nurse Initiated Activity (NIA) orders

To place an order that does **not** require a cosignature:

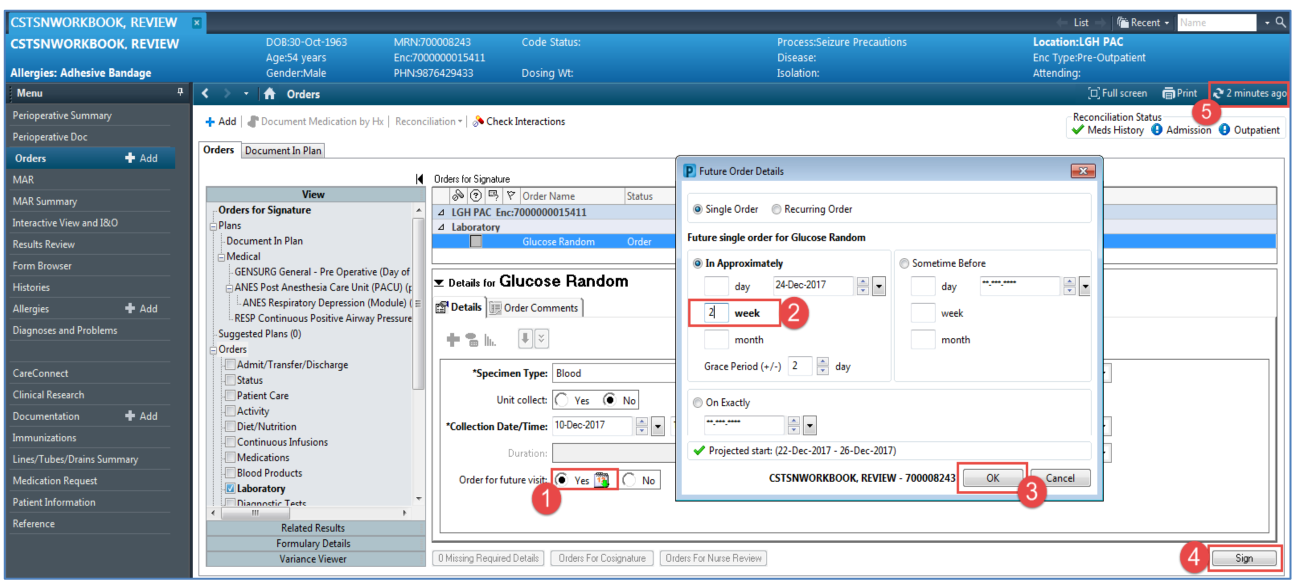


1. Click **+ Add** next to **Orders** from the Menu.
    - The **Add Order** window opens
2. Type *Glucose Random* into the search window and a list of choices will display
3. Click **Glucose Random**



The **Ordering Physician** window opens.

1. Type in the name of the patient's <*Attending Physician*> (last name, first name)
2. Select **No Cosignature Required**
3. Click **OK**
4. Click **Done**
    - The Orders page will display and you will see the order details



Within the order details window:

1. Locate the **Order for future visit:** field and select **Yes**. The **Future Order Details** window will appear
2. Under **In Approximately** enter *=2* in week field
3. Click **OK**
4. Click **Sign**
5. Remember to click **Refresh** button to see the updated information.

Key Learning Points

- Nurses can place nurse initiated orders as no cosignature required orders
- Order sentences help to pre-fill additional information/details for an order
- Future orders can be placed for future visits

Activity 1.7 – Setting an Event

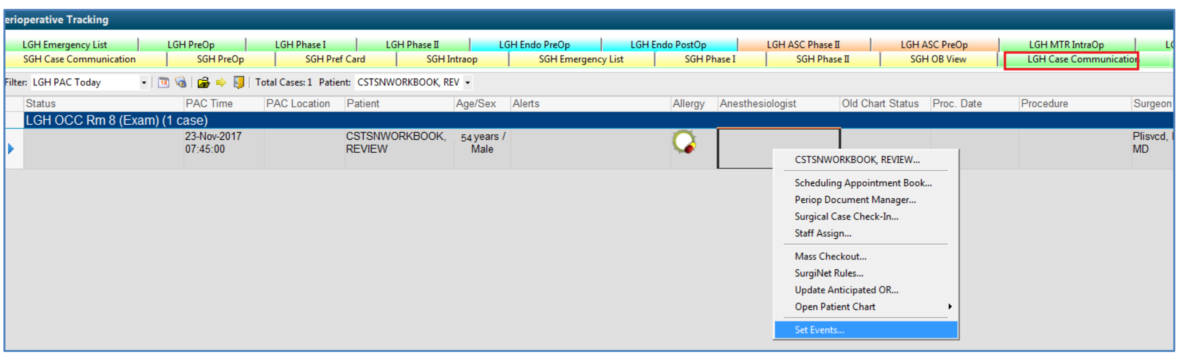
The advantage of Perioperative Tracking is that real time patient statuses can be immediately communicated as they occur. The functionality is referred to as **Setting an Event**.

An event can include an alert (e.g. Violence Alert) or a patient status (e.g. Pt. in Waiting Room), and notifications (e.g. Seen by Nurse)

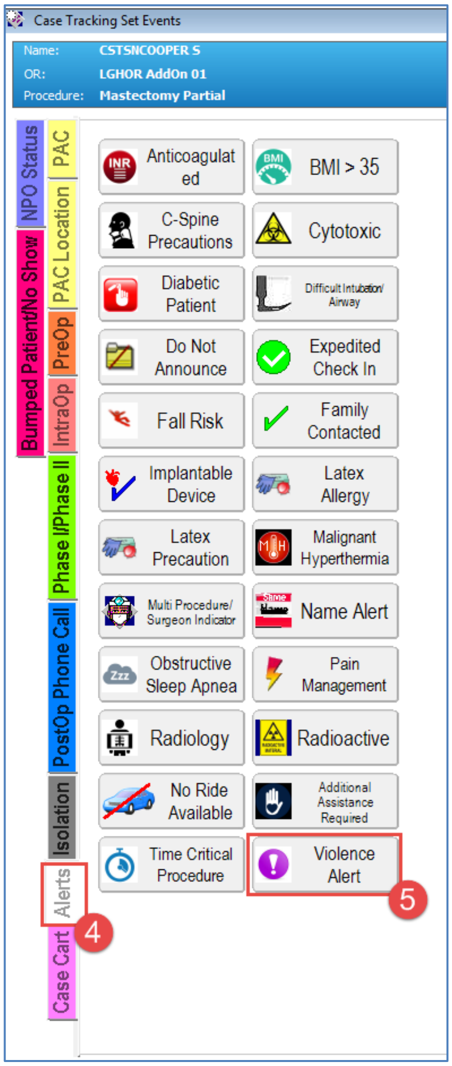
1 The **LGH Case Communication** view displays all patient charts that have a confirmed surgical appointment that is between tomorrow and 30 days. To ensure the alert is seen on the patient's upcoming PAC appointment or on the day of surgery, the alert must be entered on the patient's surgical appointment directly. The patient's upcoming surgical appointments only appear in the **LGH Case Communication** view as opposed to the **LGH PAC** view.

2 To set an Alert:

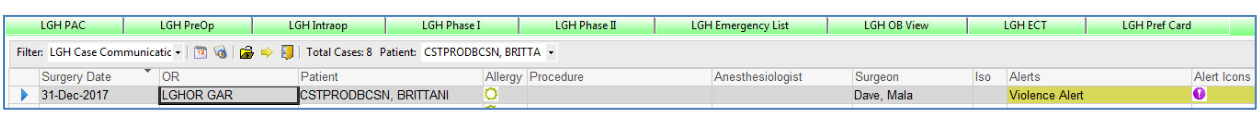
1. Click on Perioperative Tracking within the toolbar to navigate to the **Perioperative Tracking** view and select the **LGH Case Communication** view from the tracking board.



2. Right-click anywhere on the row of information for your patient and
3. Select **Set Events** from the drop-down list
   - The Case Tracking Set Events window will display.

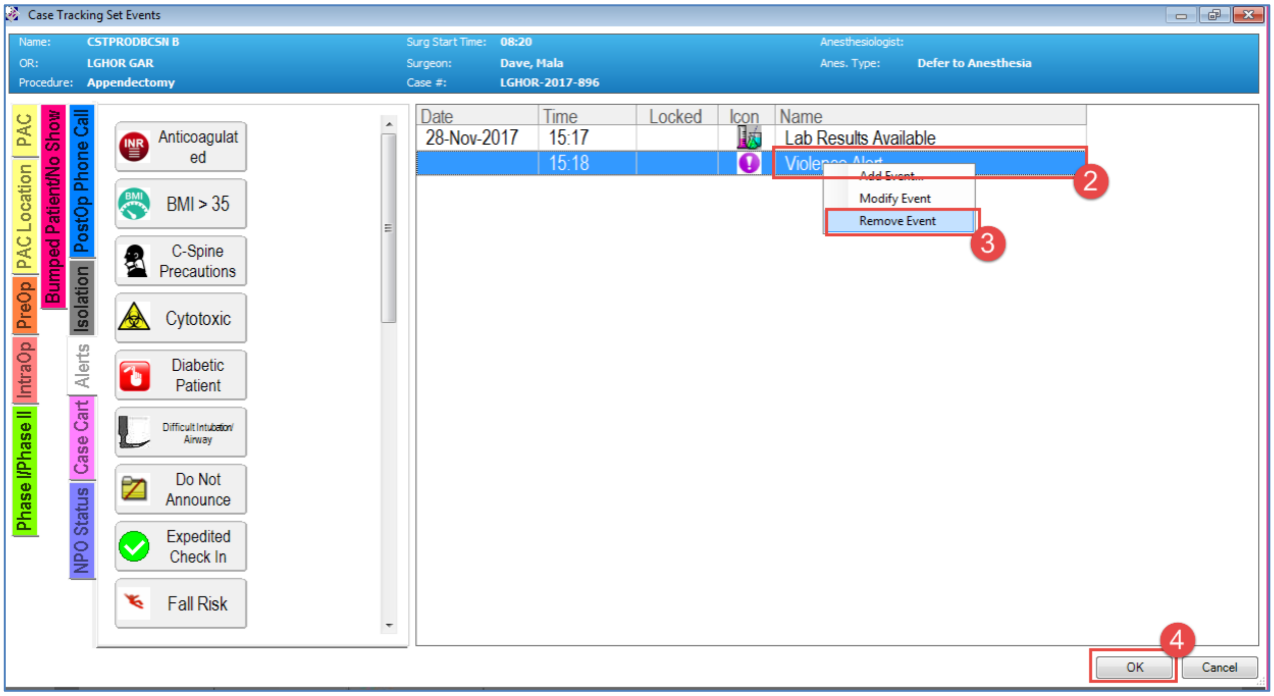


4. Click the **Alerts** tab
5. Click on **Violence Alert** button
6. Click **OK**
7. Verify that the Violence Alert has been updated on Perioperative Tracking



3 Events may be removed as necessary. To remove an alert:

1. Right-click anywhere on the row of information for your patient and select **Set Events** from the drop-down list
    - The Case Tracking Set Events window opens.



2. Right-click on the **Violence Alert** event you want to remove
3. Click **Remove Event**
4. Click **OK**

Note: Site policies and practices should be followed with regards to adding and removing alerts.

Key Learning Points

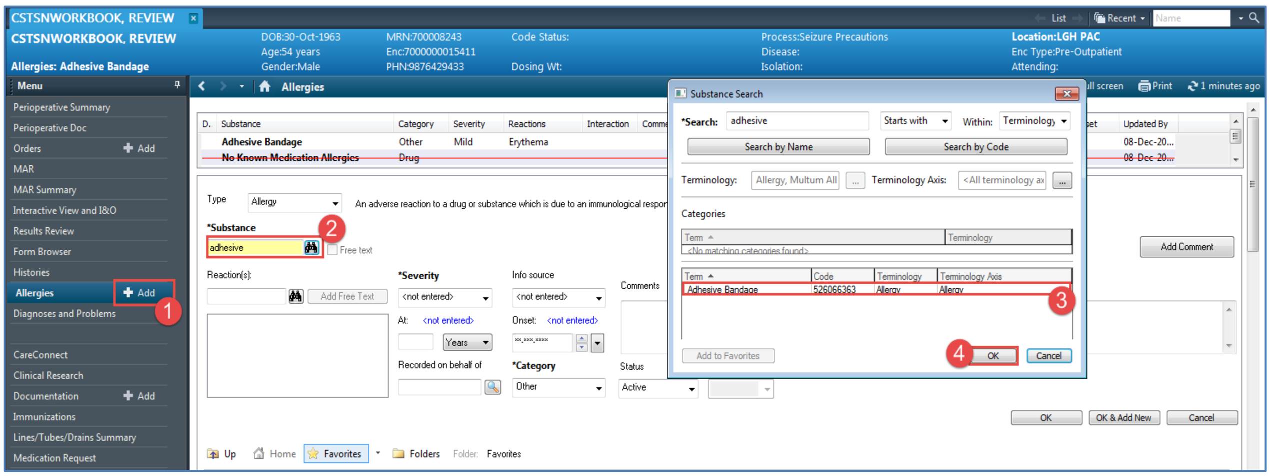
- Booking form may provide information regarding alerts that need to be documented or updated
- Ensure the correct tracking view is used -LGH Case Communication
- Alerts can be added and removed as appropriate

Activity 1.8 – Document Allergies

1 The patient currently does not have any allergies recorded.
In the booking package it is noted that the patient is allergic to adhesives.

2 To document this allergy:

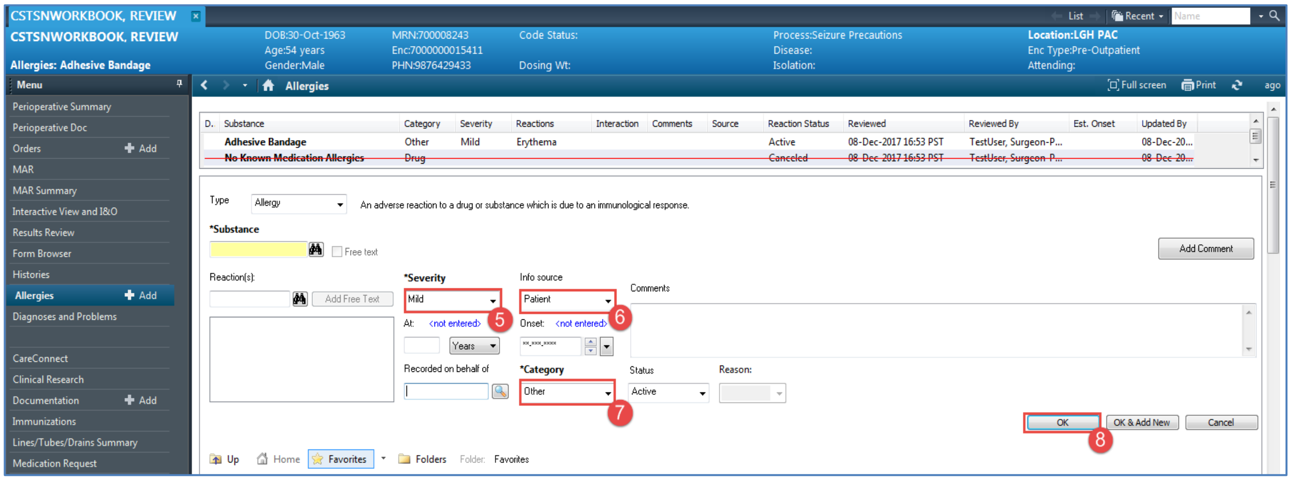
1. From Perioperative Tracking, Select the appropriate patient by Clicking on the row. Blue arrow will appear).
2. Double Click the Blue arrow next to the patient's chart to open their chart.



Alternatively, if the patient chart is still open, click on the patient chart tab to reopen the chart.

To add the allergy:

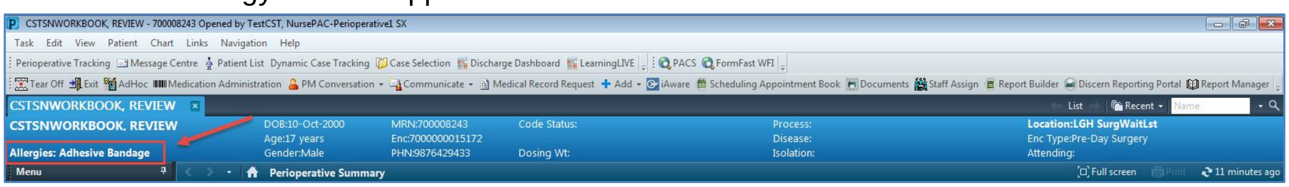
1. Click **+Add** next to the **Allergies** section on the Menu
2. Type *Adhesive* into the **Substance** field and click the **search** icon
3. The **Substance Search** window will appear. Select the closest match, **Adhesive Bandage**
4. Click **OK**



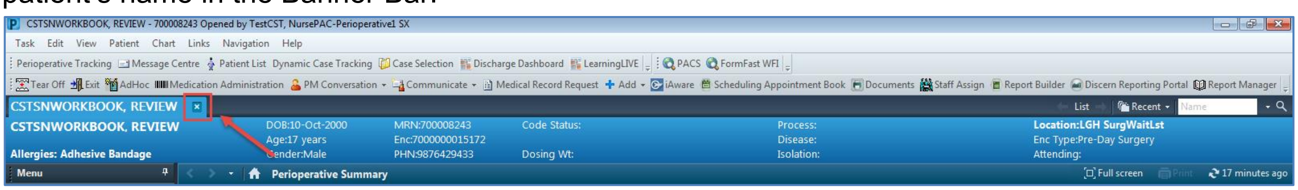
Enter additional allergy details using the appropriate drop-down selections:

5. **Severity**= *Mild*
6. **Info Source=** *Patient*
7. **Category=** *Other*
8. Click **OK** and then refresh the screen

The adhesive allergy will now appear in the Banner Bar.



3 As you are now down with this patient's chart, close the chart by clicking on "X" located beside the patient's name in the Banner Bar.



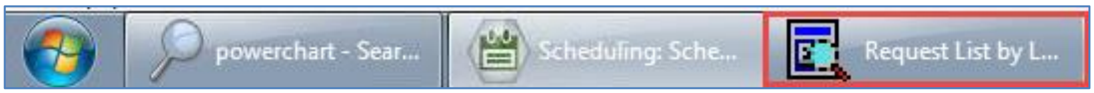
Key Learning Point

- Remember to document Substance, Reaction and Category when adding new allergies

Activity 1.9 – Place The Appointment In The Correct PAC Queue

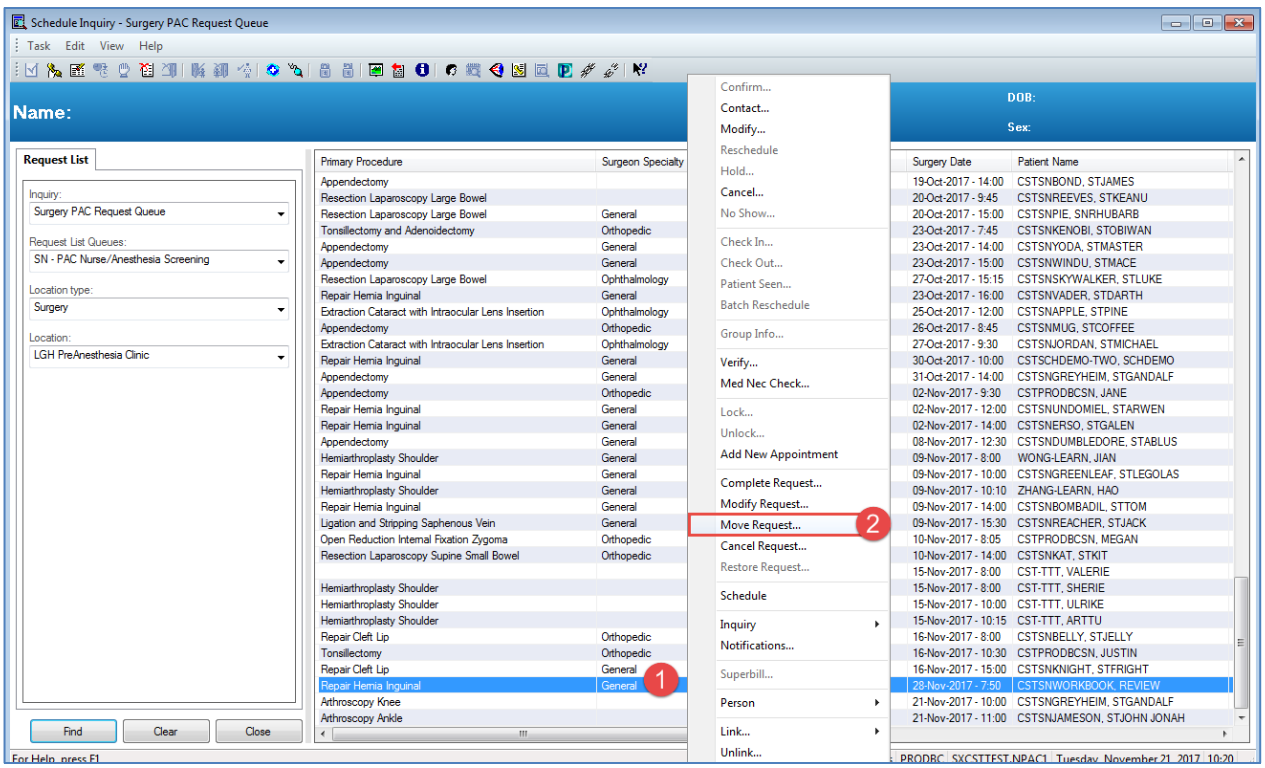
1 After reviewing the patient chart, you determine that the patient will require a Nurse and Anesthesiologist PAC appointment. To communicate this to the PAC Scheduler, you will need to move the appointment request to the SN-PAC Nurse and Anesthesia Request list.

The Schapptbook application should still be open from Activity 1. Click the Scheduling Inquiry icon on the taskbar. If not, re-open the PAC Request list following steps outlined in Activity 1.



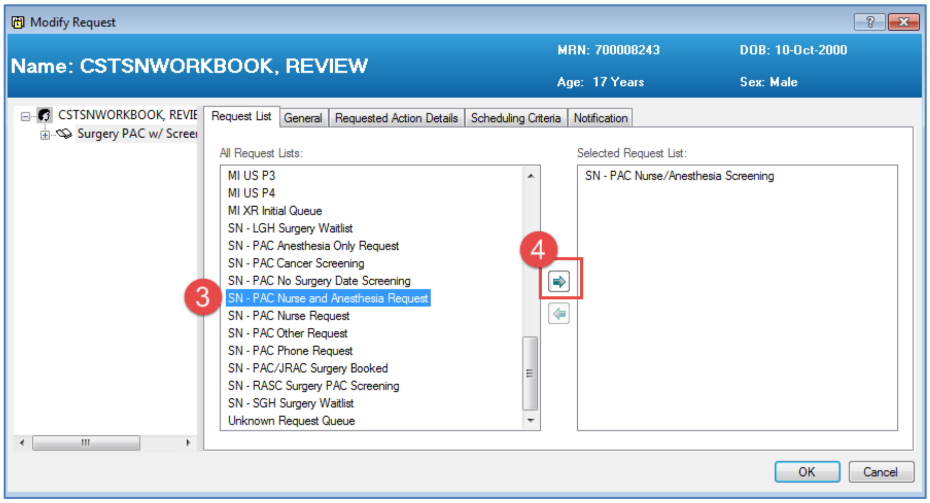
2 Look up the patient's information in Request List Inquiry and move the patient to the SN-PAC Nurse and Anesthesia Request list.
Note: the patient was initially placed in the SN-PAC Nurse / Anesthesia Screening list.

3

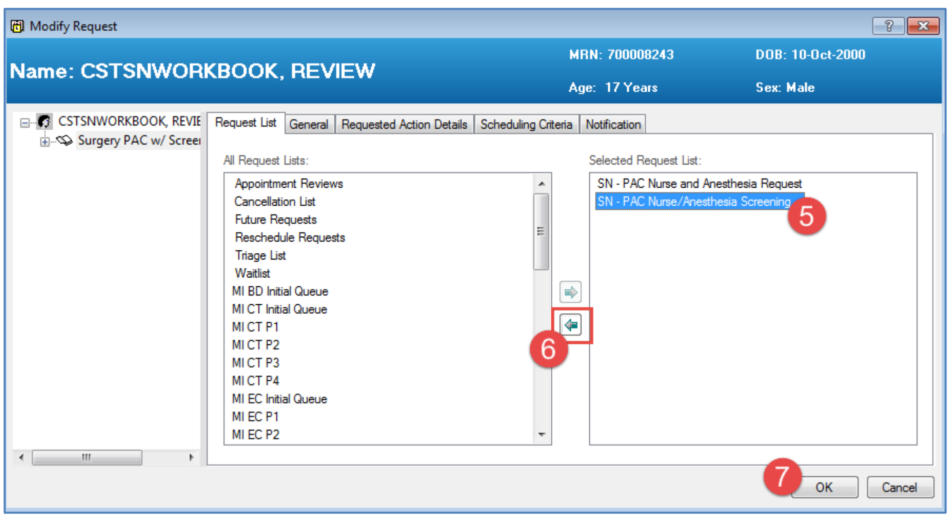


1. Locate the patient name within the Request List Inquiry. Right-click the row associated with the patient.

2. Select **Move Request…** and the Modify Request window will appear.

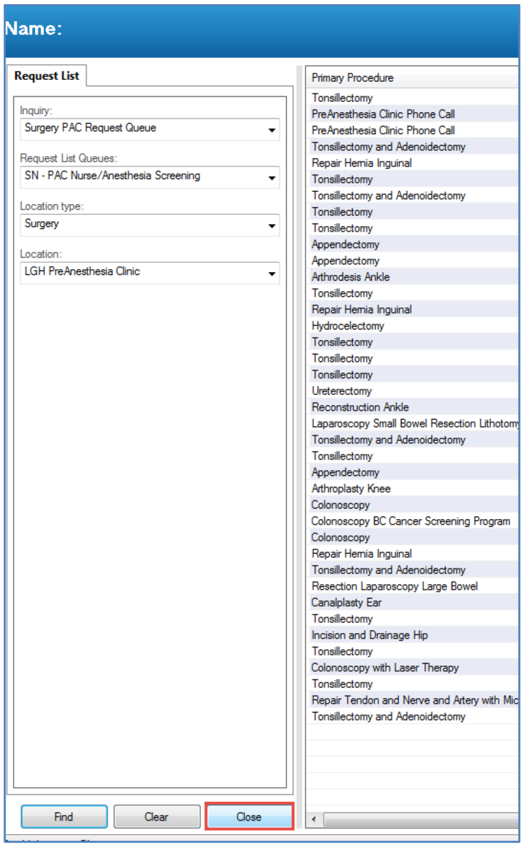


3. Click **SN-PAC Nurse and Anesthesia** Request from the **All Request List**.
4. Click the **right arrow** to move it to **Selected Request List**



5. Click **SN PAC Nurse/Anesthesia Screening** under Selected Request List
6. Click the **left arrow** to move it off the Selected Request List
7. Click **OK**

4 Patient has successfully moved to SN-PAC Nurse and Anesthesia Request list. You will now close the Request List Inquiry by clicking **Close.**



Key Learning Points

- Remove the patient from the PAC Screening request list as appropriate
- Move the patient to appropriate PAC request list as applicable

End of Workbook

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