TIP SHEET

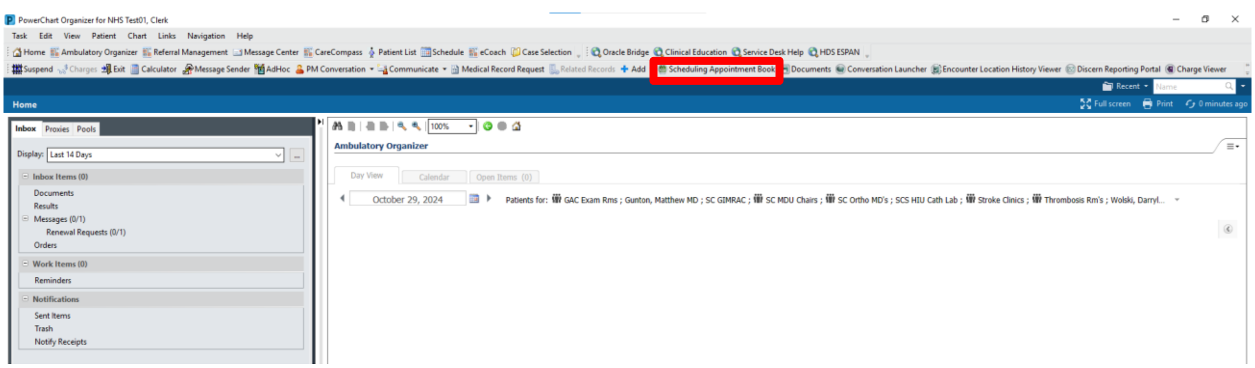
HOSPITAL INFORMATION SYSTEM (HIS)

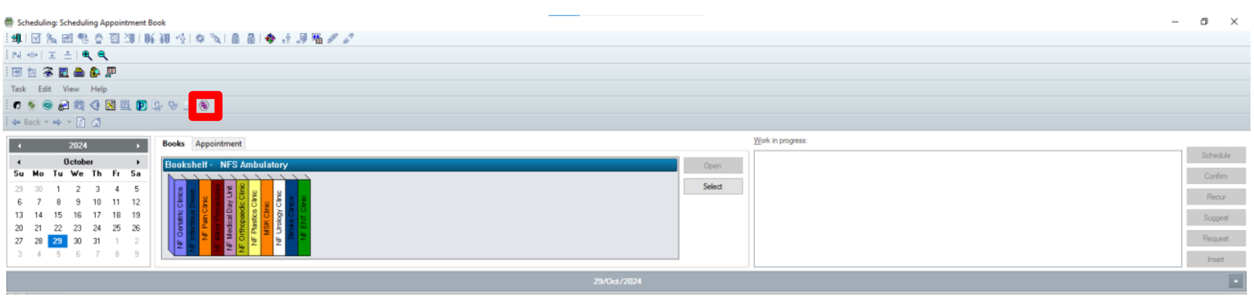
GERIATRICS – DAY IN THE LIFE

Clerical Staff:

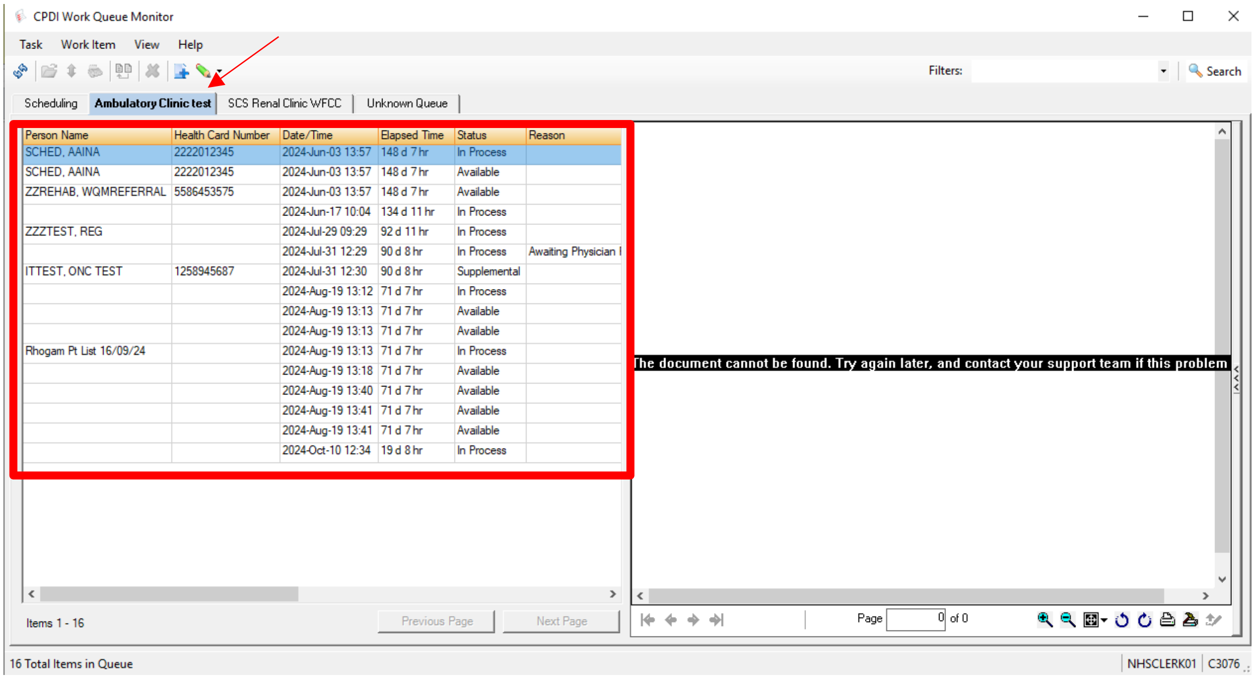
1. Navigate to **Work Queue Monitor**, this can be done two ways:
   a. Through your **App Bar**, locate the purple icon with two pieces of paper.

   b. Through Powerchart you can open your **Scheduling Appointment Book**, within the appointment book locate the purple icon in the top banner bar.



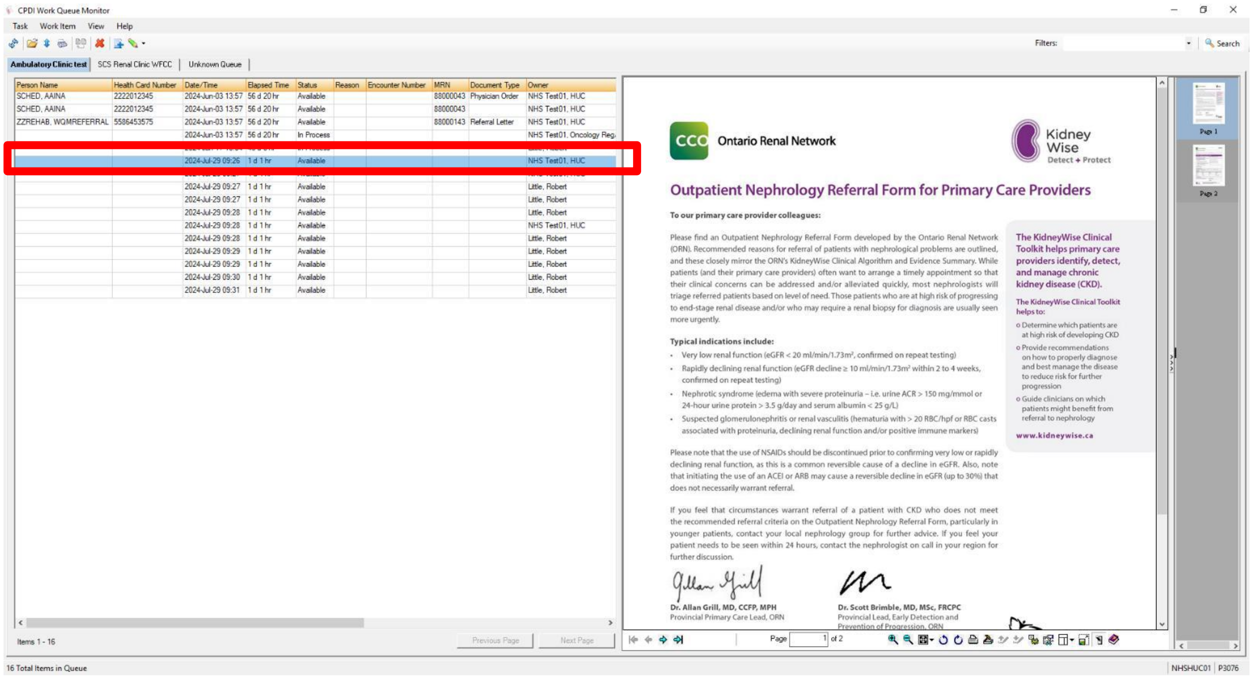


2. When in Work Queue Monitor, select the tab corresponding to your department’s queue (e.g., Ambulatory Clinic). You are now able to see all of your incoming faxes on the left window pane, they present in chronological order.

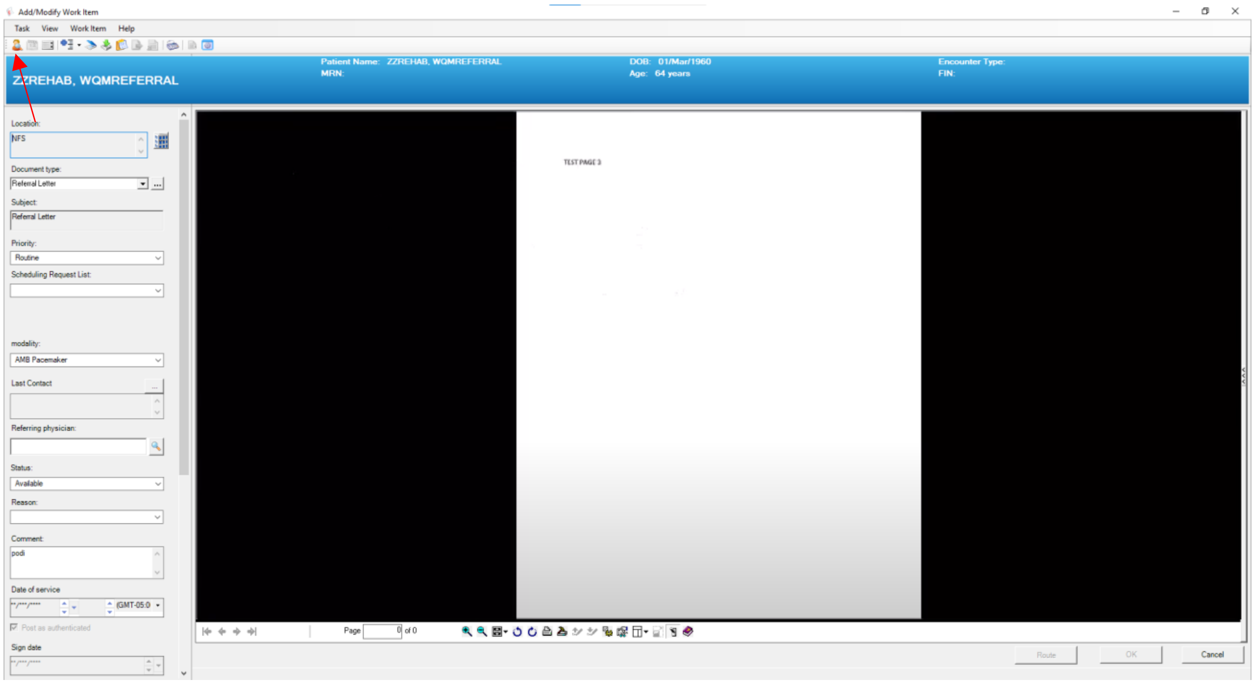


- **Single Click** on each work item for a quick view.
- **Double Click** on the thumbnail to the right of the preview pane to preview a page, **or use the blue arrows at the bottom** of the preview pane.

3. Now select the item you will associate your referral with, to do so click the work item you want to work on. **Double click** the highlighted work item.

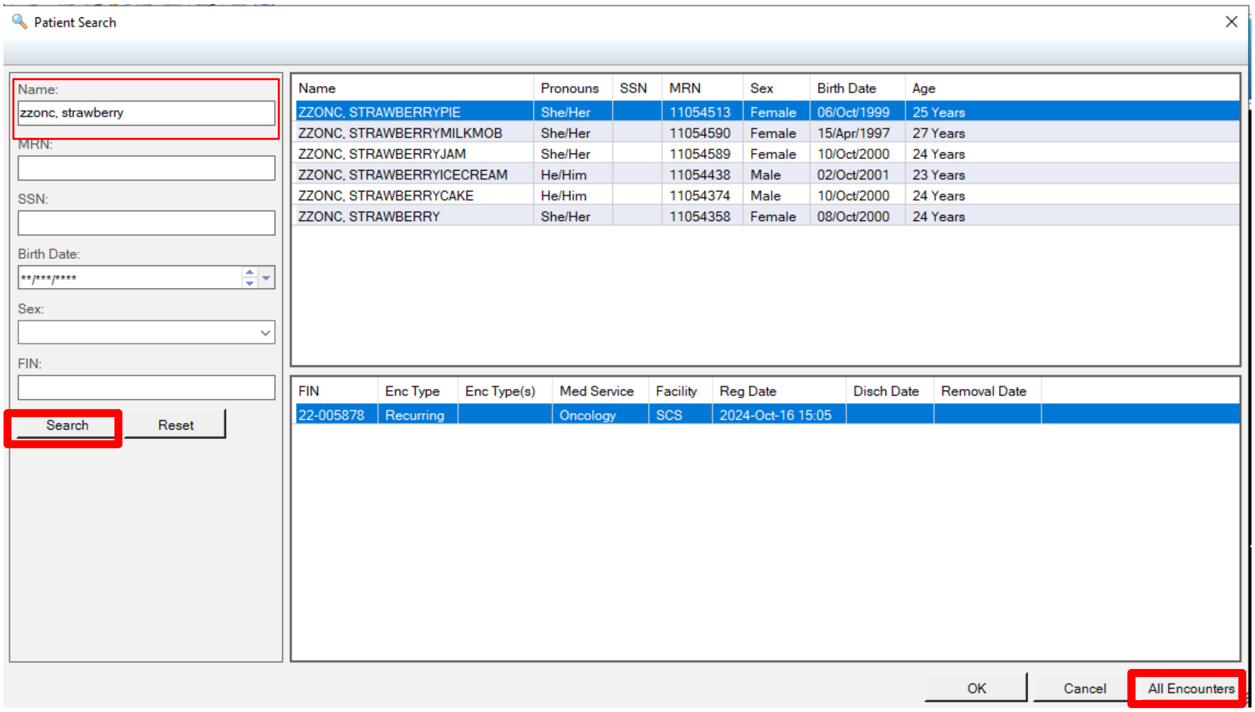


4. The **Add/Modify Work Item** window will now open. Within this window you will search the patient using the patient and magnifying glass icon in the top left-hand corner.



5. Search for the patient by entering the patient's details (last name, first name). Click search.
Note: The more information you enter, the more accurate your results.

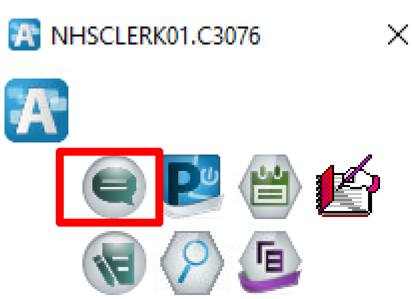
*When you find the correct patient be sure to select **ALL ENCOUNTERS. ***

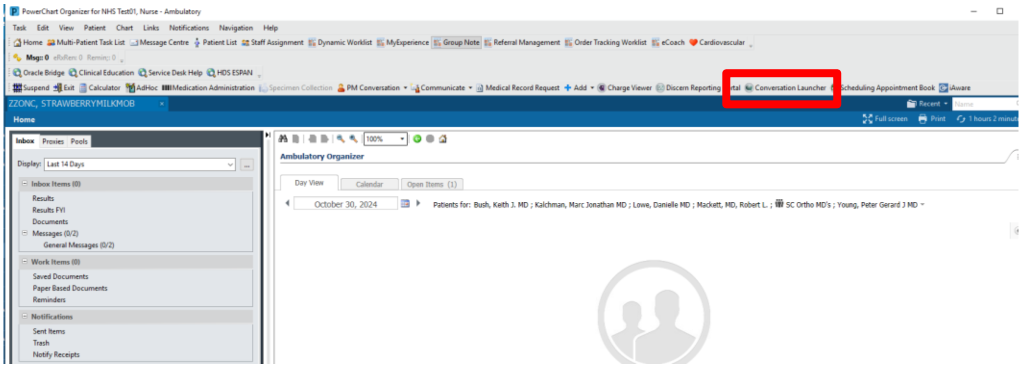


You will notice no MRN or FIN number will populate, this is intentional as we do not want to associate this referral with an encounter yet until it is accepted, this is just the initial intake.

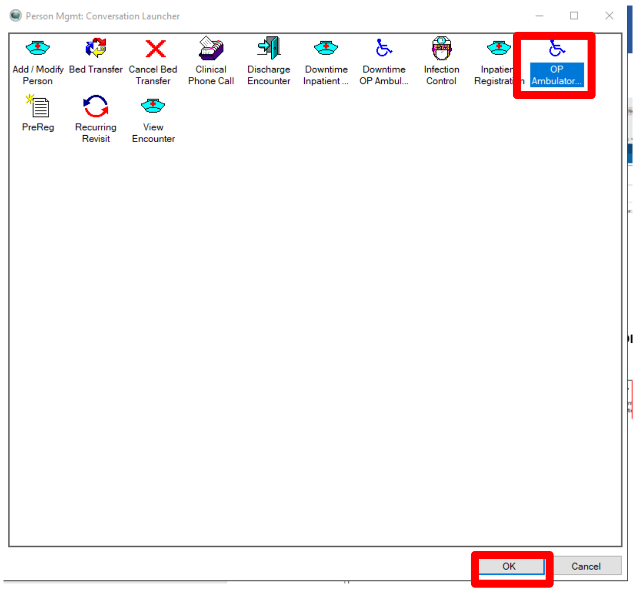
*****IF THE PATIENT IS NOT BUILT INTO THE SYSTEM*****

- Navigate to **Conversation Launcher** in your App Bar or in PowerChart





- Then select **OP Ambulatory Registration** and select **OK.**



- Now you will input all of their information and select **Search** then select **Add Person.**

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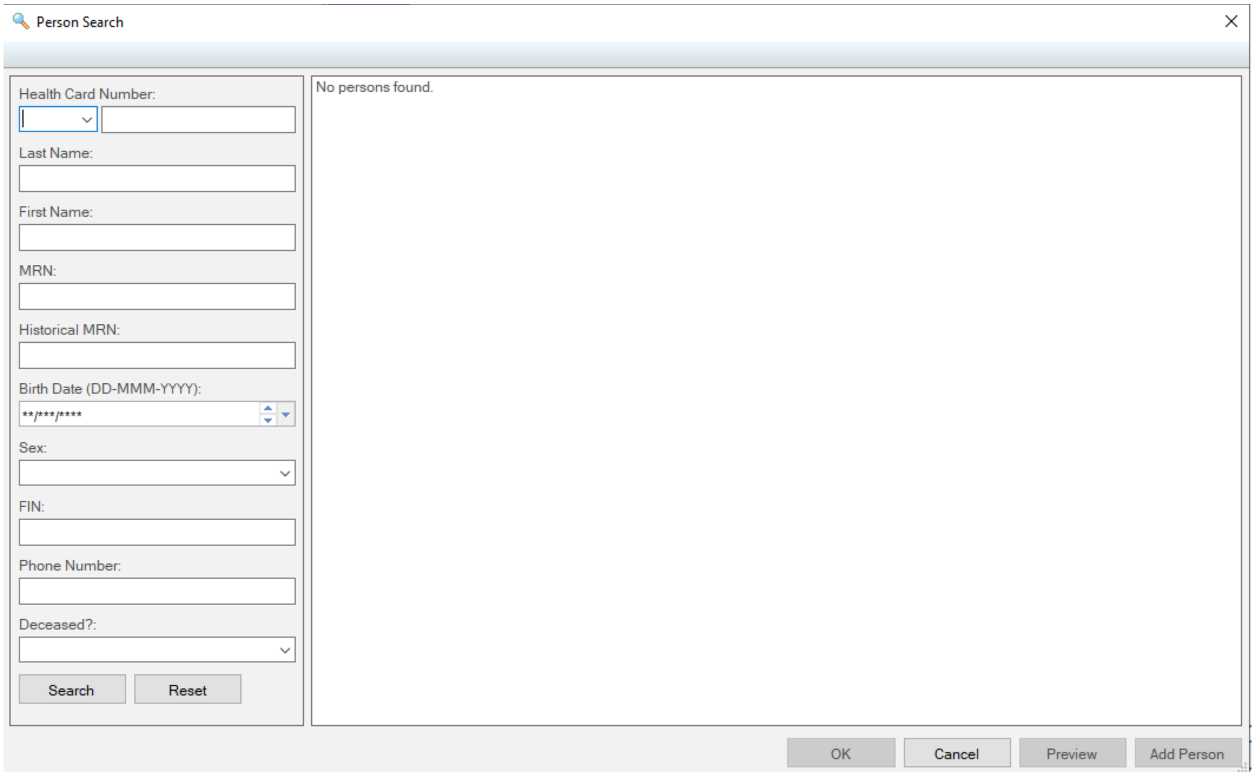
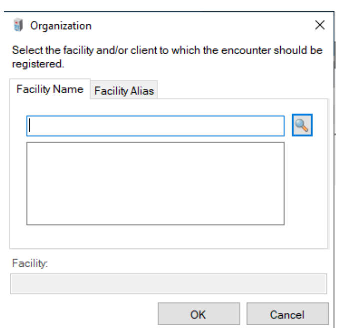
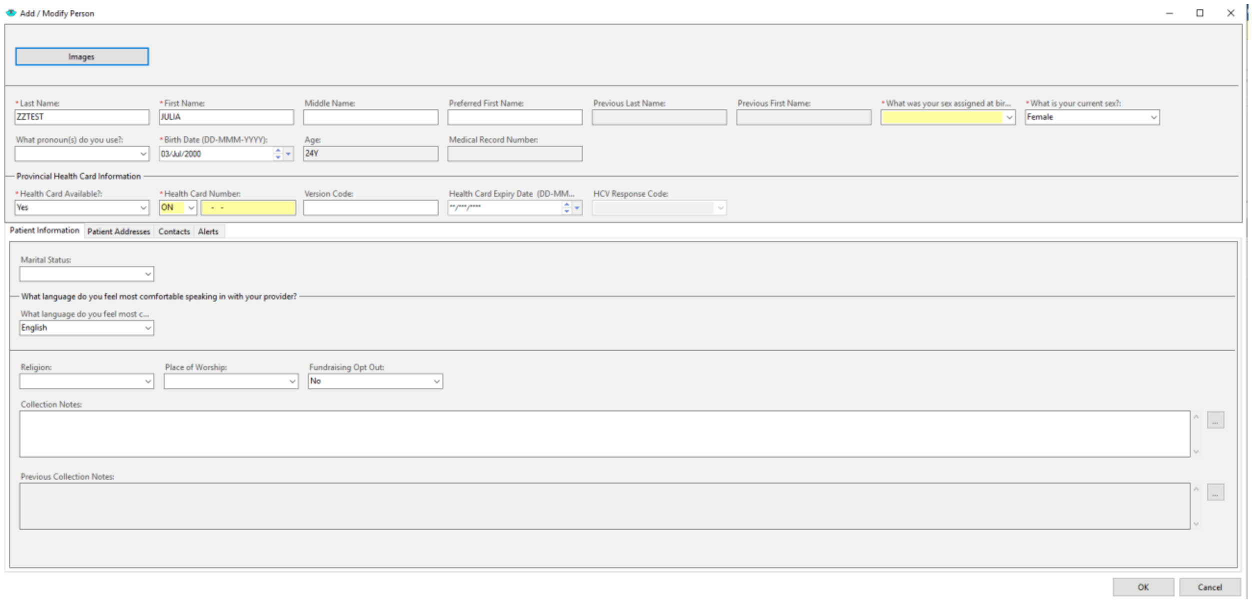
HEALTH AND REHABILITATION CENTRE



- Now the organization window populates. For **Facility Name,** it cannot use abbreviations, **Faculty Alias** can ie. SCS. Select **OK.**

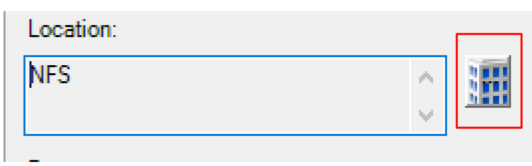


- The registration page will pop off after requiring more extensive info, complete this and select **OK.** You can now complete the previous steps which involved searching for the patient.



6. You can now modify the details on the left-hand side of the window that are applicable.

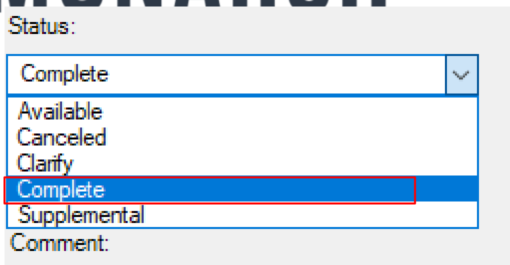
Location: Can be modified using the building icon beside the box.



Subject: Since many forms will be called *"Referral Form"* it is highly recommended to rename the subject line to be clinic specific.

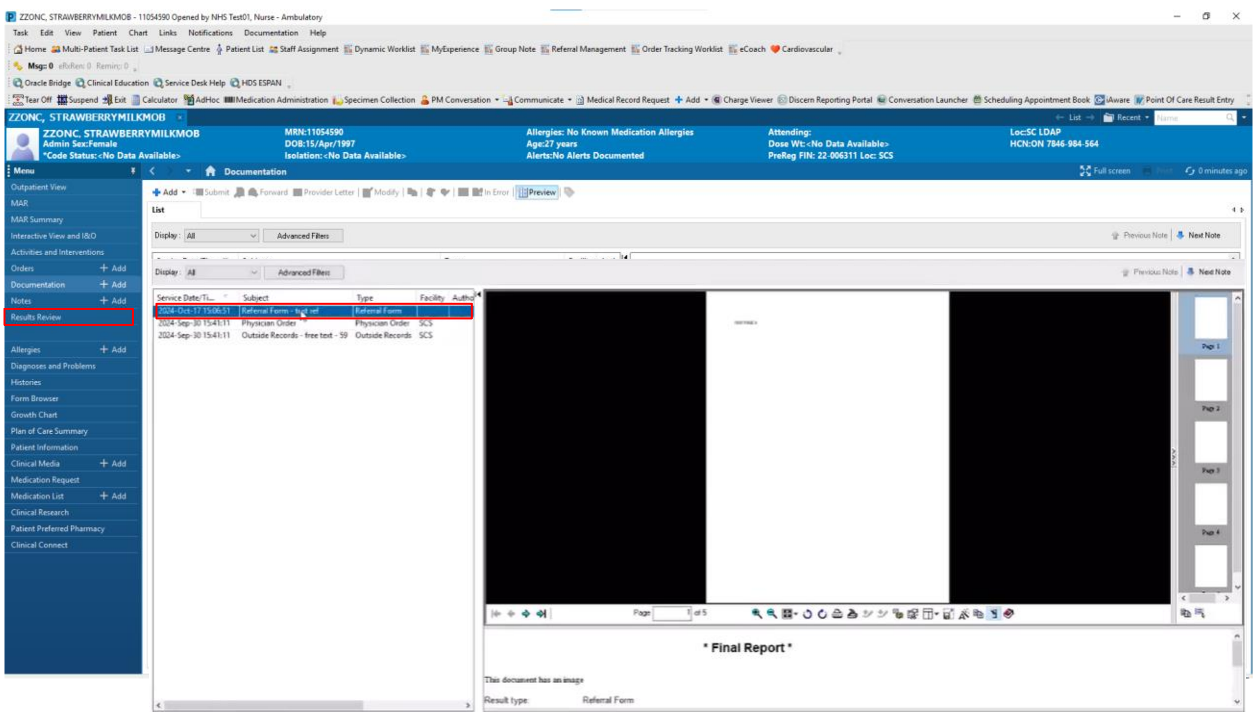
Selecting Document Type: Click "Document Type" drop down arrow. Scroll the list, find the **Referral Form** Type, and click on it to populate the field.

Click Status Drop-down Arrow: Scroll down further to the "Status" drop-down and select "Complete" for the status.



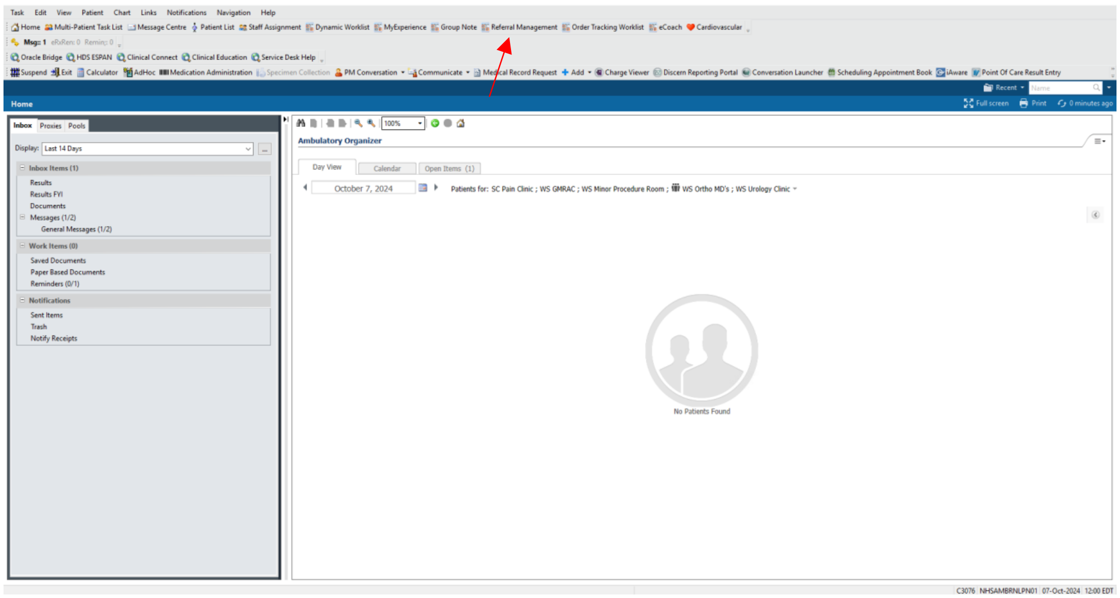
Edit the “Date of Service” if desired.

7. When documentation is complete, select **OK.**
8. Now when navigating back to Powerchart and opening the patient chart, this form will be visible under **Documentation.**

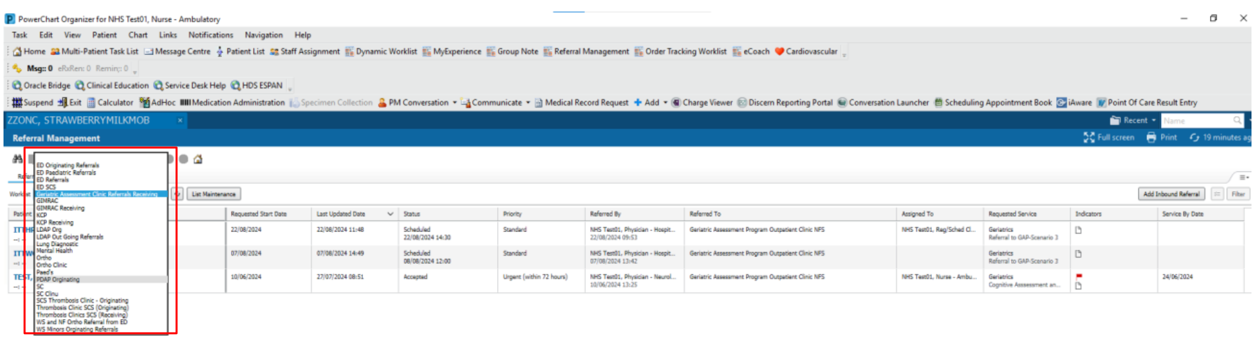


Now that the documentation has been added to the patient chart. We can create an inbound referral to add it to the clinic’s referral list.

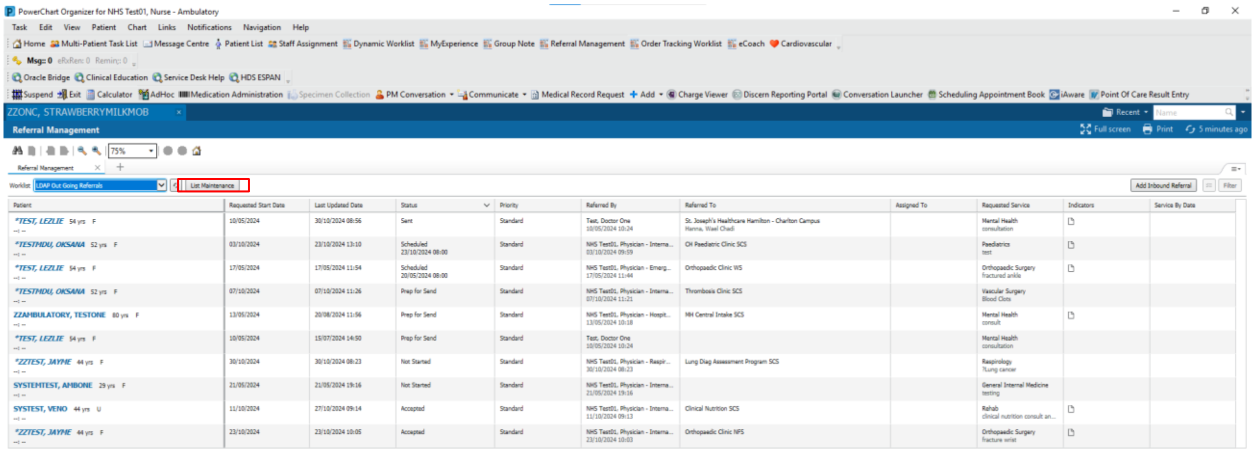
9. Navigate to **Referral Management** from the top banner bar.



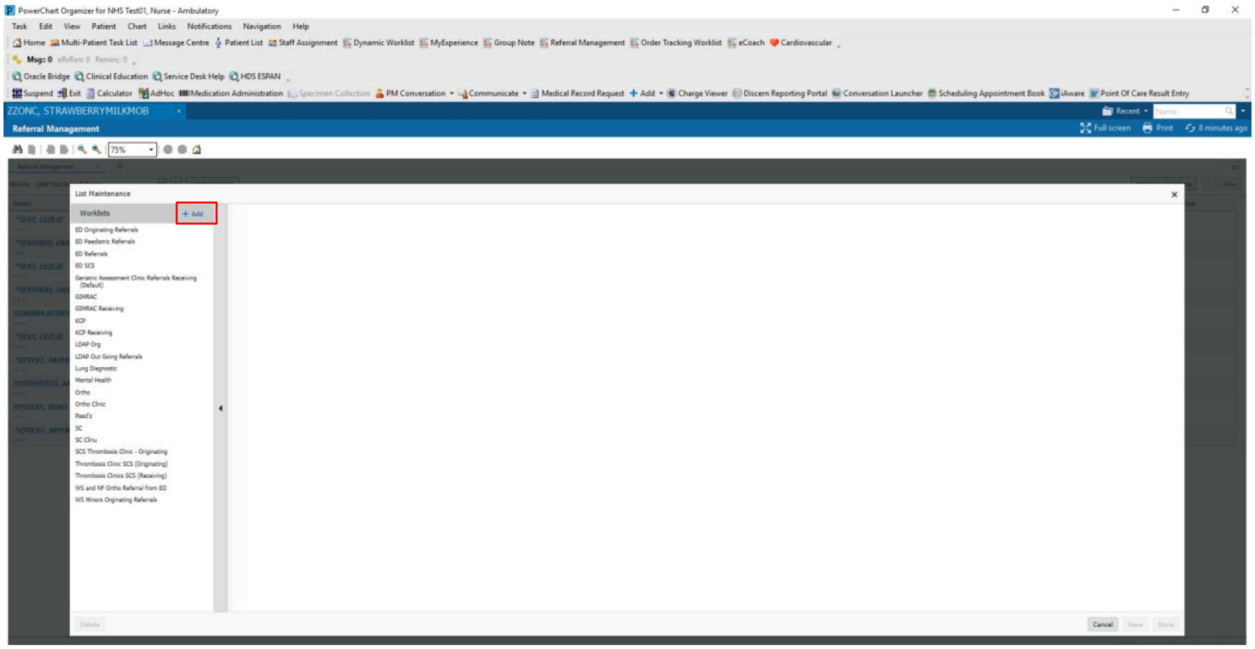
10. Ensure the correct worklist is selected, each clinic should have an **Originating** and **Receiving** list. For this you can select either list as we will be creating an **Inbound Referral.**

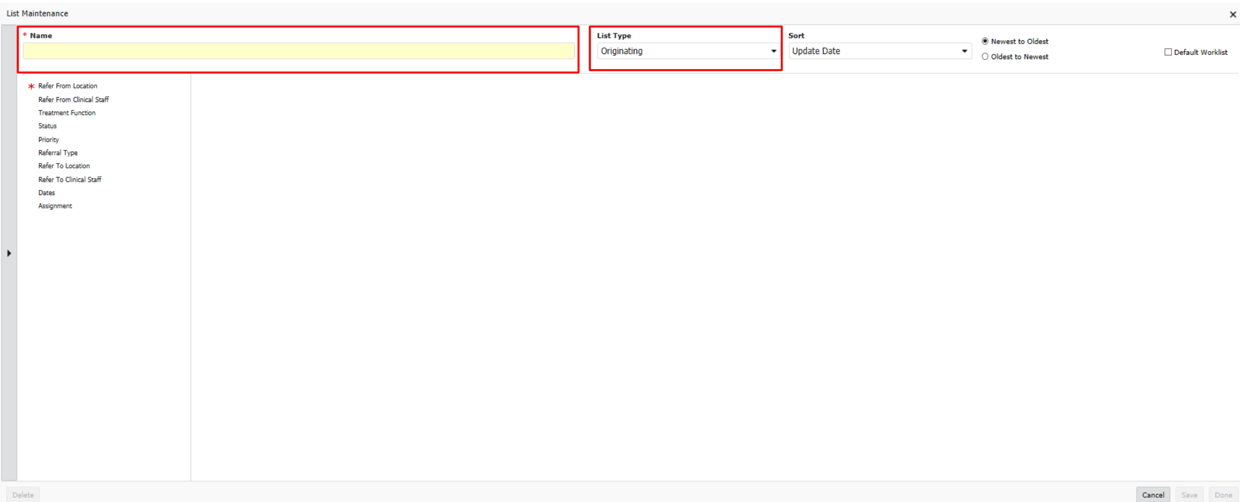


11. If you do not have the correct worklist to add a worklist select **List Maintenance.**

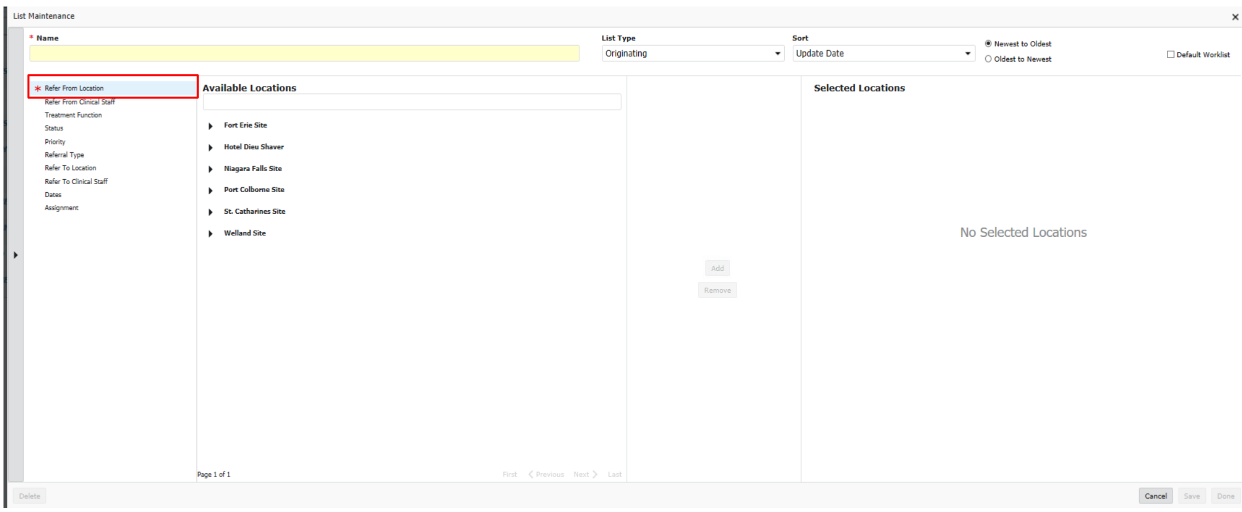


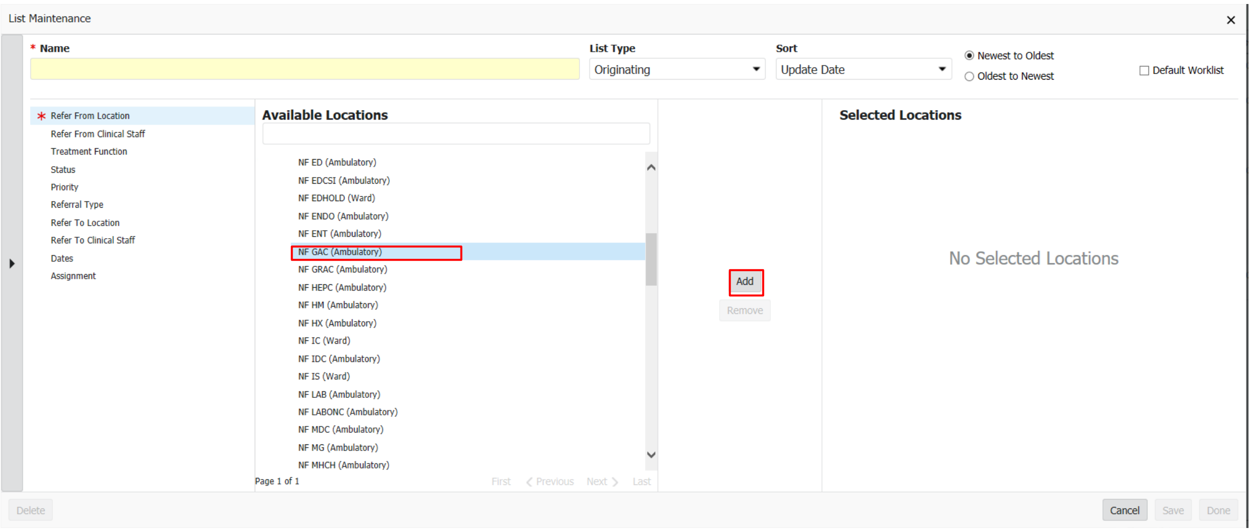
12. Then select **+Add,** here you will input a name of the clinic, then select **Originating** or **Receiving** for the List Type.



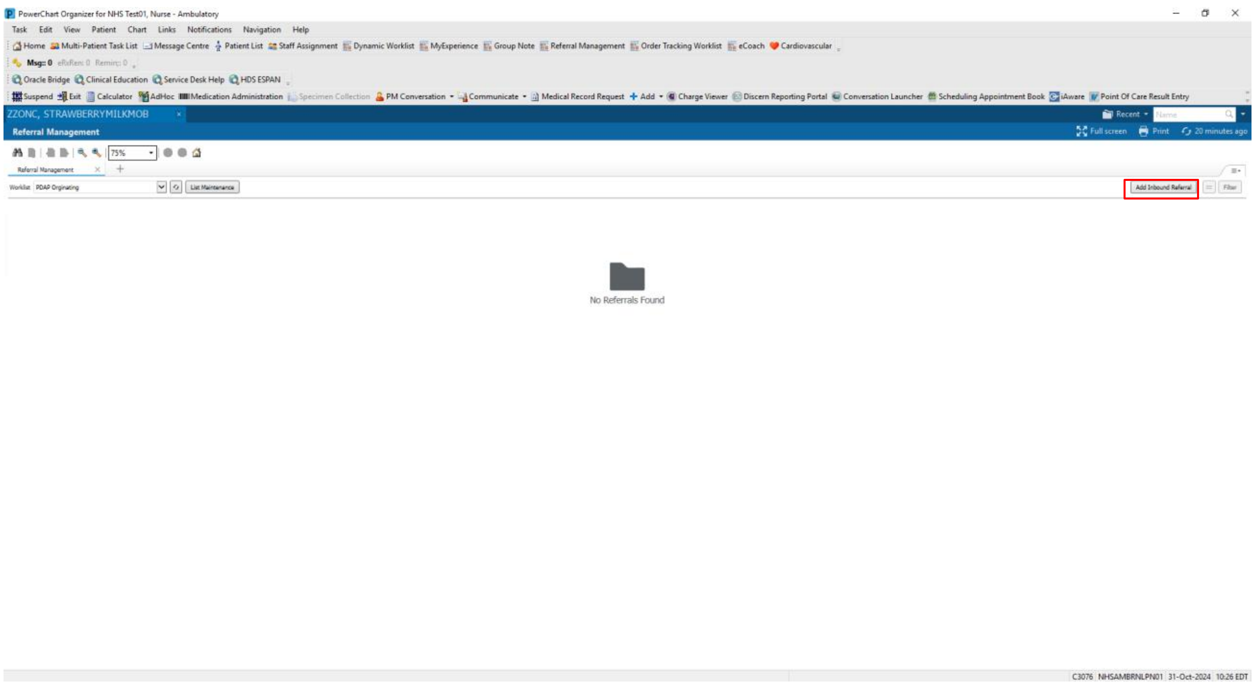


13. Then select **Refer from Location**, and input your clinic, click the name of the clinic then click **Add.** Then press **Save.**

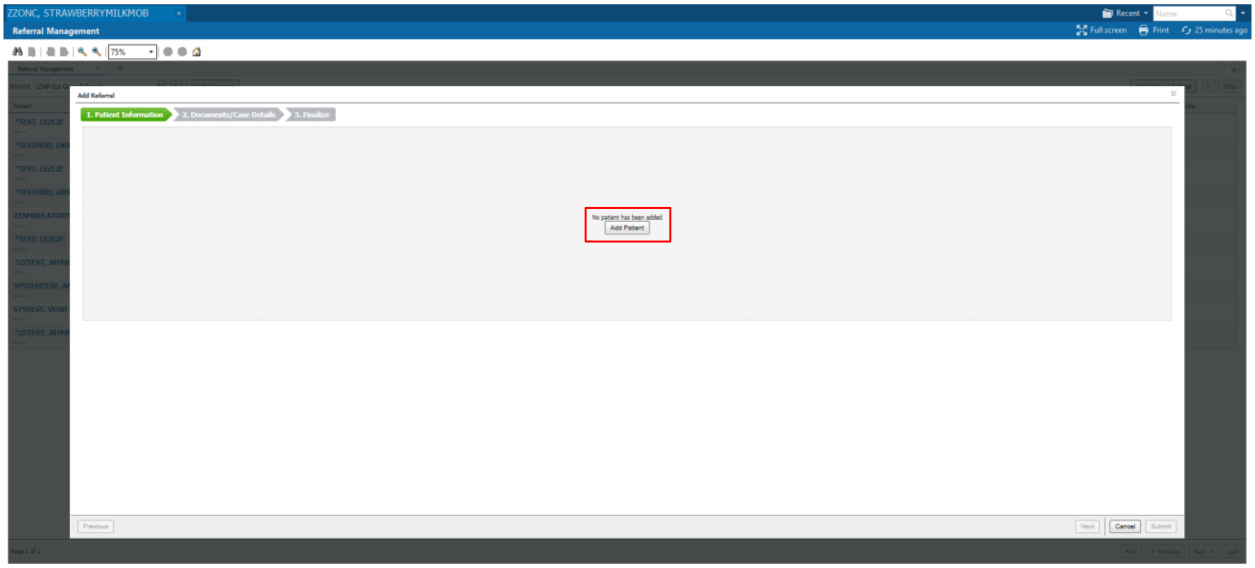




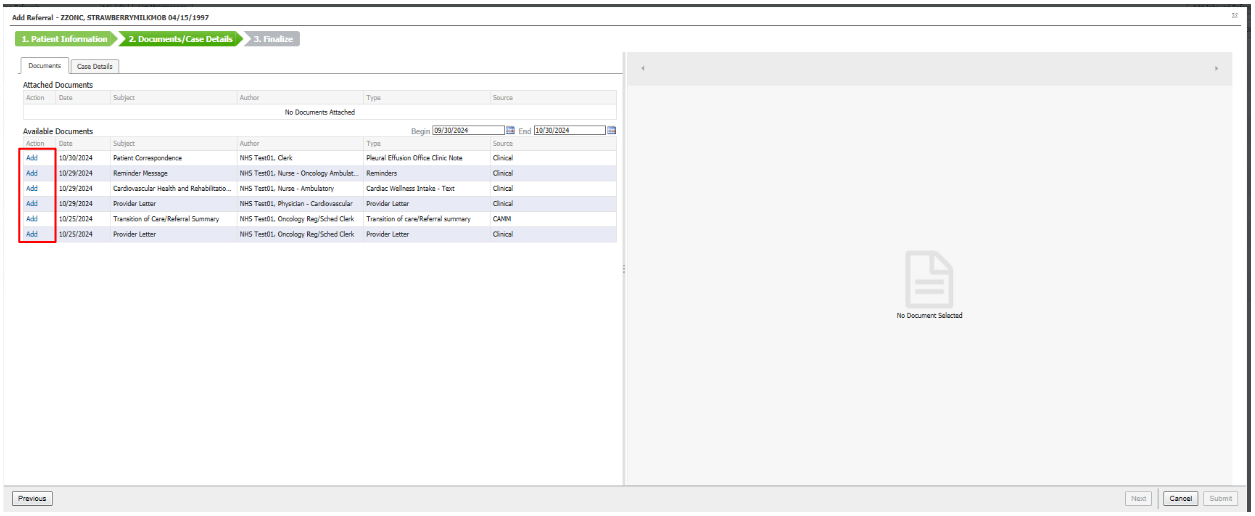
14. Now when in your correct worklist, select **Add Inbound Referral.**



15. Now you will add the patient using the **Add Patient** button.



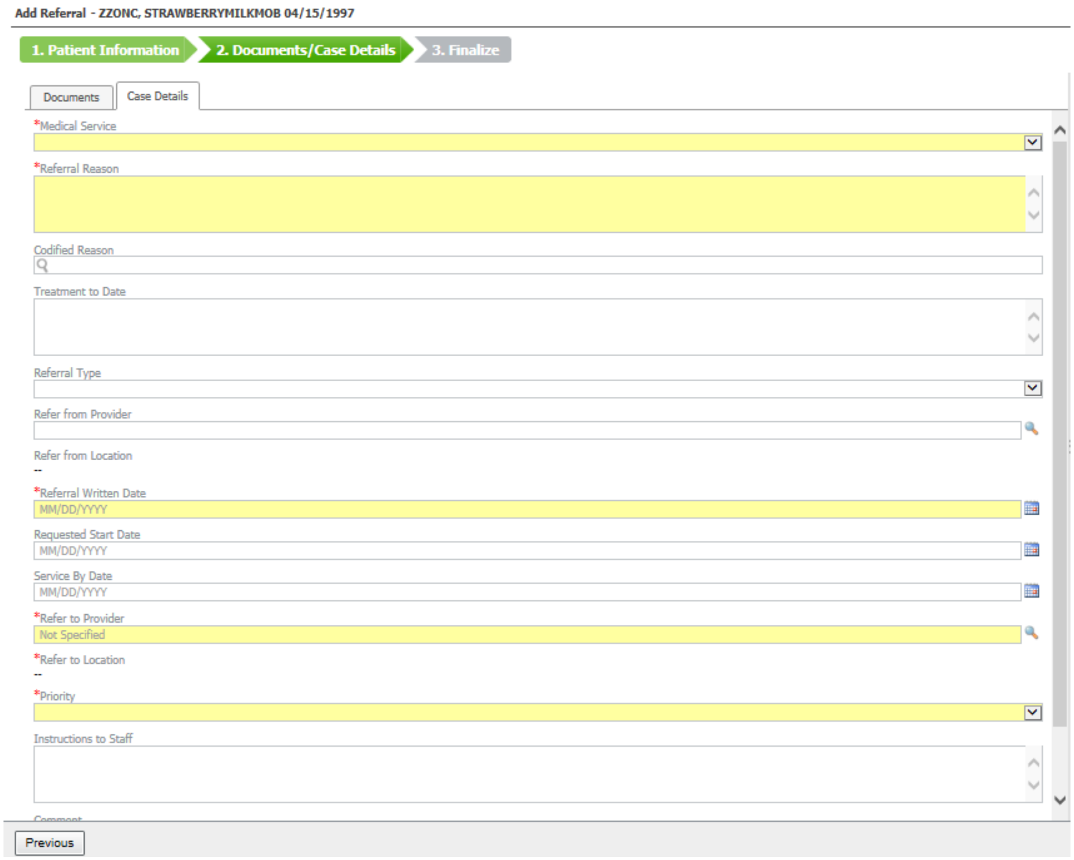
16. Now you can input the **Documents/Case Details.**
    a. To add a document, select the **Add** button to the left of the patient documents.



Action	Date	Subject	Author	Type	Source
Add	10/30/2024	Patient Correspondence	NHS Test01, Clerk	Pleural Effusion Office Clinic Note	Clinical
Add	10/29/2024	Reminder Message	NHS Test01, Nurse - Oncology Ambulat...	Reminders	Clinical
Add	10/29/2024	Cardiovascular Health and Rehabilitatio...	NHS Test01, Nurse - Ambulatory	Cardiac Wellness Intake - Text	Clinical
Add	10/29/2024	Provider Letter	NHS Test01, Physician - Cardiovascular	Provider Letter	Clinical
Add	10/25/2024	Transition of Care/Referral Summary	NHS Test01, Oncology Reg/Sched Clerk	Transition of care/Referral summary	CAMM
Add	10/25/2024	Provider Letter	NHS Test01, Oncology Reg/Sched Clerk	Provider Letter	Clinical

    b. Now in the **Case Details** tab, input all yellow fields and anything else applicable.

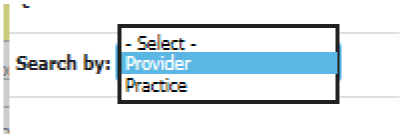
Medical Service: Ambulatory

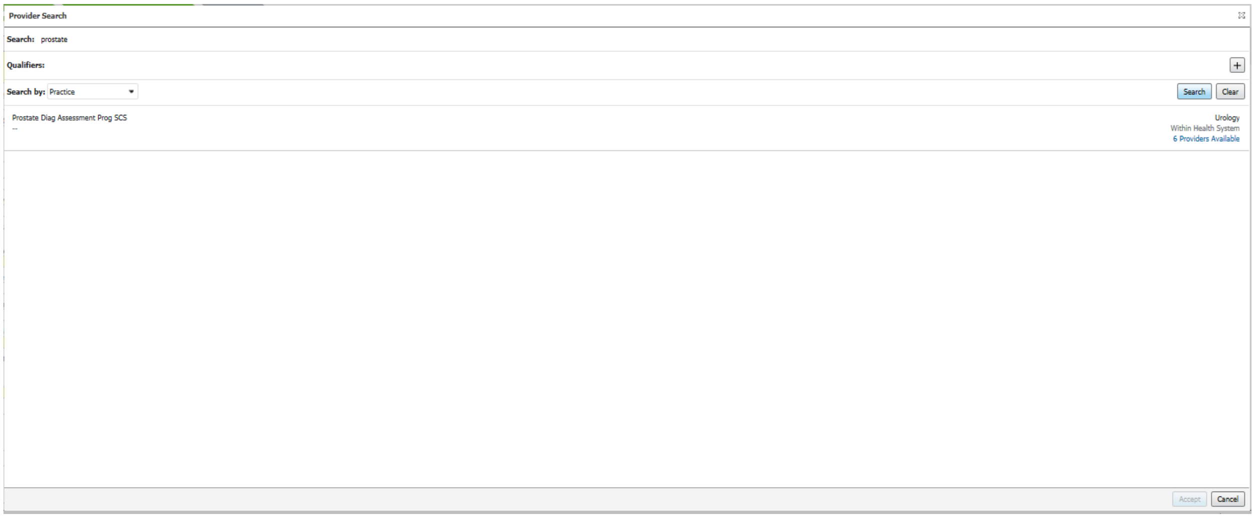


*For **Refer to Provider,** since we are just adding this to the clinic and there is not a specific provider yet since we have not accepted/rejected we will refer to a location. Complete the following:

- Select the magnifying glass to open the **Provider Search**

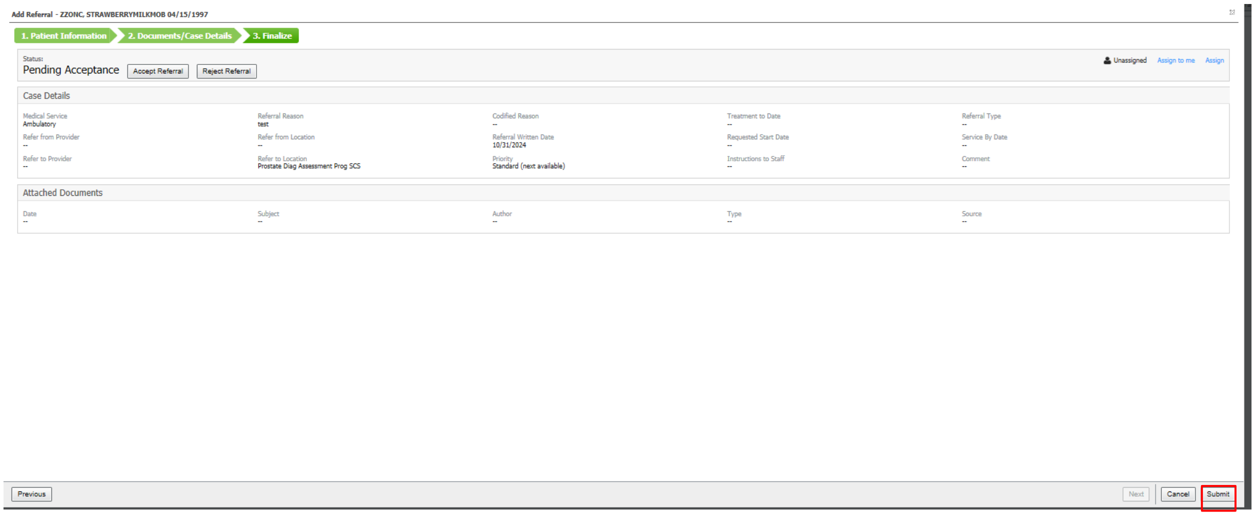
- Then select the drop down beside **Search by:** here you will click **Practice.**





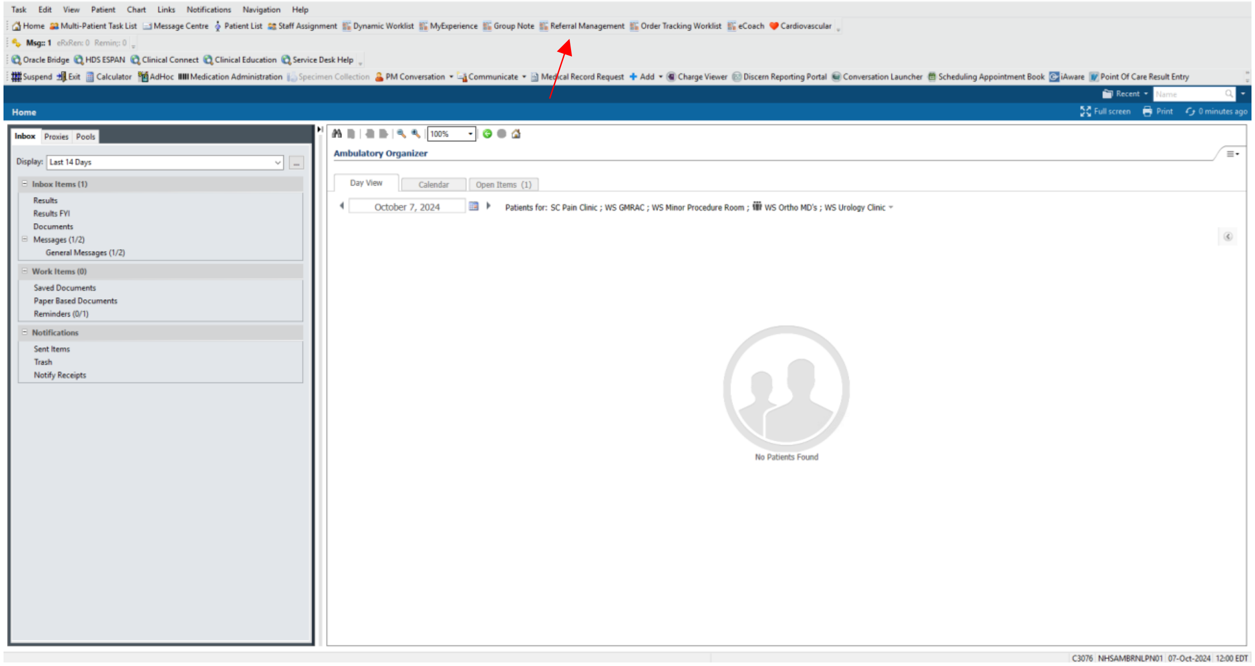
- Click the clinic and Select **Accept**

17. Now review the details and select **Submit.**



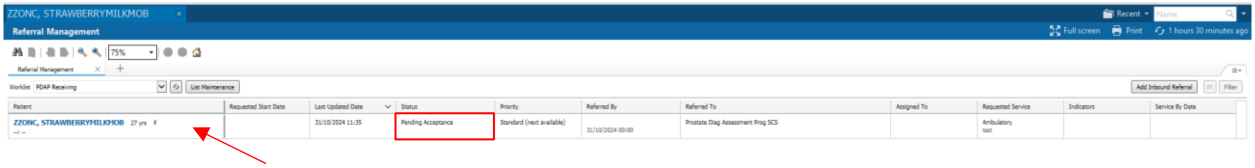
Nursing Staff:

1. Navigate to **Referral Management** from the top banner bar.

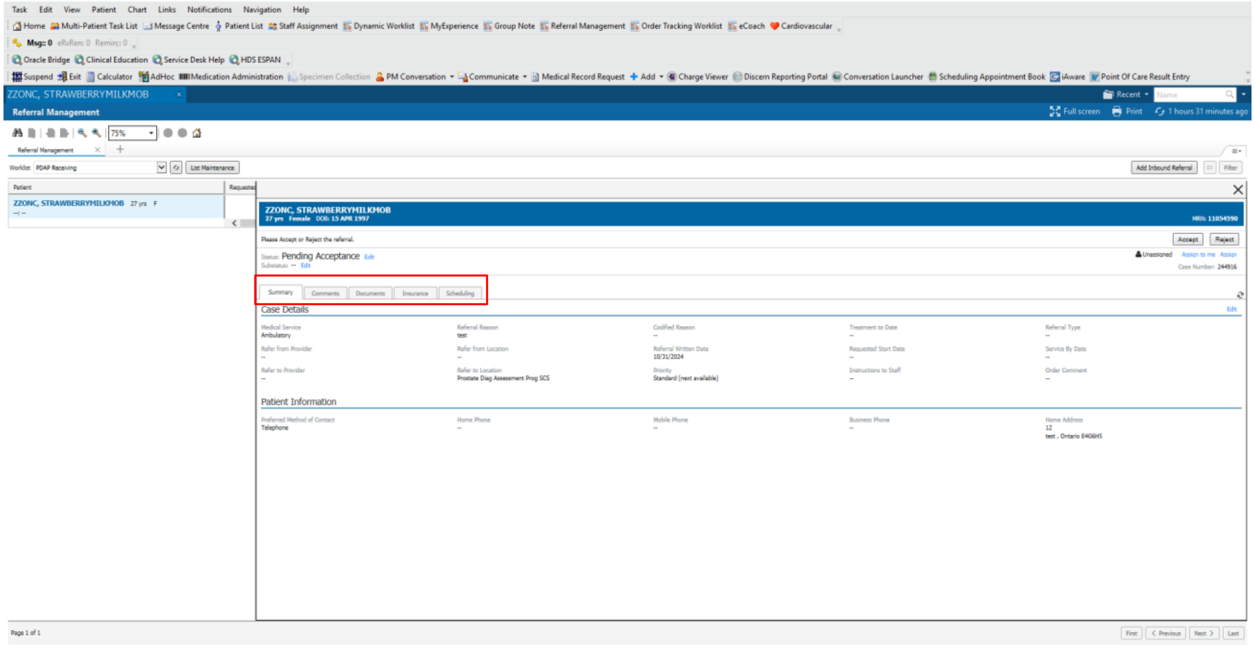


2. Ensure the correct worklist is selected, you will select the clinic's **Receiving** list.

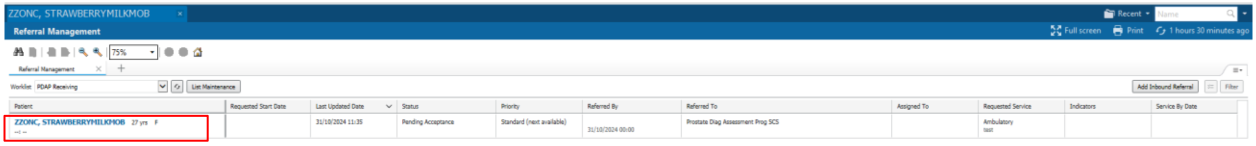
Here you will see the referral sent by the clerical staff, it will be shown in a **Pending Acceptance** status.



3. Clicking the white space beside the patient name you can open the referral and review its details, any attached documents, and add in any applicable comments.



4. You can also review the patient's chart by selecting their name in the referral management table, their name acts as a hyper link.



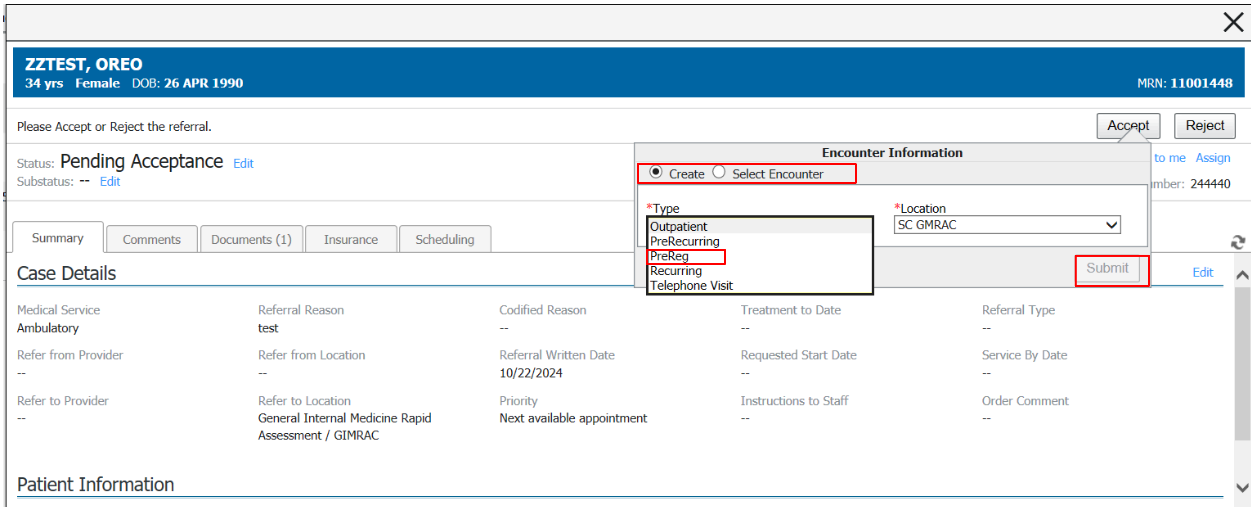
5. You can now **Accept** or **Reject** the referral.

<u>Accepting</u>

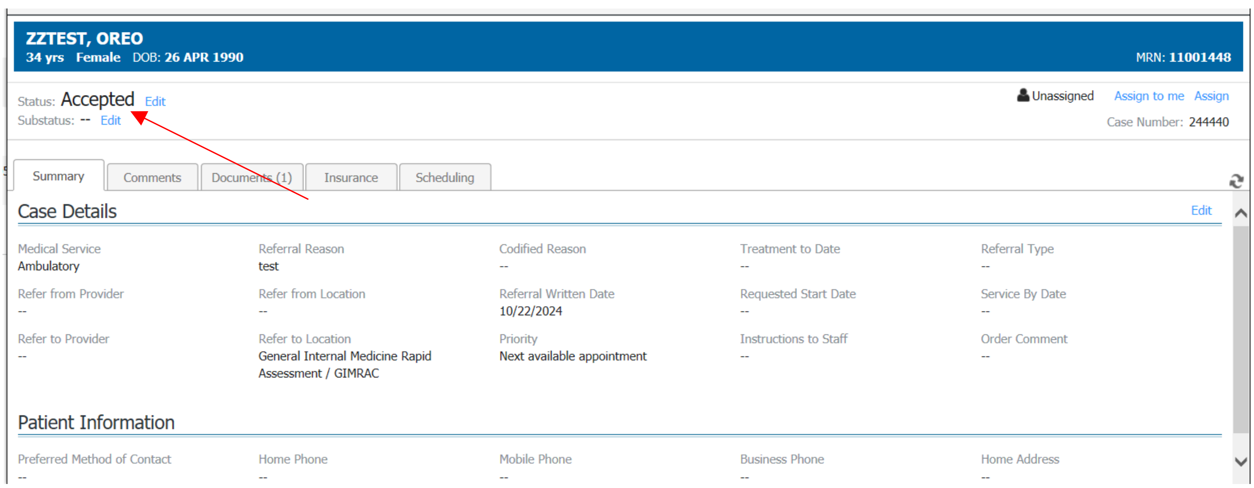
6. Select **Accept** to accept the internal referral.

In PowerChart (PowerChart.exe), the system prompts you to create an encounter or select an existing one. For your clinics, you will mostly create a new encounter.

7. To create a new encounter, select the **Create** option in the Encounter Information dialog box. For the encounter type select **PreReg,** then select a **Location**, and press **Submit.**



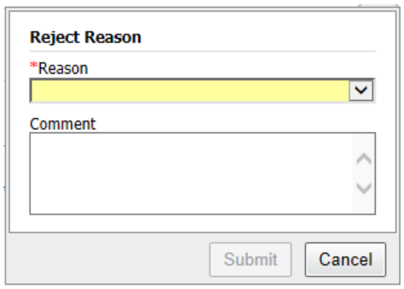
An encounter is created and associated with the referral case, then the status of the referral case is updated to **Accepted**.



<u>Rejecting</u>

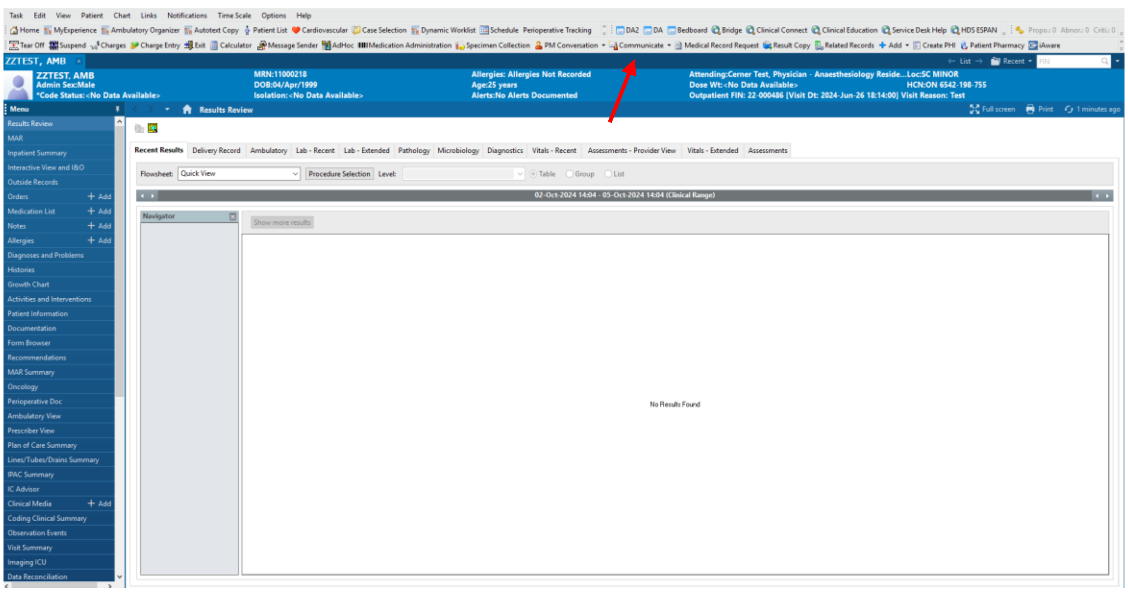
1. Select **Reject** to reject the referral or indicate that a referral sent was rejected.

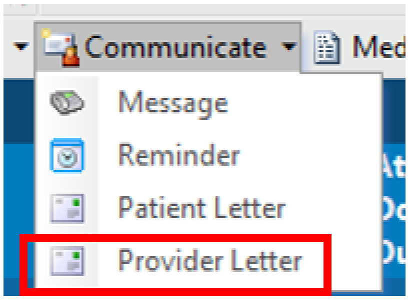
2. Enter a codified rejection reason, and, optionally, a free-text rejection reason. The system updates the status of the referral to Rejected.



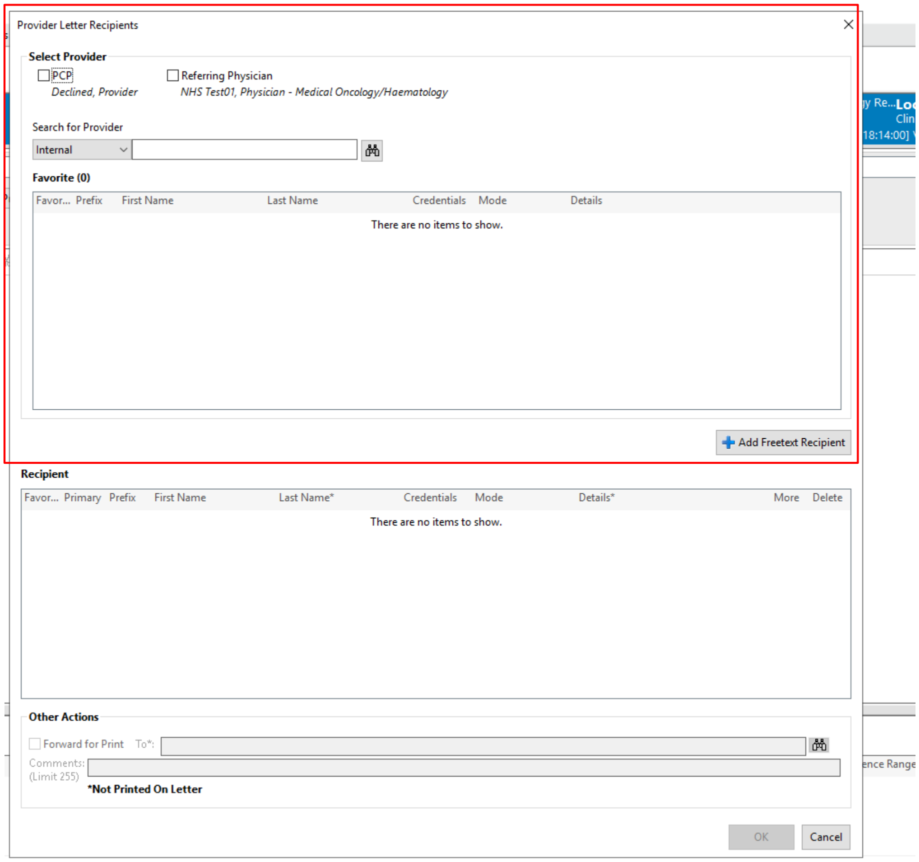
The referral status is updated to Rejected.

3. Now you inform the provider of the rejection reason, a provider letter would be used. Click on the black dropdown next to **Communicate** and select **Provider Letter.**

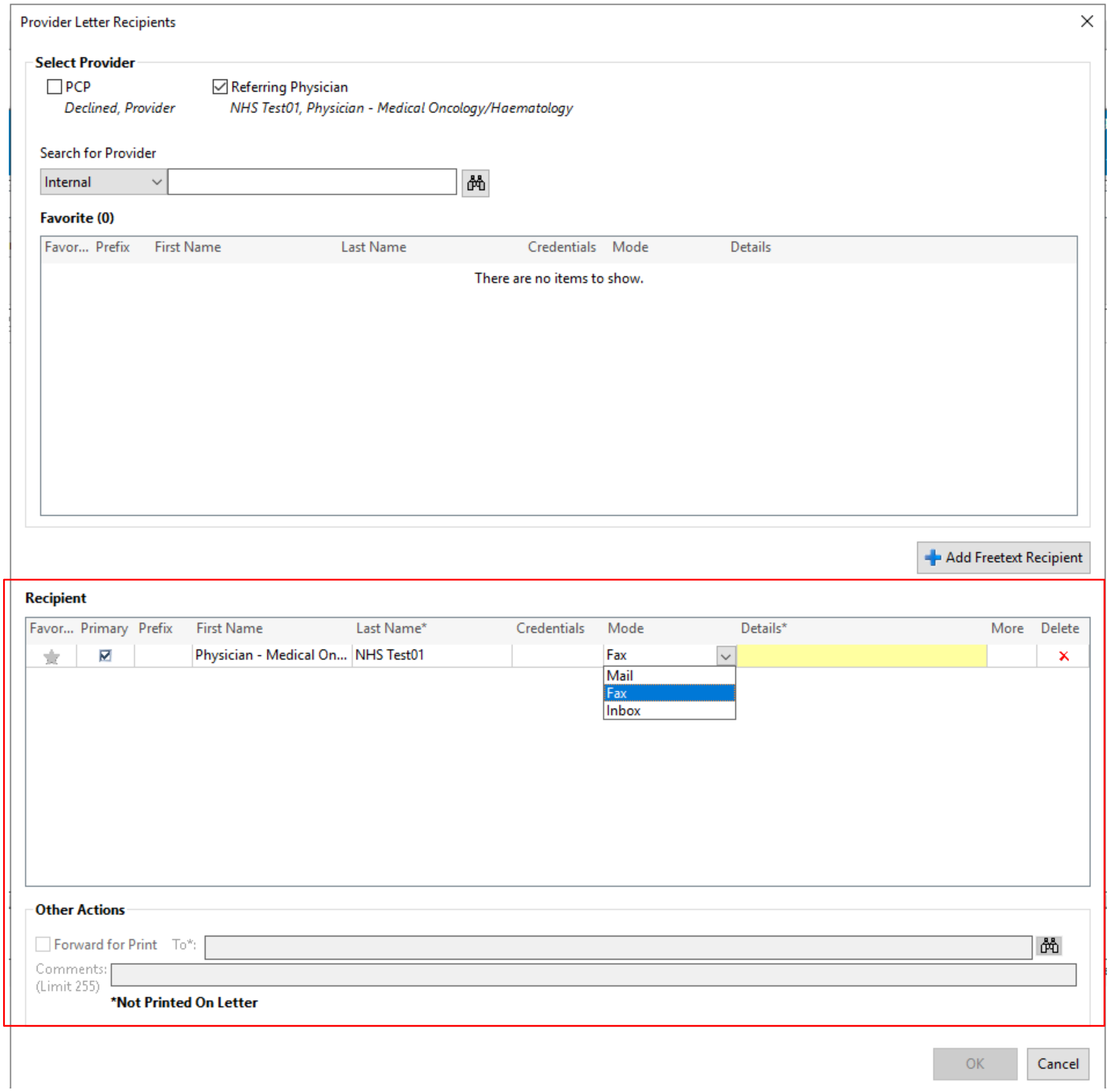




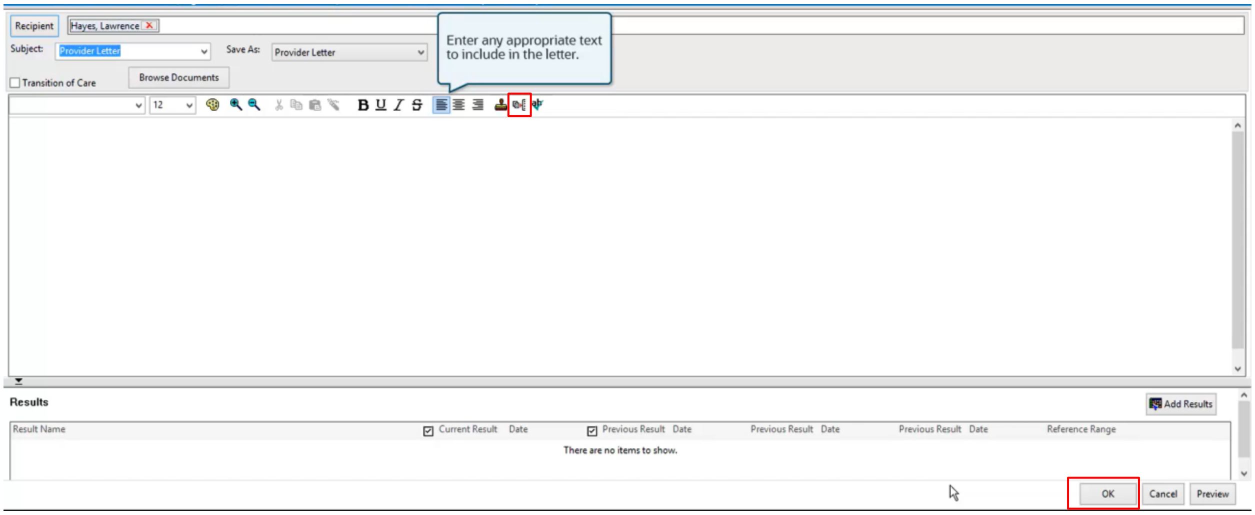
4. Search for and select a provider from the Search for Provider list, or select a provider from the Favorite or Recent Recipient tab. If you need to manually enter a recipient's click **Add Freetext Recipient**. The provider is added to the Recipient list.



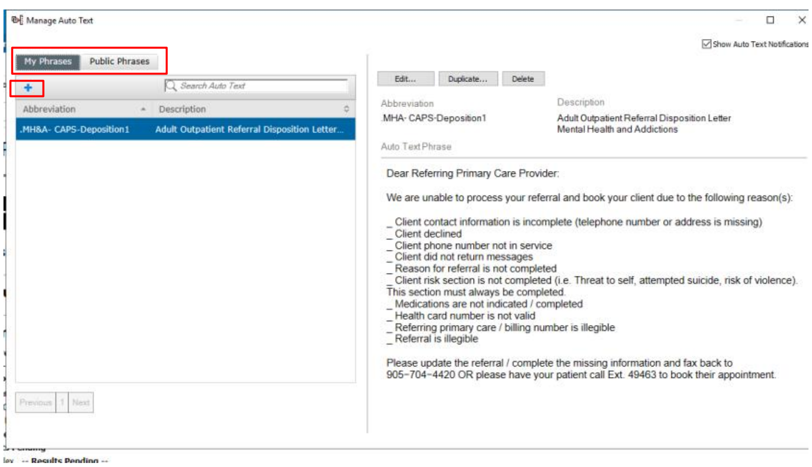
5. Select a cell from the Recipient list and update the provider's information as needed.



6. Click **OK**. The Create Letter dialog box is displayed and you can input why the referral was rejected. When complete select **OK** to send the provider letter.



7. Within the provider letter there is an autotext icon.
8. Within the auto text "library", there are three functions.



a. "My Phrases"-contains the auto texts you have created.
b. "Public Phrases"-contains all model auto text that are built in Cerner.
c. The "Add/+" button -allows the user to create a custom auto text.

The following are currently built out as **Geriatrics Autotexts.**

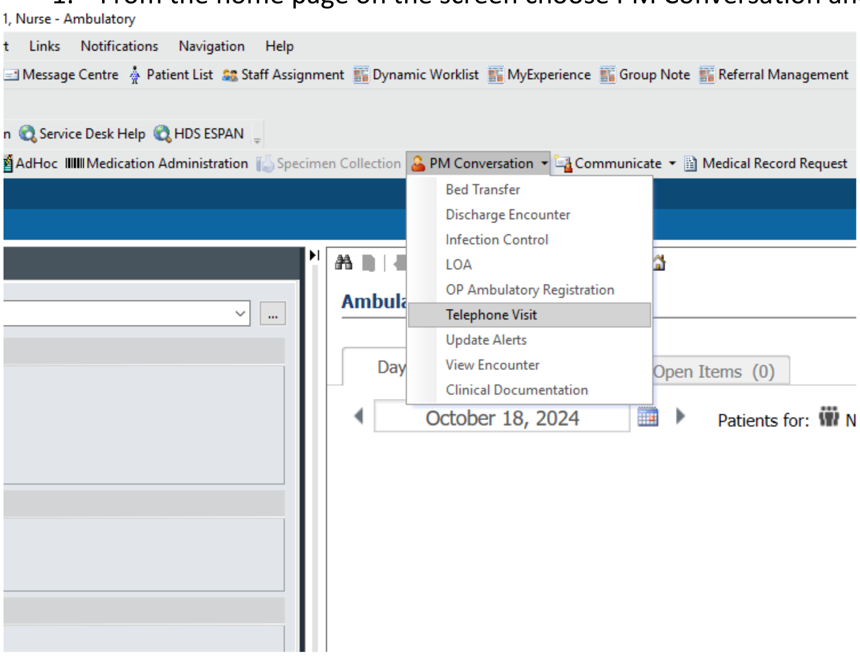
The Abbreviation This is what the end user types to bring up the auto text term. *This is sensitive to capitals and ensure you include the "." at the beginning. *	The Description This will display when the end user hovers the cursor over the auto text term prior to selecting it. This can help clarify what will be selected.
.Geriatrics-LetterEnactingPOA	Letter Enacting POA
.Geriatrics-GAPAccepted	GAP Referral Accepted
.Geriatrics-GAPOnHold	GAP Referral On Hold
.Geriatrics-GAPDeclined	GAP Referral Declined

__Charting For Geriatrics__

Initial Intake, if most of the intake pertaining to your clinic occurs on the phone, you would utilize ***PM Conversation.***

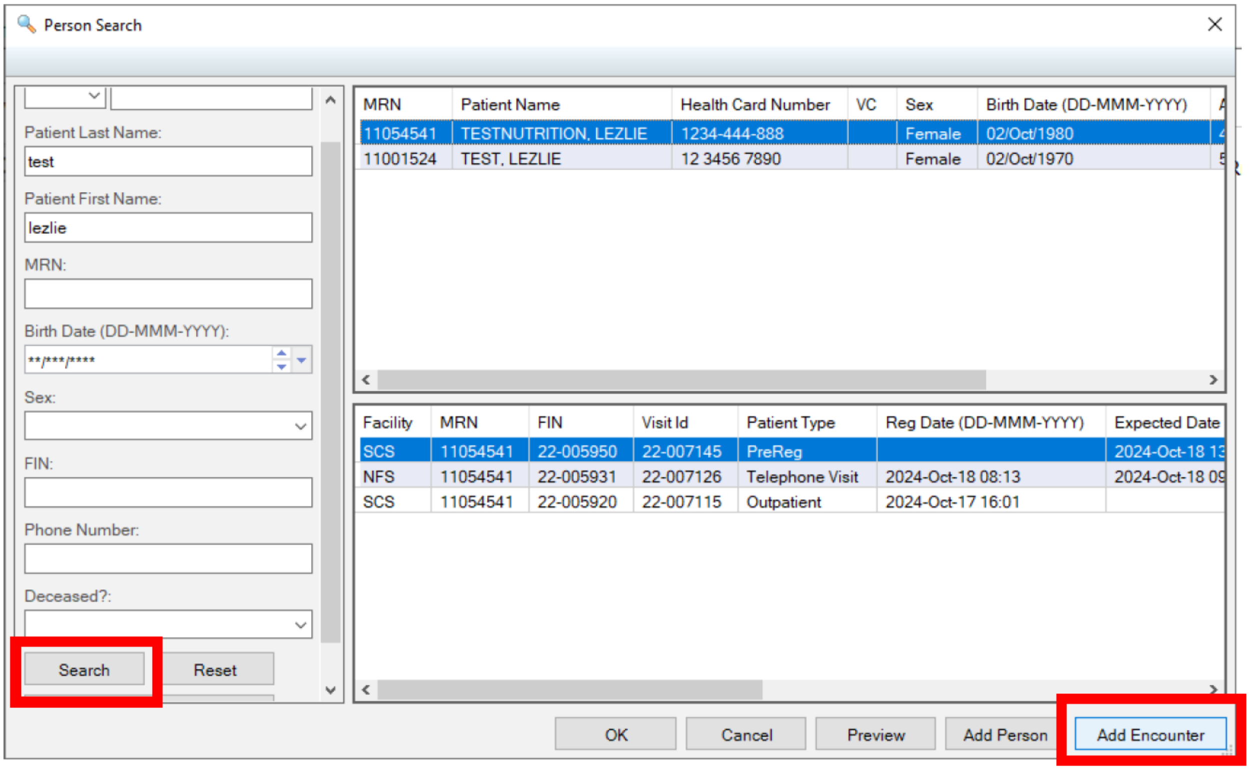
The use of PM Conversations: Telephone Visits is for patient interactions that are not booked appointments, but need to be logged as visits for the purpose of keeping statics on the amount of time staff are spending with patients. This feature is to be used for any patient telephone interaction over 5mins in length that is not a pre-booked telephone visit.

1. From the home page on the screen choose PM Conversation and Telephone Visit.



2. Type patient name in the search field and click the search button.
3. Once you find the patient click **Add Encounter** to make a telephone visit encounter.

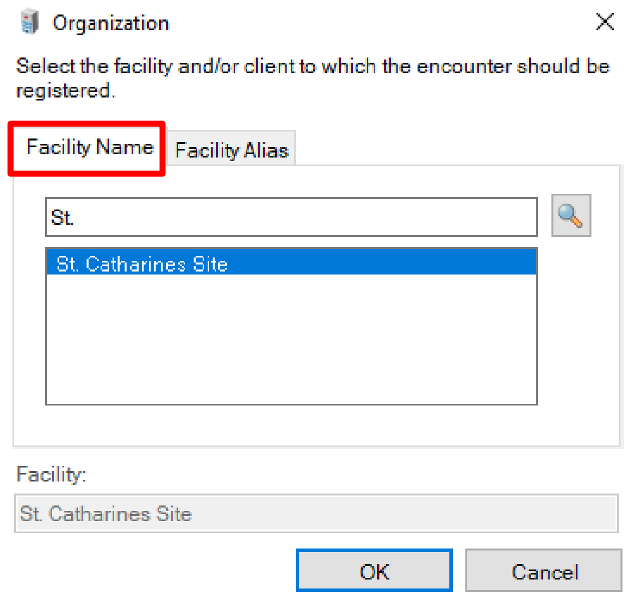
NOTE: if you do not find the patient, connect with your Ward Clerk to ensure patient information has been entered in the system.

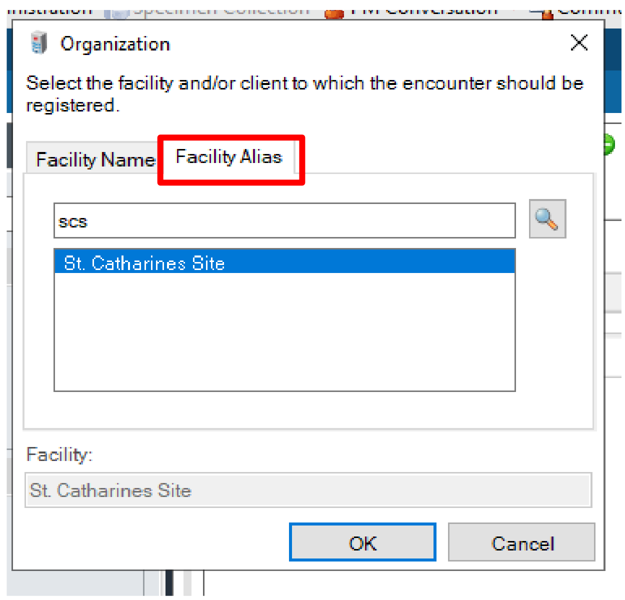


4. Select the facility to which the encounter should be registered

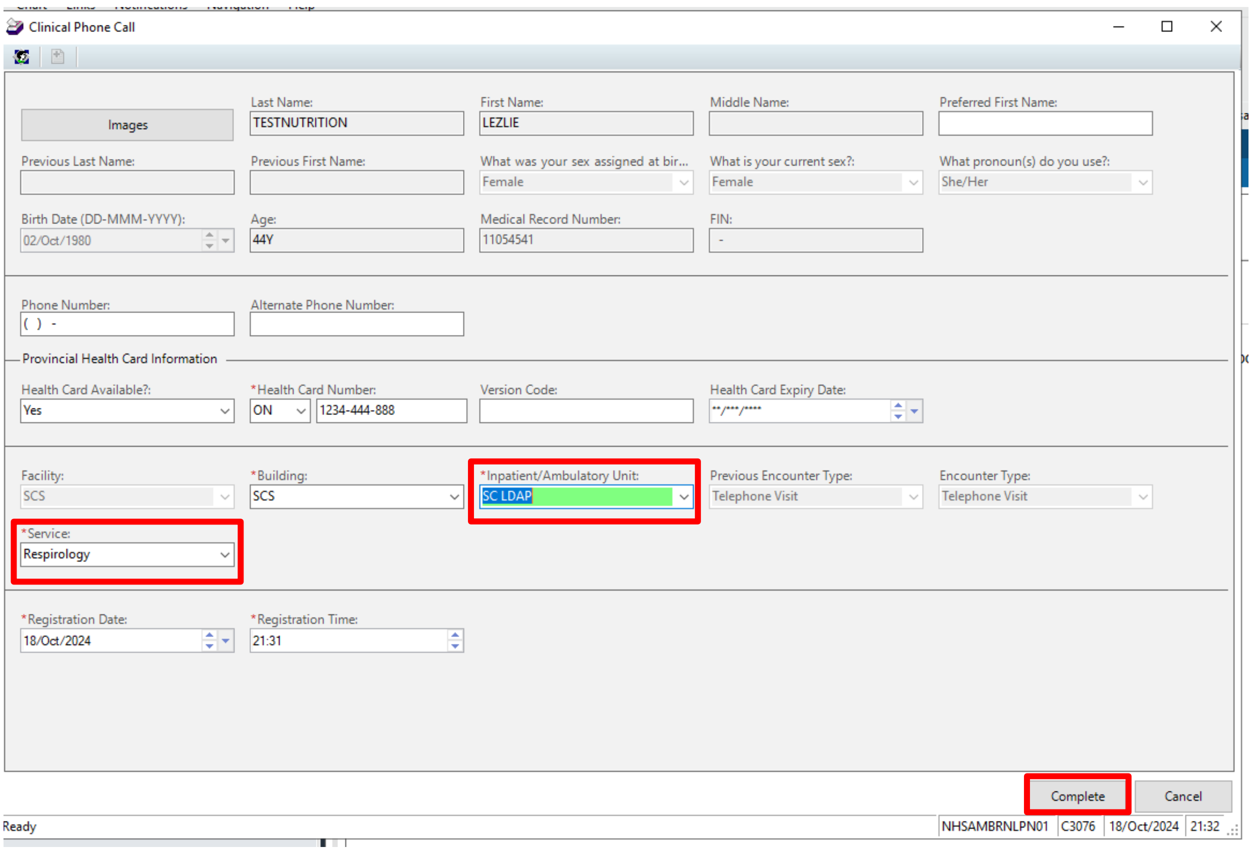
Facility Name: Is the Name (ie: St Catharines)

Facility Alias: Is the Short Form (ie: SCS, NF, WS, FE, PC, HDS)

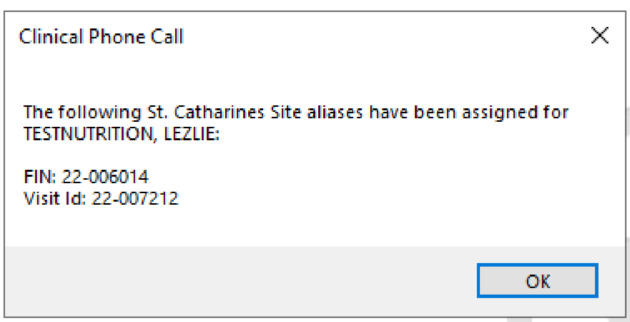


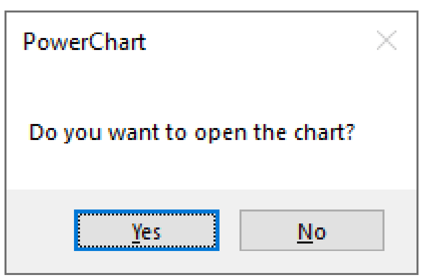


5. Complete the required fields marked in “yellow” and with an “*” to register the telephone visit to the appropriate clinic location. Can click complete when done.



6. You will receive the following message and click “OK”. You will get the following message asking if you would like to open the chart. Click “Yes”.

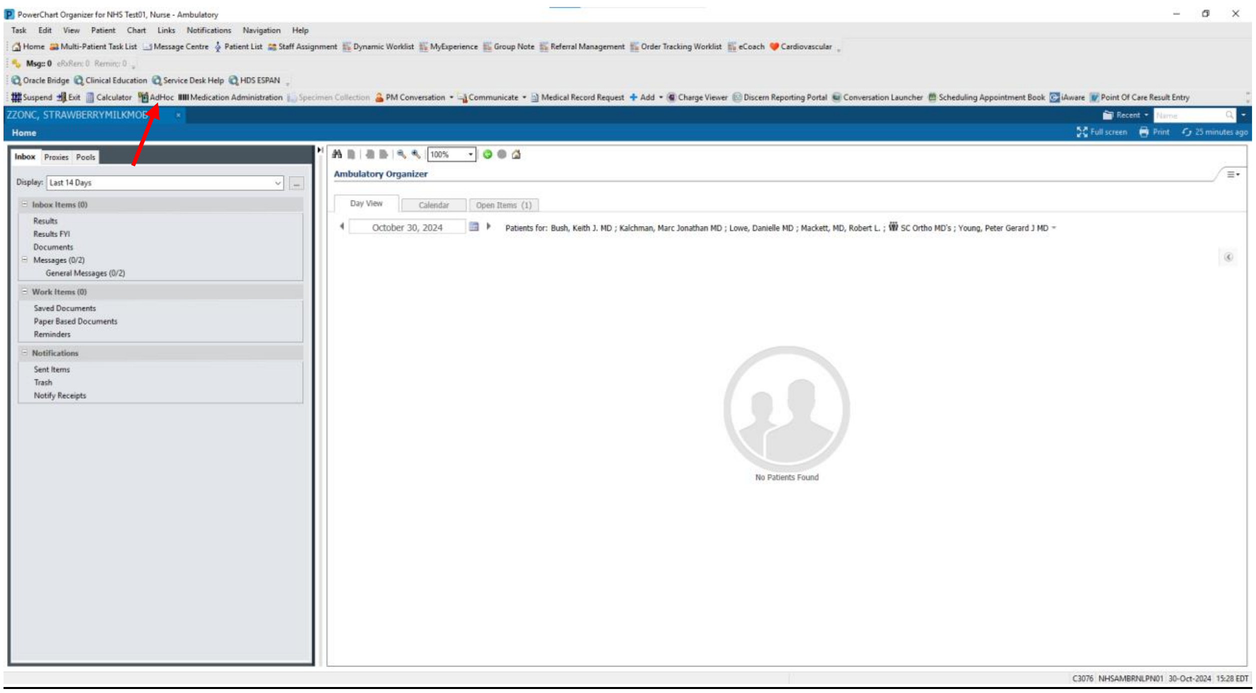




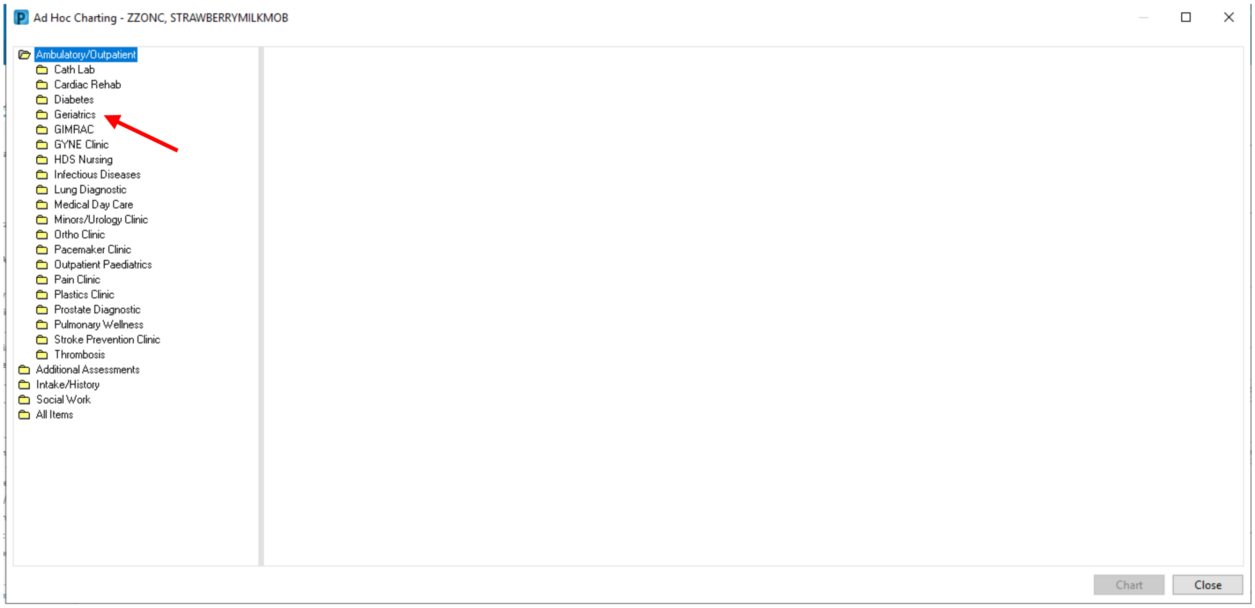
7. Launch into the patient chart and locate the powerform you would like to complete. This can be done either through adhoc charting or through the vital sign drop down “carrot”.

Adhoc Charting

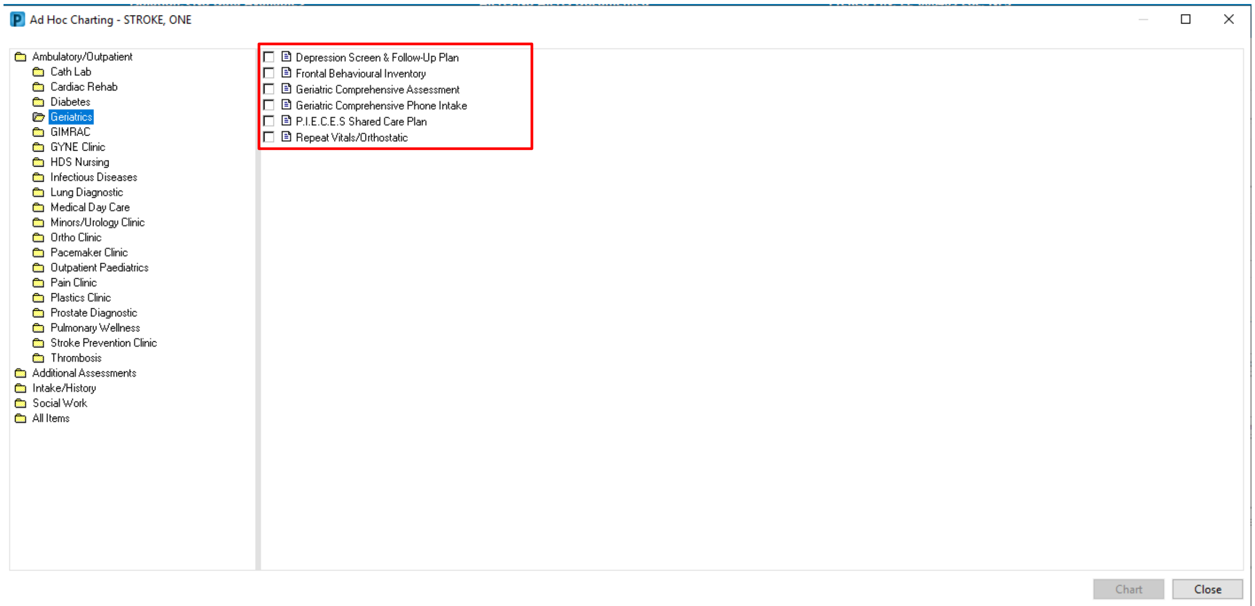
8. Select the **Adhoc** button in the top gray banner bar.



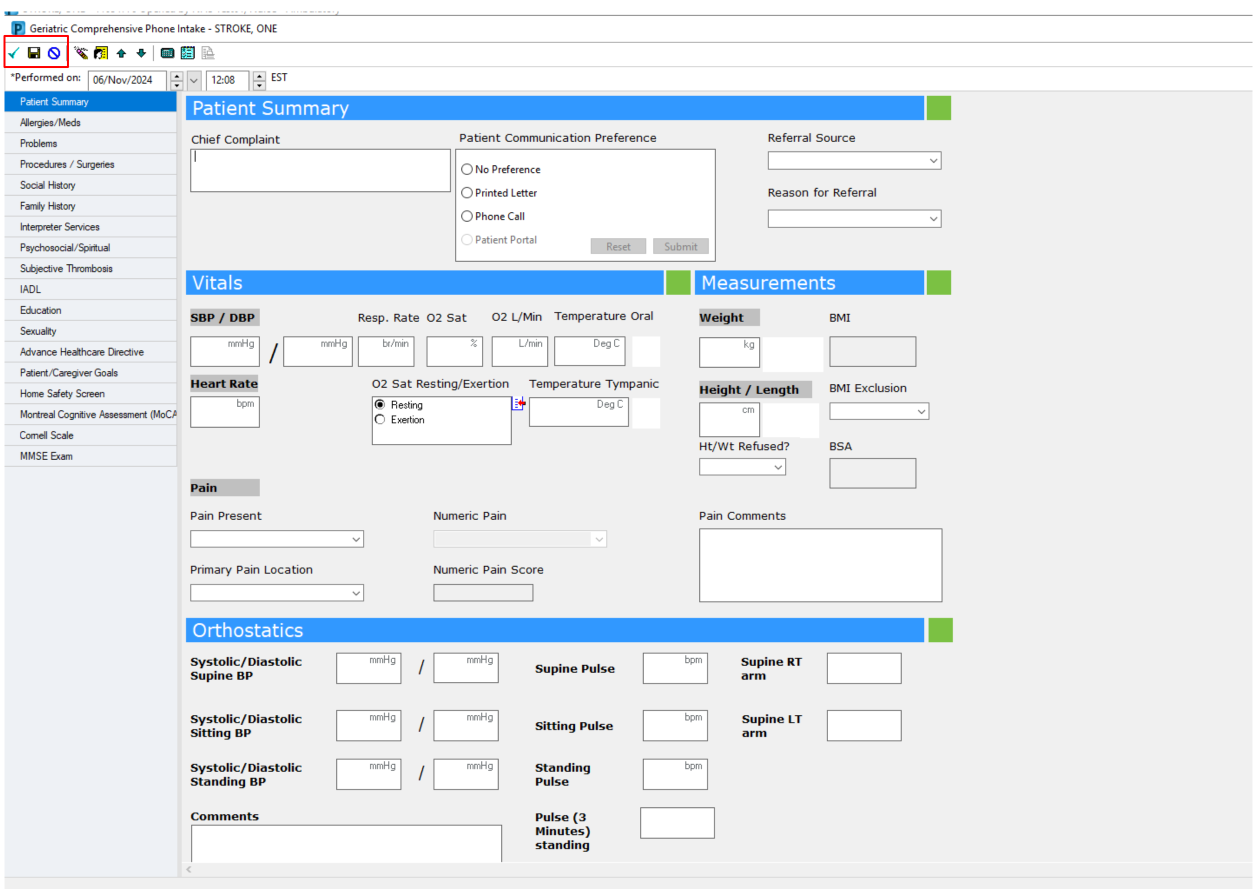
9. The ambulatory folders will show, navigate to your clinics appropriate folder.



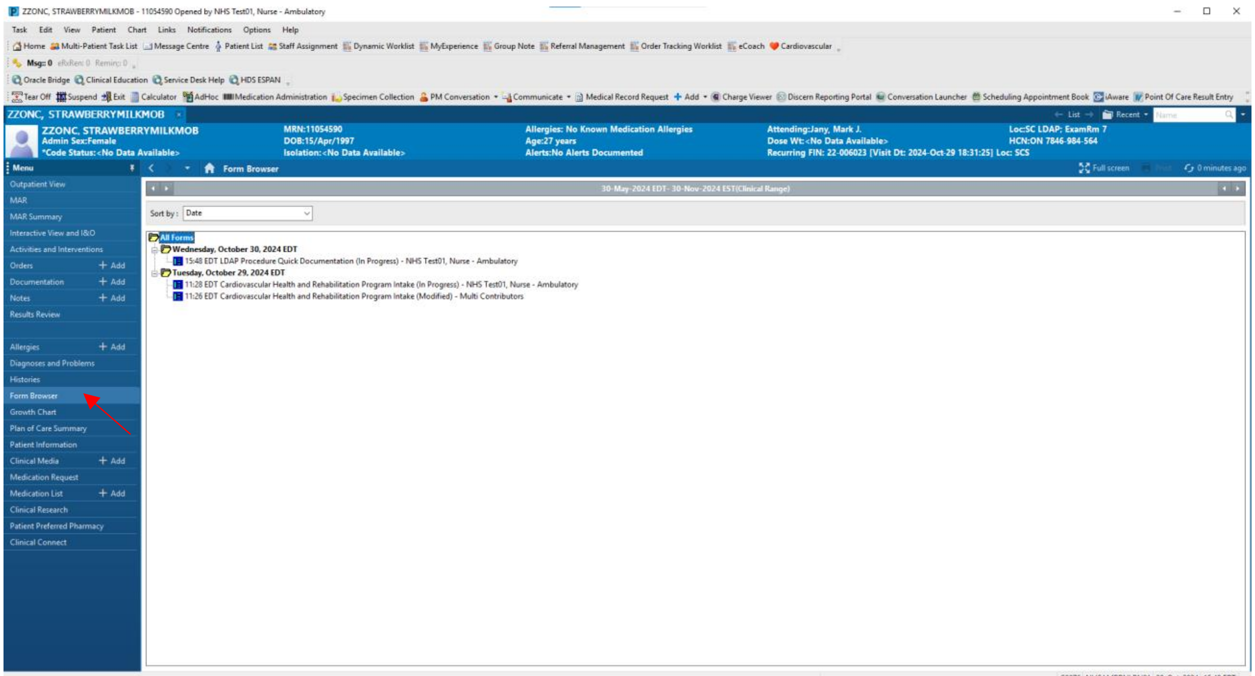
10. Now you can pick your clinic form or the telephone intake form.



Within the forms the buttons on the top are for the following:

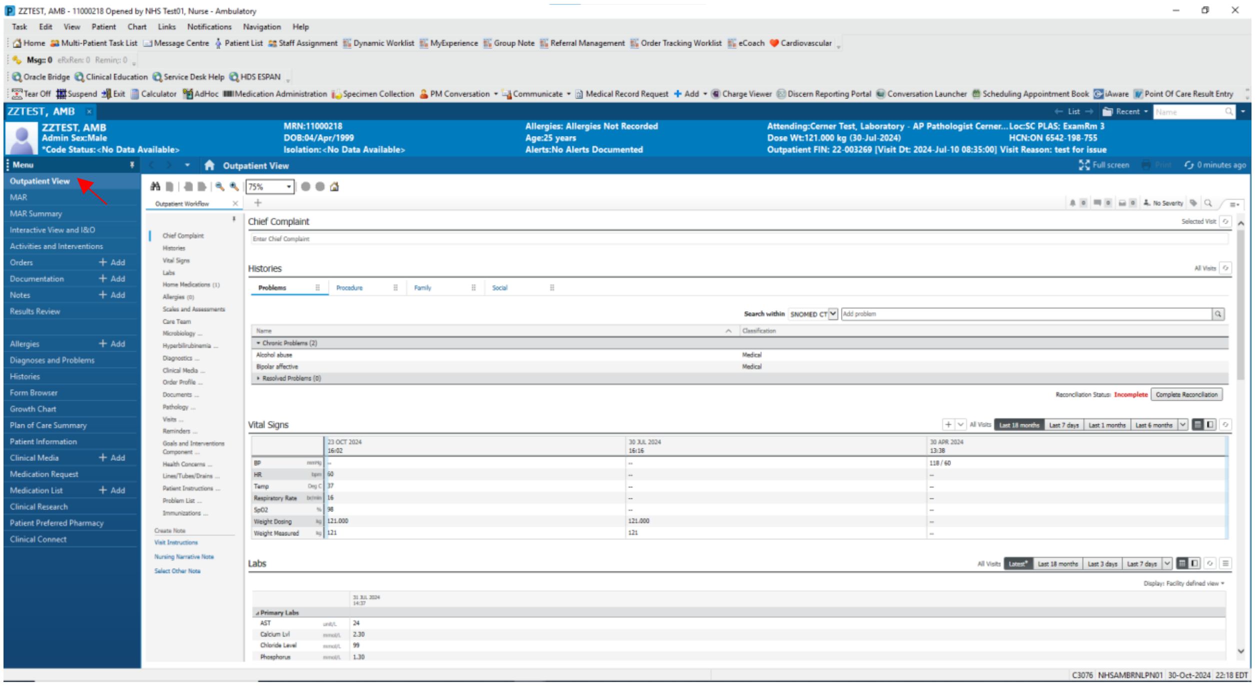


- ✓ - Submit
- - Save but **NOT** Submit, when you use this you can reopen your forms in **Form Browser.** Double click the forms to reopen and continue charting.

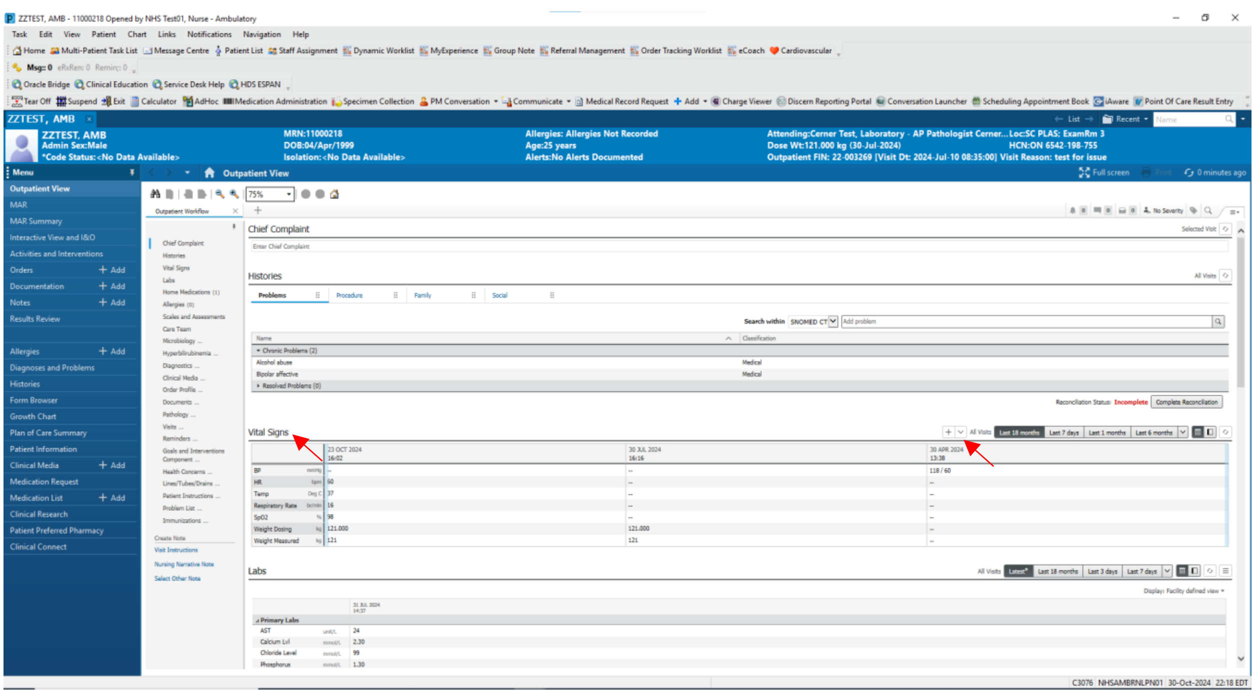


Vital Sign Drop Down Carrot:

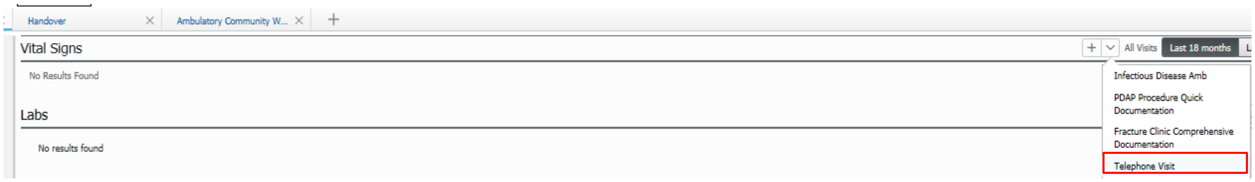
1. When in your patient chart, select **Outpatient View** if not already open.



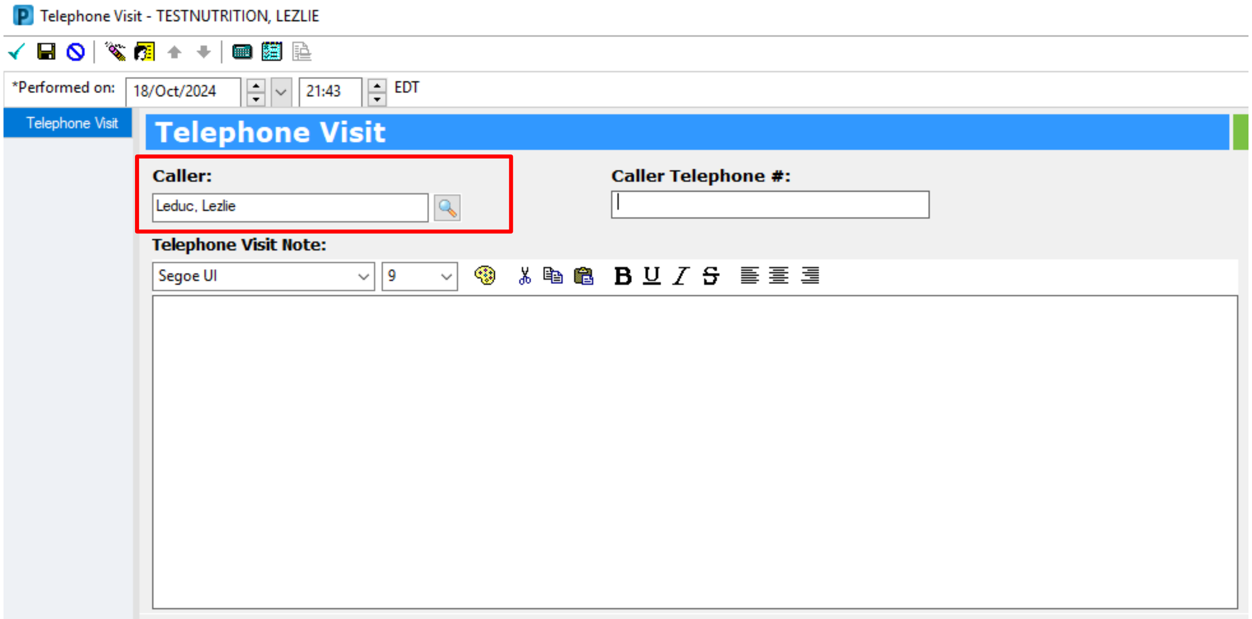
2. Now navigate to the **Vital Signs** section, here you will locate the “carrot” icon 



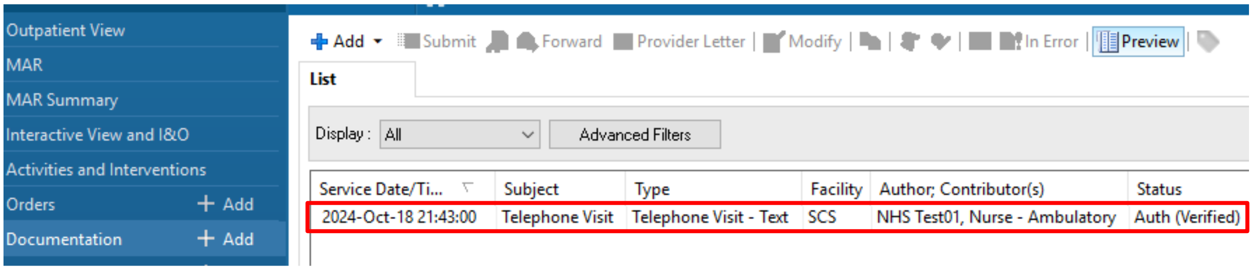
3. From the drop-down list, select **Telephone Visit.**

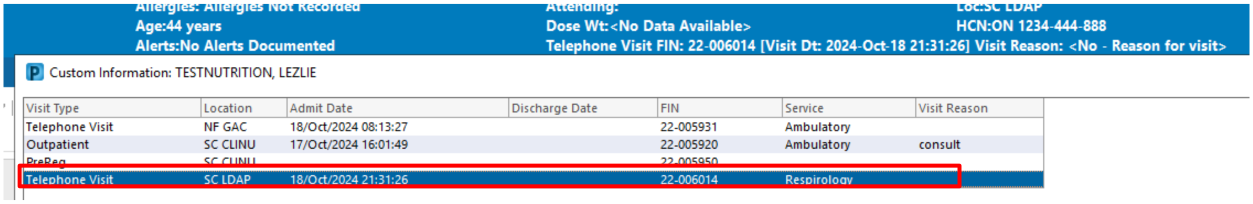


4. Document your patient encounter. On the telephone visit form you can add the caller name and number by searching with the and finding the clinicians name. Once you complete the telephone visit click the green checkmark to complete the documentation



5. This will document the power form in the chart and register a telephone visit as an encounter.





6. Decision support and clinical managers will be able to pull reports on the number of registered telephone visit encounter for a Clinic area from this data.