

Cerner Workflow ID: Client Workflow ID: 996

Last updated by Christina Carile, Aug 01, 2024 2:49pm (UTC -5 hours)

#### **Workflow Details:**

Workflow Name: Rehab Therapies - HDS AAC Clinic Workflow State: Future State Workstream: Other Venue: Rehabilitation Client Owner: Carile, Christina Elizabeth Cerner Owner: Biggins,Emily R Boswell,Scott D Standard: Yes Related Workflow(s): Tags:

#### **Workflow Summary:**

Service Line: Related Solution(s): Rehab Therapies Project Name: Niagara Health System:OPT-0297674:NIAG\_CD Niagara HIS RFP TestBuilder Script(s): Cerner Workflow ID: Client Workflow ID: 996 Workflow Notes: Introduced By: WS 7 Validated By: WS 8

#### Swim Lane:

Role(s): Prescriber [Custom] Department(s): Security Position(s):

#### Start/Stop [439]

Description: Referral to Outpatient AAC Clinic - External Prescriber

#### Start/Stop [440]

Description: Referral to Outpatient AAC Clinic - Internal Prescriber

#### Swim Lane:

Role(s): Occupational Therapist Speech Language Pathologist

Department(s): Security Position(s):



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# Off Page Reference [443]

Workflow Link: Work Queue Management - Enterprise Document Management - WQM with Referral Management

# Off Page Reference [169]

Workflow Link: Ambulatory - Referrals (Receiving)

Step Impact: Training

Comments: Hold off on scheduling first appointment until the therapists decide if the patient requires an in home assessment or an in clinic assessment

### Work Step [9]

Description: If patient appropriate, therapist assigns priority ranking in "Client Tracker" excel document; patient placed on waitlist

Comments: <u>Priority Ranking entered as follows:</u>

- 1. Children's Centre Transfer (CAST program)
- 2. Degenerative conditions (ALS prioritized within); E.g. ALS, MS, PPA, etc.
- 3. HDS recent inpatients/outpatients
- 4. All other community referrals

#### Start/Stop [289]

- Description: SLP/OT discuss readiness to pick-up new clients for assessment from priority list on "Client Tracker"
- Comments: Client Tracker will be maintained as the patient waitlist, as in current state.

### Work Step [248]

- Description: Therapist conducts initial screening via TEAMS/phone call to determine future appts. In Home, or In Person, or Virtual
  - Method: PowerForm
- Step Impact: Training
- Comments: Ad Hoc PowerForm AAC Clinic Assessment PowerForm

#### Work Step [220]

Description: Therapists determine the patient will have ongoing in-person appointments; notifies CDA for scheduling



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### Start/Stop [194]

Description: Patient present for scheduled appointment - In-Person, or TEAMS/phone call, or In-Home

#### Decision [371]

Description: Is the patient appropriate for their appointment?

#### Work Step [47]

Description: Continue ongoing assessment and Ad Hoc Augmentative & Alternative Communication Clinic Assessment PowerForm to document

Method: PowerForm

Comments: Initial assessment can be done via Microsoft Teams or via telephone.

-The first therapist to start the powerform (either OT or SLP), will save their work on the powerform, and the other therapist will retrieve the saved Assessment PowerForm when ready to document. The therapists will sign the AAC Assessment PowerForm when they feel the entire assessment is completed.

<u>Type of AAC Assessments and reports done collaboratively by OT/SLP:</u> -Face-to-face Assessment - SLP -Face-to-face Assessment with access needs - SLP -Face-to-face and written communication assessment - SLP -Integrated communication assessment SLP -Written communication assessment only - OT only -Mounting assessment - Equipment

Coordinator

#### Decision [311]

Description: Does the patient require ongoing assessment?



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# Work Step [327]

Description: Forms generated for equipment needs

Comments: The assessment portion of the patient's care is complete at this stage.

<b><u>Forms Generated:</u></b> -Order Form-General Device Set Up Form -Mounting Equipment Needs Form (OT completes) -ADP Form -Third Party Funding Applications are initiated

### Work Step [110]

Description: Attend Prescription Review with other AAC Clinics in the Province of Ontario; second Tuesday of each month via MS Teams

# Comments: This meeting is mandated for patient's to be eligible for ADP Funding.

<b><u>Prescription review is not needed when one or both of the following are true:</u></b>

1. Recommended equipment is not being funded

through the Assistive Devices Program (ADP), and;

2. Client is currently

leasing equipment funded through the Assistive Devices Program (ADP) and the therapists are adding additional equipment within the preapproved funding categories (Equipment must total less than \$500.00)

### Decision [112]

Description: Prescription Review pass?

### Work Step [116]

Description: OT/SLP Complete Order Form based on assessment recommendations Comments: Complete all necessary forms based on recommendations and prescription review pass.

### Work Step [329]

Description: Recommendations for equipment provided - decision to Purchase and/or Lease made with patient and therapists.



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### Work Step [267]

Description: Review patient's PowerChart from Rehab Organizer and Ad Hoc Treatment PowerForm Method: PowerChart; PowerForm Step Impact: Training

# Decision [345]

Description: Does the patient require ongoing treatment trials? Comments: Therapists to determine need for ongoing equipment training, ongoing discussion with CDA/Equipment Coordinator

# Work Step [349]

Description: Ad Hoc AAC Clinic PowerForm and document recommendations. Method: PowerForm Step Impact: Training

### Work Step [354]

| Description: | Send recommendations to prescriber (at therapists' discretion)   |
|--------------|--|
| Method:      | Provider Letter  |
| Step Impact: | Training   |
| Comments:    | Use Forward or Provider Letter features - e-fax, inbox, or mail. |

All support staff can use this feature.

### Decision [468]

Description: Is a follow up with patients needed via TEAMS/telephone?

### Start/Stop [390]

Description: Therapists determine patient appropriate for discharge from AAC Clinic Comments: Reasons for discharge:

- Expiration
- Refused AAC Clinic services
- Out of Niagara Region transfer
- Communication goals met
- Prolonged



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#### inactivity

- Inconsistent and poor attendance
- Does not require or no longer requires
- AAC Clinic services

# Work Step [391]

Description: Therapists document the discharge in the "Client Tracker" excel document Comments: "Client Tracker" document, not within HIS

### Work Step [393]

Description: Communicate to team that patient is discharged from AAC Clinic

Comments: Verbal communication, or other modes of communication (ie: telephone, email, notes).

### Work Step [399]

- Description: Verify equipment belonging to HDS and the Centralized Equipment Pool (CEP) have been returned & patient has a \$0 balance
- Comments: Verify this with Equipment Coordinator.

### Start/Stop [406]

- Description: Ad Hoc AAC Clinic Assessment PowerForm and choose "Discharge" as Type of Assessment and document
- Method: PowerForm
- Step Impact: Training
  - Comments: Therapists can use the Discharge Summary for their respective discipline, at their discretion.

### Start/Stop [474]

Description: Complete encounter discharge through PM Conversation

- Step Impact: Training
- Comments: Any staff member can complete.

Only discharge the patient's encounter once the patient has completed all treatment in the outpatient program. If the patient is still receiving other treatment within the same outpatient program, do not discharge the patient's encounter through PM Conversation. Accessible from the Organizer View Toolbar at the top of PowerChart. Click on PM Conversation and choose Discharge Encounter from the dropdown menu. Proceed following the prompts.



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#### Start/Stop [379]

Description: Equipment received in clinic

#### Work Step [376]

Description: Notify CDA/Equipment Coordinator of frequency of treatment trials for scheduling

#### Decision [296]

Description: Is ongoing consent obtained to participate in AAC Clinic Assessment/Treatment/Trials?

#### Work Step [305]

Description: Discuss scheduling frequency and duration with CDA/Equipment Coordinator

#### Work Step [367]

- Description: The OT or SLP, who needs to continue their documentation, retrieves the saved Assessment PowerForm from Form Browser & documents
  - Method: PowerForm
- Step Impact: Training
- Comments: Retrieving a saved PowerForm can be accomplished via Form Browser. The PowerForm can be saved at each patient assessment appointment, until therapists feel the assessment portion of the patient's care is complete.

#### Off Page Reference [369]

| Workflow Link: | Scheduling - ESM - Reschedule Appointment                  |
|----------------|--|
| Step Impact:   | Training   |
| Comments:      | Any therapist and support staff can reschedule a patient's |
|                | appointment.   |

#### Work Step [218]

Description: Therapists determine the patient will have in-home ongoing appointments - communicates to CDA to do screening and scheduling

#### Work Step [219]

Description: Therapists determine the patient will have ongoing virtual appointments; notifies CDA for scheduling



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# Start/Stop [234]

Description: Therapists communicate with support staff to schedule for further assessment.

# Start/Stop [114]

Description: Reassess patient and resubmit to Prescription Review as indicated Method: PowerForm

# Start/Stop [8]

| Description: | If patient not appropriate for AAC Clinic, therapists to communicate to the prescriber |
|--------------|--|
| Method:      | Provider Letter  |
| Comments:    | Fax off communication if provider not using Cerner                                     |

# Start/Stop [303]

Description: Document consent not obtained in the Assessment PowerForm and communicate with team. Method: PowerForm

Step Impact: Training

### Swim Lane:

Role(s): CDA [Custom] Department(s): Security Position(s):

# Work Step [19]

Description: Green clinic working file is generated

Step Impact: Training

Comments: <u>File includes:</u>

-Face Sheet (client demographic information)

- -Original Referral
- -Interdisciplinary signature sheet
- -Consent forms (media release,

virtual consent, Consent for AAC Assessment, obtain/release medical information)

- -Progress notes
- -HDS Stickers
- -Personal Contact Information Sheet



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#### Start/Stop [135]

Description: Questionnaire sent to client's home with a return envelope

#### Work Step [141]

Description: CDA to call to screen clients prior to the home visitMethod: PowerFormStep Impact: TrainingComments: Communication still occurs between CDA and therapists concerning

screening as in current state.

Ad Hoc PowerForm for documentation.

#### Off Page Reference [82]

Workflow Link: Scheduling - ESM - Schedule Appointment

Step Impact: Training

Comments: -Scheduling of the initial assessment occurs at this stage -Any staff or support staff can schedule the patient for the initial assessment.

#### Off Page Reference [197]

Workflow Link: Registration - ERM - Outpatient Registration Process

Step Impact: Training

Comments: When registering a patient for the clinic, therapists and support staff will decide if the encounter should be a single encounter or a recurring encounter. If the patient is registered as a single encounter, there will be an opportunity to flip the encounter to recurring at a later time. If staff wish to set the encounter to recurring encounter, no further outpatient registration activities need to occur at each appointment thereafter,

#### Off Page Reference [87]

Workflow Link: Scheduling - ESM - Schedule Multiple Appointments for a Single Patient

Step Impact: Training

Comments: Scheduling can be completed by any staff member within the AAC Clinic

#### Off Page Reference [377]

Workflow Link: Scheduling - ESM - Schedule Appointment

Step Impact: Training



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Comments: Scheduling can be completed by any staff member within the AAC Clinic.

Equipment is dispensed at home or in clinic depending on patient. Home visit request forms are completed as necessary.

#### Start/Stop [259]

Description: Patient present for scheduled appointment

### **Off Page Reference** [453]

Workflow Link: Registration - ERM - Recurring

Step Impact: Training

Comments: Any AAC Clinic Staff can perform this task

### Decision [273]

Description: Did the patient consent to treatment?

#### Work Step [269]

Description: Review patient's PowerChart from Rehab Organizer and Ad Hoc Treatment PowerForm Method: PowerChart; PowerForm Step Impact: Training

### **Off Page Reference** [463]

Workflow Link: Registration - ERM - Recurring Step Impact: Training Comments: Any staff can complete this task

### Work Step [357]

Description: Follow up with patient as per therapists' directions Comments: TEAMS/Phone Call

### Work Step [361]

Description: Ad Hoc Treatment PowerForm and document; determine if patient requires any further intervention

- Method: PowerForm
- Comments: Discuss with therapists



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#### Work Step [412]

- Description: Receive communication from therapists that patient being discharged from AAC Clinic
- Comments: Verbal communication, or other modes of communication (ie: telephone, email, notes).

#### **Decision** [410]

Description: Does the patient have a scheduled appointment?

#### Work Step [395]

Description: Confirm all loose paper documentation and labeling is correct

#### Work Step [403]

Description: Provide completed chart to Health Records

#### Off Page Reference [210]

Workflow Link: Scheduling - ESM - Check In Appointment

Step Impact: Training

Comments: -This can be completed by therapists and support staff.

-Time of Check In can be adjusted to reflect the exact time of the patient's appointment, especially if an appointment is at the patient's home, as staff will not have access to this function without HIS present during the appointment time.

#### Off Page Reference [243]

Workflow Link: Scheduling - ESM - Check Out Appointment

Step Impact: Training

Comments: -This can be completed by therapists and support staff.

#### -The Check Out

feature does not have to be done manually - the patient will check out automatically after end of day; if wanting to generate a time that patient is present for the appointment, the manual check out will provide data regarding the actual time the patient was present



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for the appointment.

-Time of Check Out can be adjusted to reflect the exact time of the patient's appointment, especially if an appointment is at the patient's home, as staff will not have access to this function without HIS present during the appointment time.

# Work Step [76]

Description: Estimate/Quote prepped via "Vendor Tracker" (Excel document) Comments: VENDOR TRACKER: Excel spreadsheet that tracks history of HDS vended AAC equipment (purchases only). Excel also generates estimates,

invoices, and txt file for ADP invoicing.

# Work Step [103]

Description: ADP Form sent for signature by mail or secure One Mail Comments: If applicable

# Work Step [365]

Description: Ad Hoc AAC Clinic Treatment PowerForm and document

# Work Step [160]

| Description: | Prep dispense paperwork  |
|--------------|--|
| Comments:    | -Verify with Equipment Tracker/ROUNDS, Purchase Checklist and/or |
|              | Lease Checklist.   |
|              | -Ensure ADP Form in digital format                               |

# Start/Stop [276]

- Description: Ad Hoc the Treatment PowerForm and document consent not obtained; communicate with therapists
- Method: PowerForm
- Step Impact: Training
- Comments: Ad Hoc Treatment PowerForm to document consent not obtained.

Verbal communication/email/message center - form of communication at discr etion of AAC Clinic.

# Off Page Reference [420]

Workflow Link: Scheduling - ESM - Cancel Appointment



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### Step Impact: Training

Comments: Any staff member can cancel appointments.

### Swim Lane:

Role(s): Equipment Coordinator [Custom]

Department(s):

Security Position(s):

# Work Step [153]

Description: Order Form is submitted to Finance and complete normal finance process Comments: Purchase Process:

- Order form (OT/SLP)
- Mounting Equipment Needs Form (OT)
- Funding eligibility (OT/SLP)
- Device Setup Form (All staff contribute)
- Prescription Review date (OT/SLP)
- 3rd party statement of commitment (if applicable; OT/SLP coordinates)
- ADP Form signed by doctor (CDA/equipment coordinator send for signatures)
- Estimate/quote for purchased items (CDA/

equipment coordinator generates via "Vendor Tracker")

• Equipment order date (

Equipment Coordinator assigned to order only after prescription review)

- Dispense date (All staff may coordinate depending)
- Info updated in Vendor Tracker and submitted to Finance Department (CDA and/or Equipment Coordinator can complete this process)

-PO# generated

### Off Page Reference [308]

Workflow Link: Scheduling - ESM - Schedule Appointment

Step Impact: Training

- Comments: -Scheduling of the initial assessment occurs at this stage
  - -Any staff or

support staff can schedule the patient for the initial assessment.

# **Off Page Reference** [450]

Workflow Link: Scheduling - ESM - Schedule Multiple Appointments for a Single Patient



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# Off Page Reference [319]

Workflow Link: Scheduling - ESM - Check Out Appointment

Step Impact: Training

Comments: -This can be completed by therapists and support staff.

# -The Check Out

feature does not have to be done manually - the patient will check out automatically after end of day; if wanting to generate a time that patient is present for the appointment, the manual check out will provide data regarding the actual time the patient was present for the appointment.

-Time of Check Out can be adjusted to reflect the exact time of the patient's appointment, especially if an appointment is at the patient's home, as staff will not have access to this function without HIS present during the appointment time.

# Start/Stop [385]

# Description: Receives communication for type of equipment and the patient's decision to lease and/or purchase

Comments: The therapists will determine, with the patient if the equipment will be leased or purchased.

### Work Step [75]

Description: Estimate/Quote prepped via "Vendor Tracker" (Excel document) Comments: VENDOR TRACKER: Excel spreadsheet that tracks history of HDS vended AAC equipment (purchases only). Excel also generates estimates, invoices, and txt file for ADP invoicing.

### Work Step [102]

Description: ADP Form sent for signature by mail or secure One Mail Comments: If applicable

# Work Step [251]

Description: Verifies the device is correct and functioning safely and documents in treatment PowerForm; Ad Hoc Treatment PowerForm.

Method: PowerForm

Step Impact: Training



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#### **Work Step** [159]

Description: Prep dispense paperwork

Comments: -Verify with Equipment Tracker/ROUNDS, Purchase Checklist and/or Lease Checklist. -Ensure ADP Form in digital format

#### Decision [274]

Description: Did the patient consent to treatment?

#### Work Step [270]

Description: Review patient's PowerChart from Rehab Organizer and Ad Hoc Treatment PowerForm Method: PowerChart; PowerForm Step Impact: Training

#### **Work Step** [358]

Description: Follow up with patient as per therapists' directions Comments: TEAMS/Phone Call

#### Work Step [362]

Description: Ad Hoc Treatment PowerForm and document; determine if patient requires any further intervention Comments: Discuss with therapists

#### Work Step [416]

- Description: Receive communication from therapists that patient being discharged from AAC Clinic
- Comments: Verbal communication, or other modes of communication (ie: telephone, email, notes).

#### Work Step [396]

Description: Verify equipment belonging to HDS and the Centralized Equipment Pool (CEP) has been returned & patient has a \$0 balance

Comments: Verify this with treating therapists.

#### Work Step [431]

Description: Order through Centralized Equipment Pool Software "4D" Comments: 4D tracks current/previous leasing clients and equipment, overdue



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payments, status of orders, etc. Leasing Process:

- Order form (OT/SLP)
- Mounting Equipment Needs Form (OT)
- Funding eligibility (OT/SLP)
- Device

Setup Form (All staff contribute)

- Prescription Review date (OT/SLP)
- 3rd party statement of commitment (if applicable; OT/SLP coordinates)
- ADP Form signed by doctor (
- CDA/equipment coordinator send for signatures)
- Equipment order date (Equipment
- Coordinator assigned to order only after prescription review)
- Dispense date (All staff may coordinate depending)
- Pre-lease expiry date (
- Equipment coordinator)

# Work Step [435]

Description: ADP Form sent for signature by mail or secure One Mail Comments: If applicable

### Start/Stop [275]

- Description: Ad Hoc the Treatment PowerForm and document consent not obtained; communicate with therapists
- Method: PowerForm
- Step Impact: Training

Comments: Ad Hoc Treatment PowerForm to document consent not obtained.

Verbal communication/email/message center - form of communication at discr etion of AAC Clinic.

### Swim Lane:

Role(s): HDS Health Records [Custom]

Department(s): Security Position(s):

> **Work Step** [407] Description: Receive completed patient chart from AAC Clinic

# **Facilities:**



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Facility Name: Hotel Dieu Shaver Status: Not Applicable Facility Cerner Owner: Facility Client Owner: Carile, Christina Elizabeth Authorize Date: Dec 05, 2023 Facility Comments:

