Ward Clerk Binder Build A Binder Template

Version: 07/02/2025

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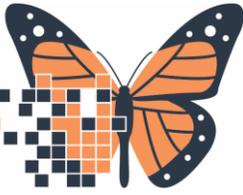
Some useful information when creating your binder!

WHERE TO START? Familiarize yourself with the scheduling icons & THESE COMMONLY USED SCREENS

(SEE BELOW)

SCHEDULE APPOINTMENT

Scheduling: Scheduling Appointment Book

Task   Edit   View   Help

Name:
DOB: Age:

‹	2025	›

| ‹ | January | › |
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Books   **Appointment**

*Appointment location:

Appointment type:

Person name:

Schedule Inquiry - Radiology Request List

Task   Edit   View   Help

Name:
DOB: Age:

Request List

Inquiry:
Radiology Request List

Request List Queues:
AAC Reschedule
AAC Reschedule
SC ORTHO Future Book
Paed Future Book
ONC Future Book
ONC DIET Future Book
SC XR Future Book
NF XR Future Book
WS XR Future Book
ONC ONSS Future Book

LIST INQUIRY

| 9:45 AM |
| 10:00 AM |
| 10:15 AM |
| 10:30 AM |
| 10:45 AM |
| 11:00 AM |
| 11:15 AM |

REFERRAL MANAGEMENT

100%

Referral Management   ✕   +

Worklist GAC receiving   List Maintenance

Patient	Referred By	Referred To
ITTHREE, FALL PRATAP 86 yrs M	NHS Test01, Physician - Hospital... 22/08/2024 09:53	Geriatric Assessm...
ITTWO, FALL PRATAP 86 yrs M	NHS Test01, Physician - Hospital... 07/08/2024 13:42	Geriatric Assessm...
*TEST, LEZLIE 54 yrs F	02/12/2024 00:00	Geriatric Assessm...
*TEST, LEZLIE 54 yrs F	NHS Test01, Physician - Neurology 10/06/2024 13:25	Geriatric Assessm...
*TEST, RMTWO 26 yrs F	Salib, Mary 03/12/2024 10:33	Geriatric Assessm...
*ZZREFERRAL, INCLINIC 39 yrs F	NHS Test01, Physician - Internal... 01/12/2024 14:31	Geriatric Assessm...
*ZZREFERRAL, INCLINIC 39 yrs F	01/12/2024 00:00	Geriatric Assessm...

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All orders to schedule will come from the follow places

Referral Orders

- Placed by providers when referring a patient for a consultation or specialized service.

- These orders should always be used when referring a patient to a new specialty or provider.

Return to Clinic Orders

- Used only by the clinic team to schedule follow-up appointments within the same specialty/service.

- If you notice a Return to Clinic order being placed instead of a Referral Order, please notify [Insert Contact], as the provider may need additional education on proper order placement.

Community Referrals Sent via WQM (Work Queue Monitor)

- When an external referral comes in via WQM, follow the steps (attach tip sheets) to create a Future Book order in the Inquiry List.

Future Book Orders

- Generated when a provider or department requires a patient to be booked for a future appointment but does not place a direct scheduling order.

- These appear in the Inquiry List and must be scheduled based on department workflows.

Same-Day or Urgent Scheduling Requests

- Certain departments allow for urgent or same-day scheduling based on patient needs. These requests may come through PowerChart messaging, verbal requests, or triage workflows.

These orders are typically submitted by providers (Physicians, NPs, PAs), interprofessional team members (Dietitians, Rehab, etc.), nursing staff, and clerks.

To prevent order backlogs, clerks should regularly check key areas where scheduling orders are received.

Referral Management is the new digital platform at Niagara Health that is designed to streamline the process of referring patients from one healthcare provider to another. This new system enhances communication, reduces delays, and improves patient care coordination.

Referral Management was designed to move referrals in the following ways -

Current Patient Location	Anticipated Patient Location	How to Process?
Inpatient @ NH	Outpatient Clinic @ NH	Referral Management
Inpatient @ NH	External Outpatient Clinic	Referral Management
Outpatient @ NH	Outpatient Clinic @ NH	Referral Management
Outpatient @ NH	External Outpatient Clinic	Referral Management

Referral Management is found directly in PowerChart. There is NOT an AppBar Icon that you can customize your app bar with.

Inpatient Clerks will only be responsible for sending (originating) referrals.

Outpatient Clerks will be responsible for both sending AND receiving referrals. Your role as a clerk in referral management will change by department, although basic function will remain the same across the organization.

Bridge

Bridge Medical is Millennium's point-of-care software used to assist in transfusion administration of blood products and/or breastmilk. The application enables caregivers to record transfusion time, vital signs, and relevant clinical observations, which can be displayed or printed later as part of the permanent medical record.

It is important to record both start and end times of each transfusion within your department. The care team does an excellent job of recording these times, however, it has been noted that sometimes end times are being missed. This leads to transfusions being marked as started but not ended in the system.

How can clerks assist with this?

Clerks & Charge Nurses have the ability to generate a report called "Start Transfusions Not Ended" which will help nurses complete their documentation before their shift end by identifying patients who incomplete transfusions in Bridge. Instructions on how to run this report are listed below.

[Generating Reports in Bridge](#)

Please confirm with your unit manager if the clerk or charge nurse in your department will be responsible for running this report at shift change.

Powerchart

Key Responsibilities of Ward Clerks in PowerChart:

Patient Registration & Updates – Ensuring accurate entry of patient demographics, admissions, and discharges.

Managing Orders & Requests – Processing physician orders for tests, procedures, and consultations.

Scheduling & Coordination – Assisting with appointment scheduling, transfers, and bed assignments.

Message Center Management – Communicating with clinical staff by reviewing, forwarding, and responding to important messages.

Document Handling – Uploading and organizing medical records, including referrals and test results.

Accessing Message Centre

In PowerChart, the Message Center is used for managing communication, reviewing documents, and handling tasks efficiently.

Accessing Message Center

- Open PowerChart and navigate to the Message Center tab.

- Your inbox will display messages, notifications, and tasks.

Managing Messages

- Click on a message to read its contents.

- Use Reply, Forward, or Delete as needed.

- Mark messages as Read/Unread for tracking.

3. Processing Orders & Documents

- Review and track referrals, lab results, and physician orders.

- Ensure orders are signed and completed if required.

- Follow up on any outstanding tasks.

4. Communicating with the Care Team

- Send messages to nurses, physicians, or other departments for clarifications.

- Attach necessary patient documents or updates to messages.

- Use predefined message templates if available to save time.

5. Ensuring Smooth Workflow

- Check incoming and outgoing referrals at the start of your shift.

- Follow up on any pending documentation or order requests.

- Keep track of patient admissions, discharges, and transfers

Access Management

Ward clerks play a crucial role in Access Management, ensuring smooth patient flow and secure handling of information.

Their responsibilities include:

- Patient Admissions & Discharges: Accurately entering and updating patient information in the system.

- Transfer Management: Coordinating patient movement between departments or units.

User Access & Permissions: Ensuring appropriate access levels for staff based on roles and responsibilities.

- Regulating Visitor & Provider Access: Managing restrictions and security settings for patient records.

This system helps optimize hospital efficiency while maintaining data security and compliance.

Capacity Management

Ward clerks play a crucial role in Capacity Management by tracking and managing bed availability to ensure efficient patient flow. Their key responsibilities include:

Monitoring Bed Status – Updating and verifying bed assignments, availability, and occupancy in real time.

Coordinating Admissions, Transfers, and Discharges – Ensuring smooth transitions for patients by communicating with nurses and administrative staff.

Assisting with Patient Placement – Helping allocate beds based on patient needs, unit capacity, and hospital policies.

Communicating with Clinical Teams – Keeping nurses, physicians, and bed management teams informed about bed status and patient movement.

By efficiently managing capacity, ward clerks help reduce delays.

Some Tips and Reminders When Building Your Own Binder

How should I keep my binder updated?

Workflows and templates are continuality being updated. It is important to keep up to date with the Tip sheets in your own binder as updates become available.

Add job aids that you think will help you and your team!

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