

# Provider CPOM Training

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## Remote Access SAC

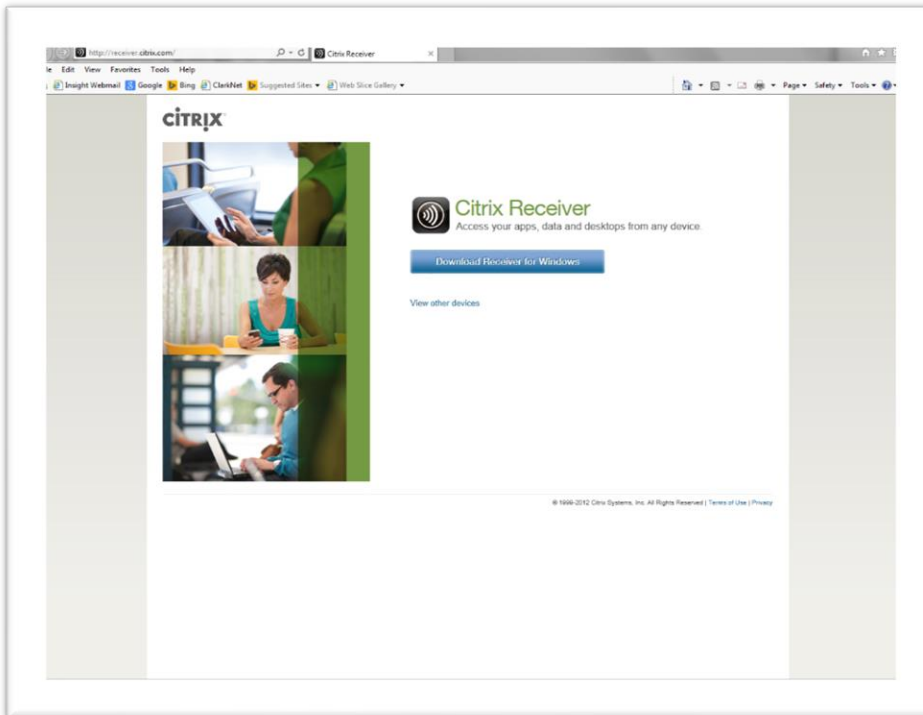
**Website:** [cag.clarkmemorial.org/](http://cag.clarkmemorial.org/)

Remote access to CMH systems is granted through Citrix.

Remote access, need to install Citrix

1. The Citrix Receiver client can be downloaded from the following URL:  
<http://receiver.citrix.com/>
2. This URL either hosts the client or will redirect to the appropriate site.

### Windows Desktop download

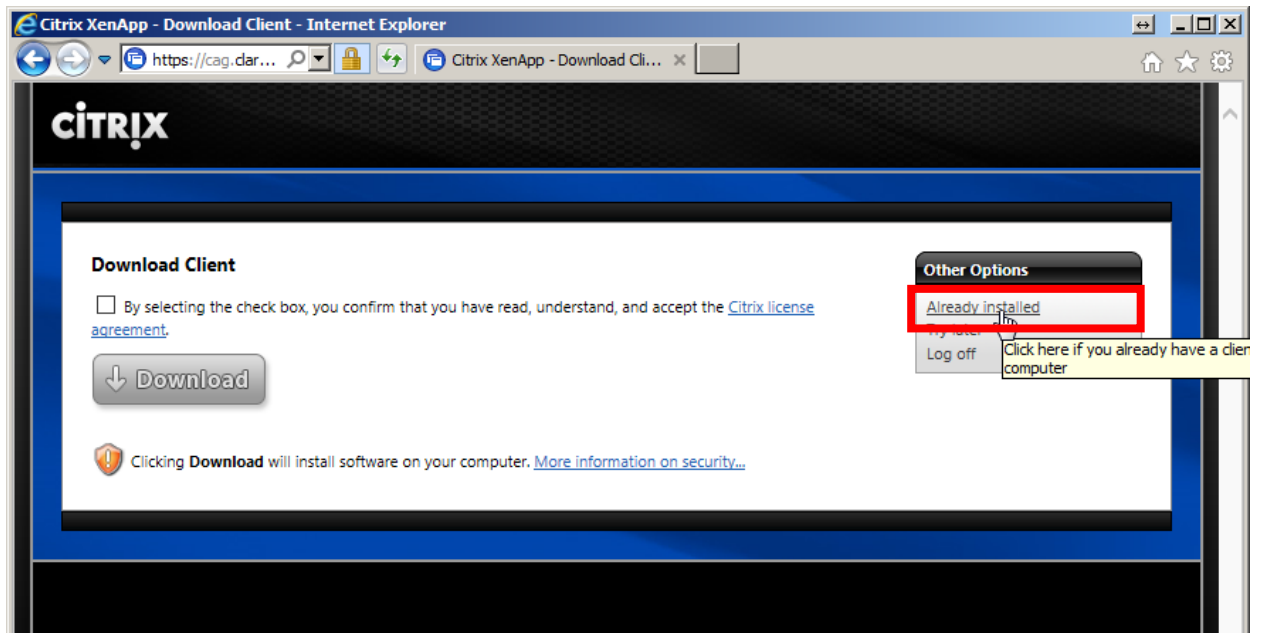


1. For full Windows and Mac operating systems such as laptops and desktops, simply download and install the client.
2. Once installed open a browser and navigate to <https://cag.clarkmemorial.org>

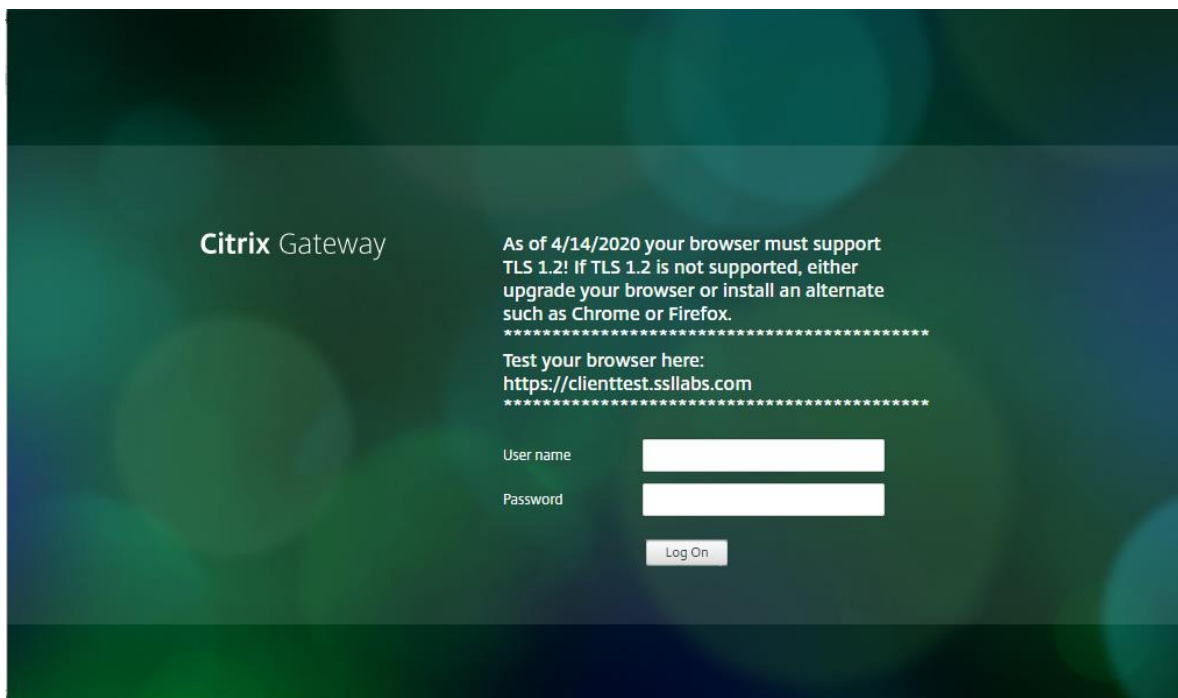
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Remote access, already installed Citrix

1. If you already have Citrix installed, after opening a browser and navigating to <https://cag.clarkmemorial.org>, you may click **Already Installed** on the right side.



2. You will then proceed to this screen, which is the Citrix Gateway screen.




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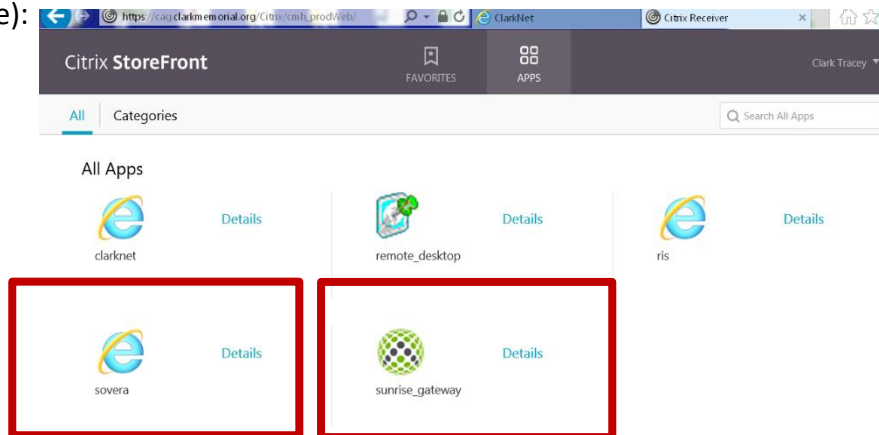
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## 3. Log In:

- a. Username: you will need to use your CMH assigned username, also known as the AD, Windows, or Network username. It is in one of 3 forms:
  - i. First.LastName
  - ii. [First.LastName@clarkmemorial.org](mailto:First.LastName@clarkmemorial.org)
  - iii. The last 5 digits of your Indiana Medical License

 The correct format should be reviewed during CMH Computer orientation.
- b. Password: the initial password will be given at computer orientation and will be required to be changed upon the first log in.

After logging into Citrix, the icons available to you will be Sovera, Sunrise, and potentially others (some are shown here):



You can then double-click on the icon to start the application.

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## Launching SAC from a Hospital Desktop or Via Citrix

1. Double-click on SAC icon:



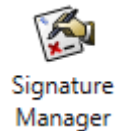
2. Enter your Allscripts username & password:



The image shows a screenshot of the 'Allscripts Gateway Logon' window. The window has a green header with the 'Allscripts® Sunrise™ Enterprise' logo. Below the header is a white login form with a tab labeled 'UsernamePassword'. The form contains two input fields: 'User Name' and 'Password'. Below the form, there is a message: 'This System should only be accessed by Authorized Users'. Below that is a welcome message: 'Welcome to the Allscripts Gateway.' At the bottom of the window, there is a 'Need Help?' link, 'Login' and 'Cancel' buttons, and a status bar showing 'Current Workgroup: CB1'. A small copyright notice is visible at the very bottom of the window.

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## Signature Manager



Upon logging in, *the first thing you may see* is Signature Manager if you have orders or documents that need to be signed.

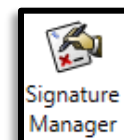
**Orders / Documents**

**Filters**

**Activates the Filters**

The screenshot shows the Signature Manager interface. On the left is a sidebar with various filter options: Function (Sign, Approve/Verify), Patient Selection (All Patients), Date Range (Start Date, Stop Date), Facility Selection (Clark Memorial Hospital), Provider Selection (My Signatures), Item Type Filter (Orders, Documents), Item Status Filter (Active, Incomplete, Refused), Sort Sequence (Location, Patient, Type, Date), and Item To Process (Sign/Refuse To Sign, Reassign). The main area displays a table of items. The first item is a 'TrainInstructor Train' order for 'Clark Memorial Hospital - 2NW' dated 04-07-2014. The table includes columns for item details, status, and session information. At the bottom, there is a toolbar with buttons for 'Show All', 'Select All', 'Unselect All', 'Details', 'Alerts', 'Info', 'Edit', 'Sign', 'Refuse', 'Reassign', and 'Close'. A 'Get List' button is located at the bottom left of the sidebar area.

You can access the Signature Manager by clicking the “To Sign” flag from your patient list or by selecting the signature manager icon in the system toolbar.






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## Purpose

Signature Manager allows you to:


- Review and sign all verbal/telephone orders for accuracy
- Review and sign PA/NP Orders or Documents
- Review and sign ADMIT TO: or other orders sent via Care Coordination Communication.
- Prevents the need of logging in and signing in Sovera later on.

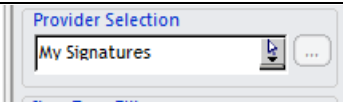
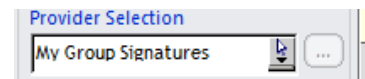
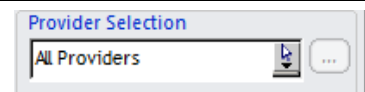
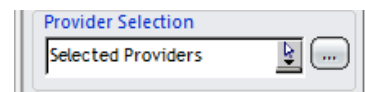

Signature Manager is no not hard stop, therefore if you need to bypass it, you may. However, **Signature Manager will continue to appear every time you open SAC until your items are addressed.**

 **Important Note:** If a patient is discharged and you have not addressed your items in Signature Manager, you will need to log in to Sovera and address them.

## Signature Manager Filters

Filters on are on the left side of the screen. You can filter by date, type, provider, etc.

 **IMPORTANT NOTE:** In order to activate one or more of these filters, you MUST select the GET LIST button below the filters.

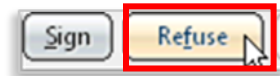
	Displays items that require YOUR signature ONLY.
	Displays ANYONE in your group who has items to be signed.
	This option will display items from ALL providers needing signatures.
	Will display only items that need to be signed by providers you select.
	Activates chosen filter(s).

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## Refuse to Sign

If you want to “Refuse” to sign an order, highlight the order and click:



You will be asked to give a reason why you are refusing to sign:

Refusal Reason:	<div data-bbox="389 514 1388 556"></div> <div data-bbox="389 556 1388 598">Did Not Document</div> <div data-bbox="389 598 1388 632">Did Not Order</div>
-----------------	--

If you refuse to sign an order, HIM will follow up with the appropriate person.

## Telephone Orders

The physician is expected to enter **ALL** orders for the patient if they have access to the system. The exception to this is no internet access or while driving a vehicle. You will be required to sign these orders the next time you log into SAC. The nurse will require you to stay on the phone with them until the orders are entered to allow you to acknowledge any and all alerts that are presented to the nurse during order entry.

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## SAC Navigation

### Log IN Screen

This screen displays a default patient list based on your security settings. Here you will see many rows, columns, flags, and information about the patients on the list. Once the SAC option is chosen from the side bar panel, the side bar may be closed to expand your view.

The screenshot shows the Allscripts Gateway | My Applications | SAC interface. The interface includes a sidebar on the left with a 'My Applications' section containing 'SAC' and 'Train, TrainSix'. The main content area features a 'Menu Bar' with options like File, Registration, View, GoTo, Actions, Preferences, and Tools. Below the menu bar is a 'Toolbar' with icons for Refresh, Previous, Next, Find, and more. A 'Patient Header' section displays details for 'Train, TrainSix', including CM, CHF, ARO, Precautions, Allergies, and WT. Below the header are 'Chart Tabs' for Patient List, Orders, Results, Patient Info, Documents, Flowsheets, Clinical Summary, and Imaging. A 'Tab Icons' section contains icons for New Visit, Modify, Delete, Flag, Select, Save Selected, Remove Selected, Select Visit, Define, Save Sort, and Reset Sort. The 'Patient List' table shows columns for Current Location, Patient Name, Age, Admit Date, Provider, New Orders, New Results, Order Rec, To Sign, New Documents, Orders Pending Review, and To Verify. A 'Status Bar' at the bottom displays 'aaTemplate, SCE MD (MD)', '11/19/2015 10:44', and 'Train\_01'. A 'Sidebar Solution' label points to the sidebar area.

Labels in the image:

- Menu Bar
- Toolbar
- SAC Icons
- Patient Header
- Chart Tabs
- Tab Icons
- Status Bar
- Patient List
- Sidebar Solution

Current Location	Patient Name	Age	Admit Date	Provider	New Orders	New Results	Order Rec	To Sign	New Documents	Orders Pending Review	To Verify
3SE 3007 01	Train, TrainOne	64y	08-13-2014	Addas, Mouhamad			1	1			
3SE 3007 02	Train, TrainTwo	63y	08-13-2014	HARPER, MICHAEL C			1	1			
3SE 3008 01	Train, TrainThree	62y	08-13-2014	Trommler, Lloyd C			1	1			
3SE 3008 02	Train, TrainFour	61y	08-13-2014	Brahmbhatt, Vipul D			1	1			
3SE 3009 01	Train, TrainFive	60y	08-13-2014	GOLDSTEIN, STEVEN			1	1			
3SE 3010 01	Train, TrainSix	59y	08-13-2014	Knight, E Ray			1	1			
3SE 3011 01	Train, TrainSeven	58y	08-13-2014	Addas, Mouhamad			1	1			

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## Toolbar

Located in the upper right corner of your screen.



Displays the icons used to set user preferences, suspend, and close SAC, and Launch Help icon.

### 1. Recently Viewed Patient

- Allows viewing of recent patients based on application.

### 2. User Preference Icon:

- Enables clinician specific settings to be set and reset.
- **Account Settings Tab:** This is where clinicians can change the password for logging into SAC.
- **General Tab:** Allows clinicians to select which application will display when SAC is launched (if more than one application is assigned to that clinician).

### 3. Suspend Session:

- Allows the current application to be suspended and resumed later (if un-suspending on the same device).
- This helps protect patient privacy and freezes your current session when you are away from the computer and re-l



### 4. Log Off Session:

- Closes the open SAC session properly.

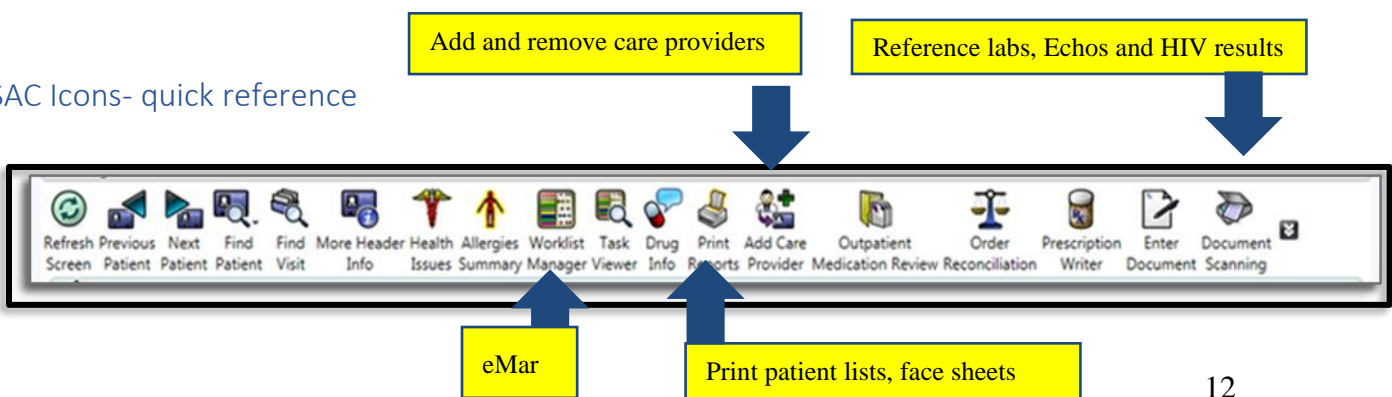
### 5. Help Icon:

- Allows access for clinicians to reference online SAC help. Online help is organized by topic.

## Header Information



## SAC Icons- quick reference



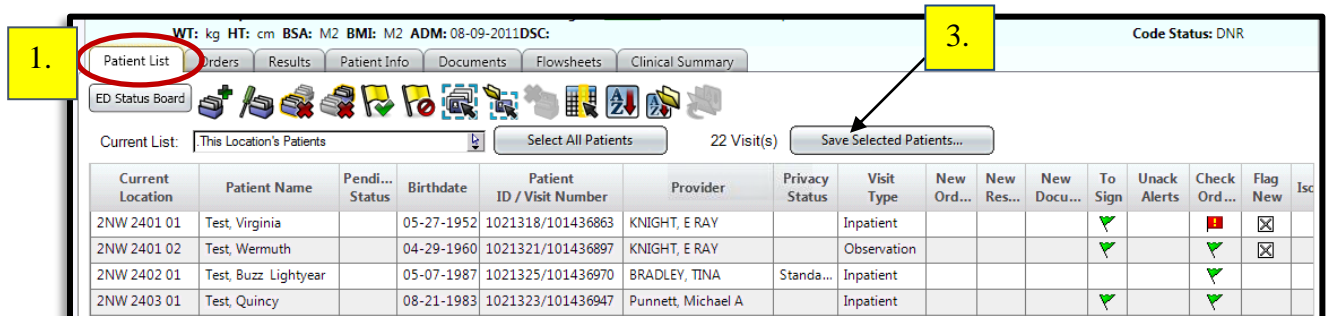
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## Patient List Tab

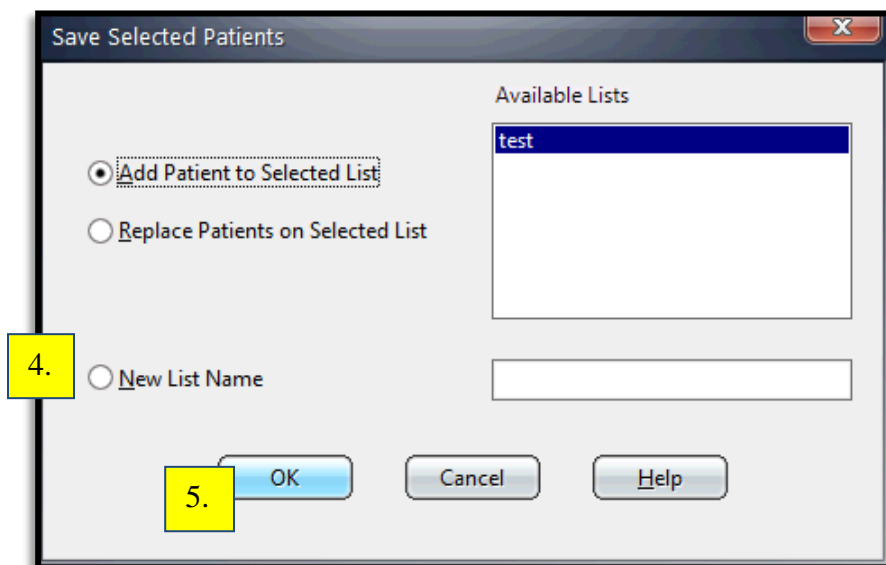
The *Patient List* Tab is the starting point for selecting patients and creating Patient Lists. You can create personal lists and criteria-based lists in addition to the preconfigured ones.

### Creating a Personal List

1. Select the **Patient List** tab



2. Press and hold the **Ctrl** key to select multiple patient names, then release the **Ctrl** key.
3. Click the **Save Selected Patients** button to display the Save Selected Patients window.
4. Click the **New List Name** radio button and type **Your Name List (ex. Dr. Knight's list)** for the list you are creating.



5. Click **OK** to close the **Save Selected Patients** window, and the system will take you to the Patient List tab, which displays your newly created patient list.

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## Maintaining Your Personal List

Personal Lists must be maintained, meaning patients **will not automatically** add or drop from personal lists as they are admitted, transferred, or discharged.

To remove a patient from your list:

1. Highlight the **patient's name**.
2. Click on the **Remove Patient** icon.



1.

2.

Current Location	Patient Name	Pendi... Status	Birthdate	Patient ID / Visit Number	Provider	Privacy Status	Visit Type	New Ord...	New Res...	New Docu...	To Sign	Unack Alerts	Check Ord...	Flag New	Isc
2NW 2403 01	Test, Quincy		08-21-1983	1021323/101436947	Punnett, Michael A		Inpatient				✓		✓		
2NW 2403 02	Test, Justin		03-25-1971	1021330/101437028	SLAUGHTER, MARK S		Inpatient						✓		
2NW 2406 01	Test, Dennis		01-02-1944	1021328/101437044	BRADLEY, TINA		Inpatient						✓		
3SE 3006 01	testBaggins, Frodo		12-12-1980	1021327/101436996	KNIGHT, E RAY		Inpatient						✓		


- A personal list is noted by a \* preceding the list name.
- Note the similar appearance of these icons:

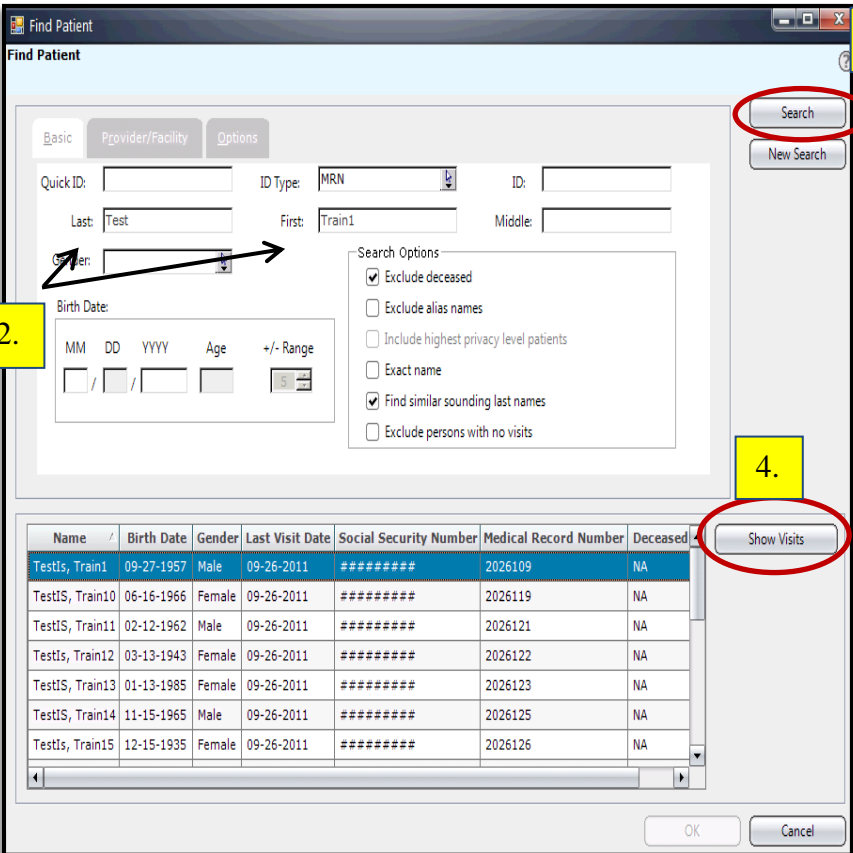
“Delete Current list” and “Remove Selected Visit”



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To add a patient that you are not a Care Provider on to your list:

1. Click the **Find Patient** icon. 
2. Enter patient's last name in the **Last** field and enter the patient's first name in the **First** field.
3. Click the **Search** button.
4. Select correct patient and click **Show Visits**.



The screenshot shows the 'Find Patient' window. Annotation 2 points to the 'Last' field containing 'Test' and the 'First' field containing 'Train1'. Annotation 3 points to the 'Search' button. Annotation 4 points to the 'Show Visits' button. Below the search fields is a table of search results.

Name	Birth Date	Gender	Last Visit Date	Social Security Number	Medical Record Number	Deceased
Testis, Train1	09-27-1957	Male	09-26-2011	#####	2026109	NA
TestIS, Train10	06-16-1966	Female	09-26-2011	#####	2026119	NA
TestIS, Train11	02-12-1962	Male	09-26-2011	#####	2026121	NA
Testis, Train12	03-13-1943	Female	09-26-2011	#####	2026122	NA
TestIS, Train13	01-13-1985	Female	09-26-2011	#####	2026123	NA
TestIS, Train14	11-15-1965	Male	09-26-2011	#####	2026125	NA
Testis, Train15	12-15-1935	Female	09-26-2011	#####	2026126	NA

5. Select the visit and click the **Save Selected Patients** button.
6. Select the **Add Patient to Selected List** button.
7. The **Override Chart Access** window will display. In the **Reason** field type **Consult**.
8. Select the list.
9. Click **OK**.

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## Creating a Criteria Based List

Another list type you can create is a **Criteria Based** List. Unlike Personal Lists, **Criteria Based** lists update with ADT activity.

**Criteria Based** Lists are built on certain criteria that you set. For the patient to show on the list they must meet all the criteria you set.

**Criteria Based** List can be based on any or more than one of the following:

- Provider Roles
- Patient Location
- Providers
- Service
- Visit Status
- Orders

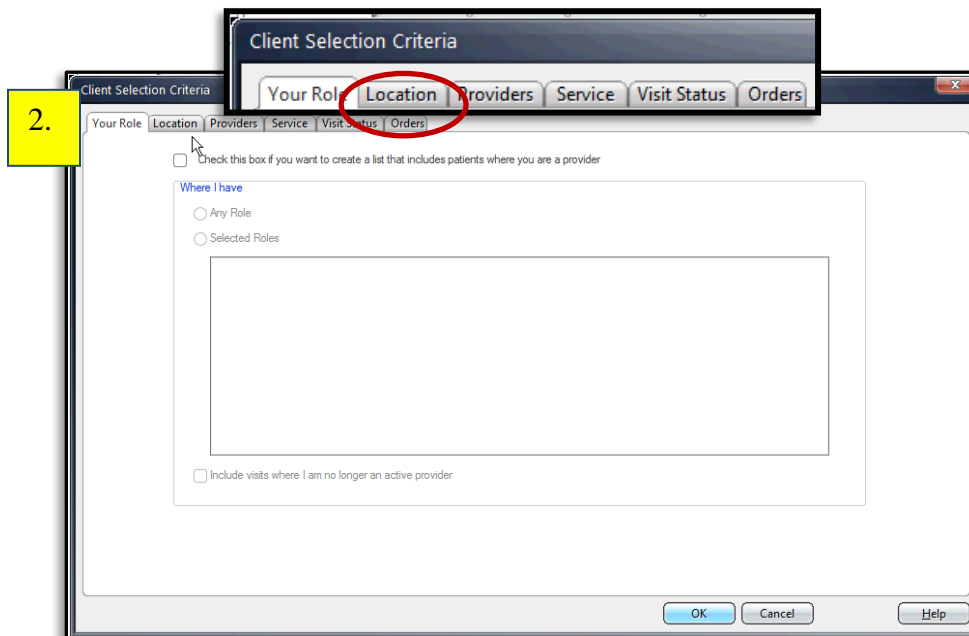
## Creating a Criteria-Based List: Location and Provider

### 1. Select “New Visit List” Icon



The Client Selection Criteria dialog opens:

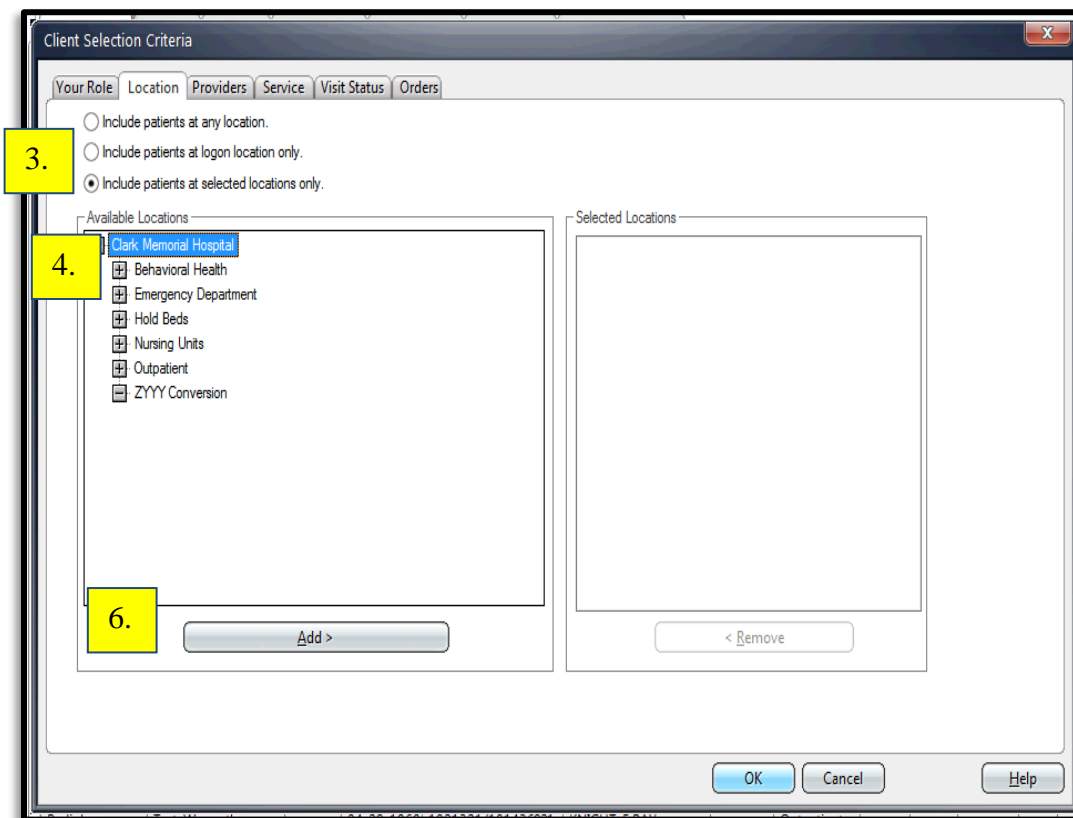
### 2. Select the “Location” tab





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3. Select the **Include patients at selection locations only** option
4. Click the + sign next to Clark Memorial Hospital to expand the list
5. After selection Clark Memorial Hospital, while holding down the Ctrl key, select the + sign next to the units you want in your list.
6. Click Add. (You can select more units if needed)



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7. Then click on the Providers tab

The screenshot shows the 'Client Selection Criteria' dialog box. The 'Providers' tab is selected and highlighted with a red circle. A yellow box with the number '7.' is placed above the tab. The dialog box contains several tabs: 'Your Role', 'Location', 'Providers', 'Service', 'Visit Status', and 'Orders'. Below the tabs, there is a checkbox labeled 'Check this box if you want to create a list that includes providers where you are a provider'. Underneath, there is a section titled 'Where I have' with two radio buttons: 'Any Role' and 'Selected Roles'. Below this is a large empty rectangular box. At the bottom, there is another checkbox labeled 'Include visits where I am no longer an active provider'. The 'OK', 'Cancel', and 'Help' buttons are at the bottom right.

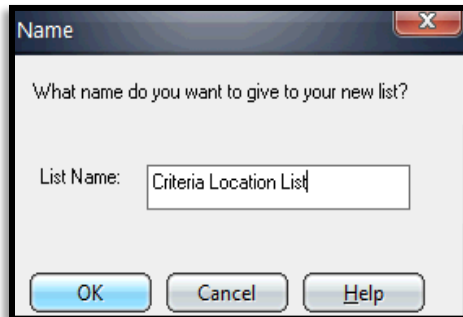
8. Enter the provider's last name and then highlight their name in the list.
9. Click on the Role drop down box to select their role(s) that you want to add this list.

The screenshot shows the 'Client Selection Criteria' dialog box with the 'Providers' tab selected. A yellow box with the number '8.' is placed to the left of the 'Provider Name' text box, which contains 'Test, Doctor'. Below the text box is a list of providers with columns for Name, Occupation, Org Unit, and Specialty. The provider 'Test, Doctor' is highlighted in blue. To the right of the list is a 'Role' dropdown menu with 'ANY' selected. A yellow box with the number '9.' is placed to the right of the dropdown. Below the list, there is a checkbox labeled 'Include visits where providers are no longer active'. At the bottom, there is a text box containing 'Test, Doctor' and 'ANY'. The 'OK', 'Cancel', and 'Help' buttons are at the bottom right.

Name	Occupation	Org Unit	Specialty
Test, CarecoordAssoc	Liaison/SIRH	Social Services	Social Work
Test, Cyndi	MD	Medicine	
Test, Doctor	Physician	Other	
TEST, ERIC	Non-Affiliated		
Test, Janet EDRN	RN	Nursing Services	Emergency Medicine
Test, Joe	LPN	PATIENT REG	None
Test, Mikecard	Other	Cardio Diagnostic Ser...	None

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10. After adding the provider(s), click OK, and name your list – e.g. Location List

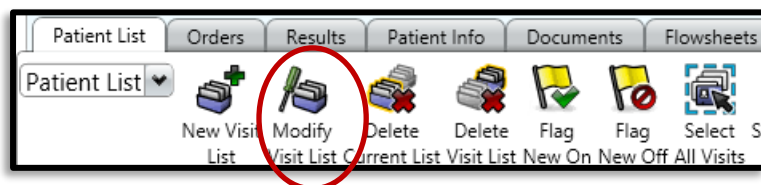


11. Click OK

12. Now your list is available in your drop down of patient lists.

## Creating a Criteria-Based List: Location and Orders

Sometimes you may need a list based on more than one criterion. Example of this would be needing a list of all your patients with a PICC line.

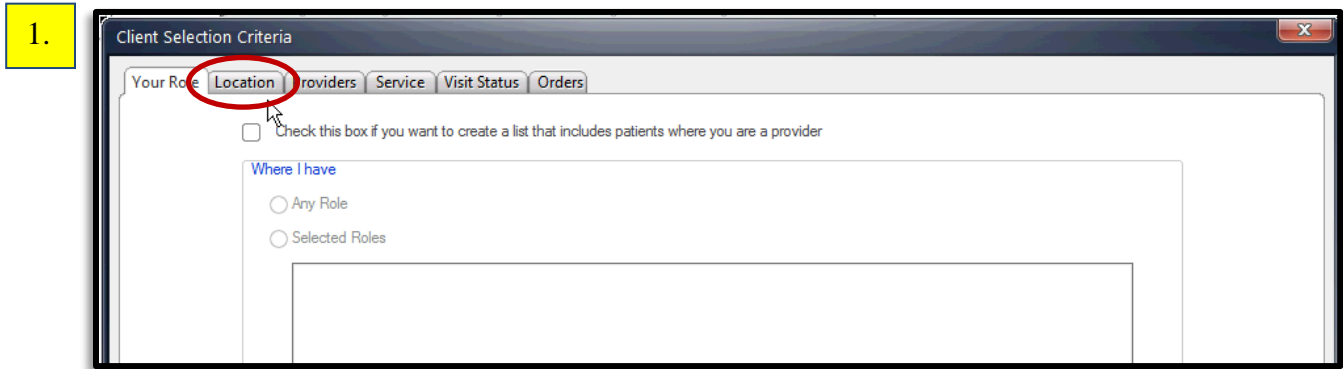


Click the **“Modify Visit List”** Icon

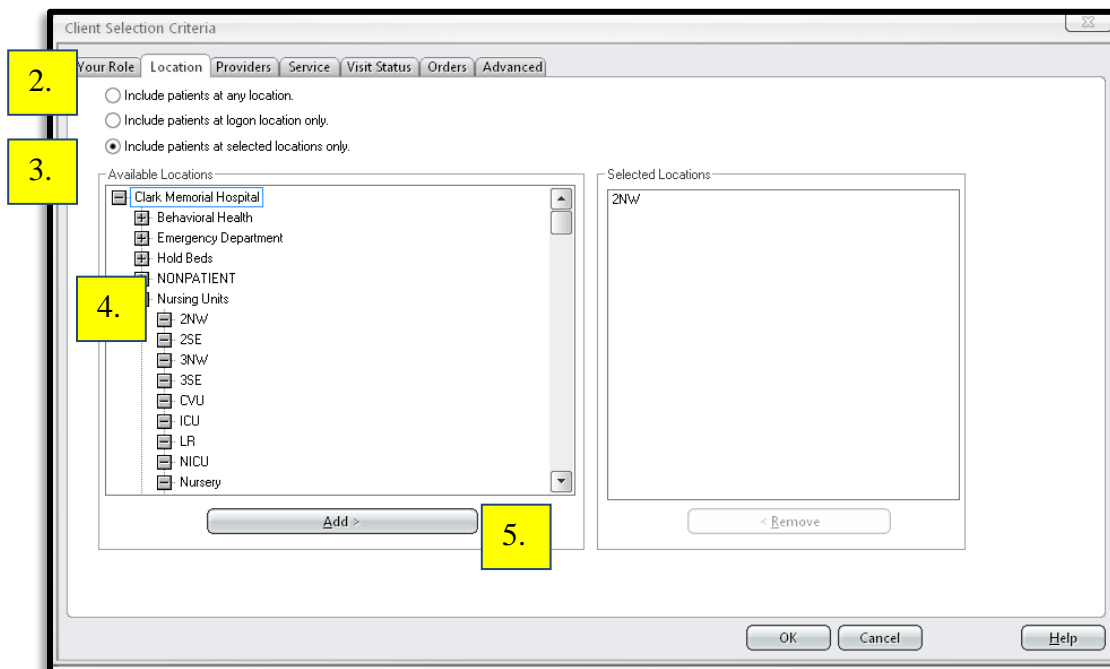
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The Client Selection Criteria dialog opens.

1. Select the **Location** tab:



2. Select the **Include patients at selection locations only** option
3. Click the + sign next to Clark Memorial Hospital to expand the list
4. After selecting Clark Memorial Hospital, Select the + sign next to Nursing Units
5. Select the units you want and click Add.



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- Next, select the Orders tab
- Check the box to create a list of patients that only have orders as specified below
- Click **Add New** to create an Order Selection Filter

Client Selection Criteria

Your Role Location Providers Service Visit Status **Orders** 6.

7. ☐ Check this box if you want to create a list of patients that only have orders as specified below:

Order Selection Filter 8.

All Add New... Modify...

Order Status Filter

Active Add New... Modify...

- Name the Filter.
- Select the Orders you wish to include, by typing the order names and click ADD to move them from the left to right columns.

Add New Order Selection Filter

9. Name: PICC LINES

Description:

Order Selection

☐ Order Browse ☒ Order Item

Enter Order: picc

Orders

PICC Exchange

PICC Line Insertion (IV PICC Line Insertion Proc)

PICC PLMT RAD NO GUIDE 36569

PICC Reposition

10. Add >

Selected

Remove

OK Cancel Help

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11. Next Select Order Status Filter.

12. From here Name the Filter and make the selections needed for your filter.

13. Select OK.

12. Name:

Description:

Order Priorities:

Statuses:

- ☐ Any
- ☐ Orders Due to Expire in  Days
- ☐ Orders Pending Review in  Days
- ☒ Selected

11. Select one or more Statuses

- Pending Verification Status 9
- Hold
- Pending
- Scheduled
- Pending Selection
- Active
- Active Clinical Pathway
- Active Master Order
- Auto Activate Status 10
- Auto Activate Status 4
- Auto Activate Status 5
- Auto Activate Status 6
- Auto Activate Status 7
- Auto Activate Status 8
- Auto Activate Status 9

13. OK Cancel Help

14. Make certain the criteria you have selected are in the boxes

Your Role Location Providers Service Visit Status Orders

☒ Check this box if you want to create a list of patients that only have orders as specified below.

Order Selection Filter

Add New... Modify...

Order Status Filter

Add New... Modify...

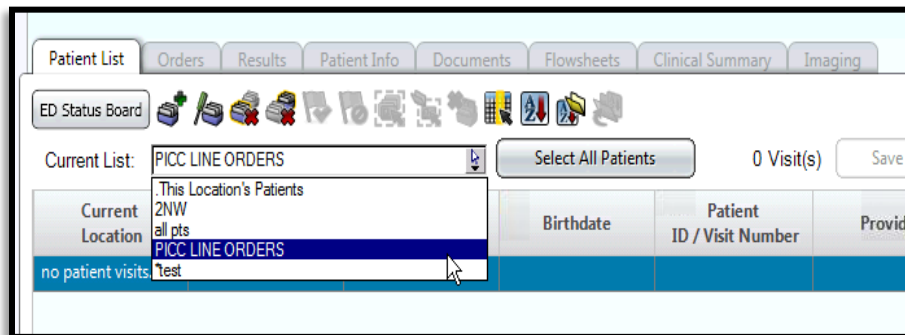
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15. Name the List a name of your choosing (e.g. PICC LINE ORDERS) and click OK.



16. The list is now available in your drop down of patient lists:






# Provider CPOM Training

## Flags in SAC



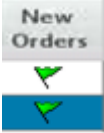
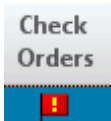

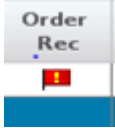


### What are Flags?

- Flags alert a caregiver to new things happening within the patient's cart.
- Can alert the user to new orders, new results, new documents, documents that need to be signed, and so on.

### Flag Colors/Meanings:

- The  indicates that something is of high priority. (Examples: stat orders, abnormal labs, overdue medication reconciliations, etc.)
- The  indicates that something is new but of routine/normal priority. (Examples: routine orders, normal labs, new documents, etc.)
- The  indicates that a new imaging result or a result that cannot be identified as normal/abnormal has been posted in the patient's chart.

### Flag Management:

			
New Orders:			
	<b>GREEN</b> - are general orders	<b>RED</b> - means STAT orders	
Order Rec:			
	<b>GREEN</b> - means it needs to be done	<b>RED</b> - means it's overdue	
To Sign:			
	<b>GREEN</b> - means there are orders that need signed	<b>RED</b> - you must sign	



# Provider CPOM Training

## Chart Tab Review

### Orders Tab

1. Click the **Patient List** tab
2. Select **"Name, Patient."**
3. Click on the **Orders** tab to view their orders.
4. Orders are displayed based on the selections you make in the **Options Panel**, on the left side of the Orders tab.
5. Changing the Display format changes how the orders should be organized (grouped), the Default is **By Department**.

3.

4.

5.

Options Panel

Chart Selection

Orders from this chart only

Date Range

Based on date: ☒ Ordered ☐ Entered

From: 09-27-2011

To:

☐ Retain selections for next patient

Display Format

By Department

Filters

Status/Priority:

No Status/Priority Filter

Order Selection:

No Order Selection Filter

Department:

No Department Filter

Rx Verified:

All

Display Styles

Group/Sort Orders by:

Department and Order Date

Show


☐ Visit details ☐ Health issues

☐ Requested by ☐ Linked set details

All orders for this chart for order dates from 09-27-2011 ; (0 of 9 selected) Clear All Selections

Display Format: By Department; Grouped/Sorted by: Department and Order Date

Order Summary	Order Date	Status	Stop Date	Entry Date
<b>IV Therapy</b>				0/1
<input type="checkbox"/> Dextrose 5% + 0.45% NaCL + 40 mEq KCL Infusion - Give 1,000 milliLiter(s), IntraVenous Continuous Run at: 75 mL/hrHang Time: 13.33 Hour(s)	09-29-2011 Routine	Active	06-24-2014	09-29-2011 14:05
<b>Laboratory</b>				0/4
<input type="checkbox"/> Arterial Blood Gases With Co	09-27-2011 23:43	1 or more Final Results Received		09-29-2011 22:36
<input type="checkbox"/> Urinalysis, Culture if Indicated	09-27-2011 23:38	1 or more Final Results Received		09-29-2011 22:36
<input type="checkbox"/> Urinalysis, with Microscopic	09-27-2011 23:35	1 or more Final Results Received		09-29-2011 14:33
<input type="checkbox"/> Urinalysis, Culture if Indicated - STAT Source: Urine Mid-Stream , Site: Clean Catch	10-18-2011 13:15	Collected		10-18-2011 13:30
<b>Pharmacy</b>				0/4
<input type="checkbox"/> acetaminophen + codeine 120 mg-12 mg/5 mL LIQ - Give 12.5 milliLiter(s), Oral, Every 3 hours Dispense as: acetaminophen-codeine 120 mg-12 mg/5 mL LIQ= 12.5 milliLiter(s), *PRN For Mild Pain (1-3) [Ordered as TYLENOL CODEINE]	09-29-2011 Routine	Active	06-24-2014	09-29-2011 14:05
<input type="checkbox"/> ceFAZolin IVPB - Give 2,000 milliGRAM(s), IntraVenous Piggy Back, Every 8 hours Run at: 100 mL/hrHang Time: 30 Minute(s) Placed in: Sodium Chloride 0.9% Infusion 50 milliLi (Dispensed as Cefazolin injection)	09-29-2011 Routine	Active	06-24-2014	09-29-2011 14:05
<input type="checkbox"/> metFORMIN - Give 850 milliGRAM(s), Oral, 2 times per day with meals Dispense as:	09-29-2011 Routine	Active	06-24-2014	09-29-2011 14:05

6.  This symbol is displayed if you have limited (filtered) what orders are displayed.

6.

Options Panel

Chart Selection

Orders from this chart only

Date Range

Based on date: ☒ Ordered ☐ Entered

From: 09-27-2011

To:

☐ Retain selections for next patient

Display Format

By Department

Filters

Status/Priority:

No Status/Priority Filter

Order Selection:

No Order Selection Filter

Department:

No Department Filter

Rx Verified:

All

Display Styles

Group/Sort Orders by:

Department and Order Date

Show

☐ Visit details ☐ Health issues

☐ Requested by ☐ Linked set details

Some orders may not be shown for this chart for order dates from 09-27-2011 ; Display Format: By Department; Filtered by: Status/Priority; Grouped/Sorted by: Department and Order Date

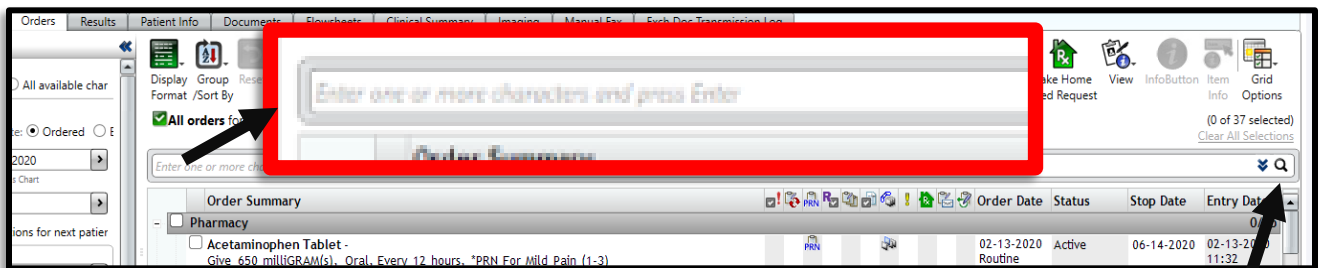
Order Summary	Order Date	Status	Stop Date	Entry Date
<b>IV Therapy</b>				0/1
<input type="checkbox"/> Dextrose 5% + 0.45% NaCL + 40 mEq KCL Infusion - Give 1,000 milliLiter(s), IntraVenous Continuous Run at: 75 mL/hrHang Time: 13.33 Hour(s)	09-29-2011 Routine	Active	06-24-2014	09-29-2011 14:05

# Provider CPOM Training

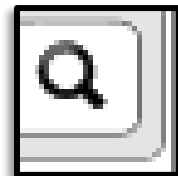
## Filters

### Orders Search Box

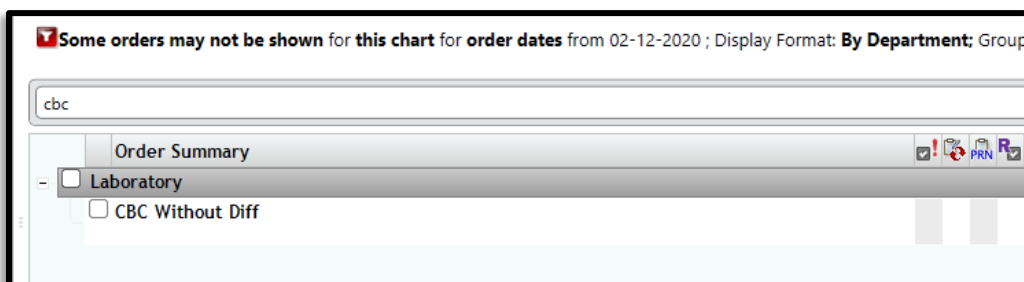
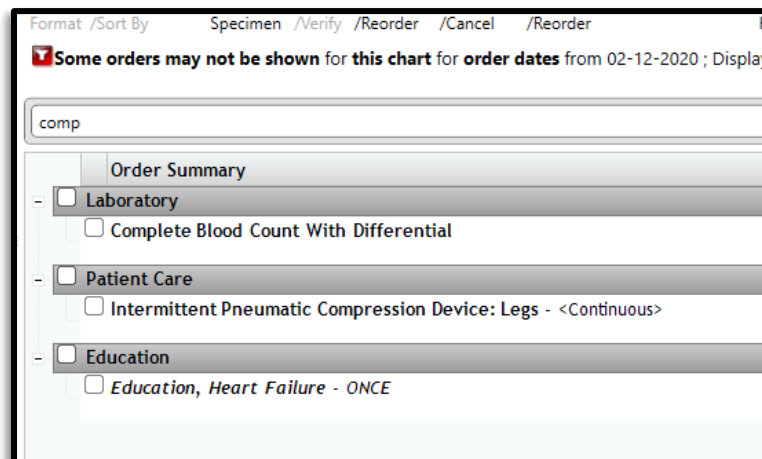
On the orders tab, there is a search box to quickly find orders, rather than using the scroll.




Once you have typed a few letters, selecting the search icon, or pressing enter will begin your search.



Please note that some items are not consistent, such as CBC and Complete Blood Count with Differential:



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To undo the search filter, select the  at the end of the search box.

## Orders Tab Options Panel

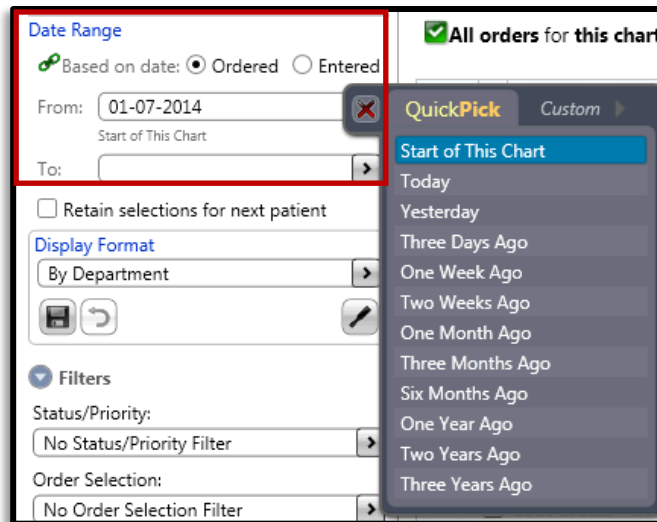
### 1. Chart Selection – This chart or All Available Charts

### 2. Date Range –

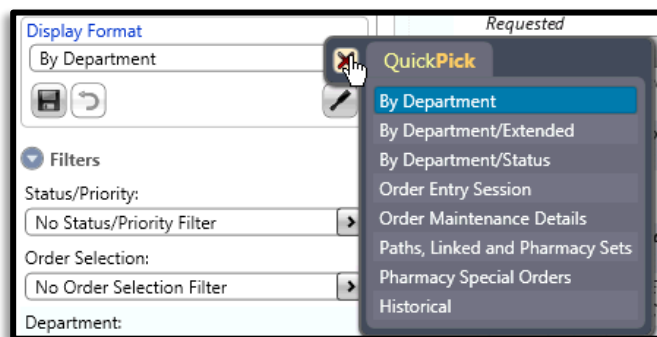
From: \_\_\_\_ To: \_\_\_\_

or

Use the QuickPick

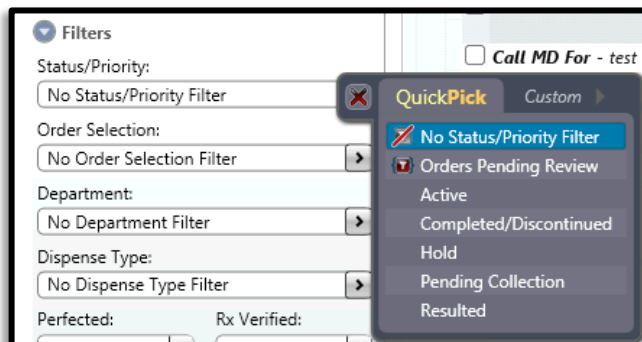


### 3. Display Format –



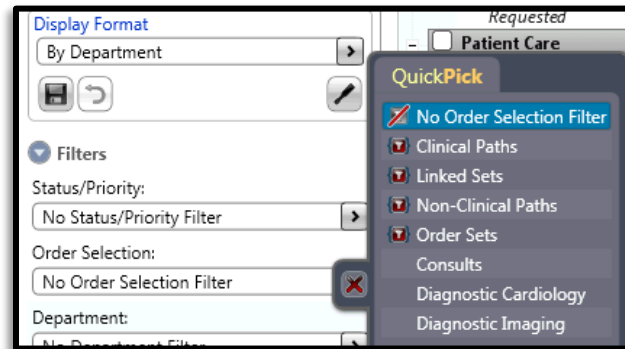
### 4. Filters –

#### a) Status / Priority



# Provider CPOM Training

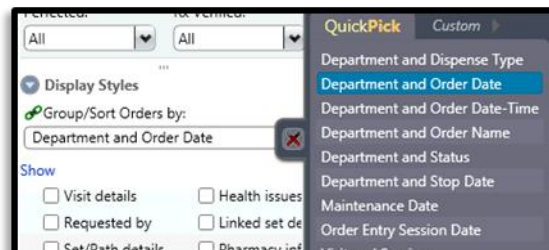
## b) Order Selection



## c) Department - (No Department Filter) is the Default

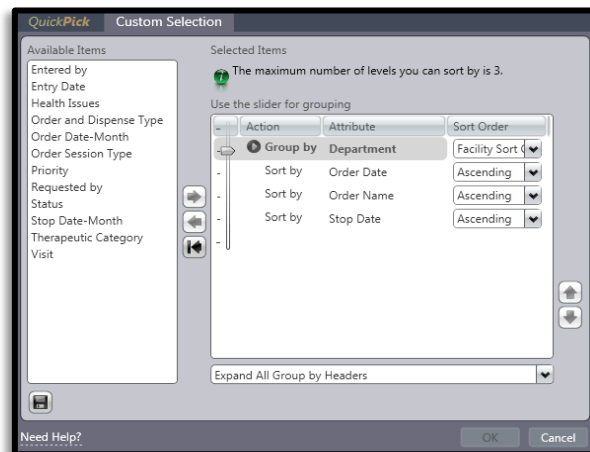


## 5. Display Styles:

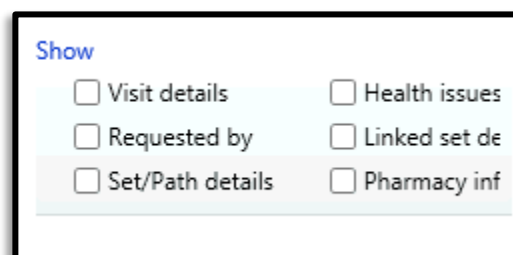


Or Customized:

**(THIS IS WHERE YOU CAN SET THE DEFAULT OF EXPANDED OR CONTRACTED HEADERS)**

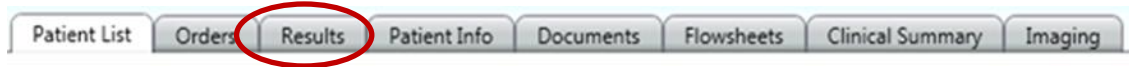


## 6. You can set your Filters to also display additional Views:



# Provider CPOM Training

## Results Tab



Clinical Results can be viewed in the Results tab.

The results displayed are based on the selections you make in the **Options Panel** on the left side of the Results tab.

Options Panel

Chart Selection

☐ This chart ☒ All available charts

Date Range

Based on date: ☐ Received ☒ Performed

From: 09-27-2011

Start of This Chart

☐ Retain selections for next patient

Display Format

Filters

Result Selection:

No Result Selection Filter

Options

☐ Abnormal

☐ Annotated only

☒ Include pending

Display Styles

Display View:

Summary

Report by Order

Trend

Trend & Graph

Sort Order (by Performed Date):

☒ Ascending ☐ Descending

Options

☒ Show category headers

QuickPick

Custom

Start of This Chart

Today

Yesterday

Three Days Ago

One Week Ago

Two Weeks Ago

One Month Ago

Three Months Ago

Six Months Ago

One Year Ago

Two Years Ago

Three Years Ago

No Result Selection Filter

ABG'S

BMP

bnp

CBC

CMP

Diagnostic Imaging

Lab

Laboratory

Micro

Microbiology

Pathology

PT and PTT

Urinalysis

Actions

Temporary Graph...

Temporary Results...


You may also click in the box next to **Abnormal**, if you wish to see **ONLY** those test results that have abnormal values.

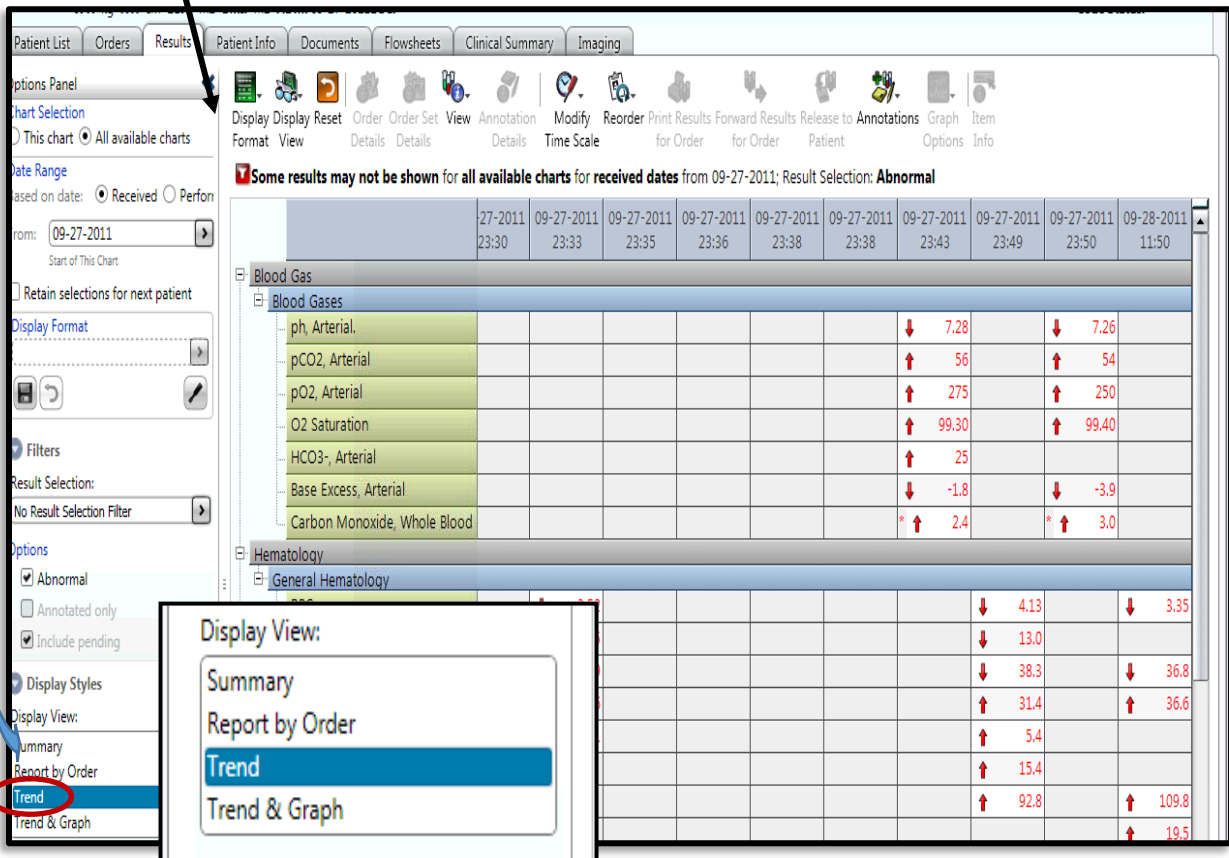


# Provider CPOM Training

Results: Trend View

Select the **Trend** view to show results at the time they are entered into SAC.

**Reminder:**  This symbol is displayed if you have limited results to be displayed.



The screenshot shows the Provider CPOM interface with the Results tab selected. The left sidebar contains the Options Panel with sections for Chart Selection, Date Range, Display Format, Filters, and Display Styles. The main area displays a table of results for Blood Gas and Hematology. A red 'T' icon is present in the top left of the results area, indicating limited results. A 'Display View' dropdown menu is open, showing options: Summary, Report by Order, Trend (selected), and Trend & Graph.

**Display View:**

- Summary
- Report by Order
- Trend**
- Trend & Graph

**Table Data:**

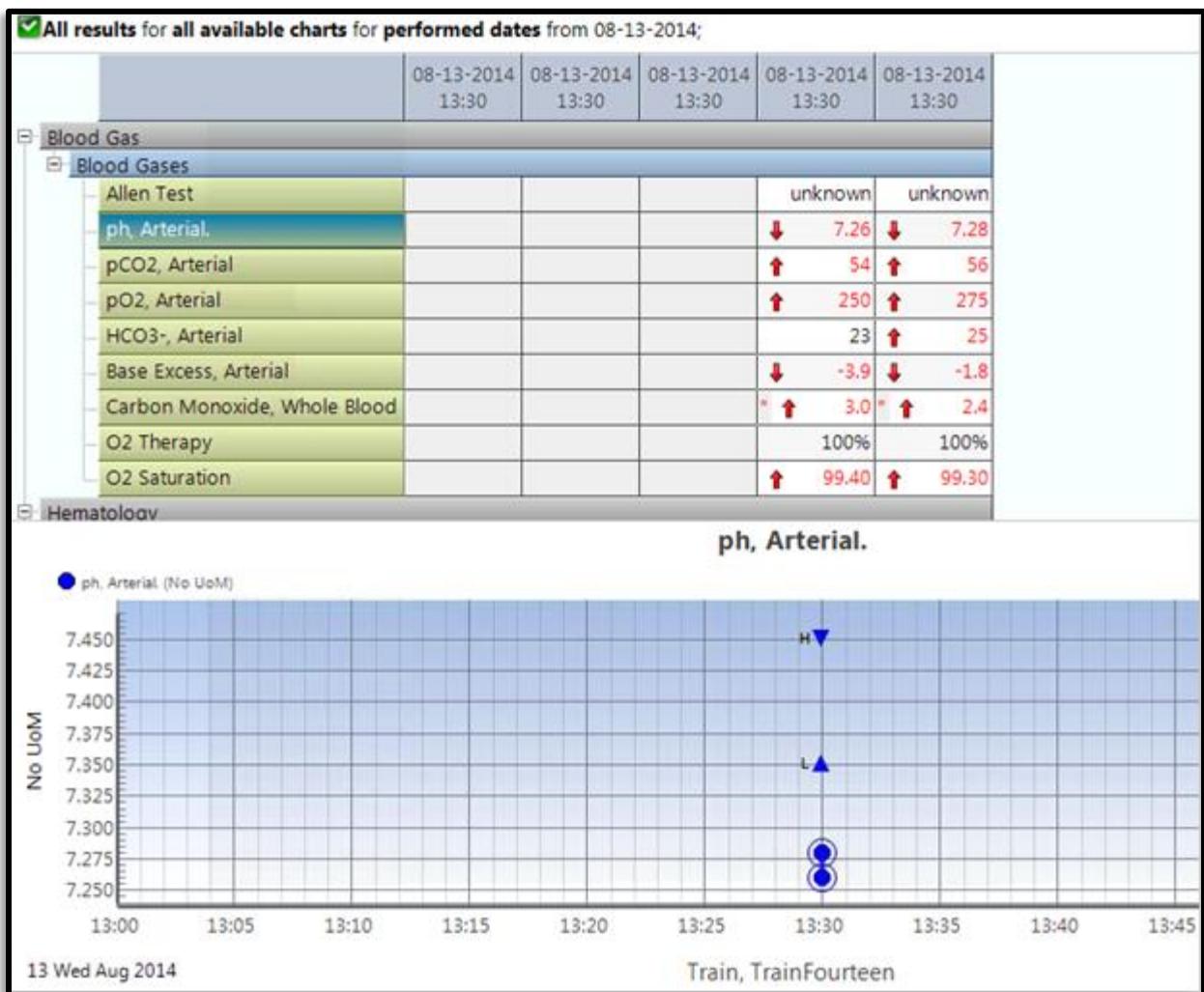
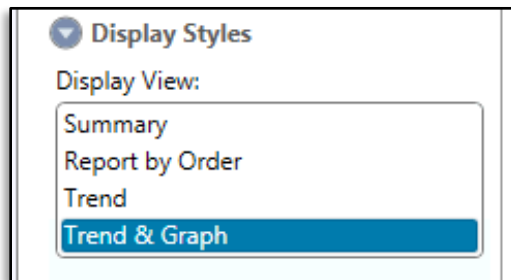
	09-27-2011 23:30	09-27-2011 23:33	09-27-2011 23:35	09-27-2011 23:36	09-27-2011 23:38	09-27-2011 23:38	09-27-2011 23:43	09-27-2011 23:49	09-27-2011 23:50	09-28-2011 11:50
<b>Blood Gas</b>										
<b>Blood Gases</b>										
ph, Arterial							↓ 7.28		↓ 7.26	
pCO2, Arterial							↑ 56		↑ 54	
pO2, Arterial							↑ 275		↑ 250	
O2 Saturation							↑ 99.30		↑ 99.40	
HCO3-, Arterial							↑ 25			
Base Excess, Arterial							↓ -1.8		↓ -3.9	
Carbon Monoxide, Whole Blood							* ↑ 2.4		* ↑ 3.0	
<b>Hematology</b>										
<b>General Hematology</b>										
WBC							↓ 4.13		↓ 3.35	
Neutrophils							↓ 13.0			
Lymphocytes							↓ 38.3		↓ 36.8	
Monocytes							↑ 31.4		↑ 36.6	
Eosinophils							↑ 5.4			
Basophils							↑ 15.4			
Hemoglobin							↑ 92.8		↑ 109.8	
Hematocrit									↑ 19.5	



# Provider CPOM Training

Results: Trend & Graph View

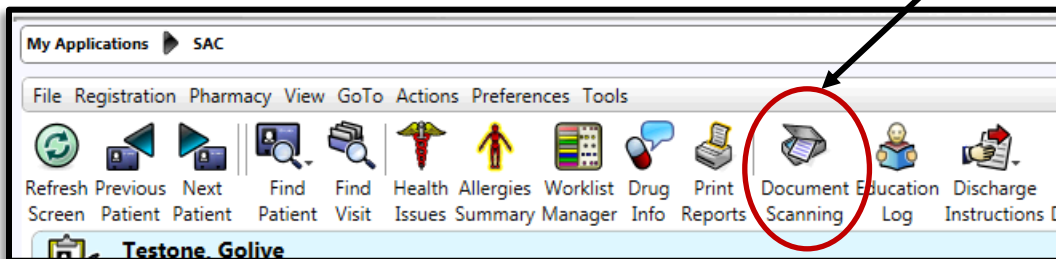
Using the Trend & graph option will display the lab values with those values in graph form.



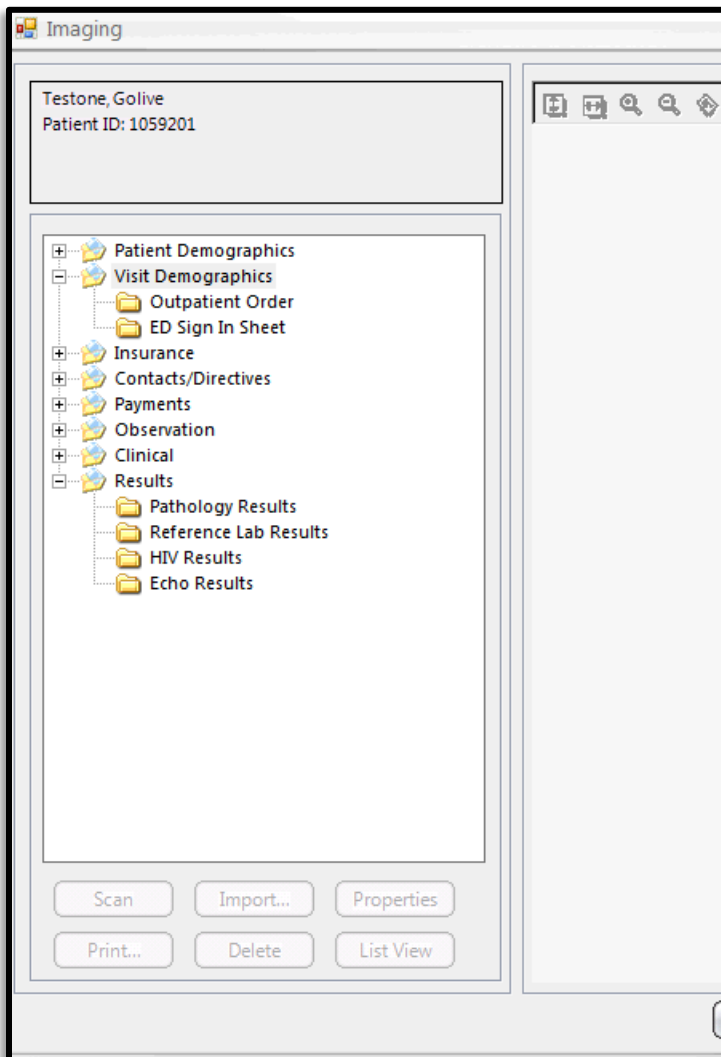


# Provider CPOM Training

**NOTE:** Results such as ECHO, HIV, or Reference Labs can be viewed from the Document Scanning icon and only if you have the security right to do so.



1. Selecting this icon will open the menu window for Scanned Imaging.
2. Click on a file folder that has a "+" to view the results in that folder.



# Provider CPOM Training

## Patient Info Tab

Patient information can be viewed or entered by clicking the **Patient Info** on the main screen.


1. Under the **Summary Views** section, select a category to **display** information
2. Click on the entry for more details.

The screenshot shows the 'Patient Info' tab with a sidebar menu on the left and a data table on the right. The 'Summary Views' menu is expanded, showing categories like Allergies, Care Providers, and Data Entry. A yellow callout box points to the 'Data Entry' option with the text: '3. The Data Entry category allows you to select a form to enter information based on your'.

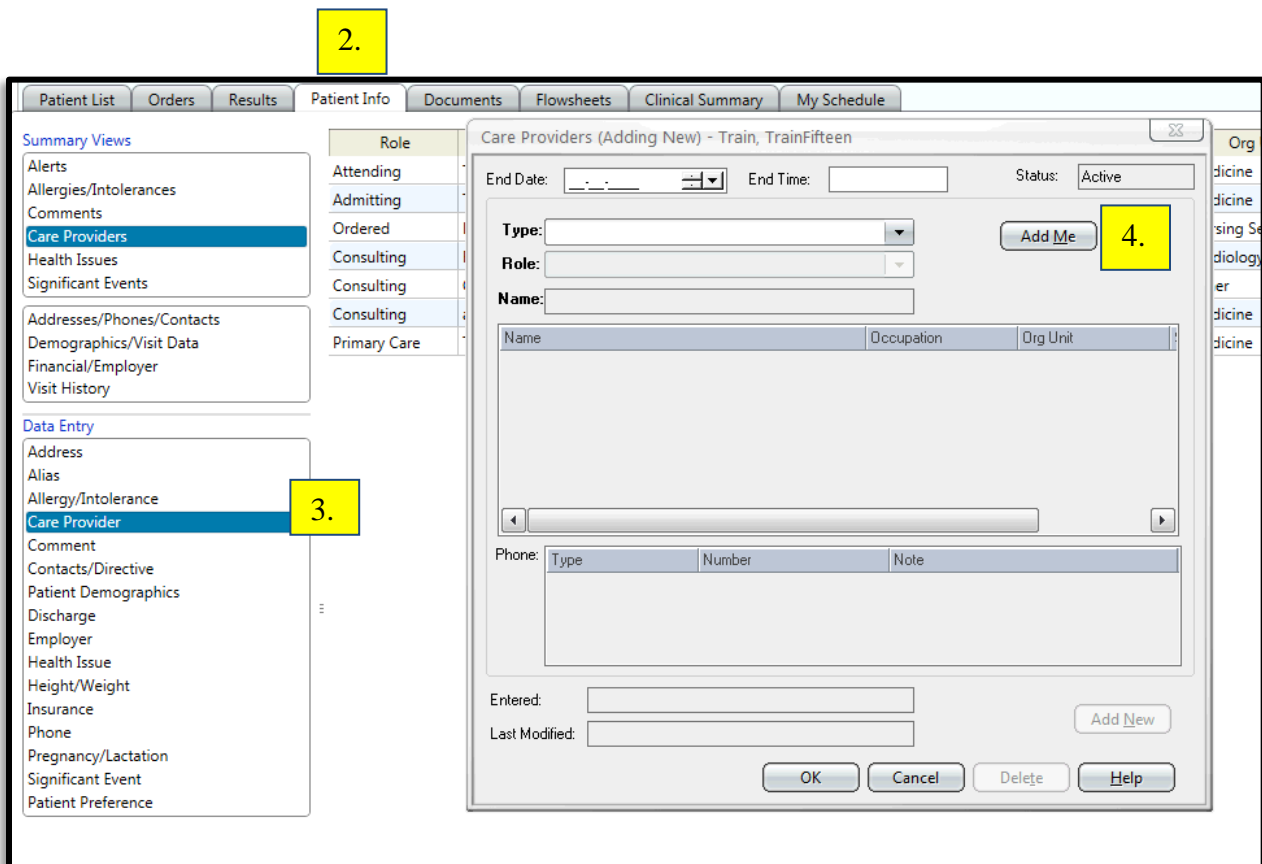
Role	Provider	Phone	Status	Effective Date	End Date	Entered Date	Org Unit	Specialty
Attending	Trommler, Lloyd...		Active	08-13-2014		08-13-2014 1...	Medicine	Internal Medicine...
Admitting	Trommler, Lloyd...		Active	08-13-2014		08-13-2014 1...	Medicine	Internal Medicine...
Ordered	Lake, Robin (RN)		Active	09-24-2015		09-24-2015 1...	Nursing Services	Nursing
Consulting	Rahman, Zaka Ur...	888-269-9786	Active	12-16-2014		12-16-2014 1...	Cardiology	Cardiology
Consulting	Cardiovascular As...		Active	09-11-2014		09-11-2014 1...	Other	Cardiology
Consulting	aaTemplate, SCE...		Active	08-13-2014		08-13-2014 1...	Medicine	Family Practice
Primary Care	Trommler, Lloyd...		Active	08-13-2014		08-13-2014 1...	Medicine	Internal Medicine...

# Provider CPOM Training

## Adding Yourself as a Provider

1. Select your patient from the patient list.
2. Click the **Patient Info** tab.
  - The Patient Info tab appears
3. From the **Data Entry** list, select **Care Provider**.
4. Click the  button.

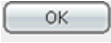
2.

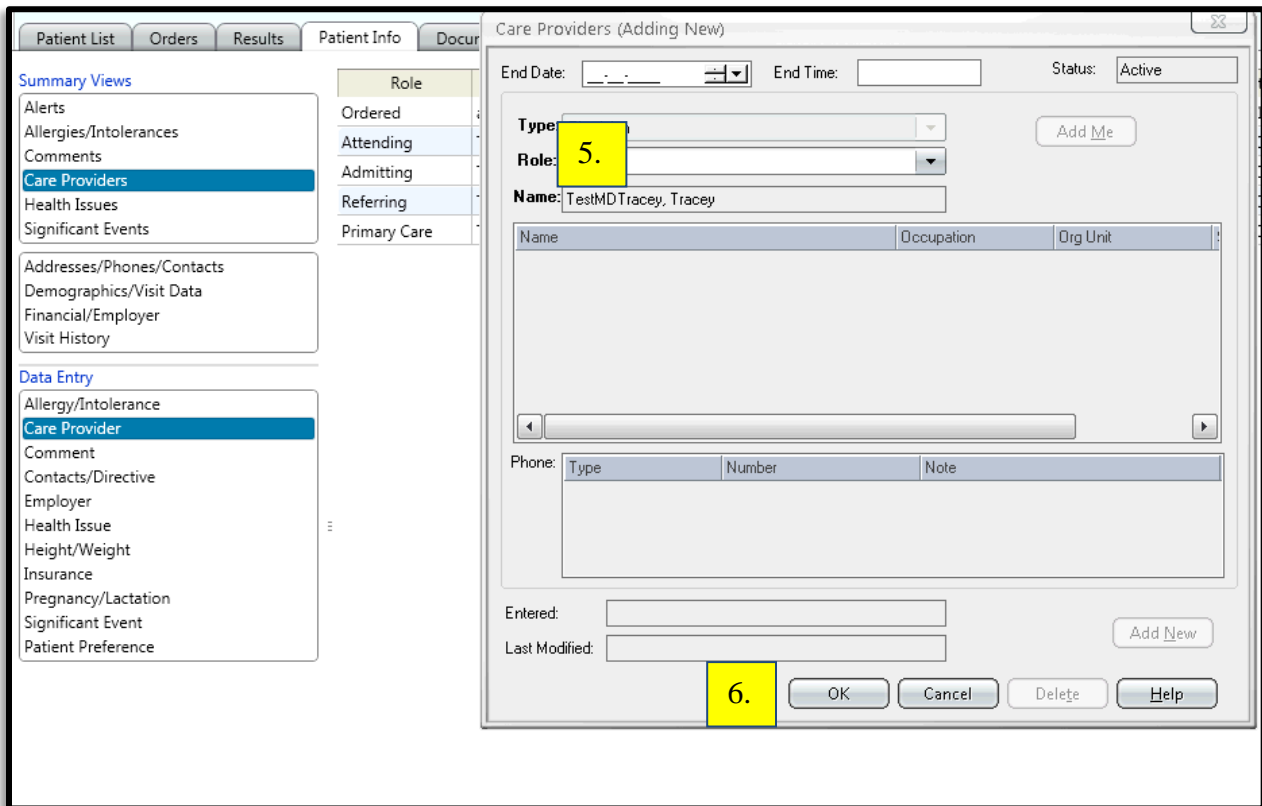


3.

4.

# Provider CPOM Training

5. From the Role drop-down list, select your role.
6. Click .
7. You are now listed as a provider for that patient.



The screenshot shows a medical software interface with a 'Patient Info' tab selected. A 'Care Providers (Adding New)' dialog box is open. The 'Role' dropdown menu is highlighted with a yellow box containing the number '5.'. The 'Name' field contains 'TestMDTracey, Tracey'. The 'Status' is set to 'Active'. The 'Entered' and 'Last Modified' fields are empty. The 'OK' button is highlighted with a yellow box containing the number '6.'. The background shows a sidebar with 'Summary Views' and 'Data Entry' sections, and a 'Role' dropdown menu with options: Ordered, Attending, Admitting, Referring, and Primary Care.

# Provider CPOM Training

## Expiring Yourself as a Provider

If you are no longer a provider for a patient, you may expire yourself from their list of care providers.

1. Fill in the end date
- OR–
2. You may pull the calendar from the dropdown menu and choose the date.

The screenshot shows the 'Adding New' dialog box for a Care Provider. The 'End Date' field is circled in red and labeled '1.' with a yellow box. The 'End Time' field is also circled in red and labeled '2.' with a yellow box. The 'Type' dropdown is set to 'Physician'. The 'Role' dropdown is empty. The 'Name' field contains 'TestMDTracey, Tracey'. Below the 'Name' field is a table with columns 'Name', 'Occupation', and 'Org Unit'. Below the table is a 'Phone' section with columns 'Type', 'Number', and 'Note'. At the bottom, there are fields for 'Entered:' and 'Last Modified:', and buttons for 'OK', 'Cancel', 'Delete', and 'Help'.

# Provider CPOM Training

## Documents Tab

The documents tab is where you can view all the structured notes and transcribed notes for SAC.

The documents displayed are based on the selections you make in the **Options Panel** on the left side of the documents tab.

Options Panel

Chart Selection

☒ This chart ☐ All available charts

Date Range

☒ Authored Date

From: 09-08-2015

To:

☐ Retain selections for next patient

Display Format

Date (Report)

Filters

Document Status/Priority:

No Document Status/Priorit

Document Selection:

No Document Selection Filt

Type/Category:

No Type/Category Filter

Signature Status:

No Signature Status Filter

Revision Status/Author:

No Revision Status/Author F

Display Styles

Display View:

Report

Group by:

Date

Display Format Date (Report): Group by: Date

(Page 1 of 1)

10 Document(s) shown

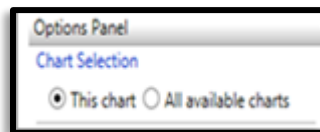
Time	Document N	Documen	Revisio	Signature Status	Finalizing Provider	Docum	Authored	Signed
10-28-2015								
16:16	Progress No...	Incomple...	Entered	Signed in Full	Non Finalization Documents	General	Clark, Tracey (RN)	10-28-2015 16:1
16:14	Progress No...	Incomple...	Entered	Signed in Full	Non Finalization Documents	General	Clark, Tracey (RN)	10-28-2015 16:1
16:12	Progress No...	Incomple...	Entered	Signed in Full	Non Finalization Documents	General	Clark, Tracey (RN)	10-28-2015 16:1
16:10	Progress No...	Complete	Entered	Signed in Full	Non Finalization Documents	General	Clark, Tracey (RN)	10-28-2015 16:1
16:08	Progress No...	Incomple...	Entered	Signed in Full	Non Finalization Documents	General	Clark, Tracey (RN)	10-28-2015 16:1
16:04	Progress No...	Incomple...	Entered	Signed in Full	Non Finalization Documents	General	Clark, Tracey (RN)	10-28-2015 16:0
16:01	Progress No...	Incomple...	Entered	Signed in Full	Non Finalization Documents	General	Clark, Tracey (RN)	10-28-2015 16:0
14:45	Progress No...	Incomple...	Entered	Signed in Full	Non Finalization Documents	General	Clark, Tracey (RN)	10-28-2015 14:5
09-09-2015								
08:27	Progress No...	Complete	Entered	Signed in Full	Non Finalization Documents	General	Clark, Tracey (RN)	09-09-2015 08:3
09-08-2015								
13:47	Certification...	Complete	Entered	Signed in Full	Non Finalization Documents	General	Trommler, Lloyd (Physician)	09-08-2015 13:4

# Provider CPOM Training

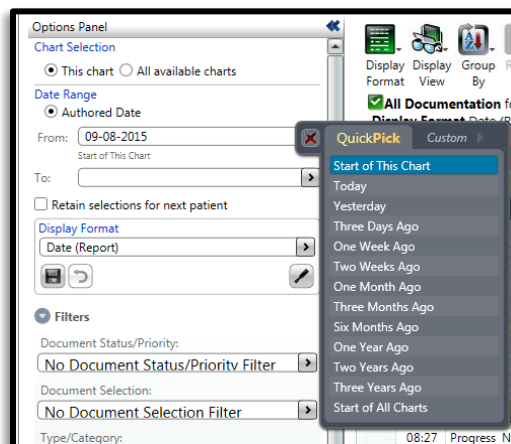
## Documents Tab Options Panel

Just like the Orders and Results Tabs, the Documents Tab has filter options. These are a few examples:

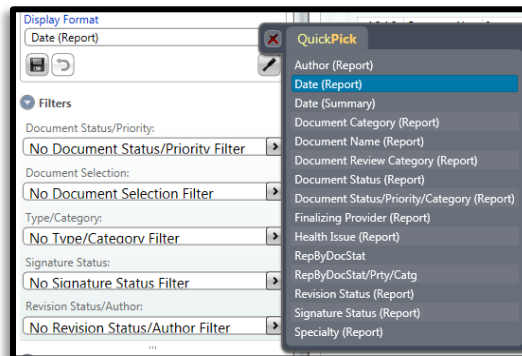
### 1. Chart Selection – This chart or All Available Charts



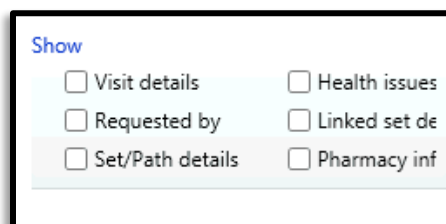
### 2. Date Range – From: \_\_\_\_ To: \_\_\_\_ or Use the QuickPick



### 3. Display Format –



### 4. You can set your Filters to also display additional Views:



# Provider CPOM Training

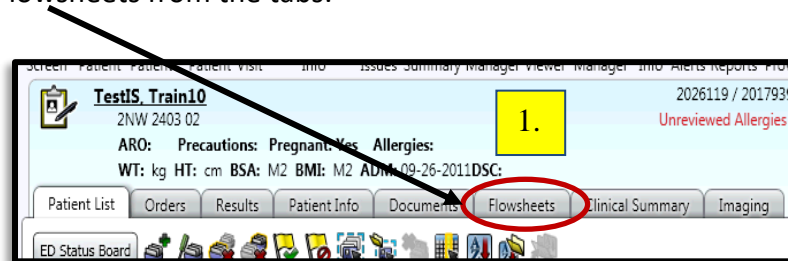
## Flowsheets Tab

### Viewing a Flowsheet

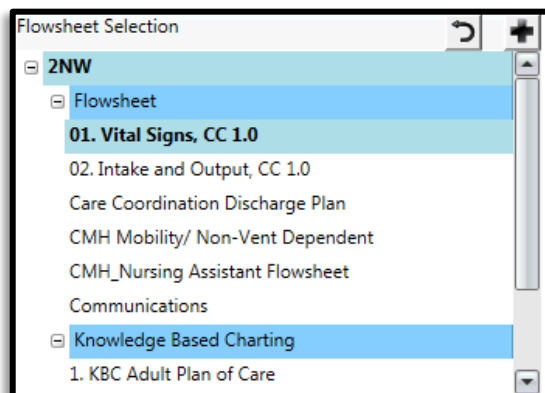
Flowsheets can be found and viewed from the flowsheet tab.

A flowsheet is a document that contains information that is entered repeatedly across time, such as Vital Signs and I&O.

1. To get to the flowsheet, first select your patient from the patient list then select Flowsheets from the tabs.



2. Then you can double click on the name of the flowsheet to view.





# Provider CPOM Training

## Flowsheet Summary View

1. The Summary View of a Flowsheet (located in the Filter section of the options panel) is helpful in finding information without the need to horizontal scroll.
2. Using the Suppress blank rows and columns compacts the information for easy review.
3. The Summary View defaults to “Weekly”, however double clicking over the “Weekly” column header will fan out the columns to a daily summary.

Options Panel

**Flowsheet Criteria**

**Chart Selection**

☒ This chart ☐ All available charts

**Date Range**

From: 01-01-2019  
Three Days Ago

To: 01-01-2019

**Filter**

☒ Default to summary

☐ Show abnormal only

☒ Suppress blank rows and cols

☐ Show ml/Kg

☐ Show cancelled columns

☐ Retain selections for next patient

**Flowsheet Selection**

☒ Flowsheet

01. Vital Signs, CC 1.0

02. Intake and Output, CC 1.0

Care Coordination Discharge Plan

CMH Nursing Assistant Flowsheet

Communications

☒ Knowledge Based Charting

1. KBC Adult Plan of Care 4.0

2. KBC Adult Assessment Inter...

KBC Adult Rehab Record

**Save Options**

**Graph Options**

Blank Rows and Columns Suppressed. VIEW ONLY 2. KBC Adult

Name	Type	Weekly 6-Jan-19 23:59	Daily 3-Jan-19 23:59	Daily 4-Jan-19 23:59
<b>Access Lines/Monitoring Devices (1 Parameters)</b>				
Peripheral IV Insertion/Assessment	Last	1		1
Site: (null)	Last	0		0
Unsuccessful Insertion Attempts	Last			
Insertion Compliance	Last			
Location	Last			
Device/Gauge/Length	Last			
<b>Cognitive (1 Parameters)</b>				
Cognitive/Neuro/Behavioral	Last	WDL		WDL
Cognitive/Neuro/Behavioral [WDL Definition: ]	Last			
<b>Respiratory (1 Parameters)</b>				
Respiratory	Last	WDL except		WDL except
Respiratory [WDL Definition: Regular depth a	Last			
Rhythm/Pattern, Respiratory	Last			
<b>Cardiac (1 Parameters)</b>				
Cardiovascular	Last	WDL		WDL
Cardiac [WDL Definition: Regular rhythm, S1,	Last			
<b>Peripheral Neurovascular (1 Parameters)</b>				
Peripheral Neurovascular	Last	WDL		WDL
Peripheral Neurovascular [WDL Definition: C	Last			
<b>Gastrointestinal (1 Parameters)</b>				
Gastrointestinal	Last	WDL except	WDL except	WDL except
GI [WDL Definition: Abdomen soft, nondisten	Last	firm	distended; firm	firm
Abdominal Appearance	Last	RUQ: tender		RUQ: tender
Abdominal Palpation	Last			
<b>Genitourinary (1 Parameters)</b>				
Genitourinary	Last	WDL		WDL
GU [WDL Definition: No reported or observed	Last			
<b>Skin (2 Parameters)</b>				
Skin	Last	WDL		WDL
Skin [WDL Definition: Warm, dry, intact, elasti	Last			

# Provider CPOM Training

## Clinical Summary Tab

The Clinical Summary is a view that pulls together information from throughout the chart in one view. Some tiles are view only; others are interactive for getting more information.


- Select your patient from the patient list then Click the Clinical Summary Tab.
- Each Section is called a “Tile”.
- The Clinical Summary defaults to “24 hours”. However, you can click the drop down to choose other starting points.

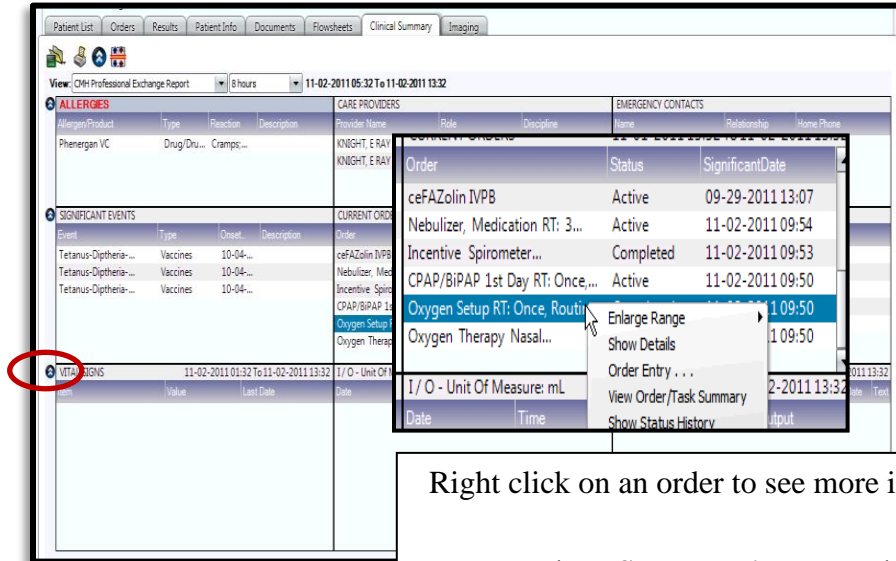
\*\*\*Notice the arrows to the left of each tile, these arrows allow you to collapse each row.

Contract

Collapsed

# Provider CPOM Training

The  will expand a collapsed set of tiles.



The screenshot displays the Provider CPOM interface with several sections: ALLERGIES, SIGNIFICANT EVENTS, and VITAL SIGNS. A red circle highlights the VITAL SIGNS section. A right-click context menu is open over the 'Oxygen Setup RT: Once, Routi...' order, showing options: Enlarge Range, Show Details, Order Entry . . ., View Order/Task Summary, and Show Status History.

Order	Status	SignificantDate
cefAZolin IVPB	Active	09-29-2011 13:07
Nebulizer, Medication RT: 3...	Active	11-02-2011 09:54
Incentive Spirometer...	Completed	11-02-2011 09:53
CPAP/BIPAP 1st Day RT: Once...	Active	11-02-2011 09:50
Oxygen Setup RT: Once, Routi...		11-02-2011 09:50
Oxygen Therapy Nasal...		11-02-2011 09:50

Right click on an order to see more information.

- Select **“Show Details”** to see the original order form.
- Select **“Order Entry”** to put in an order.
- Select **“View Order/Task Summary”** to see task manager view of this order
- Select **“Status History”** to display details about the orders

# Provider CPOM Training

## Imaging Tab

1. The “**Imaging**” tab allows you to see all the patient’s radiology/diagnostic imaging statuses and results.
2. This includes both **a.)** Dictated summaries and access to **b.)** Actual radiology images in PACS.

**\*\* Please NOTE:** Not all monitors are usable for diagnostic purposes with imaging. Only certain monitors are designated diagnostic appropriate on each unit. Check with a unit staff member as to which monitor is acceptable for diagnostic purposes.

Visit Number	Order Name	Date Performed	Status	Accession Number
	Xray Chest AP Portable		1 or more Final	
	Xray Abdomen AP Portable		Active	
	Xray Chest AP Portable		1 or more Final	
	Xray Chest AP Portable		Interim Results	
	Xray Chest AP Portable		1 or more Final	
	CT Abdomen + Pelvis without Contrast 741		1 or more Final	
	US Kidneys + Bladder 76770		1 or more Final	
	CT Head without Contrast		1 or more Final	
	Xray Pelvis		1 or more Final	
	Xray Lumbar Spine Complete		1 or more Final	
	Xray Chest AP Portable		1 or more Final	
	Xray Chest AP Portable		1 or more Final	
	Xray Chest AP Portable		1 or more Final	
	Xray Chest AP Portable		1 or more Final	
	US Vein Lower Extremities Bilateral		1 or more Final	
	Xray Chest 2 Views		1 or more Final	
	Xray Chest AP Portable		1 or more Final	
	Xray Chest AP Portable		1 or more Final	

3. You can view “This Chart” or “All Charts” from the drop down menu.

Order Name	Date Performed	Status	Accession Number
------------	----------------	--------	------------------

# Provider CPOM Training

## Order Entry

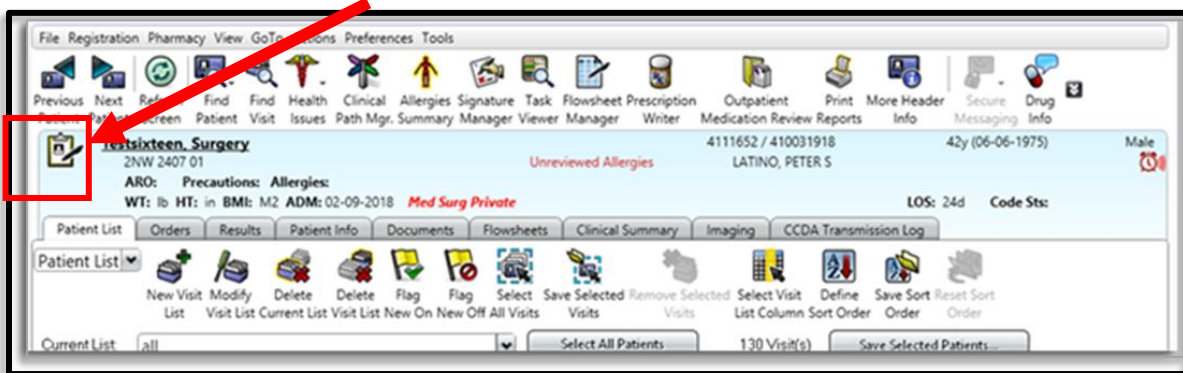
### To Enter an Order

All patient orders are entered in a similar fashion using the Enter Order icon.  
All orders are entered into SAC for the inpatient population.

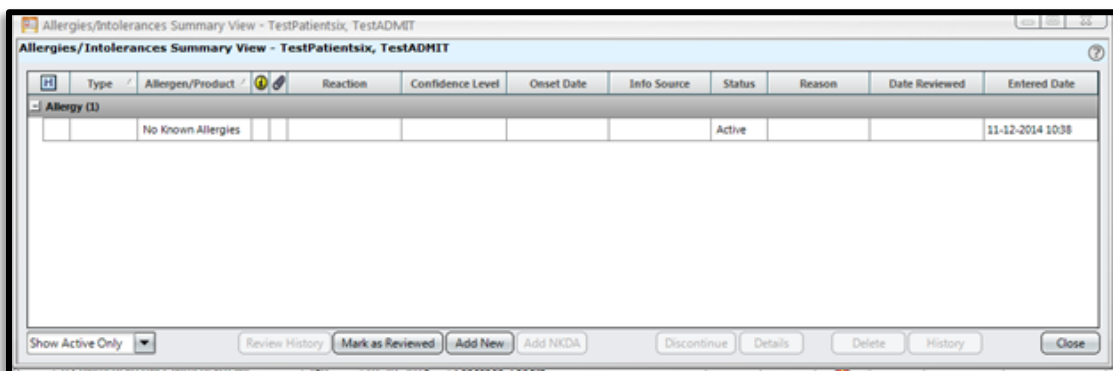
1. Click the **Patient List** tab and select your patient's name.



2. Click the **Enter Order** icon, you are then presented with the order entry worksheet (unless the patient's allergies have not been reviewed).



3. If the patient's allergies have not been reviewed, they will present for review.
4. To manage the Allergies, you will a.) Review current allergies or b.) add new to enter the patient allergies
  - **Note:** This window will not display if you have previously clicked on the **Mark as Reviewed** button or if your patient does not have allergies.



5. Click the **Mark as Reviewed** button to acknowledge you have seen the allergies and the Allergy Summary window will **not** appear the next time you enter orders for this patient. This is only done once a visit.
6. Click the **Close** button to close the window.

# Provider CPOM Training

## General Order Entry Worksheet Design

The screenshot shows the 'Order Entry Worksheet - Test, Tracey2' window. A yellow box labeled 'Session Type' points to the 'Requested By' and 'Source' fields. Another yellow box labeled 'Search/Manual Entry free text' points to the 'Type here to enter order name' search bar. A third yellow box labeled 'Order List will populate here' points to the main order list area. A fourth yellow box labeled '"Shopping Basket" - Orders you have entered that are waiting to be submitted.' points to the bottom section of the worksheet. The interface includes a sidebar with a list of medical categories, a top header with patient information, and a right sidebar with action buttons like 'Add...', 'View...', 'Item Info', 'Add to Favorites', 'Message', 'Drug Info', 'Edit...', 'Delete', 'Copy...', 'Add Specimen...', 'Indication...', and 'Mark as Done'.

## Order Sessions



This close-up shows the 'Session' section of the form. It includes a 'Requested By' field with radio buttons for 'Me' (selected) and 'Other: TestMDTracey, Tracey'. Below this are 'Date' and 'Time' fields. The 'Type' dropdown menu is open, showing options: 'Standard' (highlighted), 'Discharge Orders', and 'Hold'. The 'Reason' field is empty. The 'Start Of' dropdown is also visible, showing 'Standard'.

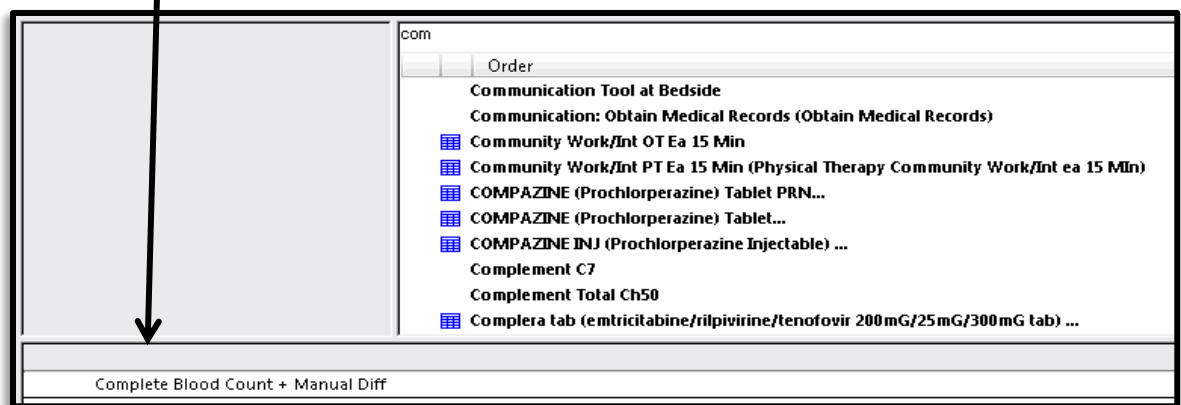
There are 3 types of Session Types for orders:

- Discharge** – used for discharge orders
- Hold** – used for direct admit orders or post op orders; these orders are to be activated by nursing
- Standard** – *default choice* – used for majority of orders.

# Provider CPOM Training







## Order Entry Icons

- Icons to the left of the options represent information about the item.
-  The blue grid indicates that the order needs more details to be complete. When you select an order that requires more details (blue grid) the form will open up for you to enter the details. Some fields will already be populated with data but can be changed if it's not what you are wanting.
-  The icon with the blue link and the file type icon indicate these are linked order sets. A plain order set does not have the link. An order set is a group of orders that covers multiple department orders.
- Orders that do not have a blue grid are complete orders that when selected will move to the order review pane.



com

Order

- Communication Tool at Bedside
- Communication: Obtain Medical Records (Obtain Medical Records)
-  Community Work/Int OT Ea 15 Min
-  Community Work/Int PT Ea 15 Min (Physical Therapy Community Work/Int ea 15 Min)
-  COMPAZINE (Prochlorperazine) Tablet PRN...
-  COMPAZINE (Prochlorperazine) Tablet...
-  COMPAZINE INJ (Prochlorperazine Injectable) ...
- Complement C7
- Complement Total Ch50
-  Complera tab (emtricitabine/rilpivirine/tenofovir 200mG/25mG/300mG tab) ...

Complete Blood Count + Manual Diff


- You can select one or more orders to be entered during an order entry session
- The order review pane will also display when the order is to be active/acted upon.

Complete Blood Count + Manual Diff	12-08-2015	Pending
Comprehensive Metabolic Panel	12-08-2015	Pending
Xray Chest 1 View - Radiology May Change Exam per Protocol: Yes; AM Rad Exam. Sign-Symp :cough	12-09-2015 AM Rad Exam	Pending


# Provider CPOM Training

## Individual Worksheet Fields

The screenshot shows a medical form titled "Individual Worksheet Fields". At the top, there are fields for "Order:" (EKG -), "Requested By:" (Gill, Connie), "Template Name:", and "Order ID:" (001147QXQ). Below these are "Requested For Date:" (12-09-2015) and "Requested For Time:". A "Portable" checkbox is present. On the right, there are fields for "Height (inches)", "Height (cm)", "Weight (lb)", "Weight (kg)", and "BSA". Below these are "Relevant Results:" and "Health Issues:". On the left, there is a "Signs and Symptoms" section with a red star icon (labeled 'a.') and a "Special Instructions" field. Below "Signs and Symptoms" is a "Cardiologist To Read" dropdown menu (labeled 'b.'). At the bottom right, there is a "ConditionalOrder" section with a checkbox (labeled 'c.') and a "Max # of activations:" dropdown menu.

a. The field with the red star  indicates this is a mandatory field that must be entered before this order can be submitted.

A close-up of the "Signs and Symptoms" dropdown menu. It shows a list of options: Arrhythmia/Change in Pattern, Chest Pain, PreOp, Pre Cath, Post PCI, Dyspnea, TIA/CVA, Murmur, CHF, and Assess LV Function. A blue arrow points from the text in block 'b' to the dropdown icon at the top right of the list.

b. The  icon at the end of the Signs and Symptoms box indicates that the field can be typed in or select from one of the options that present.

A close-up of the "ConditionalOrder" section. It shows a checkbox labeled "Max # of activations:" which is checked, and a dropdown menu set to "Unlimited". Below this is a text field containing "At the onset of chest pain". A blue arrow points from the text in block 'c' to this section.

c. A Conditional Order is available to enter a specific "condition" that must be met before the test is to be done. The Nurse activates the order when the condition is met.



# Provider CPOM Training

## Routine Orders

Routine orders that need to be done sometime today: there is no need to indicate a time, date, or priority.

1. Select your *patient's name* from the **Patient List** screen.
2. Click the **Order Entry** icon from the tool bar.
3. Select "Me" for the ordering physician, if required.
4. Leave the **Session** type as Standard.
5. Leave the Date and Time fields as is.

The screenshot shows the 'Order Entry' window. The 'Requested By' is set to 'Me' (TestMDTracey, Tracey). The 'Session Type' is 'Standard'. The 'Manual Entry' dropdown is open, and the search bar contains 'cbc'. The list of orders includes 'CBC and BMP IN AM', 'CBC W/Auto Diff', 'CBC with differential (Complete Blood Count With Differential)' (selected), 'CBC with differential (Complete Blood Count With Differential) STAT', and 'CBC Without Diff'. The 'Add...' button is on the right. The bottom of the window shows a 'Submit Order(s) for Test, Tracey2' button, which is highlighted with a yellow box and the number '10.'.

6. Type in the order name (example here is CBC)
  7. **Select CBC (Complete Blood Count)** and click **Add**
  8. If you had additional orders you could go back to the type in field and type another order name and proceed.
  9. When you are finished adding orders, review them for correctness in the basket.
  10. Click "Submit {patient's name} -----this is a safety feature
  11. Type Password and click OK
- If a test has more than one common name, the other common name will be in parenthesis.  
**i.e.-- CBC (Complete Blood Count)**

# Provider CPOM Training

## Priorities Other Than Routine

If you have an order that needs a priority other than Routine, open the order by selecting “View” and the order worksheet will open. The other Priority choices available are:

The screenshot shows a medical order form for a 'Complete Blood Count With Differential'. The 'Collection Date' is set to '12-07-2015'. The 'Collection Priority/Time' dropdown menu is open, showing the following options: 'AM Lab Draw', 'Routine', 'STAT', 'Time Critical', and 'Urgent'. The 'Time Critical' option is highlighted with a blue background and is circled in red.

- The “AM” designation will order for the following morning.
- STAT
- The “Time Critical” designation will require a date and time

The screenshot shows the 'Collection Date' set to '12-07-2015' and the 'Collection Priority/Time' dropdown menu set to 'Time Critical'. The 'Time Critical' option is highlighted with a blue background. Below the dropdown menu, there is a button labeled 'Use previous specimen if'.

- Urgent is not used.

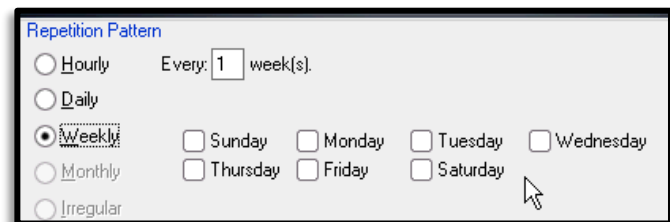
# Provider CPOM Training

## Repeat Orders

1. To place a repeat order, select the  button on the bottom **LEFT** of the order entry worksheet.

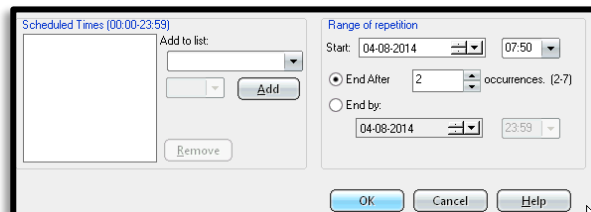


2. Orders can be repeated: Hourly / Daily / Weekly

A screenshot of the 'Repetition Pattern' dialog box. It has radio buttons for 'Hourly', 'Daily' (selected), 'Weekly', 'Monthly', and 'Irregular'. There is an 'Every: 1 Day(s)' field.A screenshot of the 'Repetition Pattern' dialog box with 'Weekly' selected. It shows checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'.

3. You decide when to start & how often:

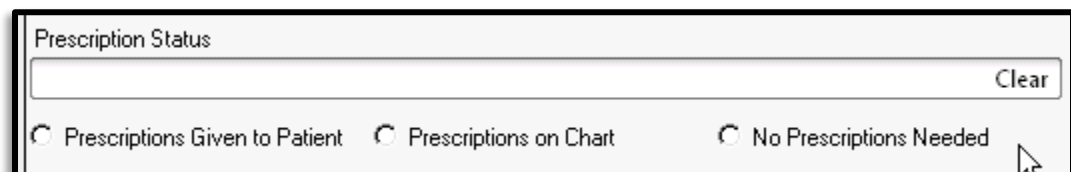
- The defaults for occurrences are 2 but can be changed to meet your needs.

A screenshot of the 'Scheduled Times' dialog box. It shows a 'Range of repetition' section with 'Start' and 'End' times and a 'Number of occurrences' field set to 2.

- ✎ Sometimes you will see “checkboxes” which allow you to select “more than one option”.

A screenshot of the 'Type of Restraint' dialog box. It lists various restraint types with checkboxes: Soft Wrist Left, Soft Wrist Right, Soft Wrist Bilateral, Soft Ankle Left, Soft Ankle Right, Soft Ankle Bilateral, 4 Siderails, Mittens, Safety Belt, Enclosure Bed, Hard Wrist/Ankle, Hard Wrist Bilateral, Hard Ankle Bilateral, and 4-point Hard.

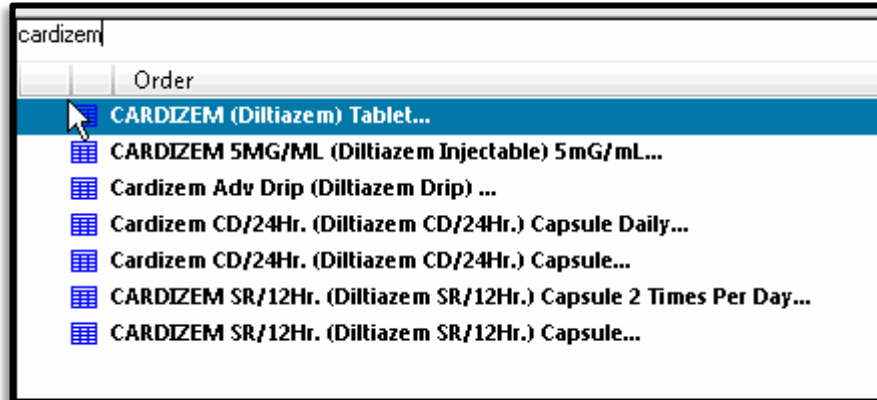
- ✎ Other times you can see “circles” that allow only one choice:

A screenshot of the 'Prescription Status' dialog box. It has radio buttons for 'Prescriptions Given to Patient', 'Prescriptions on Chart', and 'No Prescriptions Needed'.

# Provider CPOM Training

## Medication Order Entry

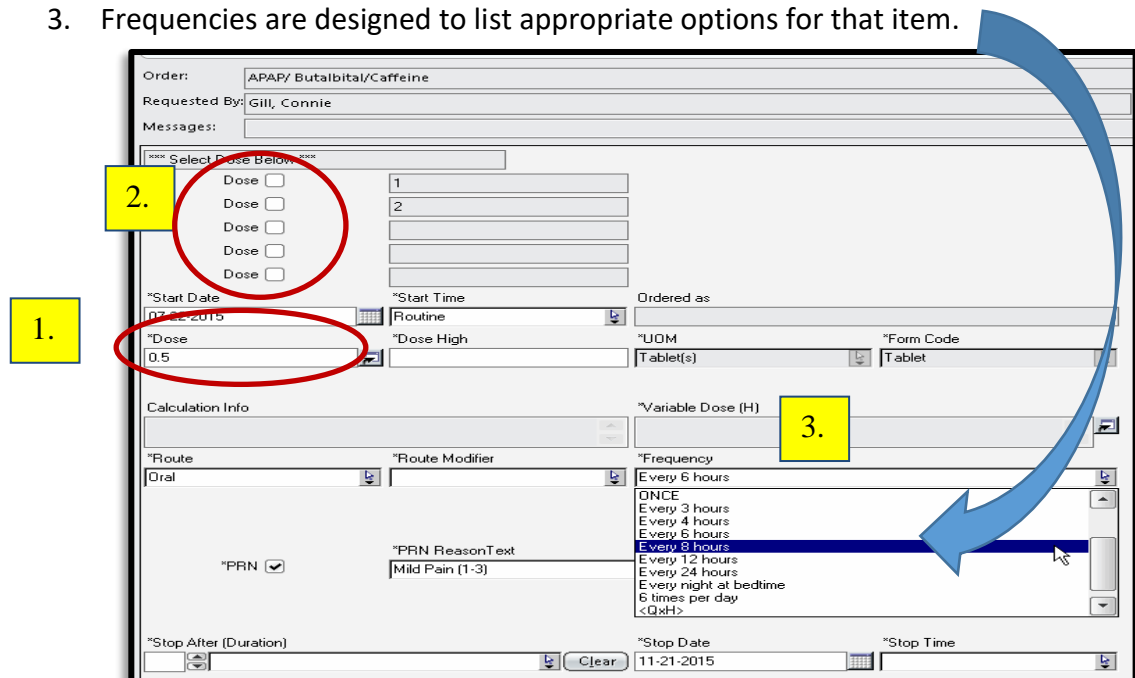
- When ordering medication depending on the order there may be items that are complete, but most require you to enter the dose desired.
- The screen shot shows the different administrations but still require a dose to be selected.



- Therapeutic substitutions are configured in SAC for items that are non-formulary at CMH.
- Medication forms default with options that complete the necessary fields to complete an order.
- Not all substitutions are a 1-1 for dosages.

## Medication options and how to use them

1. The dose field is required and several of the fields are prefilled in for ease of order entry
2. You can either type in a dose or use the check boxes at top of form to complete the dose.
3. Frequencies are designed to list appropriate options for that item.



# Provider CPOM Training

Order: APAP/ Butalbital/Caffeine

Requested By: Gill, Connie

Messages:

Select Dose Below

Dose ☐ 1

Dose ☐ 2

Dose ☐

Dose ☐

Dose ☐

\*Start Date 07-22-2015

\*Start Time Routine

Ordered as

\*Dose 0.5

\*Dose High

\*UOM Tablet(s)

\*Form Code Tablet

Calculation Info

\*Variable Dose (H)

\*Route Oral

\*Route Modifier

\*Frequency Every 6 hours

ONCE

Every 3 hours

Every 4 hours

Every 6 hours

Every 8 hours

Every 12 hours

Every 24 hours

Every night at bedtime

6 times per day

<Q>H>

\*PRN ☒

\*PRN ReasonText Mild Pain (1-3)

\*Stop After (Duration)

\*Stop Date 11-21-2015

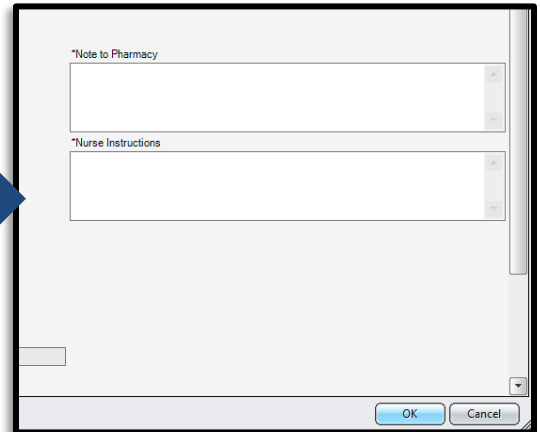
\*Stop Time

1. The above example shows that you can type in a dose other than the options listed (remember to check the unit of measure whether it is in mg/mcg/tablet/capsule). Some forms are not eligible for fractions. For frequency you may need to slide the bar down to find the frequency you are looking for.
2. If you want the medication to be given only over the next 24 hrs or X2 days, you will want to complete the **Stop After (Duration)** field.
3. Medications that require different doses at different times of the day **will require separate orders**. Typing in dose changes is not the correct way to enter those orders.
4. For medication that you want the first dose to be given stat you only must change the Start Time from Routine to Stat. This lets nursing know to give first dose now. Then the frequency that you have entered will schedule the future doses.

# Provider CPOM Training

On the bottom, right side of the form are additional fields that can communicate to pharmacy or nursing any specific instructions you may have for administrations of the medication.

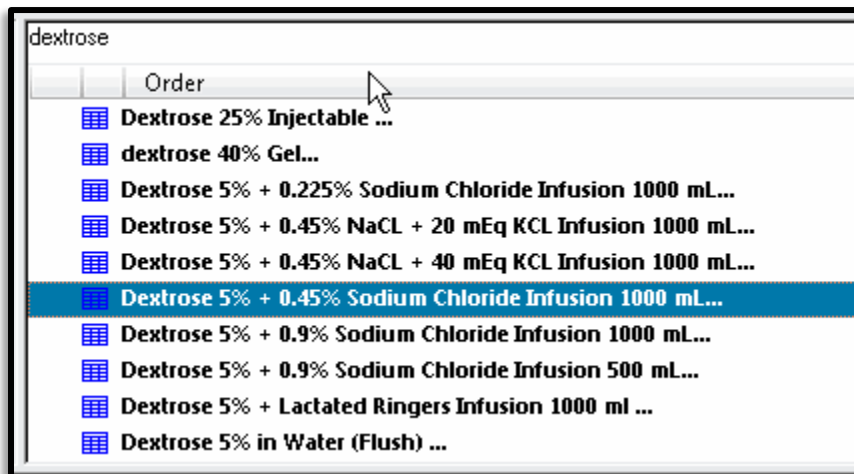
**\*These areas are not appropriate for dosage changes or titration directions or additional orders.**



The screenshot shows a software window with two text input areas. The top area is labeled '\*Note to Pharmacy' and the bottom area is labeled '\*Nurse Instructions'. Both areas have a vertical scrollbar on the right. At the bottom right of the window are 'OK' and 'Cancel' buttons.

## IV Order Entry

- The IV order is displayed with different concentration and amounts of solution.
- Select the intended item to open the form
- Some items are displayed with pre-mixed concentrations of KCL



The screenshot shows a window titled 'dextrose' with a tab labeled 'Order'. A mouse cursor is pointing at the 'Order' tab. Below the tab is a list of items, each preceded by a small grid icon. The items are:

- Dextrose 25% Injectable ...
- dextrose 40% Gel...
- Dextrose 5% + 0.225% Sodium Chloride Infusion 1000 mL...
- Dextrose 5% + 0.45% NaCL + 20 mEq KCL Infusion 1000 mL...
- Dextrose 5% + 0.45% NaCL + 40 mEq KCL Infusion 1000 mL...
- Dextrose 5% + 0.45% Sodium Chloride Infusion 1000 mL...** (highlighted in blue)
- Dextrose 5% + 0.9% Sodium Chloride Infusion 1000 mL...
- Dextrose 5% + 0.9% Sodium Chloride Infusion 500 mL...
- Dextrose 5% + Lactated Ringers Infusion 1000 ml ...
- Dextrose 5% in Water (Flush) ...

# Provider CPOM Training

Order: Dextrose 5% + 0.45% Sodium Chloride Infusion Order ID: 001147QXT

Requested By: Gill, Connie Template Name: Dextrose 5% + 0.45% Sodium Chloride Infusion 1000 mL...

Messages:

\*Start Date: 12-08-2015 \*Start Time: Routine Ordered as: Review Date: Review Time:

\*Requested Volume: 1,000 \*UOM: millLiter(s) \*Form Code: Solution

Height (inches) Height (cm) Weight (lb) Weight (kg) BSA

Ideal Body Weight (Kg)

Relevant Results

\*IVAdditiveCalc:

\*Route: IntraVenous Continuous \*Route Modifier: Rate: mL/hr KVO Hang Time (Hours) Total IV Volume: UOM: Line Type

\*Stop After (Duration) Stop Date: 04-08-2016 Stop Time

\*Note to Pharmacy

\*Nurse Instructions

- The IV Rate (a) is the only required field, but you can also use the Total Volume (b) to order an item to be given- for example X 3000 ml - and using the **stop after field** (c) to make the order specific to the patient's needs.

Order: Dextrose 5% + 0.45% Sodium Chloride Infusion Order ID: 001147QXT

Requested By: Gill, Connie Template Name: Dextrose 5% + 0.45% Sodium Chloride Infusion 1000 mL...

Messages:

\*Start Date: 12-08-2015 \*Start Time: Routine Ordered as: Review Date: Review Time:

\*Requested Volume: 1,000 \*UOM: millLiter(s) \*Form Code: Solution

Height (inches) Height (cm) Weight (lb) Weight (kg) BSA

Ideal Body Weight (Kg)

Relevant Results

\*IVAdditiveCalc:

\*Route: IntraVenous Continuous \*Route Modifier: Rate: mL/hr KVO Hang Time (Hours) Total IV Volume: UOM: Line Type

\*Stop After (Duration) Stop Date: 04-08-2016 Stop Time

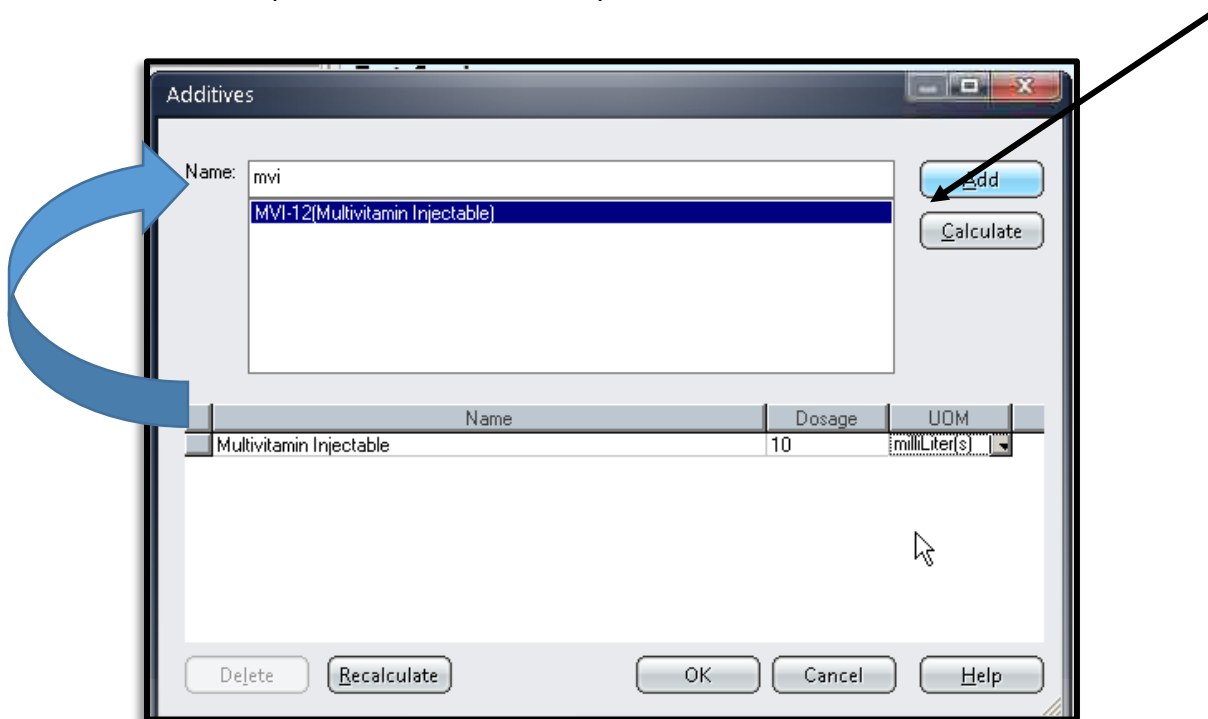
\*Note to Pharmacy

\*Nurse Instructions

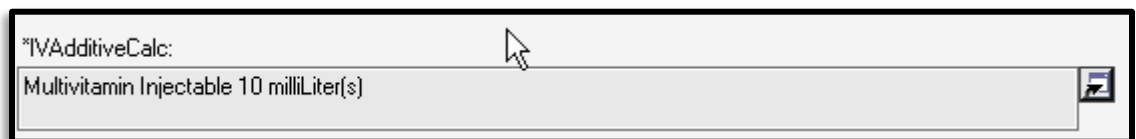
- When you select the icon at the end of the IVAdditive Calc field-----

# Provider CPOM Training

it opens the additive box so you can add additional medications to the IV solution.



- First type in the additive name, select the additive and then Add, once the additive is in the lower box you will need to enter the dose and UOM.
- When you select OK the additive will display in the IVadditiveCalc box and be a part of the order on the orders tab.





# Provider CPOM Training

## Radiology Test Order Entry

You can type the name of test you are looking for or use the Start of Browse.

- Xray
- MRI
- CT
- US

The list is all the tests that can be ordered for that department.

The left screenshot shows a tree view of Radiology tests. The 'MRA + MRI' folder is selected. The right screenshot shows a list of tests under the 'xray' category.

Test Name
MRI Cardiac With + Without Contrast
MRI Cervical Spine Without Contrast
MRI Cervical Spine With + Without Contrast
MRI Chest Without Contrast 41601006
MRI Elbow With + Without Contrast 73223 Left
MRI Elbow With + Without Contrast 73223 Right
MRI Elbow Without Contrast 73221 Left
MRI Elbow Without Contrast 73221 Right
MRI Femur With Without Contrast 73720 Left
MRI Femur With Without Contrast 73720 Right

Test Name
Xray Cervical Spine Complete with Flex-Ext
Xray Cervical Spine Flexion + Extension
Xray Chest 1 View
Xray Chest 1 View In AM
Xray Chest 2 Views
Xray Chest 2 Views In AM
Xray Chest AP Portable
Xray Chest AP Portable In AM
Xray Chest Apical Lordotic*
Xray Chest Bilateral Decub

The form contains the following fields:

- Order: Xray Chest 1 View
- Requested By: Gill, Connie
- Template Name: Xray Chest 1 View In AM
- Messages:
- Requested For Date: 12-03-2015
- Requested For Priority/Time: AM Rad Exam
- Pregnancy Status: (dropdown menu)
- Radiology May Change Exam per Protocol: Yes
- Signs and Symptoms: (ex:Pain, SOA, Edema)
- Special Instructions:
- Height (inches), Height (cm), Weight (lb), Weight (kg), BSA
- Relevant Results:
- Health Issues:

- Radiology test entered on female patients from the age of 12-50 will require you to answer if the patient is pregnant. There is an option of unknown and that requires the technician to determine this before the test can be done.
- Signs and Symptoms are required for radiology tests. R/O is not an acceptable entry.

# Provider CPOM Training

## Lab Order Entry

- Type in the name of test you are looking for or use the Start of Browse.
- You can “double-click” the name of the test, and it will show up in your pending orders and scheduled as “Routine”.
- If you “view” the order:

The screenshot shows a web-based form for entering lab orders. At the top, there are fields for 'Order:' (containing 'Urinalysis, with Microscopic'), 'Requested By:' (containing 'Gill, Connie'), 'Template Name:', and 'Order ID:' (containing '001147QYQ'). Below these are 'Messages:' and a 'Collection Date' field with a calendar icon. A red circle highlights the 'Collection Date' field (which contains '12-08-2015') and the 'Collection Priority/Time' dropdown menu. Below the date field is a 'Scheduled Date/Time' field. To the right of the date field are fields for 'Height (inches)', 'Height (cm)', 'Weight (lb)', 'Weight (kg)', and 'BSA'. Below the date field are 'Specimen Source' and 'Site: \* Please Choose Correct Site' dropdown menus. Below these are 'Medication Info (Last Dose/Antibiotics)' and 'Comments/Instructions' text areas. At the bottom right, there are 'Health Issues', 'Collection Container', and 'Minimum Volume' fields. A link for 'Specimen Collection Instructions' is at the bottom right.

- The current date is already populated. If this is correct, you can then select the appropriate Collection Priority/Time.
- If you want the lab test to be done at a later date, you will need to use the calendar to enter the correct collection date and select the appropriate Collection Priority /Time.

# Provider CPOM Training

## Order Search

All patient orders are entered in a similar fashion using either *Start of Browse* or *Manual Entry* (Type here to enter order name).

### Order Entry Options

1. *Start of Browse* allows you to browse various orders from a hierarchical tree structure and then select your order.
  - When you select the “+” to the left of an item it will either open for more specific options or will display all of the options for order entry in that category.

1.

Requested By: ☐ Me ☒ Other: Denny, D Marty Source: .Written Allergy Details

Date: . . . Time: . . .

Session: . . .

Type: Standard Reason: . . .

Start Of Browse Contents of 'Cardiology'

Order Sets

Admit / Discharge / Transfer

Cardiology

Charges

Consults

IV Therapy

Laboratory

Neurodiagnostics

Nutritional Services

Patient Care

Pharmacy

Radiology

Rehab Services

Respiratory Care

Type here to enter order name

Order	Cost
Cardio Stress Thallium	
Cardiolite Stress Test Order Set	
Echo 2D Complete	
EKG -	
EKG Rhythm Strip	
EKG Signal Average	
Event Monitoring Setup	
Holler Monitor, 24 Hour w/Scan*	
Holler Monitor, 48 Hour w/Scan*	
Saline Contrast	
Stress Echo	
Tee Exam	
Treadmill Test	

Add...

View...

Item Info

Add to Favorites

Message

Drug Info

2. *Manual Entry*, the “Type here to enter order” name field

Type here to enter order name

Order

allows you to type in part or all of an order item name (i.e., ABG, urine, cbc, etc).

2.

Requested By: ☐ Me ☒ Other: Denny, D Marty Source: .Written Allergy Details

Date: . . . Time: . . .

Session: . . .

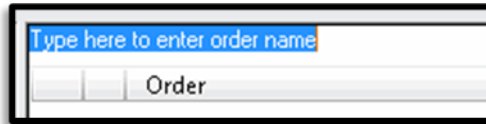
Type: Standard Reason: . . .

Manual Entry Searching for ...

ABG

Order	Cost
ABG Order Set Routine (Arterial Blood Gas Routine Today Order Set)	
ABG Order Set STAT (Arterial Blood Gasses STAT Order Set)	

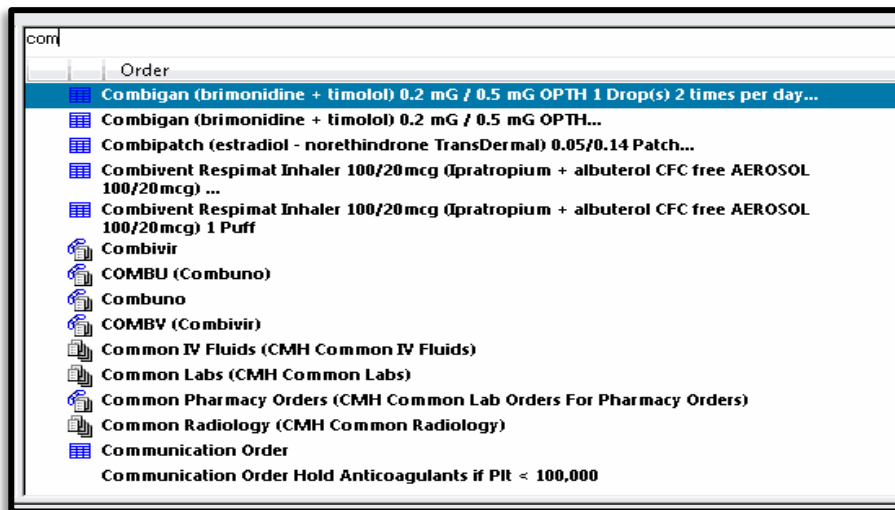
# Provider CPOM Training



Type here to enter order name

Order

- When the Type here to enter order name is blue you can start typing to find the order you need to enter.

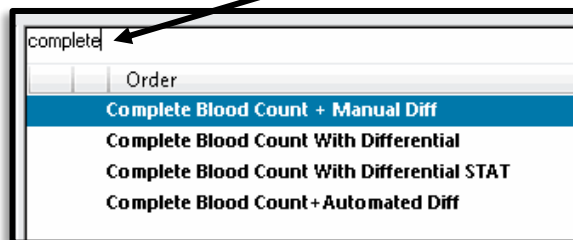


com

Order

- Combigan (brimonidine + timolol) 0.2 mG / 0.5 mG OPTH 1 Drop(s) 2 times per day...
- Combigan (brimonidine + timolol) 0.2 mG / 0.5 mG OPTH...
- Combipatch (estradiol - norethindrone TransDermal) 0.05/0.14 Patch...
- Combivent Respimat Inhaler 100/20mcg (Ipratropium + albuterol CFC free AEROSOL 100/20mcg) ...
- Combivent Respimat Inhaler 100/20mcg (Ipratropium + albuterol CFC free AEROSOL 100/20mcg) 1 Puff
- Combivir
- COMBU (Combuno)
- Combuno
- COMBV (Combivir)
- Common IV Fluids (CMH Common IV Fluids)
- Common Labs (CMH Common Labs)
- Common Pharmacy Orders (CMH Common Lab Orders For Pharmacy Orders)
- Common Radiology (CMH Common Radiology)
- Communication Order
- Communication Order Hold Anticoagulants if Ptt < 100,000

- Note: The more you type the less options you are presented with



complete

Order

- Complete Blood Count + Manual Diff
- Complete Blood Count With Differential
- Complete Blood Count With Differential STAT
- Complete Blood Count + Automated Diff

# Provider CPOM Training

- You also have the option of saving your favorite order sets for easy reference.  
By choosing “My Favorite Sets” from the drop-down menu, you can view your already saved order sets.

The screenshot shows the 'Order Entry Worksheet - Test, Tracey2' window. At the top, patient information is displayed: 'Test, Tracey2', '25E 2120 01', 'TestMDTracey, Tracey', '4100269 / 410003750', and '75y (06-20-1940)'. Below this, there are fields for 'Allergies: NKDA, Bee Stings' and 'Intolerances: Egg'. The 'Requested By' section shows 'Me' selected. The 'Date' and 'Time' fields are empty. The 'Session' section shows 'Type: Standard' and 'Reason:'. A dropdown menu is open, showing 'Start Of Browse', 'Manual Entry', and 'My Favorite Sets'. A yellow box with the number '3.' is placed over the 'My Favorite Sets' option. To the right, there is a table with columns 'Order' and 'Cost', containing items like 'Blood Product and Transfusion', 'CARD Heart Failure', 'CMH Common Labs', and 'Discharge \* Order Set'. On the far right, there are buttons for 'Add...', 'View...', 'Item Info', 'Remove', 'Message', and 'Drug Info'.

- To add order sets to your favorites, highlight the name of the order set and choose “Add to Favorites”.

This screenshot shows a different view of the 'Order Entry Worksheet' interface. The 'Contents of "/>

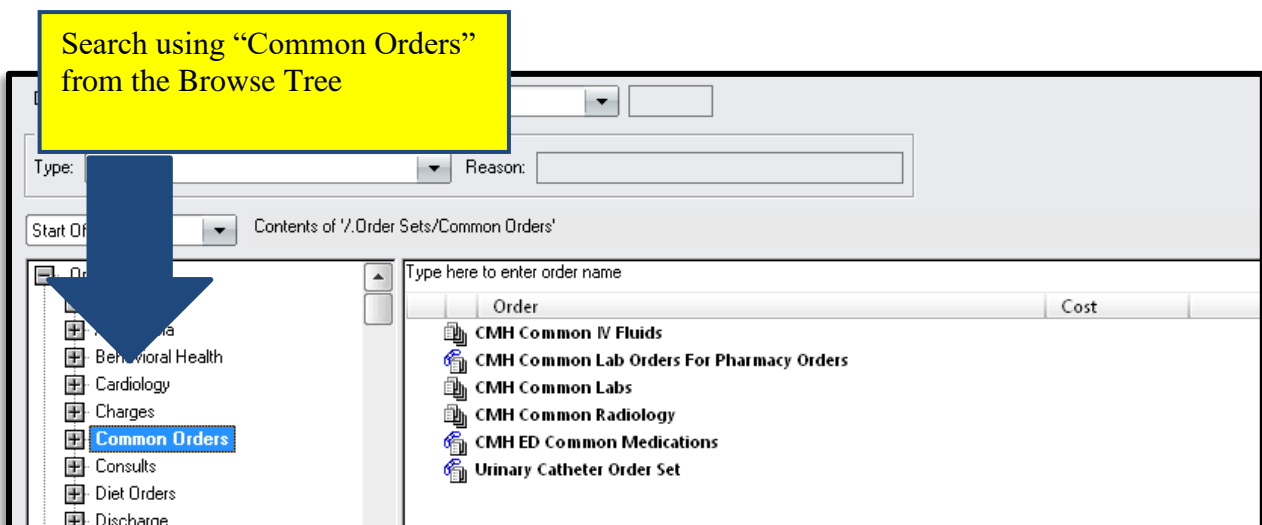
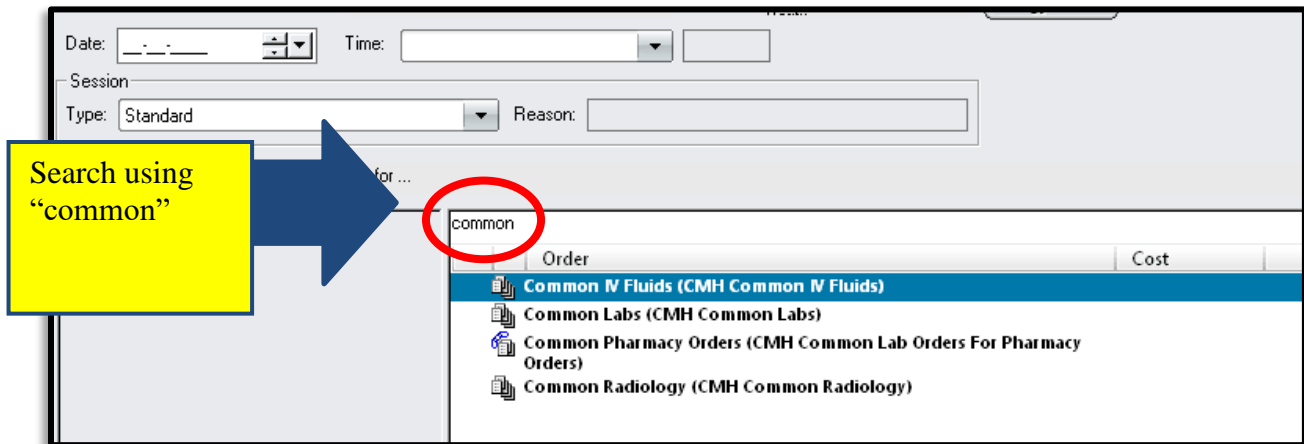
# Provider CPOM Training

## Order Sets

Order sets of various types are available for various conditions.

### Common Order Sets

There are common orders ets that can expedite order entry. They contain the most commonly ordered items of their type: IV Fluids, Labs, Labs for Pharmacy, Radiology, and ED Medications.



# Provider CPOM Training

## Blood Bank Order Set

1. When ordering Blood Product and Transfusion, the order set allows for entering type & screen as well as ordering product.
2. When ordering blood, first complete the required fields at the top of the order form.  
(These will then populate the orders you select from the grids.)

CMH\_Blood Product and Transfusion [1 orders of 18 are selected]

LAB Trans Reason

LAB Trans Give/Hold

Does the Pt. Have Sickle Cell Anemia?

LAB Bld Bank No. of Units

Has the Pt. Had an Organ Transplant?

Relevant Results

Labs

☒ Type + Screen

☐ ABO and RH - Adult

Red Blood Cells

3. TRANSFUSION REASON: There is a drop down with suggested reasons, but the field allows for doctor to free text a reason not listed.

Blood Bank Order and Transfusion Form Adult - TrainInstructor, Train

TrainInstructor, Train

2NW 2425 01

Havens, James M

4000166 / 400001988

70y (03-14-1944)

Female

Allergies: Drug Allergies Not Recorded, Shellfish

CMH\_Blood Product and Transfusion [1 orders of 18 are selected]

LAB Trans Reason

LAB Bld Bank No. of Units

Has the Pt. Had an Organ Transplant?

Relevant Results

Labs

☒ Type + Screen

☐ ABO and RH - Adult

Red Blood Cells

Order

Requested Date

Requested Time

# of Units

Now/Later

Units To Transfuse

Reason for Transfuse

Special Instructions

Red Blood Cells Leuko Reduced - 5 item(s)

# Provider CPOM Training

## 4. TRANSFUSION GIVE/HOLD: Select status of blood product—Give/Hold/Conditional.

Give = give now.

Hold = Hold, will probably order to transfuse in 24-48 hours.

Conditional = if specific condition met, want nurse to transfuse; but **only** if condition met.

Red Blood Cells	Order	Requested Date	Requested Time	# of Units	Now/Later	Units To Transfuse	Reason for Transfuse	Special Instructions
Red Blood Cells Leuko Reduced - 5 item(s)								

## 5. SICKLE CELL Question: This is a mandatory question that blood bank needs answered to do the crossmatch checking on the blood.

Red Blood Cells	Order	Requested Date	Requested Time	# of Units	Now/Later	Units To Transfuse	Reason for Transfuse	Special Instructions
Red Blood Cells Leuko Reduced - 5 item(s)								
Red Blood Cells Leuko Reduced (Most Common)								
Red Blood Cells Leuko Reduced Irradiated								
Red Blood Cells Leuko, CMV Neg, Irradiated								
Transfuse (Red Blood Cells - Now)								Red Blood Cells - Now
Transfuse (Red Blood Cells - Conditional)								Red Blood Cells - Conditional



# Provider CPOM Training

## 6. Number of Units: Enter number of units needed

Order	Requested Date	Requested Time	# of Units	Now/Later	Units To Transfuse	Reason for Transfuse	Special Instructions
Red Blood Cells Leuko Reduced - 5 item(s)							
<input checked="" type="checkbox"/> Red Blood Cells Leuko Reduced (Most Common)	04-29-2014		4	Give		Patient Actively Bleeding	
<input type="checkbox"/> Red Blood Cells Leuko Reduced Irradiated	T						
<input type="checkbox"/> Red Blood Cells Leuko, CMV Neg. Irradiated	T						
<input checked="" type="checkbox"/> Transfuse (Red Blood Cells - Now)	04-29-2014				4	Patient Actively Bleeding	Red Blood Cells - Now
<input type="checkbox"/> Transfuse (Red Blood Cells - Conditional)	T						Red Blood Cells - Conditional

\*\*\*Patients must have a **Type + Screen** for blood products. It is valid for 72 hours.\*\*\*


RelevantResults  
ABO: A; RH Typing: POS; Coombs Test--Indirect: NEG;

Labs  
☒ Type + Screen ☒ Consent

- If the patient has a **current** Type + Screen, it will show in the 'Relevant Results' box.
- If the patient does not have a **current** Type + Screen, the box will be blank

**\*If results are present, please uncheck the box for 'Type + Screen'.**

# Provider CPOM Training

-  With the questions answered on the top of the form, once a blood product is selected it automatically fills in appropriate fields and selects the transfuse now order.

CMH\_Blood Product and Tranfusion [3 orders of 18 are selected]

☒ LAB Trans Reason  
Patient Actively Bleeding

☒ LAB Trans Give/Hold  
Give

☒ Does the Pt. Have Sickle Cell Anemia?  
Yes

Has the Pt. Had an Organ Transplant?  
RelevantResults

☒ LAB Bld Bank No. of Units  
4

☒ Type + Screen  
☐ ABO and RH - Adult

Red Blood Cells

	Order	Requested Date	Requested Time	# of Units	Now Later	Units To Transfuse	Reason for Transfuse	Special Instructions
Red Blood Cells Leuko Reduced - 5 item(s)								
<input checked="" type="checkbox"/>	<b>Red Blood Cells Leuko Reduced (Most Common)</b>	04-29-2014		4	Give		Patient Actively Bleeding	
<input type="checkbox"/>	Red Blood Cells Leuko Reduced Irradiated	T						
<input type="checkbox"/>	Red Blood Cells Leuko, CMV Neg. Irradiated	T						
<input checked="" type="checkbox"/>	<b>Transfuse (Red Blood Cells - Now)</b>	04-29-2014				4	Patient Actively Bleeding	Red Blood Cells - Now
<input type="checkbox"/>	Transfuse (Red Blood Cells - Conditional)	T						Red Blood Cells - Conditional

Platelets

# Provider CPOM Training

## Managing Order Alerts

1. Managing alerts when presented ensure that the most current order is active.
2. The alert presents the current order in process and the duplicate order for review:

Alert: Duplicate Order

Message: The current order:  
enoxaparin Pre-Filled SYNG-----  
Give 120 milliGRAM(s), SubCutaneous, Every 12 hours  
Pharm Note If patient is on an Epidural, contact Anesthesiology before starting.  
RENAL DOSE ADJUSTMENT FOR CRCL<30[Ordered as Lovenox Pre-Filled SYNG]  
Date: 04-15-2016 17:41  
Status: Pending

Expand

May be duplicate with:

enoxaparin Pre-Filled SYNG-----  
Give 40 milliGRAM(s), SubCutaneous, Every 12 hours  
Pharm Note If patient is on an Epidural, contact Anesthesiology before starting.  
RENAL DOSE ADJUSTMENT FOR CRCL<30[Ordered as Lovenox Pre-Filled SYNG]  
Date: 04-14-2016 11:47  
Status: Active  
Warning duplicate order - enoxaparin Pre-Filled SYNG has already been ordered for the same date and time.

3. In some cases, it is appropriate to keep both orders. To do so, click "Proceed".
4. Managing alerts can be done by selecting the "View Actions..." button.
  - a. By selecting view actions, you can choose what to do with both orders.
  - b. Exiting or cancelling the current screen (possibly losing any other orders already entered) is not necessary.

Alert Detail - Test, Tracey2 - enoxaparin Pre-Filled SYNG

Alert Summary

Acknow...	Viewed	Docu...	Alert	Priority	Type	Comment	Scope
✓	✓		Duplicate Order	LOW	WARNING		Chart

Alert: Duplicate Order

Message: The current order:  
enoxaparin Pre-Filled SYNG-----  
Give 120 milliGRAM(s), SubCutaneous, Every 12 hours  
Pharm Note If patient is on an Epidural, contact Anesthesiology before starting.  
RENAL DOSE ADJUSTMENT FOR CRCL<30[Ordered as Lovenox Pre-Filled SYNG]  
Date: 04-15-2016 17:41  
Status: Pending

Expand

May be duplicate with:

Acknowledgement Comment:

☒ Acknowledge when seen  
☒ Acknowledge all on Proceed

To view suggested actions for the enoxaparin Pre-Filled SYNG order click View Action

To continue with the enoxaparin Pre-Filled SYNG unchanged click Proceed.

To return to the enoxaparin Pre-Filled SYNG and discard alerts click Go Back.

Unacknowledge << Previous Alert 1 of 1 Next >> View Actions... Proceed Go Back Help

4. View Actions...

3. Proceed

Go Back

Help

# Provider CPOM Training

5. The first order presented is the order trying to be submitted.
  - a. There are 3 options to manage this order:
    - i. Cancel
    - ii. Modify
    - iii. Keep

5. enoxaparin Pre-Filled SYNG - Give 120 milliGRAM(s), SubCutaneous, Every 12 hours Pharm Note If patient is on an Epidural, contact Anesthesiolog

☐ Cancel This Order ☐ Modify This Order ☒ Keep This Order

You may select additional actions

Type	Order	Date	Actions	Action Taken	Undo
6. Existing	enoxaparin Pre-Filled SYNG - Give 40 milliGRAM(s), SubCutaneous, Every 12 hours Pharm Note If patient is on an Epidural, contact Anesthesiolog	04-14-2016 Routine			

6. The existing order is displayed for review.
  - a. There are 3 options to manage this order:
    - i. Modify
    - ii. Suspend
    - iii. Cancel

## Practice: Enter the following orders

**\*\*These are examples only\*\***

1. Diet – clear liquids,
  1. Diet – NPO after midnight
  2. Activity – Activity – ambulate with assist, up to chair 2 times/ day
  3. Orthostatic Blood Pressure/Pulse 2 times a day. Stop after 5 days.
  4. Notify MD – Temp >101
  5. Troponin q8hrs x3
  6. EKG – unlimited conditional order; when patient complains of chest pain.
  7. CT PE protocol – symptoms SOA/Chest pain (patient takes metformin)
  8. Consult – Internal Medicine for medical management
  9. 500ml LR bolus 999ml/hr, stop after 1 dose
  10. LR @ 100ml/hr (start after LR bolus)
  11. Sucralfate 1 gram PO once a day
  12. Docusate Sodium 100mg 2 times a day
  13. Flagyl 500mg IV every 8 hours
  14. Ativan 0.5mg 2x a day IM prn anxiety/agitation
  15. Maalox Plus 30ml every 8 hours prn indigestion
- (Submit orders when finished)**

# Provider CPOM Training

## Admitting a Patient

- ✎ The workflow for admitting a patient is Reconciling Home Medications then placing the Admission Order Set.

## Order Reconciliation Manager



There are three Order Reconciliation types:



The screenshot displays the 'Order Reconciliation Manager' interface. At the top, it shows patient information: 'Test, Templeton', '2NW 2410 01', and 'Allergies: No Known Allergies'. It also displays the provider's name 'aa Template, SCE Medical Resident' and a unique identifier '4000042 / 400000337'. Below this, there are two tabs: 'Reconcile Orders' (selected) and 'View/Maintain History'. The main content area is titled 'Select a reconciliation to perform:' and lists three options: 'Admission', 'Transfer', and 'Discharge'. Each option is accompanied by a blue arrow pointing left towards a yellow box containing a number and the type name. The 'Admission' box contains the text '1. Admission'. The 'Transfer' box contains the text '2. Transfer'. The 'Discharge' box contains the text '3. Discharge'.

Order Reconciliation Manager

Test, Templeton  
2NW 2410 01  
Allergies: No Known Allergies

aa Template, SCE Medical Resident  
4000042 / 400000337

Reconcile Orders View/Maintain History

Select a reconciliation to perform:

Admission  
[Admission \(Incomplete\) 10-01-2013; modified by: aaTemplate, SCE MD](#)  
Select the link above to complete the reconciliation for the admission.  
To mark this reconciliation as entered in error, go to View/Maintain History tab.

Transfer  
[Transfer\(New\)](#)  
Select the above link to perform the transfer reconciliation.

Discharge  
[Discharge\(New\)](#)  
Select the above link to perform the discharge reconciliation.

1. Admission

2. Transfer

3. Discharge

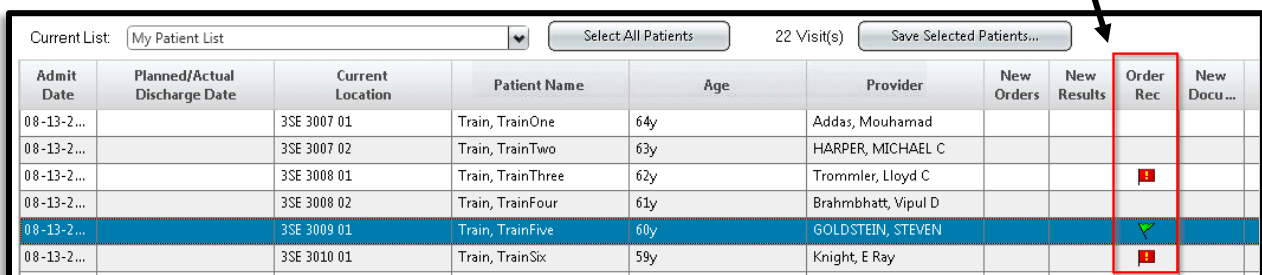
# Provider CPOM Training

## Admission Medication Reconciliation

Upon admission, the patient's home medication list must be reviewed to -

- address continuing/discontinuing home medications for the patient visit
- modify the dose/frequency of home medications during hospitalization
- not continue the medication during this hospitalization

When a patient is admitted, a flag is triggered in the Order Rec column on the patient list.



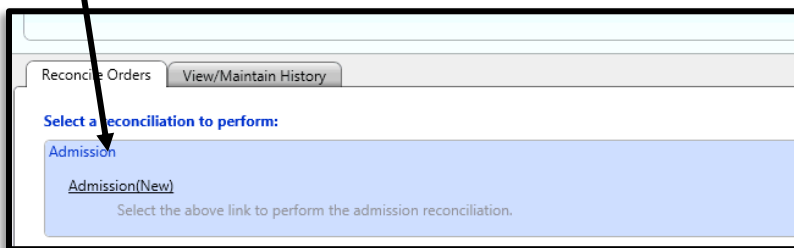
Admit Date	Planned/Actual Discharge Date	Current Location	Patient Name	Age	Provider	New Orders	New Results	Order Rec	New Docu...
08-13-2...		3SE 3007 01	Train, TrainOne	64y	Addas, Mouhamad				
08-13-2...		3SE 3007 02	Train, TrainTwo	63y	HARPER, MICHAEL C				
08-13-2...		3SE 3008 01	Train, TrainThree	62y	Trommler, Lloyd C			🚩	
08-13-2...		3SE 3008 02	Train, TrainFour	61y	Brahmbhatt, Vipul D				
08-13-2...		3SE 3009 01	Train, TrainFive	60y	GOLDSTEIN, STEVEN			✅	
08-13-2...		3SE 3010 01	Train, TrainSix	59y	Knight, E Ray			🚩	

To Complete the Admission Order Reconciliation:

1. Either double click on the flag in the Order Rec column or click on the *Order Reconciliation* icon

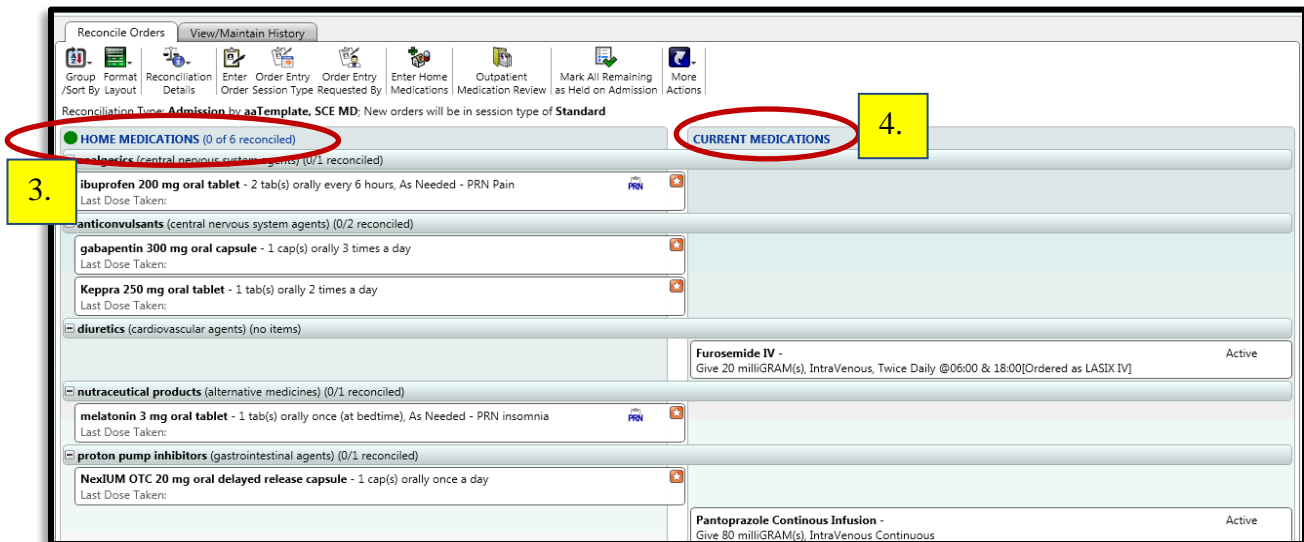


2. Select to perform the Admission Reconciliation

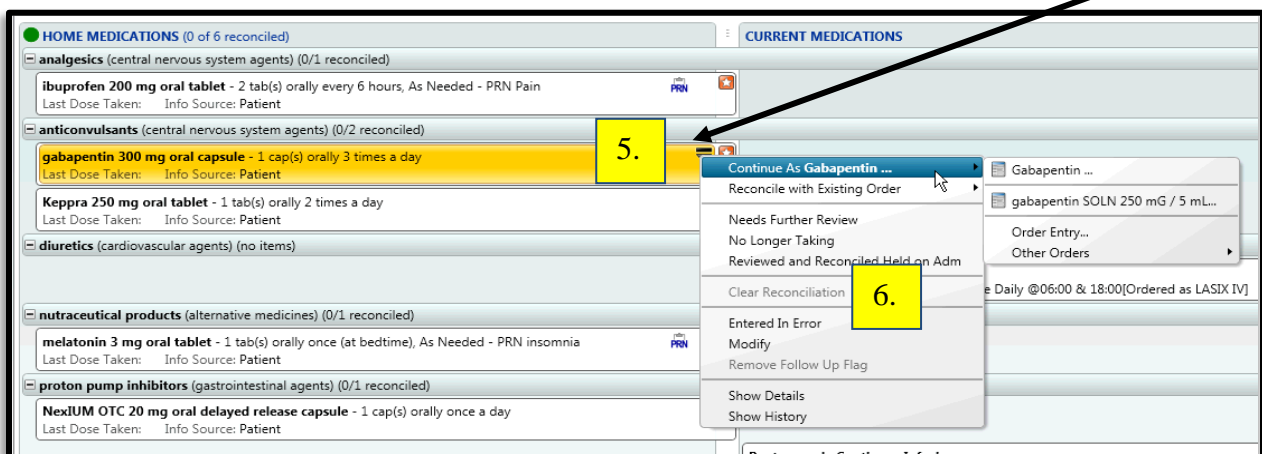


# Provider CPOM Training

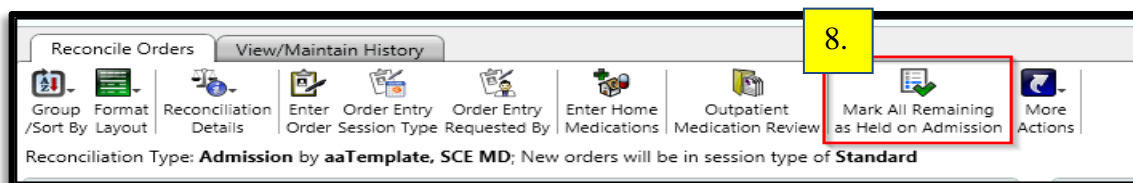
- When the reconciliation manager opens, home medications entered will appear on the left.
- Current, active orders will appear on the right.



- To take action with a home medication, hover over the medication name and click on the dropdown arrow.
- Choose the appropriate action for that medication.



- If continuing a home medication, look for **bold print**. This indicates a best match for that medication. Click on the **bold name** to continue.
- To save time, you can just mark which home medications should be continued using steps 4-6 above. Then for all the medications left (which will be held on admission), simply click the *Mark All Remaining as Held on Admission* icon in the toolbar.



# Provider CPOM Training

## Admission Order Set



1. The Enter Order Icon allows you to perform order entry, such as the Admission Orders. Selecting the Enter Order Icon will take you to the Order Entry Worksheet.

Order Entry Worksheet - Test, Tracey2

Test, Tracey2  
23E 2120 01  
Allergies: NKDA, Bee Stings; Intolerances: Egg

Requested By: ☐ Me ☐ Other: TestMD Tracey, Tracey Source: Allergy Details

Date:  Time:

Session Type:  Reason:

Start Of Browse

Type here to enter order name

Order Cost

Submit Order(s) for Test, Tracey2 Hide Worksheet Cancel Help

2. Then you can type "Admission" which will bring up the Admission Order Set

Session Type:  Reason:

Manual Entry Searching for ...

admission

Order

Admission (MED GENERAL ADMISSION)

Admission Assessment

Admission Evidence Link

Admission History

Admission Reason

3. When you click on the admission order set, it opens the admission worksheet.



# Provider CPOM Training

## The Admission Order Set Worksheet

1. Evidence links are provided in the order set to allow you to include them into your orders.
2. Selecting the “E” in the grid will take you to articles related to the topic.

The screenshot displays the 'Admission Order Set Worksheet' interface. At the top, there's a section for 'Admit To:' with a table containing columns for Order, Status, Unit, Admit Diagnosis, and Special Instructions. Below this, a yellow box labeled '1.' highlights the 'Evidence Links' section. This section contains a list of evidence links with checkboxes, such as 'Allergy Evidence Link', 'Code Status Evidence Link', 'Respiratory Evidence Link', 'IV Fluids Evidence Link', 'Antiemetic Evidence Link', 'Medication Consult Evidence Link', 'Med Pain Evidence Link', 'Sedative Evidence Link', 'Stress Ulcer Evidence Link', 'Urinalysis Evidence Link', and 'Xray Evidence Link'. A yellow box labeled '2.' highlights the 'CLICK ON "E" THEN BUTTON' column in the evidence links table. Below the evidence links, there are sections for 'Critical Care Admission', 'Code Status', and 'Vital Signs', each with its own set of checkboxes and input fields.

Order	Status	Unit	Admit Diagnosis	Special Instructions
Admit - 1 item(s)				
Admit To:	*	*		

EVIDENCE LINK	EVIDENCE DESCRIPTION	CLICK ON "E" THEN BUTTON
Evidence - 11 item(s)		
<input checked="" type="checkbox"/> Allergy Evidence Link	Allergy to penicillins	E
<input checked="" type="checkbox"/> Code Status Evidence Link	Ethical issues near the end of life	E
<input checked="" type="checkbox"/> Respiratory Evidence Link	Pulse Oximetry Evidence	E
<input checked="" type="checkbox"/> IV Fluids Evidence Link	Maintenance and replacement fluid therapy in adults	E
<input checked="" type="checkbox"/> Antiemetic Evidence Link	Selection of antiemetics by clinical situation	E
<input checked="" type="checkbox"/> Medication Consult Evidence Link	Overview of the principles of medical consultation and perioperative medicine	E
<input checked="" type="checkbox"/> Med Pain Evidence Link	NSAIDs: Therapeutic use and variability of response in adults	E
<input checked="" type="checkbox"/> Sedative Evidence Link	Sedatives and hypnotics abuse and dependence: Pharmacology and epidemiology	E
<input checked="" type="checkbox"/> Stress Ulcer Evidence Link	Stress ulcer prophylaxis in the intensive care unit: summary and recommendations	E
<input checked="" type="checkbox"/> Urinalysis Evidence Link	Urinalysis in the diagnosis of renal disease	E
<input checked="" type="checkbox"/> Xray Evidence Link	Evaluation of diffuse lung disease by conventional chest radiography	E

Order	Start Date	Start Time	Special Instructions
Critical Care Admission - 2 item(s)			
<input type="checkbox"/> Use Critical Care Chest Pain/Rule Out MI/Long Form Orders If Not...	T		
<input type="checkbox"/> Use Critical Care Short Form Orders If Not Already Entered	T		

Order	Code Status
Code Status - 3 item(s)	
<input type="checkbox"/> Code Status	DO NOT RESUSCITATE
<input type="checkbox"/> Code Status	DO NOT INTUBATE
<input type="checkbox"/> Code Status	COMFORT MEASURES ONLY

Order	Frequency	PRN	PRN Reason	Stop After	Instructions
Vital Signs - 6 item(s)					
<input type="checkbox"/> Vital Signs	Every 4 hours	<input type="checkbox"/>			
<input type="checkbox"/> Vital Signs	Every 8 hours	<input type="checkbox"/>			
<input type="checkbox"/> Vital Signs	<Multiple>	<input type="checkbox"/>			
<input type="checkbox"/> Vital Signs		<input type="checkbox"/>			
<input type="checkbox"/> Intake and Output	Every 8 hours	<input type="checkbox"/>			
<input type="checkbox"/> Urine Output	Every 2 hours	<input type="checkbox"/>			

3. The order sets are set up to have the same grid sequence from one order set to another. Columns on the grids are also consistent from one order set to another.

# Provider CPOM Training

Activity					
Order	Frequency	Stop After	Special Instructions		
Activity - 6 item(s)					
<input type="checkbox"/> Activity (- As Tolerated)					
<input type="checkbox"/> Activity (- Ambulate with Assistance)					
<input type="checkbox"/> Activity (- Bedrest with Bathroom..					
<input type="checkbox"/> Activity (- Bedrest, Strict)					
<input type="checkbox"/> Activity (- Up in Chair)	with Meals				
<input type="checkbox"/> Activity					

Nursing					
Order	Frequency	PRN	PRN Reason	Special Instructions	Reason Cath Continued
Assessments - 6 item(s)					
<input type="checkbox"/> Weight	Daily	<input type="checkbox"/>			
<input type="checkbox"/> Cardiac Monitor, Bedside Device		<input type="checkbox"/>			
<input type="checkbox"/> Safety Precautions		<input type="checkbox"/>			
<input type="checkbox"/> Glucoscan		<input type="checkbox"/>			
<input checked="" type="checkbox"/> Influenza Vaccine Protocol	ONCE	<input type="checkbox"/>		Seasonal September Through March	
<input checked="" type="checkbox"/> Pneumococcal Vaccine Protocol	ONCE	<input type="checkbox"/>			
Circulatory - 1 item(s)					
<input type="checkbox"/> Saline Lock		<input type="checkbox"/>			
Urinary - 2 item(s)					
<input type="checkbox"/> Urinary Catheter Order Set					
<input type="checkbox"/> Straight Catheter, Bladder	PRN	<input checked="" type="checkbox"/>	If Unable to Void		

Nursing Communication			
Order	Start Date/Time	Priority	Instructions
Nursing Communication - 1 item(s)			

- Orders that are pre checked do not require any actions by the user to initiate the order
- If you do not want this order to be on the patient just select the check and remove it- except for Evidence and quality indicators.

<b>Lab - AM</b> <input type="checkbox"/> BNP Triage <input type="checkbox"/> CBC Without Diff <input type="checkbox"/> Protine INR <input type="checkbox"/> Thyroid Stimulating Hormone, Serum TSH <input type="checkbox"/> Basic Metabolic Panel <input type="checkbox"/> Comprehensive Metabolic Panel <input type="checkbox"/> PTT <input type="checkbox"/> Complete Blood Count With Differential <input type="checkbox"/> Lipid Panel <input type="checkbox"/> T4 Serum																																			
<b>Lab - Repeat Daily For 3 Days</b> <input type="checkbox"/> Basic Metabolic Panel <input type="checkbox"/> Complete Blood Count With Differential <input type="checkbox"/> Protine INR <input type="checkbox"/> BNP Triage <input type="checkbox"/> CBC Without Diff <input type="checkbox"/> Troponin I, Serum																																			
<b>LAB - Repeat Every 8 Hours X 3</b> <input type="checkbox"/> Creatine Kinase MB, Serum <input type="checkbox"/> Troponin I, Serum <b>Labs - Other</b> <input type="checkbox"/> Other Laboratory																																			
<b>Radiology Signs and Symptoms</b>																																			
<table border="1"> <thead> <tr> <th>Order</th> <th>Priority</th> <th>Signs &amp; Symptoms</th> <th>Special Instructions</th> </tr> </thead> <tbody> <tr> <td colspan="4">X-Ray - 6 item(s)</td> </tr> <tr> <td><input type="checkbox"/> Xray Chest 2 Views</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Xray Chest 1 View</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Xray Chest AP Portable</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Xray Abdomen KUB 2 Views</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Other Diagnostic Imaging</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Other CT Exams</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Order	Priority	Signs & Symptoms	Special Instructions	X-Ray - 6 item(s)				<input type="checkbox"/> Xray Chest 2 Views				<input type="checkbox"/> Xray Chest 1 View				<input type="checkbox"/> Xray Chest AP Portable				<input type="checkbox"/> Xray Abdomen KUB 2 Views				<input type="checkbox"/> Other Diagnostic Imaging				<input type="checkbox"/> Other CT Exams			
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<input type="checkbox"/> Xray Abdomen KUB 2 Views																																			
<input type="checkbox"/> Other Diagnostic Imaging																																			
<input type="checkbox"/> Other CT Exams																																			

- Typing in the Radiology Signs and Symptoms in the box provided on the form will populate ALL of the x-rays you order from this form.
- If you have a different reason for ordering an exam, make sure to select the column for the signs and symptoms for each individual order and modify.

# Provider CPOM Training

The screenshot displays the CPOM interface with several lab sections. Callout 8 points to the headers of the 'Lab-STAT', 'Lab-Today', and 'Lab - AM' sections, which indicate the pre-selected priority for items in that grouping. Callout 9 points to the repeat order icon (a small icon with a clock) next to the 'Basic Metabolic Panel' and 'BNP Triage' items in the 'Lab - Repeat Daily For 3 Days' section.

8. The headers in each lab section let you know what priority is pre-selected for the items in that grouping.
9. Note the icon beside the repeat orders. This is the indication that the repeat criteria have been set (daily x3 days). You can open the lab item and modify the repeat criteria if needed.

The screenshot shows the 'Add Generic Item' dialog box open over the CPOM interface. Callout 10 points to the 'Other Cardiology' folder in the 'Cardiology' section of the main interface. Callout 11 points to the 'Type here to enter order name' field in the dialog box, which is used to enter the order name and cost.

10. Note some of the grids have folders at the bottom that allow for ordering items outside of what is on the order set.
11. Once you select the order(s) and enter them, you will be able to come back to the order set.

# Provider CPOM Training

12. When possible, the medication grid will have complete orders for you to select. If there are multiple options, you can select the column and pick/type in the desired amount/option.

Order	Dose Low	Dose High	Units	Route	Frequency	PRN	PRN Reason	Duration	Special Instructions
<b>Pain: - 8 item(s)</b>									
<input type="checkbox"/> Acetaminophen Tablet (...)	650		milliGRAM(s)	Oral	Every 4 hours	<input checked="" type="checkbox"/>	Mild Pain (1-3) or fever		Per P&T policy, if dose is greater than...
<input type="checkbox"/> Ibuprofen Tablet (...)	200		milliGRAM(s)	Oral	Every 8 hours	<input checked="" type="checkbox"/>	Mild Pain (1-3) or Fever		
<input type="checkbox"/> Ibuprofen Tablet (...)	800		milliGRAM(s)	Oral	Every 8 hours	<input checked="" type="checkbox"/>	Mild Pain (1-3)		
<input checked="" type="checkbox"/> acetaminophen + HYDROcodone 325 mg-5 mg (Tablet...)			Tablet(s)	Oral	Every 4 hours	<input checked="" type="checkbox"/>	Mild Pain (1-3)		Total daily dose of acetaminophen given...
<input type="checkbox"/> acetaminophen + HYDROcodone 325 mg-10 mg...			Tablet(s)	Oral	Every 4 hours	<input checked="" type="checkbox"/>	Moderate Pain (4-7)		Total daily dose of acetaminophen given...
<input type="checkbox"/> acetaminophen + oxyCODONE 325 mg/5 mg (TAB...)			Tablet(s)	Oral	Every 4 hours	<input checked="" type="checkbox"/>	Moderate Pain (4-7)		Total daily dose of acetaminophen given...
<input type="checkbox"/> morphine Injectable (...)			milliGRAM(s)	IntraVenous	Every 2 hours	<input checked="" type="checkbox"/>	Severe Pain (8-10)		
<input type="checkbox"/> HYDROMorphone 2 mg/mL Injectable (...)			milliGRAM(s)	IntraVenous	Every 2 hours	<input checked="" type="checkbox"/>	Severe Pain (8-10)		
<b>Constipation - 1 item(s)</b>									
<input type="checkbox"/> Docusate Sodium Capsule (...)	100		milliGRAM(s)	Oral	Daily	<input checked="" type="checkbox"/>	constipation		Do Not Crush (taste)
<b>Gastrointestinal Agents: - 4 item(s)</b>									
<input type="checkbox"/> pantoprazole (ECT...)	40		milliGRAM(s)	Oral	Daily @ 0600	<input type="checkbox"/>			Do Not Crush.; Formulary sub for all PPI's...
<input type="checkbox"/> Pantoprazole Injectable (...)	40		milliGRAM(s)	IntraVenous	Daily @ 0600	<input type="checkbox"/>			Dilute vial with 10mL Normal Saline. Give...
<input type="checkbox"/> Metoclopramide Tablet (...)			milliGRAM(s)	Oral	Every 6 hours	<input checked="" type="checkbox"/>	nausea/vomiting		Administer on an empty stomach
<input type="checkbox"/> Metoclopramide Injectable (...)			milliGRAM(s)	IntraVenous	Every 6 hours	<input checked="" type="checkbox"/>	nausea/vomiting		For IV use. Give over 1 to 2 minutes.
<b>Antiemetic Agents: - 5 item(s)</b>									
<input type="checkbox"/> Ondansetron (Tablet...)	4		milliGRAM(s)	Oral		<input checked="" type="checkbox"/>	nausea/vomiting		
<input type="checkbox"/> Ondansetron Injectable (...)	4		milliGRAM(s)	IntraVenous		<input checked="" type="checkbox"/>	Nausea/vomiting		per 2014 IV Handbook: Doses upto 4mg...
<input type="checkbox"/> Promethazine Tablet (...)			milliGRAM(s)	Oral	Every 6 hours	<input checked="" type="checkbox"/>	nausea/vomiting		
<input type="checkbox"/> Promethazine Rectal (Suppository...)	25		milliGRAM(s)	Rectal	Every 6 hours	<input checked="" type="checkbox"/>	nausea/vomiting		
<input type="checkbox"/> Promethazine Injectable (...)			milliGRAM(s)	IntraVenous	Every 6 hours	<input checked="" type="checkbox"/>	Nausea/vomiting		IF ADMINISTERED IV DILUTE WITH...
<b>Sedative-Hypnotics: - 3 item(s)</b>									
<input type="checkbox"/> Zolpidem (Tablet...)	5		milliGRAM(s)	Oral	Every night at...	<input checked="" type="checkbox"/>	Insomnia		
<input type="checkbox"/> Zolpidem (Tablet...)	10		milliGRAM(s)	Oral	Every night at...	<input checked="" type="checkbox"/>	Insomnia		
<input type="checkbox"/> Temazepam (Capsule...)			milliGRAM(s)	Oral	Every night at...	<input checked="" type="checkbox"/>	insomnia		
<b>Stress Ulcer Prophylaxis: - 1 item(s)</b>									
<input type="checkbox"/> Pantoprazole Injectable (...)	40		milliGRAM(s)	IntraVenous	Daily @ 0600	<input type="checkbox"/>			Dilute vial with 10mL Normal Saline. Give...
<b>Miscellaneous: - 2 item(s)</b>									
<input type="checkbox"/> Nicotine Transdermal (Patch...)	21		mG/24 Hour	TransDermal	Daily	<input type="checkbox"/>			Wash hands after handling patch
<input type="checkbox"/> Other Medications									

12.

13. The communication order Call MD For allows you to type in the special instructions.

Communications	
Order	Special Instructions
<b>Communication - 1 item(s)</b>	
<input type="checkbox"/> Call MD For	

14. In some order sets this can be pre-filled out.

Communication		
Order	Priority	Special Instructions
<b>Communications - 3 item(s)</b>		
<input checked="" type="checkbox"/> Call MD For		Notify Cardiologist if Change in Rhythm and/or ST Segment, Complaints of Chest Pain, or Hypotension (systolic B/P less than 95)
<input checked="" type="checkbox"/> Call MD For		Notify Cardiologist if Bleeding or if Extremity Becomes Cold/Hematoma/Bleeding Occurs, or Change in Condition.
<input checked="" type="checkbox"/> Call MD For		

# Provider CPOM Training

15. You can order consult from this worksheet as well. If you check the box, the Consult worksheet will open.

Consults

☐ Consult

Consult [0 orders of 57 are selected]

Physician Consults

<input type="checkbox"/> Consult- Allergist	<input type="checkbox"/> Consult- Family Practice Adult	<input type="checkbox"/> Consult- Internal Medicine Adult	<input type="checkbox"/> Consult- Ophthalmology	<input type="checkbox"/> Consult- Podiatry
<input type="checkbox"/> Consult- Anesthesia	<input type="checkbox"/> Consult- Gastroenterology	<input type="checkbox"/> Consult- Maxillofacial Surgery	<input type="checkbox"/> Consult- Orthopedics	<input type="checkbox"/> Consult- Psychiatry
<input type="checkbox"/> Consult- Cardiology	<input type="checkbox"/> Consult- General Surgery	<input type="checkbox"/> Consult- Medical Oncology	<input type="checkbox"/> Consult- Orthopedic Spine Surgery	<input type="checkbox"/> Consult- Pulmonary
<input type="checkbox"/> Consult- Cardiology Pediatric	<input type="checkbox"/> Consult- Geriatrics	<input type="checkbox"/> Consult- Neonatology	<input type="checkbox"/> Consult- Otolaryngology	<input type="checkbox"/> Consult- Radiation Oncology
<input type="checkbox"/> Consult- Cardiovascular Thoracic	<input type="checkbox"/> Consult- GYN/Oncology	<input type="checkbox"/> Consult- Nephrology	<input type="checkbox"/> Consult- Pain Management	<input type="checkbox"/> Consult- Rheumatology
<input type="checkbox"/> Consult- Dental	<input type="checkbox"/> Consult- Hand Surgery	<input type="checkbox"/> Consult- Neurology	<input type="checkbox"/> Consult- Physiatry	<input type="checkbox"/> Consult- Thoracic
<input type="checkbox"/> Consult- Dermatology	<input type="checkbox"/> Consult- Hematology/Oncology	<input type="checkbox"/> Consult- Neurosurgery	<input type="checkbox"/> Consult- Pediatrics	<input type="checkbox"/> Consult- Urology
<input type="checkbox"/> Consult- Endocrinology	<input type="checkbox"/> Consult- Infectious Disease	<input type="checkbox"/> Consult- Obstetrics- Gynecology	<input type="checkbox"/> Consult- Plastic Surgery	<input type="checkbox"/> Consult- Vascular Surgery

Nursing Consults

<input type="checkbox"/> Consult- Bariatric Nurse Specialist	<input type="checkbox"/> Consult- Diabetic Nurse Specialist	<input type="checkbox"/> Consult- Ostomy Care Nurse
<input type="checkbox"/> Consult- Cardiac Rehab Nurse	<input type="checkbox"/> Consult- Lactation Specialist	<input type="checkbox"/> Consult- Wound Care Nurse

Rehab Consults

<input type="checkbox"/> Occupational Therapy Eval + Treatment	<input type="checkbox"/> Physical Therapy Evaluation and Treatment	<input type="checkbox"/> Speech Therapy for Clinical Swallow Eval + Treat	<input type="checkbox"/> Speech Language Eval
--	--	---	---

Other Consults

<input type="checkbox"/> Consult- Care Coordination	<input type="checkbox"/> Pastoral Care Counseling	<input type="checkbox"/> Consult- Poison Control Center	<input type="checkbox"/> Consult- Smoking Cessation Counselor
<input type="checkbox"/> Consult- Dietitian	<input type="checkbox"/> Consult- Pharmacist	<input type="checkbox"/> Consult- Public Health	

Conditional Order  
☐ Max # of activations:

16. Each check box will open the appropriate worksheet. After selecting the information you need, it will revert to this screen, and then you can click "OK" to return to the Admission Order Set Worksheet.

✎ At the bottom of the Admission Order Set worksheet is the CMH VTE order set. This link will take you to another order set to select items and then those items will become a part of this set for this patient.

**\*This must be completed for EVERY ADMISSION\*** or you will not be able to perform a discharge at the end of the stay. (Requirement may not be present for BHS patients).

PLEASE COMPLETE VTE PROPHYLAXIS ORDERS:

☒ VTE Prophylaxis  
Order Set (0 orders of 16 selected)

# Provider CPOM Training

- To optimize positive patient outcomes, each patient that is in ICU/TCU should have two forms of VTE prophylaxis, both pharmacologic AND mechanical, OR a documented contraindication reason.
- For example, it will ensure patients that move from a lower level of care (Med-Surg) to a higher level of care (ICU/TCU) consistently have their VTE risk re-evaluated on transfer.

The screenshot displays a medical alert system interface. At the top, an 'Alert Summary' table lists alerts. Below this, a detailed alert is shown for 'Patient with No Active ICU VTE Orders'. The alert message states: 'All Critically Ill Patients Should Have **TWO VTE Orders** For ICU/TCU Admission. PLEASE Select **a Pharmacologic and Mechanical item or a Contraindication Reason**'. An 'Expand' link is provided. A yellow callout box explains: 'This alert will appear on all ICU/TCU patients for VTE Prophylaxis that *do not already* have a pharmacologic and mechanical item active order.' The interface includes an 'Acknowledgement Comment' field, an 'Acknowledge when seen' checkbox, and buttons for 'Unacknowledge', '<< Previous', 'Proceed', 'Go Back', and 'Help'.

Ac...	View...	Doc...	Alert	Priority	Type	Comment	Scope
✓	✓		Patient with No Active ICU VTE Or	LOW	WARNING		Chart

**Alert:** Patient with No Active ICU VTE Orders

**Message:** All Critically Ill Patients Should Have **TWO VTE Orders** For ICU/TCU Admission. PLEASE Select **a Pharmacologic and Mechanical item or a Contraindication Reason**

[Expand](#)

Go to Order Entry, locate the VTE Prophylaxis Order Set and complete.

Acknowledgement Comment:

☒ Acknowledge when seen

To continue with the Order Set unchanged click Proceed.

To return to the Order Set and discard alerts click Go Back.

# Provider CPOM Training

## Health Issues



r Health  
Issues

The Health Issues Manager, **Issues**, holds all the health issues entered on the patient for diagnostic purposes.

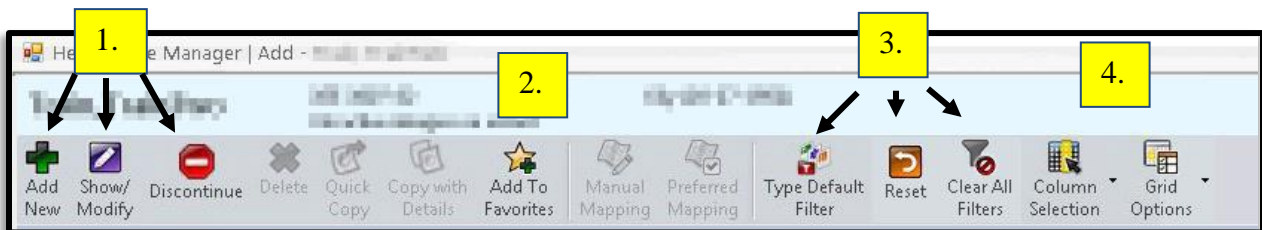
Health Issue Manager | Add - [Patient Name]

Health Issues: Currently showing - Health Issue Types (All); Status (Active Only); Entered By (All)

Health Issue	Code	ICD-9	ICD-10	SNOMED CT	Type	Onset
<b>- Admitting Dx (1)</b>						
Acute ischemic stroke	434.91	434.91	I63.50	422504002	Admitting Dx	
<b>- Other Diagnosis (3)</b>						
Abdominal abscess	567.22	567.22	K65.0	75100008	Other Diagnosis	
Atrial fibrillation	427.31	427.31	I48.91	49436004	Other Diagnosis	
Diabetes type 2, uncontrolled	250.02	250.02	E11.9	443694000	Other Diagnosis	
<b>- Discharge Dx (1)</b>						
Acute ischemic stroke	434.91	434.91	I63.50	422504002	Discharge Dx	
<b>- Chronic (2)</b>						
CHF, acute	428.0	428.0	I50.9	10633002	Chronic	
Acute back pain	724.5	724.5	M54.9	161891005	Chronic	

## Health Issues Toolbar

The toolbar allows you to quickly perform various functions within the Health Issues Manager window.



1. Health issues can be added, modified, and discontinued.
2. Add to Favorites – Commonly used health issues can be saved to the physician favorites list
3. Filters can be used to organize the list of health issues
4. Column Selection – allows the physician to customize the columns that present when viewing the added health issues.

# Provider CPOM Training

## Entering a Health Issue

1. Physicians can enter health issues for the patient by:



- a) Clicking on the Health Issues icon
- b) Clicking on the drop-down field in the “Admission Diagnosis” heading in the Admission Order Set

Order	Status	Unit	Admit Diagnosis	Special Instru
Admit - 1 item(s)				
<input checked="" type="checkbox"/>				

- c) Clicking on the mandatory field in the “Discharge Diagnosis” heading in the Discharge Order Set.

Discharge Diagnosis

1C.

2. Select the type of health issue being added

Add New Health Issue

Select a Type:

- Admitting Dx
- Axis I
- Axis II
- Axis III
- Axis IV
- Chronic
- Discharge Dx
- Family History
- Other Diagnosis
- Pt. Medical Hx.
- Pt.Surgical Hx.

Browse by Category: Start Of Browse

Coding Scheme: ICD10-CM

Find in: <no category selected>

Starts with Contains Include sub-categories in search

Close Help

**IMPORTANT:** This step is important to ensure that the health issue is being entered correctly. Diagnoses can easily be entered incorrectly if this step is skipped.

3. Search for the health issue using the favorites tab, the browse tab, or the full catalog search tab.

Add New Health Issue

Select a Type:

- Admitting Dx
- Axis I
- Axis II
- Axis III
- Axis IV
- Chronic
- Discharge Dx
- Family History
- Other Diagnosis
- Pt. Medical Hx.
- Pt.Surgical Hx.

Browse by Category: Start Of Browse

Coding Scheme: ICD10-CM

Find in: <no category selected>


Starts with Contains Include sub-categories in search

Close Help

4. Once the health issue is located, highlight it, and click ADD




# Provider CPOM Training

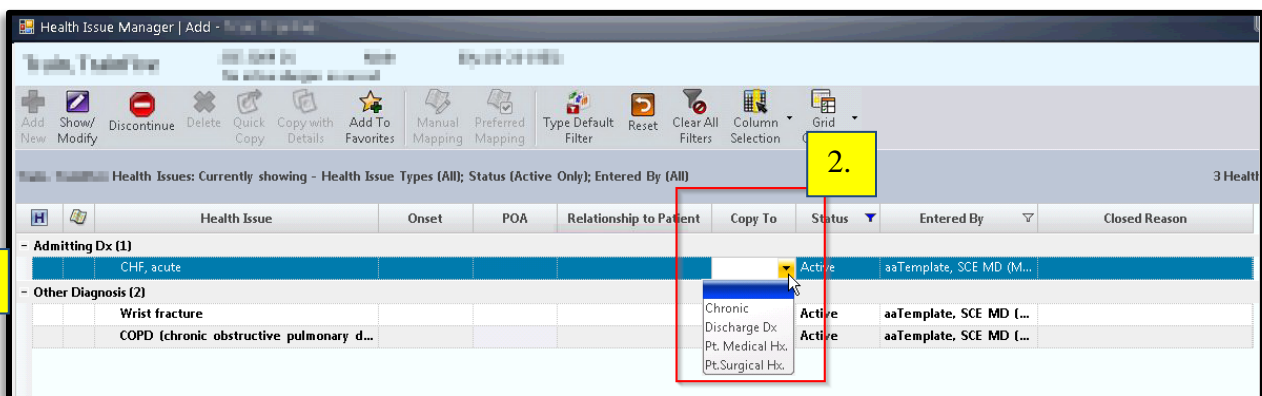
**NOTE:** Clicking the  will allow the health issue to be edited before it is added.

## Quick Copy

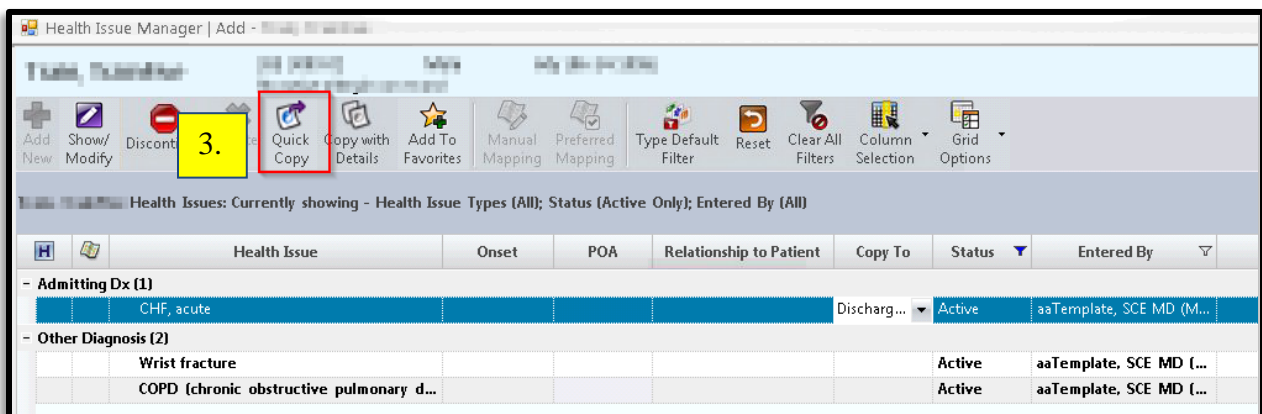
To speed up entry of health issues, physicians can use the quick copy feature. This feature allows them to take an existing health issue and copy to another health issue type.

 Example: admitting diagnosis copied to discharge diagnosis.

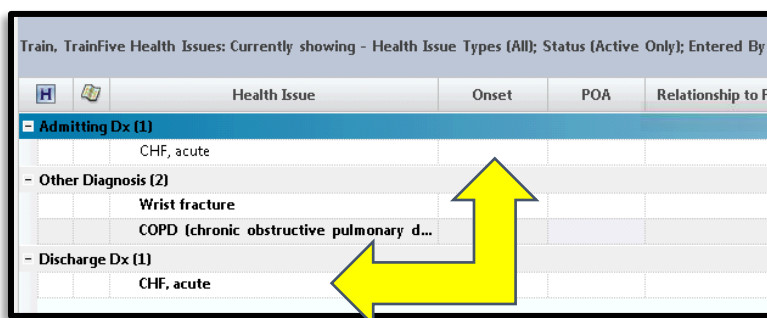
1. In the Health Issue Manager, highlight the health issue that needs to be copied.
2. Then in the "Copy To" column, choose what type the health issue is being copied to.



3. Once the type is selected, click the Quick Copy icon in the toolbar.



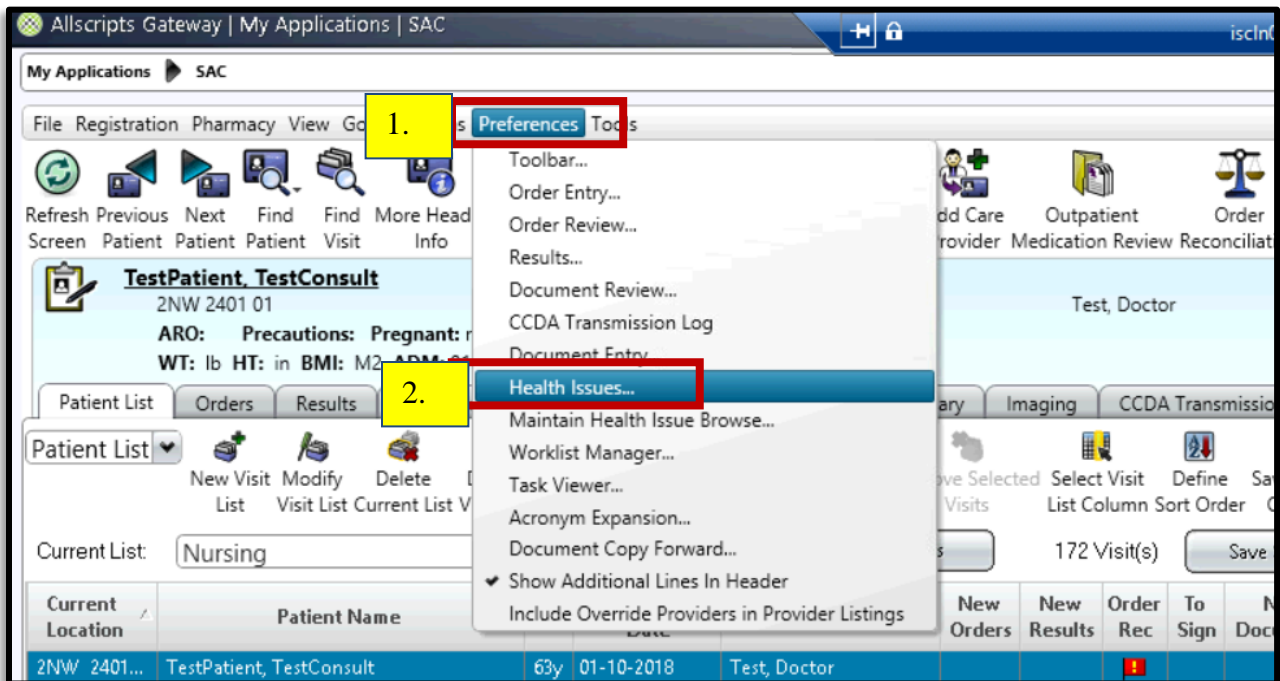
4. The health issue will copy over to the new type.



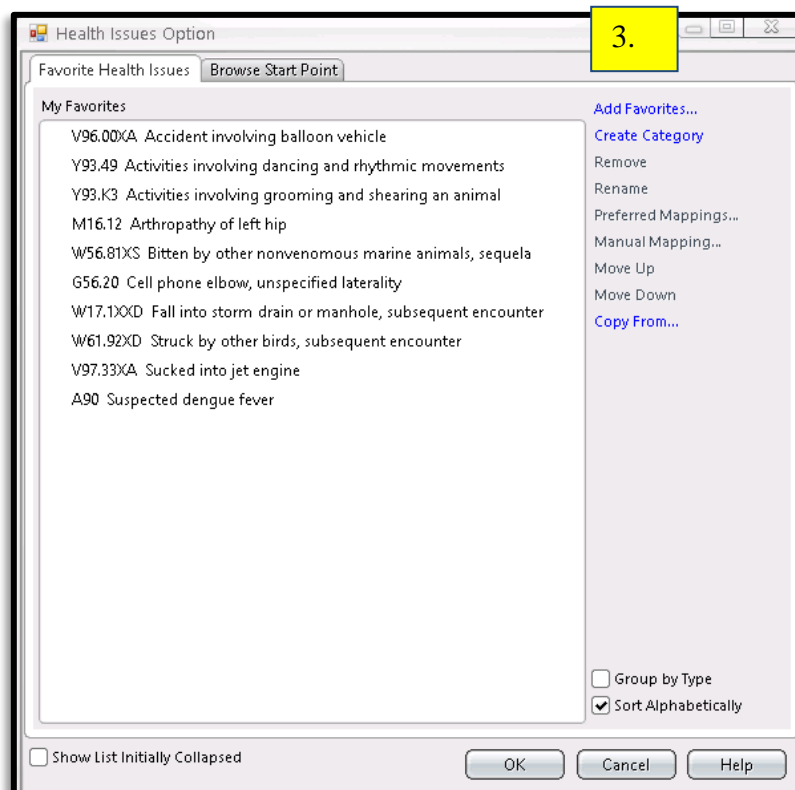
# Provider CPOM Training

## Health Issues Favorites

1. From system toolbar select Preferences,
2. then select Health Issues:



3. From this screen, you can use the menu to perform actions to edit and customize your health issues.



# Provider CPOM Training

4. The results will then appear in your favorites tab in Health Issues:

The screenshot displays the 'Health Issue Manager' interface for a patient named 'TestPatient, TestConsult'. The patient's details include '2NW 2401 01', 'Female', and '63y (03-04-1954)'. The 'Allergy' section lists 'Drug/Drug Class: sulfa drugs' and 'Food: Garlic Powder/Clove'. The 'Health Issues' section shows a table with columns: Health Issue, Code, ICD-9, ICD-10, SNOMED CT, and Type. The table lists four issues: 'Admitting Dx (1)' (Acute MI, I21.3, I21.3, 57054005), 'Other Diagnosis (1)' (Acute MI, I21.3, I21.3, 57054005), 'Chronic (1)' (Chronic obstructive pulmonary disease, 496, 496, J44.9, 13645005), and 'Abst Other Diag (1)' (Central abdominal pain, 789.09, 789.09, R10.9, 162046002). Below the table, the 'Add New Health Issue' dialog is open, showing the 'Favorites' tab selected. The 'Select by Favorites' section shows a list of health issues with columns: Health Issues, Code, and Coding. The list includes: 'Accident involving balloon vehicle' (V96.00X, ICD10-CM), 'Activities involving dancing and rhyt' (Y93.49, ICD10-CM), 'Activities involving grooming and s' (Y93.K3, ICD10-CM), 'Arthropathy of left hip' (M16.12, ICD10-CM), 'Bitten by other nonvenomous marin' (W56.81X, ICD10-CM), 'Cell phone elbow, unspecified latera' (G56.20, ICD10-CM), 'Fall into storm drain or manhole, su' (W17.1XX, ICD10-CM), 'Struck by other birds, subsequent e' (W61.92X, ICD10-CM), 'Sucked into jet engine' (V97.33X, ICD10-CM), and 'Suspected dengue fever' (A90, ICD10-CM). A black arrow points from the 'Favorites' tab in the dialog to the 'Favorites' tab in the 'Health Issues' section of the main interface.

Health Issue Manager | Add - TestPatient, TestConsult

TestPatient, TestConsult 2NW 2401 01 Female 63y (03-04-1954)  
Allergy - Drug/Drug Class: sulfa drugs; Food: Garlic Powder/Clove

Health Issues: Currently showing - Health Issue Types (All); Status (Active Only); Entered By (All)

Health Issues My Ranked

Health Issue	Code	ICD-9	ICD-10	SNOMED CT	Type
Admitting Dx (1)					
Acute MI	I21.3		I21.3	57054005	Admitting Dx
Other Diagnosis (1)					
Acute MI	I21.3		I21.3	57054005	Other Diagnosis
Chronic (1)					
Chronic obstructive pulmonary disease	496	496	J44.9	13645005	Chronic
Abst Other Diag (1)					
Central abdominal pain	789.09	789.09	R10.9	162046002	Abst Other Diag

Add New Health Issue

Select a Type: Favorites Browse Full Catalog Search

Select by Favorites:

<No category>

Health Issues	Code	Coding
Add Accident involving balloon vehicle	V96.00X	ICD10-CM
Add Activities involving dancing and rhyt	Y93.49	ICD10-CM
Add Activities involving grooming and s	Y93.K3	ICD10-CM
Add Arthropathy of left hip	M16.12	ICD10-CM
Add Bitten by other nonvenomous marin	W56.81X	ICD10-CM
Add Cell phone elbow, unspecified latera	G56.20	ICD10-CM
Add Fall into storm drain or manhole, su	W17.1XX	ICD10-CM
Add Struck by other birds, subsequent e	W61.92X	ICD10-CM
Add Sucked into jet engine	V97.33X	ICD10-CM
Add Suspected dengue fever	A90	ICD10-CM

# Provider CPOM Training

## Transfer Orders

To Complete the Transfer Order Reconciliation (in house only):

1. Either double click on the flag in the Order Rec column or click on the *Order Reconciliation*



2. Select to perform the Transfer Reconciliation

Reconcile Orders View/Maintain History

Select a reconciliation to perform:

Admission

Admission (Outstanding) 09-08-2015  
Select the above link to start this reconciliation.  
To mark this reconciliation as not done, go to View/Maintain History tab.

Transfer

Transfer (Complete) 12-02-2015; modified by: TestMDTracey, Tracey  
To perform functions such as viewing details, canceling, or resetting this reconciliation, go to View/Maintain History tab.

Transfer(New)  
Select the above link to perform the transfer reconciliation.

2.

3. In the Icon Toolbar of the Transfer Reconciliation worksheet, select the



icon to enter the order. This will open the order entry worksheet.

4. Select the Transfer Request order.

Session

Type: Standard Reason:

Manual Entry Searching for ...

Transfer

Order	Cost
Transfer Request ...	
Transferrin - TIBC	
Transferrin, Serum	

4.

# Provider CPOM Training

5. Select the appropriate unit.

The screenshot shows a web form titled "Allergies: NKDA, Bee Stings Intolerances: Eggs". The form includes fields for "Order:" (Transfer Request), "Requested By:" (Clark, Tracey), "Template Name:" (Transfer Request ...), and "Order ID:" (001147RBD). A red circle highlights the "Unit" dropdown menu, which is currently set to "ICU". A yellow box with the number "5." is placed next to the "Unit" dropdown. Other fields include "Messages:", "Make Private" (checkbox), "Medically Necessary?" (dropdown), "Other Information" (text area), and "Isolation Type" (text area).

6. The transfer order shows up in the shopping cart.

The screenshot shows a shopping cart interface. The cart contains one item: "Transfer Request - ICU" with a date of "12-11-2015" and a status of "Pending". A yellow box with the number "6." is placed next to the item. On the right side of the cart, there are buttons for "Edit...", "Delete", "Copy...", "Add Specimen...", "Indication...", and "Mark as Done". At the bottom right, there are buttons for "Return to Order Reconciliation" and "Help".

# Provider CPOM Training

Reconcile Orders View/Maintain History

Group Format Reconciliation Enter Order Entry Order Entry Enter Home Outpatient Mark All Remaining As Import Home Clinical More Multi Order  
/Sort By Layout Details Order Session Type Requested By Medications Medication Review Continued On Transfer Medications Reconciliation Actions Reconciliation

Reconciliation Type: **Transfer** by **Clark, Tracey**; New orders will be in session type of **Standard**

ITEMS TO RECONCILE (0 of 33 reconciled) ORDERS AFTER TRANSFER RECONCILIATION

**Pharmacy**

Active (0/1 reconciled)

Rosuvastatin - Active  
Give 20 milliGRAM(s), Oral, Daily  
Pharm Note Renal dose adjustment For CrCl <30: Maximum 10mg daily  
Date: 12-11-2015 Routine Disc/Stop: 04-11-2016

**IV Therapy**

Active (0/1 reconciled) 7.

**Laboratory** (0/9 reconciled)

**Blood Bank** (0/3 reconciled)

**Radiology**

Active (0/1 reconciled)

Xray Chest 2 Views - Radiology May Change Exam per Protocol: Yes. Sign- Active  
Symp :soa  
Date: 09-08-2015 Disc/Stop:

**Diagnostic Cardiology**

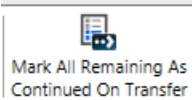
Active (0/3 reconciled)


EKG - - 10-20-2015 ,Chest Pain Available for Activation  
For Chest Pain <Avail. Activations=Unlimited>  
Date: 10-20-2015 Disc/Stop:

EKG - - 10-27-2015; Routine ,Chest Pain Active  
Date: 10-27-2015 Routine Disc/Stop:

EKG - - 11-18-2015; STAT ,Chest Pain Active  
Date: 11-18-2015 15:46 Disc/Stop:

8. HOME MEDICATIONS (2 items)

7. Can review all orders, not just medications before transfer.
8. Home medications can be reviewed again with the transfer since they may now be appropriate for the patient.
9. After review and changing necessary orders, can use the  to expedite the continuation of all remaining orders.

 Because patients can be transferred more than once, this type of Reconciliation can be performed several times.

# Provider CPOM Training

## How to Discharge a Patient

When discharging a patient, the physician should **FIRST** enter their discharge orders. Then they should complete the discharge reconciliation, followed by signing printed prescriptions (if applicable).

### Discharge Orders



1. With the patient highlighted, choose the *Enter Order* icon.
2. On the order entry worksheet, change the session type to “Discharge Orders”

The screenshot shows the 'Order Entry' window. At the top, there are fields for 'Requested By' (with radio buttons for 'Me' and 'Other'), 'Source', 'Date', and 'Time'. Below these is the 'Session' section, which includes a 'Type' dropdown menu currently set to 'Discharge Orders'. A red box highlights the 'Session' section, and a yellow box with the number '2.' points to the dropdown menu. To the left of the main window is a sidebar with a tree view containing 'Order Sets', 'Admit / Discharge / Transfer', 'Cardiology', and 'Consults'. Below the 'Session' section, there is a 'Reason' field and a 'Start Of' dropdown menu. At the bottom, there is a 'here to enter order name' field and an 'Order' button.

3. Search for the Discharge Order Set

The screenshot shows a search interface. At the top, there is a search bar with the text 'Searching for ...' and a yellow box with the number '3.' next to it. Below the search bar, there is a list of search results. The first result is 'discharge', which is expanded to show a sub-list. The sub-list contains 'Order', 'Discharge \* Order Set' (highlighted in blue), and 'Discharge Planning'.

4. Choose the appropriate discharge order and then enter discharge orders for the patient.

# Provider CPOM Training

Gen Medicine Discharge Order Set - *Friday, 10/13/2015*

**Discharge \* Order Set [0 orders of 84 are selected]**

Requested Date: 10-13-2015  Is LVEF <40? ☐

Discharge

Order	Discharge To	Prescription Status	Ok to Discharge	Diet	Activity	Follow up with
<b>ORDER DISCHARGE PLAN SEPARATE - 17 item(s)</b>						
<input type="checkbox"/> Discharge Medicine	*					
<input type="checkbox"/> Discharge Cardiology				Healthy...		
<input type="checkbox"/> Discharge GYN	Home (Routine)					Follow up...
<input type="checkbox"/> Discharge Surgery						
<input type="checkbox"/> Discharge Orthopedics						
<input type="checkbox"/> Discharge Plastic Surgery						
<input type="checkbox"/> Discharge Urology	Home (Routine)					Follow up... Call 812-282
<input type="checkbox"/> Discharge-Shoulder/Elbow						
<input type="checkbox"/> Discharge Behavioral Health						
<input type="checkbox"/> Discharge Planning						
<input type="checkbox"/> Consultant Follow Up			<input type="checkbox"/>			
<input type="checkbox"/> Consultant Follow up Cardiology			<input type="checkbox"/>			
<input type="checkbox"/> Consultant Follow up Gastroenterology			<input type="checkbox"/>			
<input type="checkbox"/> Consultant Follow up Oncology			<input type="checkbox"/>			
<input type="checkbox"/> Consultant Follow up Pulmonary			<input type="checkbox"/>			

5. The medication grids below the discharge orders will be greyed out unless the patient is a Core Measure patient. Then, only the grids for medication type(s) recommended for that core measure will be available for selection.

Beta Blocker

Order	Dose	Dose	Units	Route	Frequency	Form	Omission Reason	Other Reason
<b>Beta Blocker - 13 item(s)</b>								
<input type="checkbox"/> Acebutolol (200 mg Capsule...)			milliGRAM(s)	Oral	2 times per day	Capsule		
<input type="checkbox"/> Atenolol (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Bisoprolol (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Carvedilol (Tablet...)			milliGRAM(s)	Oral	2 times per day	Tablet		
<input type="checkbox"/> Labetalol (Tablet...)			milliGRAM(s)	Oral		Tablet		
<input type="checkbox"/> Metoprolol Tartrate (Tablet...)			milliGRAM(s)	Oral	2 times per day	Tablet		
<input type="checkbox"/> nebivolol (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Propranolol (Tablet...)			milliGRAM(s)	Oral	2 times per day	Tablet		
<input type="checkbox"/> Sotalol (Tablet...)			milliGRAM(s)	Oral	2 times per day	Tablet		
<input type="checkbox"/> Timolol (10 mg Oral)	10		milliGRAM(s)	Oral	2 times per day	Tablet		
<input type="checkbox"/> Beta Blocker Omission Reason								
<input type="checkbox"/> Discharge medication ordered by another MD								
<input type="checkbox"/> Home Medication continued at discharge f: Beta...								

6. When grids are lit up, the physician must make a selection in each category that is accessible (ACE, ARB, etc.). If not selected, you will be unable to submit the discharge orders.



# Provider CPOM Training

- Please note: There are 3 options that will satisfy the requirement regarding omission of the medication, the required medication being ordered by another MD, or the required medication is a HOME medication that is continued on discharge.

**Discharge \* Order Set [0 orders of 84 are selected]**

ACE

Order	Dose	Dose	Units	Route	Frequency	Form	Omission Reason	Other Reason
ACE - 13 item(s)								
<input type="checkbox"/> amLODIPine + Benazepril 2.5mg-10 mg (Capsule...)			Capsule(s)	Oral		Capsule		
<input type="checkbox"/> Benazepril (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Captopril (Tablet...)			milliGRAM(s)	Oral		Tablet		
<input type="checkbox"/> Enalapril (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Fosinopril (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Hydrochlorothiazide-Lisinopril 12.5mg-10mg...			Tablet(s)	Oral		Tablet		
<input type="checkbox"/> Lisinopril (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Moexipril (Tablet...)			milliGRAM(s)	Oral		Tablet		
<input type="checkbox"/> Quinapril (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Ramipril (Capsule...)			milliGRAM(s)	Oral		Capsule		
<input type="checkbox"/> ACE or ARB Omission Order								
<input type="checkbox"/> Discharge medication ordered by another MD								
<input type="checkbox"/> Home Medication continued at discharge (- ACE)								

ARB

Order	Dose	Dose	Units	Route	Frequency	Form	Omission Reason	Other reason
ARB - 9 item(s)								
<input type="checkbox"/> Candesartan (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Irbesartan (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Losartan (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Olmesartan (Tablet...)			milliGRAM(s)	Oral		Tablet		
<input type="checkbox"/> telmisartan (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> Valsartan (Tablet...)			milliGRAM(s)	Oral	Daily	Tablet		
<input type="checkbox"/> ACE or ARB Omission Order								
<input type="checkbox"/> Discharge medication ordered by another MD								
<input type="checkbox"/> Home Medication continued at discharge (- ARB)								

## Saving Discharge Diagnosis to Discharge Order

- In the discharge order, select the square icon to the right of the Discharge Diagnosis

Order: Discharge Medicine

Requested By: GILL, Connie

Template Name:

Messages:

Discharge Date: 06-24-2014

Discharge Time:


Discharge to: Home (Routine)

Prescription Status:

Clear with Doctor/Specialty:


Prescriptions Given to Patient: ☐ Prescriptions on Chart: ☐ No Prescriptions Needed: ☐

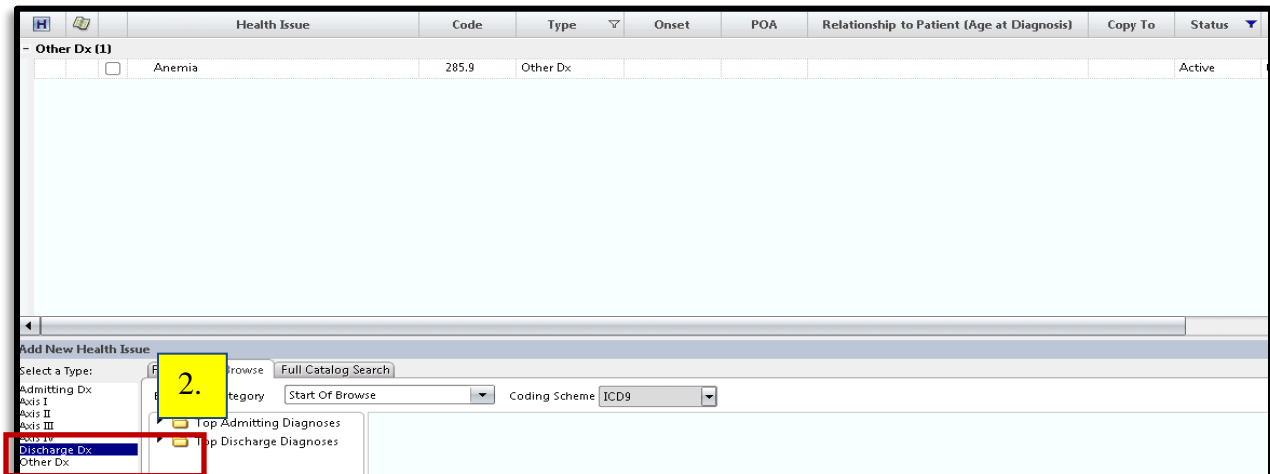
Discharge Diagnosis:

☐ 

# Provider CPOM Training

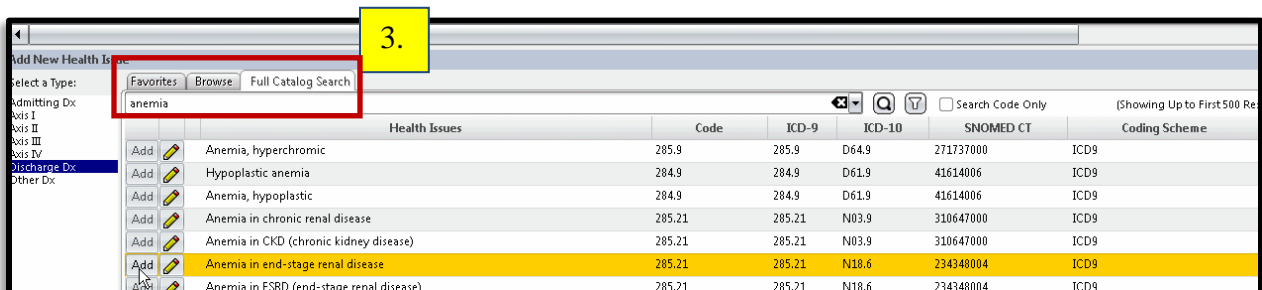
2. This opens up Health Issue Manager:

 Note on the left side of screen at the bottom Discharge Dx is highlighted. If not, make sure to select before entering in the appropriate diagnosis.



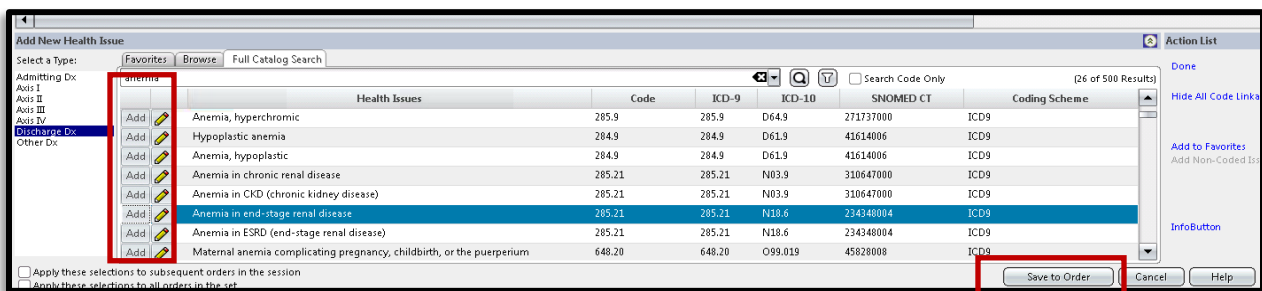
Health Issue Manager interface showing the 'Add New Health Issue' section. The 'Discharge Dx' tab is selected and highlighted with a red box. A yellow box with the number '2.' is placed over the 'Discharge Dx' tab.

3. You can use any of the browse tabs, Favorites Browse, or Full Catalog Search to find the diagnosis you wish to add to this patient's visit.



Health Issue Manager interface showing a list of health issues. The 'Discharge Dx' tab is selected. A yellow box with the number '3.' is placed over the 'Discharge Dx' tab. The list of health issues includes 'Anemia, hyperchromic', 'Hypoplastic anemia', 'Anemia, hypoplastic', 'Anemia in chronic renal disease', 'Anemia in CKD (chronic kidney disease)', 'Anemia in end-stage renal disease', and 'Anemia in ESRD (end-stage renal disease)'. The 'Anemia in end-stage renal disease' row is highlighted in yellow.

4. Select the ADD button for the Health Issue. The Discharge Diagnosis will be added to this visit.



Health Issue Manager interface showing the 'Add' button for the 'Anemia in end-stage renal disease' row. The 'Discharge Dx' tab is selected. A red box highlights the 'Add' button. A yellow box with the number '4.' is placed over the 'Add' button. The 'Save to Order' button is highlighted with a red box.

5. Now you will need to select the Save to Order button to add this discharge diagnosis to your Discharge order.

# Provider CPOM Training

- You can now continue to add the appropriate instructions to complete the Discharge order.

A screenshot of a software interface showing the 'Discharge Date' field with the value '06-24-2014' and a calendar icon. To its right is the 'Discharge Time' field with a dropdown arrow. Below these is the 'Prescription Status' section with three radio buttons: 'Prescriptions Given to Patient' (selected), 'Prescriptions on Chart', and 'No Prescription'. Below that is the 'Discharge Diagnosis' field with the text 'N18.6 Anemia in end-stage renal disease'.

## Conditional Discharge Order

**NOTE:** *If multiple physicians need to approve the discharge or specific requirements must be met prior to discharge:*

- Enter the discharge orders on the Order Entry worksheet per your specialty. (Current workflow)
- After entering the discharge information and prior to submitting the order, in the bottom right of the screen, select the conditional order box


A screenshot of the 'Follow Discharge order Instructions' screen. It contains a section for 'FOLLOW UP INSTRUCTIONS' with multiple rows for 'Return to Office for Follow Up With Dr.' and 'Follow up in' fields, each with dropdowns for 'Day(s)', 'Week(s)', and 'Month(s)', and a radio button for 'As Needed'. Below this is an 'Additional Instructions' text area. In the bottom right corner, there is a 'Conditional Order' section with a checkbox for 'Max # of activations:' and a 'Clear' button. A yellow box with the number '2.' is placed over the 'Conditional Order' section.

- You will then need to select how many times this is applicable (usually once)

A screenshot of the 'Conditional Order' section. It shows a checkbox for 'Max # of activations:' which is checked, and a dropdown menu showing 'Once'. Below this is a text field containing 'May activate when vital signs stable, patient has adequate bowel movement,' and a 'Clear' button. A yellow box with the number '3.' is placed over the 'Max # of activations:' dropdown, and another yellow box with the number '4.' is placed to the left of the text field.

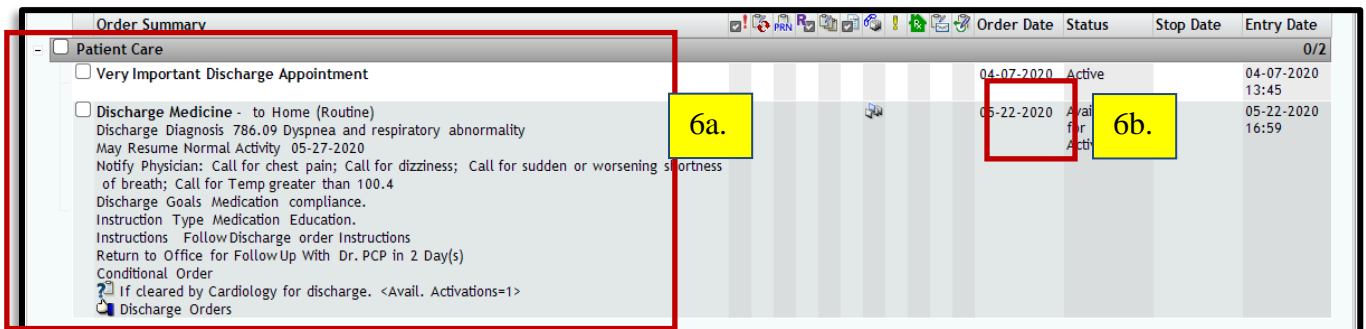
# Provider CPOM Training

- Then, type the condition (this is an example only and not meant to be a guideline) in the free text box so the nurse knows what conditions need to be met to activate the order.

 Other Condition examples: if okay with (physician / specialty) \*, after (medication administration, blood draw, or test), if can void after foley catheter removal, etc.

\* In the event another physician/specialty has not previously signed off on the patient as documented in the progress notes.

- Once completed, select OK and save the order.
- If saved correctly, it will appear on the patient's orders tab in the Patient Care heading (6a.) and will have a Question mark in front of it to designate as conditional and (6b.) will have Available for Activation in the status column.



Order Summary	Order Date	Status	Stop Date	Entry Date
<input type="checkbox"/> Patient Care				0/2
<input type="checkbox"/> Very Important Discharge Appointment	04-07-2020	Active		04-07-2020 13:45
<input type="checkbox"/> Discharge Medicine - to Home (Routine) Discharge Diagnosis 786.09 Dyspnea and respiratory abnormality May Resume Normal Activity 05-27-2020 Notify Physician: Call for chest pain; Call for dizziness; Call for sudden or worsening shortness of breath; Call for Temp greater than 100.4 Discharge Goals Medication compliance. Instruction Type Medication Education. Instructions Follow Discharge order Instructions Return to Office for FollowUp With Dr. PCP in 2 Day(s) Conditional Order If cleared by Cardiology for discharge. <Avail. Activations=1> Discharge Orders	05-22-2020	Available for Activation		05-22-2020 16:59

# Provider CPOM Training

## Discharge Medication Reconciliation

- ✎ Once the discharge orders are submitted, these orders trigger the discharge reconciliation and a new flag appears in the Order Rec column on the patient list.

Current List

My Patient List

Select All Patients


22 Visit(s)

Save Selected Patients...

Admit Date	Planned/Actual Discharge Date	Current Location	Patient Name	Age	Provider	New Orders	New Results	Order Rec	New Docu...
08-13-2...		3SE 3007 01	Train, TrainOne	64y	Addas, Mouhamad				
08-13-2...		3SE 3007 02	Train, TrainTwo	63y	HARPER, MICHAEL C				
08-13-2...		3SE 3008 01	Train, TrainThree	62y	Trommler, Lloyd C				
08-13-2...		3SE 3008 02	Train, TrainFour	61y	Brahmbhatt, Vipul D				
08-13-2...		3SE 3009 01	Train, TrainFive	60y	GOLDSTEIN, STEVEN				
08-13-2...		3SE 3010 01	Train, TrainSix	59y	Knight, E Ray				

- ✎ **NOTE:** The discharge medication reconciliation should be completed by the admitting physician/service.

To complete the discharge medication reconciliation:

1. Either double click on the flag in the Order Rec column on the patient list, or click on the *Order Reconciliation* icon  .
2. Select the Discharge Order (Outstanding) to complete the discharge reconciliation.

Reconcile Orders View/Maintain History

**Select a reconciliation to perform:**

**Admission**  
[Admission \(Complete\) 10-14-2015; modified by: aaTemplate, SCE MD](#)  
To perform functions such as viewing details, canceling, or resetting this reconciliation, go to View/Maintain History tab.

**Transfer**  
[Transfer\(New\)](#)  
Select the 2. link to perform the transfer reconciliation.

**Discharge**  
[Discharge Order \(Outstanding\) 10-14-2015](#)  
Select the above link to start this reconciliation.  
To mark this reconciliation as not done, go to View/Maintain History tab.

# Provider CPOM Training

- Indicate which medications will be continued on discharge and which will be discontinued on discharge by using the icons in the middle of the screen:

Continue medication      Continue medication as a new prescription      Discontinue medication

ITEMS TO RECONCILE (0 of 23 reconciled)

adrenal cortical steroids (hormones/hormone modifiers) (0/1 reconciled)

**predniSONE -** Inpatient  
Give 5 milliGRAM(s), Oral, Daily

analgesics (central nervous system agents) (0/4 reconciled)

**Acetaminophen -** Inpatient  
Give 650 milliGRAM(s), Oral, Every 12 hours, \*PRN For Mild Pain (1-3)  
Nurse Instructions Per P&T policy, if dose is greater than 650mG it will ...

**morphine 2 mg/mL Injectable -** Inpatient  
Give 2 milliGRAM(s), IntraVenous, Every 6 hours  
\*PRN For Moderate Pain (4-7)

**morphine 4mg/mL Injectable -** Inpatient  
Give 4 milliGRAM(s), IntraVenous, Every 6 hours  
\*PRN For Severe Pain (8-10)

**acetaminophen + oxyCODONE 325 mG/10 mG TAB -** Inpatient  
Give 1 Tablet(s), Oral, Every 8 hours, \*PRN For Pain[Ordered as Percocet 10]

angiotensin converting enzyme inhibitors (cardiovascular agents) (0/1 reconciled)

3. 4.

Continue As predniSONE 5 mg oral tablet [1 tab(s) once a day]

Create New Prescription As predniSONE 5 mg oral tablet [1 tab(s) once a day]

Replace with New Prescription

Replace with New Home Medication

Not Required

Reconcile with Existing Item

Clear Reconciliation

Show Details...

Show History

- To save time, after continuing all the medications that are appropriate on discharge, for all the medications left (ones to be discontinued), the physician can use the *Mark All Remaining As Discontinued on Discharge* icon.

Reconcile Orders View/Maintain History

Group Format Reconciliation Enter Order Entry Enter Home Enter Outpatient Mark All Remaining As Discontinued On Discharge More Discharge

/Sort By Layout Details Discharge Order Requested By Medications Prescriptions Medication Review Actions Instruction

Reconciliation Type: Discharge by aaTemplate, SCE MD; New orders will be in session type of Discharge Orders

## More Actions in Order Reconciliation Manger

- If an additional medication prescription needs to be entered that are not listed under the items to reconcile, the physician can use the enter prescription icon.




# Provider CPOM Training

## Document Entry

### Search for a Document



1. Select the  icon.
2. Select "Start of Browse"

2.

The screenshot shows a software window titled "Document Entry worksheet - TESTMD/Note, One". The interface includes several input fields and a dropdown menu. A yellow box with the number "2." points to the dropdown menu, which is open and shows the following options: "Start Of Browse" (highlighted), "Start Of Browse", "Manual Entry", "Personal Documents", "Most Recent Documents", and "Document Recovery". The main area of the window contains a text input field labeled "Type here to enter document" and a section for "Document Name" and "Progress Note, Adult". At the bottom, there are buttons for "Need help?", "Document Help", "Open", and "Close".

# Provider CPOM Training

3. Select "Physician Documentation" in the browse tree.
4. Select desired document.
5. Select "Open" and the document will open.

The screenshot displays a web-based interface for selecting a document. At the top, there are fields for 'Authored' (radio buttons for 'Date' and 'Now', with 'Now' selected), a date picker set to '07 - 11 - 2017', and a time picker set to '12:04'. Below these are fields for 'Authored by' (radio buttons for 'Me' and 'Other', with 'Me' selected), 'Source', 'Co-Signer(s)', and 'Mark Note As' (checkboxes for 'Incomplete', 'Results pending', and 'Priority').

The main area is divided into two panes. The left pane, titled 'Start Of Browse', shows a tree structure with 'Physician Documentation' selected and highlighted in blue. A yellow box with the number '3.' is placed over this selection. The right pane, titled 'Content of "/>

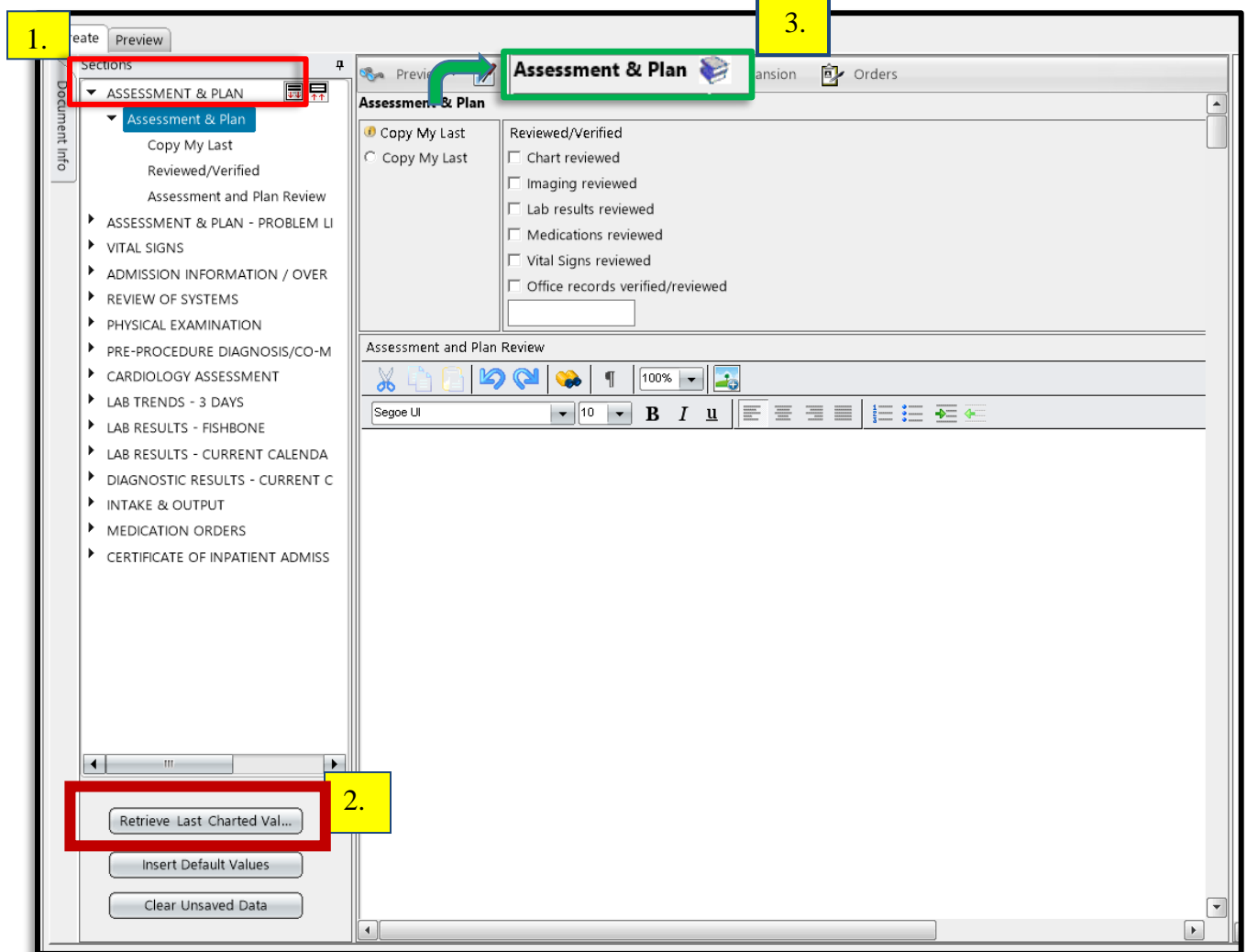


# Provider CPOM Training

## How to Use “Retrieve Last Charted” and Other Retrieval Options

### Retrieve Last Charted

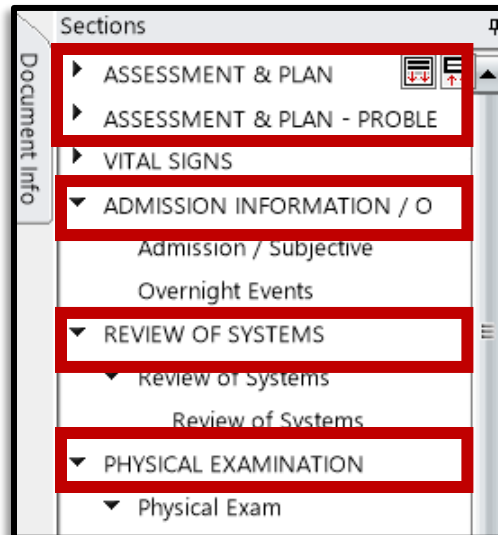
1. Highlight the main section header in ALL CAPS.



2. Select this option. This will copy forward information from the last note with this name on this patient for the Assessment and Plan (Free Text) Heading, **IF** there was information placed in the previous note.
3. An icon will appear next to the heading to indicate information has been brought in.

# Provider CPOM Training

- ✎ By repeating the above steps, the user can retrieve last charted information on the following sections:



## Other Charting Retrieval Options

- ✎ Each section has a separate option as well to bring in past charting.

### *Review of Systems Copy Forward (not using Retrieve Last Charted)*

**Review of Systems**

**1.** **Apply Default**  
☐ APPLY NEGATIVES (male 18+ yrs)

**2.** **All Other Systems**  
☐ negative statement  
☐ negative detailed

**3.** **Reason Not Obtained**  
☐ family not present  
☐ mental status  
☐ unable to respond

**Default**  
☐ my last

**General**  
neq pos Answer All

**Skin**  
neq pos Answer All

**Breast**  
neq pos Answer All

1. Will copy in the “users” default (preset) negatives.
2. Will select negatives from a system-supplied dictionary for all items not selected as positive.
3. Will copy in the “users” last charted values from this patient.

# Provider CPOM Training

*Physical Examination Copy Forward (not using Retrieve Last Charted)*

The image shows a 'Physical Exam' form. At the top left is a tab labeled 'Physical Exam' with a yellow box containing the number '1.' next to it. Below the tab are four sections, each with a 'DEFAULT' label and a radio button. The first section is 'SAVE DEFAULTS' with the option 'save my normal defaults'. The second section is 'normal' with the option 'normal'. The third section is 'my normal' with the option 'my normal'. The fourth section is 'my last' with the option 'my last'. A yellow box containing the number '3.' is positioned above the third section. A yellow box containing the number '4.' is positioned above the fourth section. At the bottom of the form are two text input fields: 'General Appearance Comments' and 'General'.

1. Will save the normal defaults as set by the provider.
2. Will copy in the system supplied (canned) normal.
3. Will copy in the “users” preset normal values.
4. Will copy in the “users” last charted values on this note for this patient.

*Problem A&P Copy Forward (not using Retrieve Last Charted)*


The image shows a 'Problem/Assessment Plan' form. On the left side, there is a yellow box containing the number '1.' next to the 'Copy Problem List' section. This section contains two radio buttons: 'Copy Problem List' and 'Copy from my last saved note'. A yellow box containing the number '2.' is positioned next to the 'Copy from my last saved note' option. Below this section are two text input fields: 'Problem 1' and 'Assessment/Plan 1'. To the right of these fields is a section titled '1 - Actions' containing two radio buttons: 'Move Down' and 'Clear Data'.

1. Copy Problem List - Will copy in all of the problems listed in Health Issues.
2. Copy from my last saved note - Will copy in the “users” last charted values on this note for this patient.

# Provider CPOM Training

## Completing a Document


The screenshot displays the 'Assessment & Plan Review' section of the software. On the left, a 'Document Info' sidebar lists various sections, with 'ASSESSMENT & PLAN' selected. Below this list are buttons for 'Retrieve Last Charted...', 'Insert Default Values', and 'Clear Unsaved Data'. The main window features a 'Preview' tab and a toolbar with icons for 'Preview', 'Modify Template', 'Acronym Expansion', and 'Orders'. The 'Assessment & Plan Review' section includes a 'Copy My Last' button and a 'Reviewed/Verified' checklist with items: 'Chart reviewed', 'Imaging reviewed', 'Lab results reviewed', 'Medications reviewed', 'Vital Signs reviewed', and 'Office records verified/reviewed'. Below the checklist is a text input field. The main editing area has a 'Segue UI' dropdown, a font size of '10', and bold, italic, and underline formatting options. At the bottom, there are checkboxes for 'Mark Note As: Results pending', 'Priority', and 'Incomplete', along with 'E&M Calculation' and 'Charge Capture SuperBill' checkboxes. 'Save' and 'Cancel' buttons are located in the bottom right corner.

-  Amount of content charted is determined by the provider. There is no “required” amount of charting or “required” charting fields in a note. The ONLY exception to this is if the provider is completing the “Certificate of Inpatient Admission” section, which has required fields.

# Provider CPOM Training

The screenshot displays the 'Structured Notes Entry' window for 'TestSixteen, NewPatient A - CMH Progress Note Adult'. The interface is divided into several sections:

- Document Info:** Located on the left, it contains a 'Sections' list with expandable categories: 'ASSESSMENT & PLAN' (with sub-items 'Assessment & Plan Review' and 'Copy My Last Reviewed/Verified Assessment and Plan Review'), 'ASSESSMENT & PLAN - PROBLEM' (with sub-items 'Problem/Assessment Plan' and 'Problem/Assessment Plan'), 'VITAL SIGNS', 'ADMISSION INFORMATION / OV', 'REVIEW OF SYSTEMS', 'PHYSICAL EXAMINATION', 'LAB TRENDS - 3 DAYS', 'LAB RESULTS - FISHBONE', 'LAB RESULTS - CURRENT CALEN', 'DIAGNOSTIC RESULTS - CURREN', 'INTAKE & OUTPUT', 'MEDICATION ORDERS', and 'CERTIFICATE OF INPATIENT ADM'. Below this list are buttons for 'Retrieve Last Charted...', 'Insert Default Values', and 'Clear Unsaved Data'.
- Problem/Assessment Plan:** The main content area on the right, titled 'Problem/Assessment Plan', contains a 'Copy Problem List' section with radio buttons for 'Copy Problem List' and 'Copy from my last saved note'. Below this are five rows of input fields, each with a 'Problem' and 'Assessment/Plan' text box. To the right of each row is an 'Actions' column with radio buttons for 'Move Up', 'Move Down', and 'Clear Data'. The rows are numbered 1 through 5.
- Footer:** At the bottom, there are checkboxes for 'Need Help?', 'Mark Note As: Results pending', 'Priority', and 'Incomplete'. On the far right, there are checkboxes for 'E&M Calculation' and 'Charge Capture SuperBill', along with 'Save' and 'Cancel' buttons.

 The provider can use the predefined check boxes and/or radio buttons in each section or use the free text boxes.

# Provider CPOM Training

Structured Notes Entry - TestSixteen, NewPatient A - CMH Progress Note Adult

Modify Preview

Sections

- ASSESSMENT & PLAN
- ASSESSMENT & PLAN - PROBLEM LIST
- VITAL SIGNS
  - Current Day
    - 01. Vital Signs, CC 1.0
- ADMISSION INFORMATION / OVERNIGHT
- REVIEW OF SYSTEMS
- PHYSICAL EXAMINATION
- LAB TRENDS - 3 DAYS
- LAB RESULTS - FISHBONE
- LAB RESULTS - CURRENT CALENDAR DATA
- DIAGNOSTIC RESULTS - CURRENT CALENDAR DATA
- INTAKE & OUTPUT
- MEDICATION ORDERS
  - Medication Orders (Active/Hold)
- CERTIFICATE OF INPATIENT ADMISSION

01. Vital Signs, CC 1.0

Range: 03-06-2018 to 03-06-2018 Chart Scope: This Chart

03-06-2018

Description Label	04:32	11:30
<input checked="" type="checkbox"/> degrees F degrees F	104.3	98.6
<input checked="" type="checkbox"/> C	40.1	37
<input checked="" type="checkbox"/> Heart Rate Heart Rate (bpm)	126	78
<input checked="" type="checkbox"/> Systolic Systolic	190	118
<input checked="" type="checkbox"/> Diastolic Diastolic (mmHg)	100	68
<input checked="" type="checkbox"/> Mean Mean (mmHg)	130	84
<input checked="" type="checkbox"/> Resp Rate breaths/min	28	16
<input checked="" type="checkbox"/> SpO2 %	90	99
<input type="checkbox"/> Oxygen Oxygen (L/min)	4	
<input type="checkbox"/> Inch(s)		72
<input type="checkbox"/> cm		182.88
<input type="checkbox"/> lbs		220
<input type="checkbox"/> oz		0
<input type="checkbox"/> kg		99.79
<input type="checkbox"/> BSA (m2) BSA (m2)		2.2
<input type="checkbox"/> BMI (kg/m2) BMI (kg/m2)		29.8


Retrieve Last Charted Values

Insert Default Values

Clear Unsaved Data


Admission / Subjective

Chief Complaint

 Content highlighted in blue color is automatically added to the note. If content is not desired in note, select the check box or the blue content box itself to remove from note.

# Provider CPOM Training

The screenshot shows the 'Admission / Subjective' section of the CPOM software. On the left is a 'Sections' sidebar with a tree view containing: ASSESSMENT & PLAN, ASSESSMENT & PLAN - PROBLEM LIST, VITAL SIGNS, ADMISSION INFORMATION / OVERNIGHT (expanded), REVIEW OF SYSTEMS, PHYSICAL EXAMINATION, LAB TRENDS - 3 DAYS, LAB RESULTS - FISHBONE, LAB RESULTS - CURRENT CALENDAR DA, DIAGNOSTIC RESULTS - CURRENT CALE, INTAKE & OUTPUT, MEDICATION ORDERS (with sub-item Medication Orders (Active/Hold)), and CERTIFICATE OF INPATIENT ADMISSION. The 'Overnight Events' item is highlighted. The main area has tabs for 'Modify' and 'Preview'. Below the tabs are icons for 'Preview', 'Modify Template', 'Acronym Expansion', and 'Orders'. The 'Admission / Subjective' section contains a 'Chief Complaint' text box, a 'Subjective' text box, and an 'Overnight Events' section. The 'Overnight Events' section has a header bar with two radio buttons: 'no overnight events' and 'overnight events (specify)'. Below this, there is a list of checkboxes for 'Overnight Events include:': fall, altered mental status, pain, chest pain, change in level of care, change in cardiac status, change in pulmonary status, change in GI status, change in GU status, Nurse Blue, Code 4, and new fever.

 The provider can use the predefined check boxes and/or radio buttons in each section or use the free text boxes.

The screenshot shows the 'Review of Systems' section of the CPOM software. The 'Sections' sidebar on the left is the same as in the previous screenshot, but 'REVIEW OF SYSTEMS' is now highlighted. The main area has the same tabs and icons. The 'Review of Systems' section includes a table for 'Apply Default', 'All Other Systems', 'Reason Not Obtained', and 'Default'. Below this are several panels for different body systems, each with a 'neg' (negative) and 'pos' (positive) radio button and a list of symptoms with checkboxes. The panels are: General (anorexia, chills, fever, malaise/fatigue, weight loss), Skin (icterus, lesions, pruritus, rash, varicose veins), Breast (breast lump, gynecomastia, nipple discharge, nipple retraction, tenderness), Eye (icterus, itching, lacrimation, pain, photophobia, vision changes), Ear (discharge, hearing disturbance, hearing loss, pain, tinnitus), Nose (congestion, discharge, nose bleeds, obstruction, sneezing), Mouth/Throat (dysphagia, hoarseness, lesions, rash), Respiratory (cough, dyspnea, hemoptysis, pleuritic chest pain), and Cardiovascular (claudication, lower extremity swelling, orthopnea, palpitation). At the bottom, there are buttons for 'Retrieve Last Charted Values', 'Insert Default Values', and 'Clear Unsaved Data'. Below these are checkboxes for 'Need Help?', 'Mark Note As: Results pending', 'Priority', and 'Incomplete'. At the very bottom are buttons for 'Save', 'Save/Print', and 'Cancel'.

# Provider CPOM Training

- ✎ If the provider does not want to use the supplied content or retrieve previous documentation, they can free text.

- ✎ Content highlighted in blue color is automatically added to the note. If content is not desired in note, select the check box or the blue content box itself to remove from note.

Result Name	Value	Unit
HCT	42	35
Hgb	13	11
PLT	140	120
WBC	5.0	12

- ✎ A fishbone lab section is available if desired.



# Provider CPOM Training

- ✎ Results will only appear if they fall in the designated time frame. For lab and diagnostic results, the default is 1 calendar day.
- ✎ An option for 2 calendar days is available in “modify template”.

The screenshot displays the 'Structured Notes Entry - TestSixteen, NewPatient A - CMH Progress Note Adult' window. The interface is divided into several sections:

- Modify / Preview Tabs:** Located at the top left, with 'Modify' selected.
- Document Info:** A vertical sidebar on the left containing a list of sections. The 'DIAGNOSTIC RESULTS - CURRENT CALE' section is highlighted in blue.
- Diagnostic Imaging:** A section with a 'Show all available' button and a 'Show selected only' button. Below these are fields for 'Range: 03-06-2018 to 03-06-2018' and 'Chart Scope: This Chart'. A table with columns 'Result', 'Value', and 'Text' is visible.
- Diagnostic Cardiology:** A section with similar controls and a table as the Diagnostic Imaging section.
- Diagnostic Neuro:** A section with similar controls and a table as the Diagnostic Imaging section.
- Buttons:** At the bottom left, there are buttons for 'Retrieve Last Charted Values', 'Insert Default Values', and 'Clear Unsaved Data'. At the bottom right, there are 'Save', 'Save/Print', and 'Cancel' buttons.
- Footer:** A line of text at the bottom includes 'Need Help?', 'Mark Note As:', and checkboxes for 'Results pending', 'Priority', 'Incomplete', 'E&M Calculation', and 'Charge Capture SuperBill'.

# Provider CPOM Training

- ✎ Most recent I/Os are available for review.
- ✎ If content is desired in note, select the check box or the content box itself to add to the note.

Structured Notes Entry - TestSixteen, NewPatient A - CMH Progress Note Adult

Modify Preview

Sections

Document Info

ASSESSMENT & PLAN

Assessment & Plan Review

Copy My Last

Reviewed/Verified

Assessment and Plan Review

ASSESSMENT & PLAN - PROBLEM L

VITAL SIGNS

ADMISSION INFORMATION / OVER

REVIEW OF SYSTEMS

PHYSICAL EXAMINATION

LAB TRENDS - 3 DAYS

LAB RESULTS - FISHBONE

LAB RESULTS - CURRENT CALENDAR DAY

DIAGNOSTIC RESULTS - CURRENT

INTAKE & OUTPUT

Intake & Output

02. Intake and Output, CC 1.0

MEDICATION ORDERS

02. Intake and Output, CC 1.0

Range: 03-06-2018 to 03-06-2018 Chart Scope: This Chart

	03-06-2018	06:52	Shift 07:00	Daily 07:00
Length of Stay Totals				
Intake			800	800
Output			600	600
Net			200	200
Grand Totals				
Intake		800	800	800
Output		600	600	600
Net		200	200	200
24 Hr.		200	200	200
Generic IV Solution				
In		800	800	800
Oral Fluid				
In				
Voided (mL) ml				

LAB RESULTS - CURRENT CALENDAR DAY:

General Hematology:

03-06-2018 11:43, Complete Blood Count With Di

- WBC: 12, [4.4 - 11.1 10<sup>3</sup>/uL]
- RBC: 3., [4.49 - 5.91 10<sup>6</sup>/uL]
- Hgb: 11, [13.4 - 17.6 g/dL]
- HCT: 35, [40 - 54 %]
- PLT: 120, [139 - 401 10<sup>3</sup>/uL]

INTAKE & OUTPUT:

02. Intake and Output, CC 1.0:

Date/Time	Length of Stay Totals
03-06-2018 07:00	Intake: 800
Daily	Output: 600
	Net: 200

Electronic Signatures:

Bradley, Tina N (Physician) (Signature Pending)

Co-Signer: ASSESSMENT & PLAN

Clark, Tracey (RN) (Signed 03-06-2018 11:52)

Authored: VITAL SIGNS, ADMISSION INFO, TRENDS - 3 DAYS, LAB RESULTS - FISHBONE, CALENDAR DAY

- ✎ Medication orders appear in blue highlight. To remove, de-select the check box to the left.

Structured Notes Entry - TestSixteen, NewPatient A - CMH Progress Note Adult

Modify Preview

Sections

Document Info

ASSESSMENT & PLAN

Assessment & Plan Review

Copy My Last

Reviewed/Verified

Assessment and Plan Review

ASSESSMENT & PLAN - PROBLE

VITAL SIGNS

ADMISSION INFORMATION / OV

REVIEW OF SYSTEMS

PHYSICAL EXAMINATION

LAB TRENDS - 3 DAYS

LAB RESULTS - FISHBONE

LAB RESULTS - CURRENT CALEN

DIAGNOSTIC RESULTS - CURREN

INTAKE & OUTPUT

Intake & Output

02. Intake and Output, CC

MEDICATION ORDERS

Medication Orders (Active/Ho

Medication Orders (Active/Hold)

Chart Scope: This Chart

Date	Order Name	Order Summary Line
------	------------	--------------------

Certification of Inpatient Admission

Yes, I certify

Inpt hospital services provided in accordance w/ 42CFR 412.3

# Provider CPOM Training

Items for NP or PA: Assigning a Co-Signer during selection of document:

NPs or PAs are required to assign a co-signer and indicate document is incomplete. This will allow the designated co-signer to perform necessary actions on the document as well as be properly identified to HIM.

## 1. Select Co-signer box.

Document Entry Worksheet - TestSixteen, NewPatient A

Authored: ☐ Date ☒ Now 03 - 06 - 2018 Time: 10:24

Authored by: ☒ Me ☐ Other Source: [ ]

Co-signer ☐ [ ]

Mark Note As: ☐ Final ☐ Results pending ☐ Priority

Personal Documents [ ]

Type here to enter document

Document Name [ ]

[Need help?](#) [Document Help](#) [Open](#) [Close](#)

## 2. Choose a physician from the list or search for the appropriate one:

Authorized By - TestSixteen, NewPatient A

Authorized By: ☐ Me ☒ Current Providers ☐ Other

Care Provider: Bradley, Tina N Search

Filter

Occupation: ALL

Org. Unit: ALL

Name	Occupation	Org Unit	Specialty
Bradley, Tina N	Admitting	Medicine	Internal Medicine
Schroeter, Edward O	Attending	Medicine	Emergency Medicine
Sweat, T Matthew	Consulting	Cardiology	Cardiology

Source: Dictation

[Need Help?](#) [OK](#) [Cancel](#)

Authorized By - TestSixteen, NewPatient A

Authorized By: ☐ Me ☐ Current Providers ☒ Other

Care Provider: Search

Filter

Occupation: ALL

Org. Unit: ALL

Source: Dictation

[Need Help?](#) [OK](#) [Cancel](#)

# Provider CPOM Training

3. Mark as incomplete prior (a.) to selecting the note or while already in the note (b.):

**a.**

Document Entry Worksheet - TestSixteen, NewPatient A

Authored: ☐ Date ☒ Now 03 - 06 - 2018 Time: 10:24

Authored by: ☐ Me ☒ Other Bradley, Tina N Source: Dictation

Co-Signer(s): ☐ ☐ ☐

Mark Note As: ☒ Incomplete ☐ Results pending ☐ Priority

Start Of Browse

- KBC - Profiles/Assessments
- KBC - Rehab
- ED
- ED Physicians
- Physician Documentation**
- BH
- Discharge
- Addenda
- Miscellaneous

Content of /Physician Documentation'

Type here to enter document

Document Name

- CMH Progress Note Adult
- CMH Progress Note Adult - Anesthesia
- CMH Progress Note Adult - Behavioral Medicine
- CMH Progress Note Adult - Cardiology
- CMH Progress Note Adult - Dermatology
- CMH Progress Note Adult - GI
- CMH Progress Note Adult - Hospitalist
- CMH Progress Note Adult - Infectious Disease
- CMH Progress Note Adult - Medical
- CMH Progress Note Adult - Nephrology
- CMH Progress Note Adult - Neurology
- CMH Progress Note Adult - Ortho
- CMH Progress Note Adult - Pulmonary
- CMH Progress Note Adult - Surgery

[Need help?](#) [Document Help](#) [Open](#) [Close](#)

**b.**

Retrieve Last Charted...

Insert Default Values

Clear Unsavd Data

Need Help? Mark Note As: ☐ Results pending ☐ Priority ☒ Incomplete

☐ E&M Calculation ☐ Charge Capture SuperBill

[Save](#) [Cancel](#)

4. Submit as Incomplete selection results in appearance on documents tab with Document Status of Incomplete:

Time	Document Name	Document Status
01-27-2017		
14:10	CMH Progress Note Adult - Hospitalist	Incomplete

5. If needed, it is possible to still edit this Incomplete Status not by selecting the Modify Document icon, Modify tab, or Modify Document bolded option.

**5.**

[Modify](#)

**Modify Document**

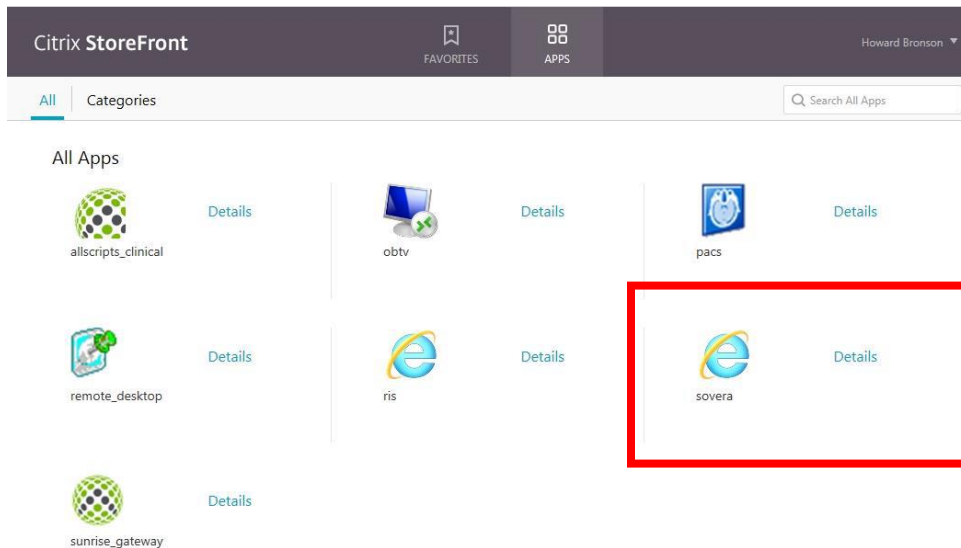
# Provider CPOM Training

## Sovera

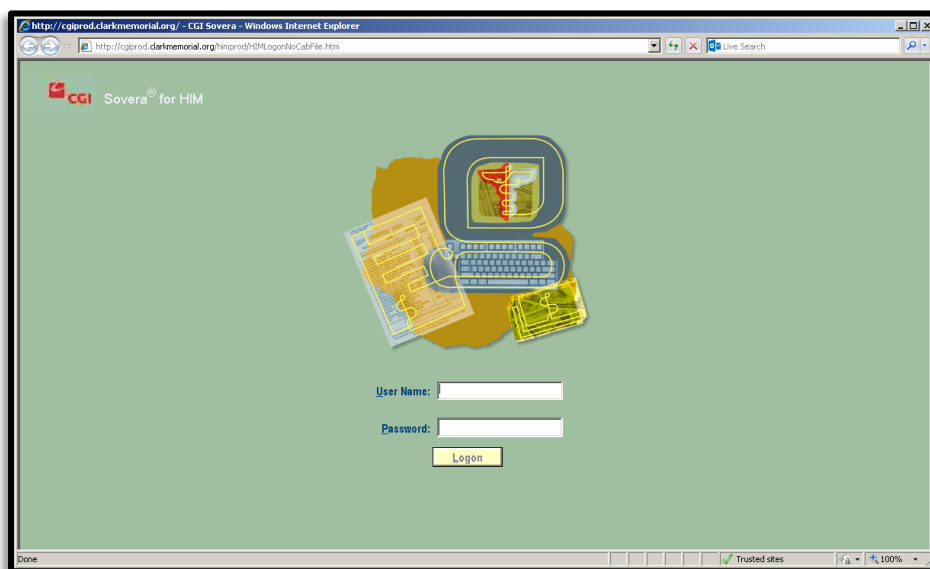
- Sovera is CMH's comprehensive medical health record.
- Accessing Sovera
  - Separate icon on hospital desktop
  - Through SAC Thin client – toolbar icon in SAC
  - Through CAG

After logging into the Citrix Portal you will see a listing of those applications you have requested and been granted access to.

### Select **Sovera**

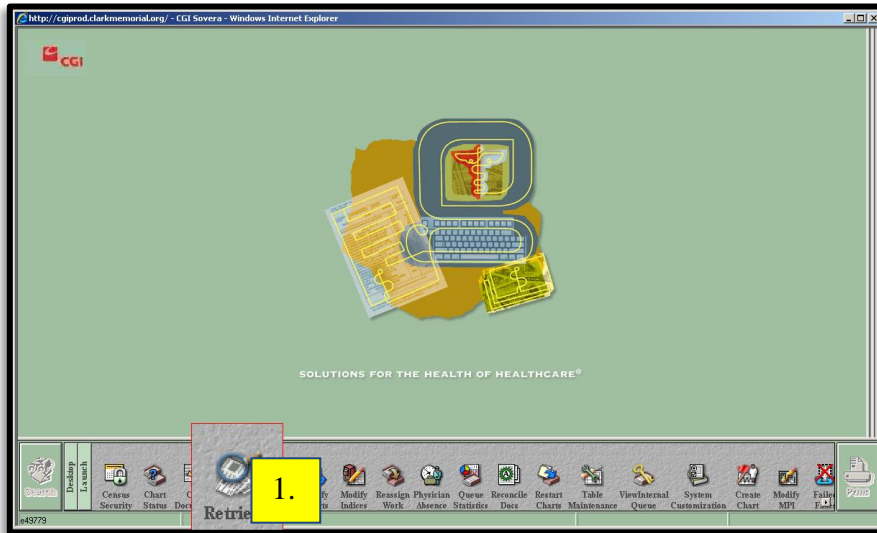


May take a while for it to launch for the first time.



# Provider CPOM Training

1. When you log in you will need be presented with a search pop up (see next section) or you can find the icon “Retrieval” to search for medical records or deficiencies.



## Searching for Medical Records

1. In the new (pop up) window,  
change the sort to Name/MRN  
and enter the appropriate information.
2. Select Retrieve to view that patient's data.

A screenshot of a "Search" pop-up window. The window has a title bar "Search" and a close button. It contains several fields and a list box. The "Search Type" field is set to "Medical Records". The "Current Search" field is set to "Name/MRN". The "Search Queue" field is set to "MRN". The "Description" field is set to "Acct #". The "Search Criteria" field is set to "MRN and Account". Below these fields, there are four input fields labeled "Last Name", "First Name", "MRN", and "Account Number", each followed by an equals sign and a text input box. A yellow box with the number "1." is placed over the "Search Queue" field. At the bottom of the window, there are three buttons: "Retrieve", "Search Manager", and "Close". A yellow box with the number "2." is placed over the "Retrieve" button.

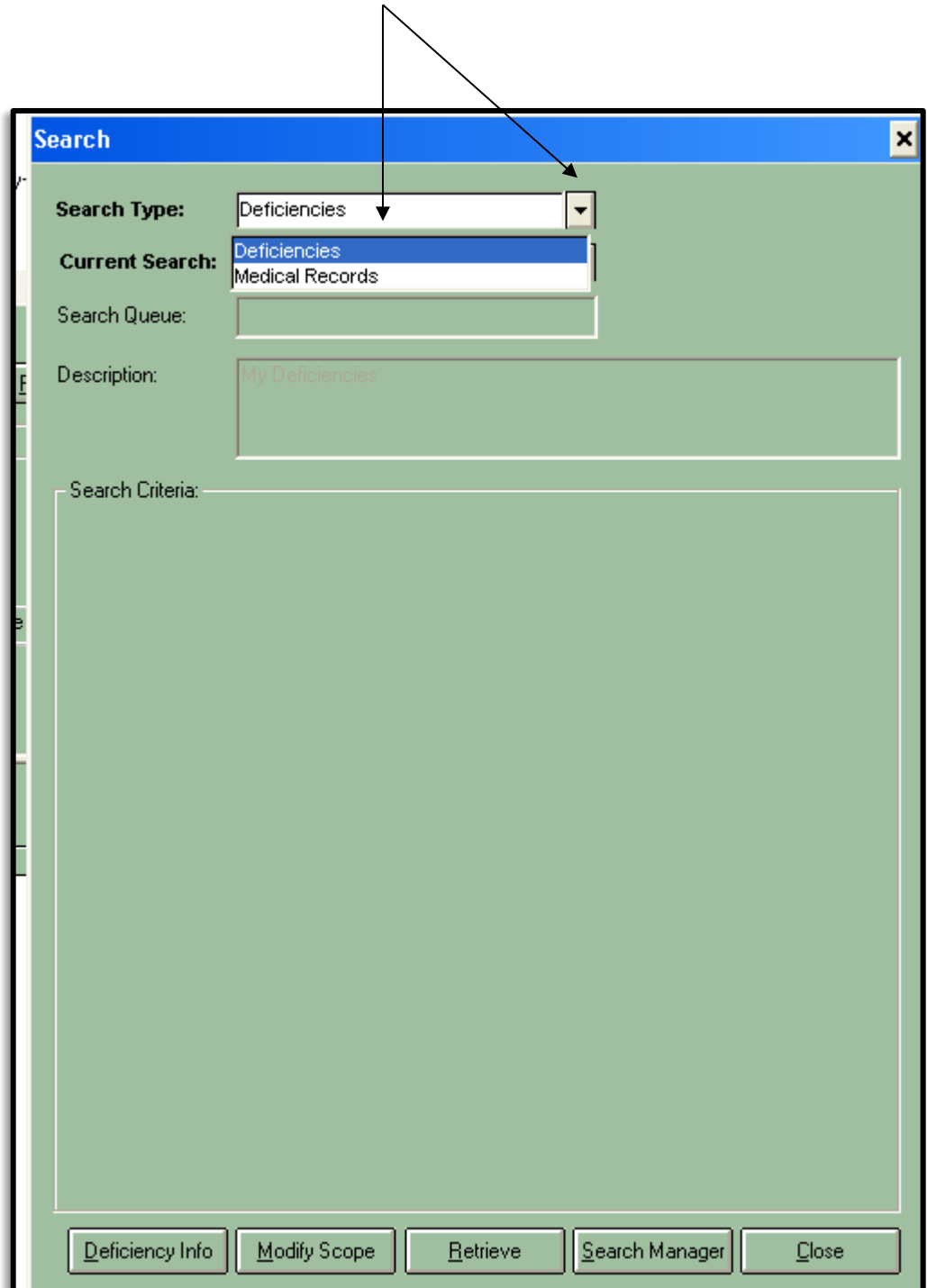
3. You can then view documents located in the tabs of the chart. Click on the title of the document and it will appear in the PDF viewer.

# Provider CPOM Training

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## Addressing Deficiencies

1. Click on the drop-down box and select “Deficiencies”.



The screenshot shows a window titled "Search" with a blue header bar. Inside the window, there are several fields and a large text area. The "Search Type:" field is a dropdown menu that is currently open, showing two options: "Deficiencies" (highlighted in blue) and "Medical Records". An arrow points from the text "Click on the drop-down box and select 'Deficiencies'." to the "Deficiencies" option in the dropdown menu. Below the "Search Type:" field is the "Current Search:" field, which also shows "Deficiencies" and "Medical Records". Below that is the "Search Queue:" field, which is empty. Below the "Search Queue:" field is the "Description:" field, which contains the text "My Deficiencies". Below the "Description:" field is the "Search Criteria:" field, which is a large text area. At the bottom of the window, there are five buttons: "Deficiency Info", "Modify Scope", "Retrieve", "Search Manager", and "Close".

**Search**

**Search Type:** Deficiencies

**Current Search:** Deficiencies  
Medical Records

**Search Queue:**

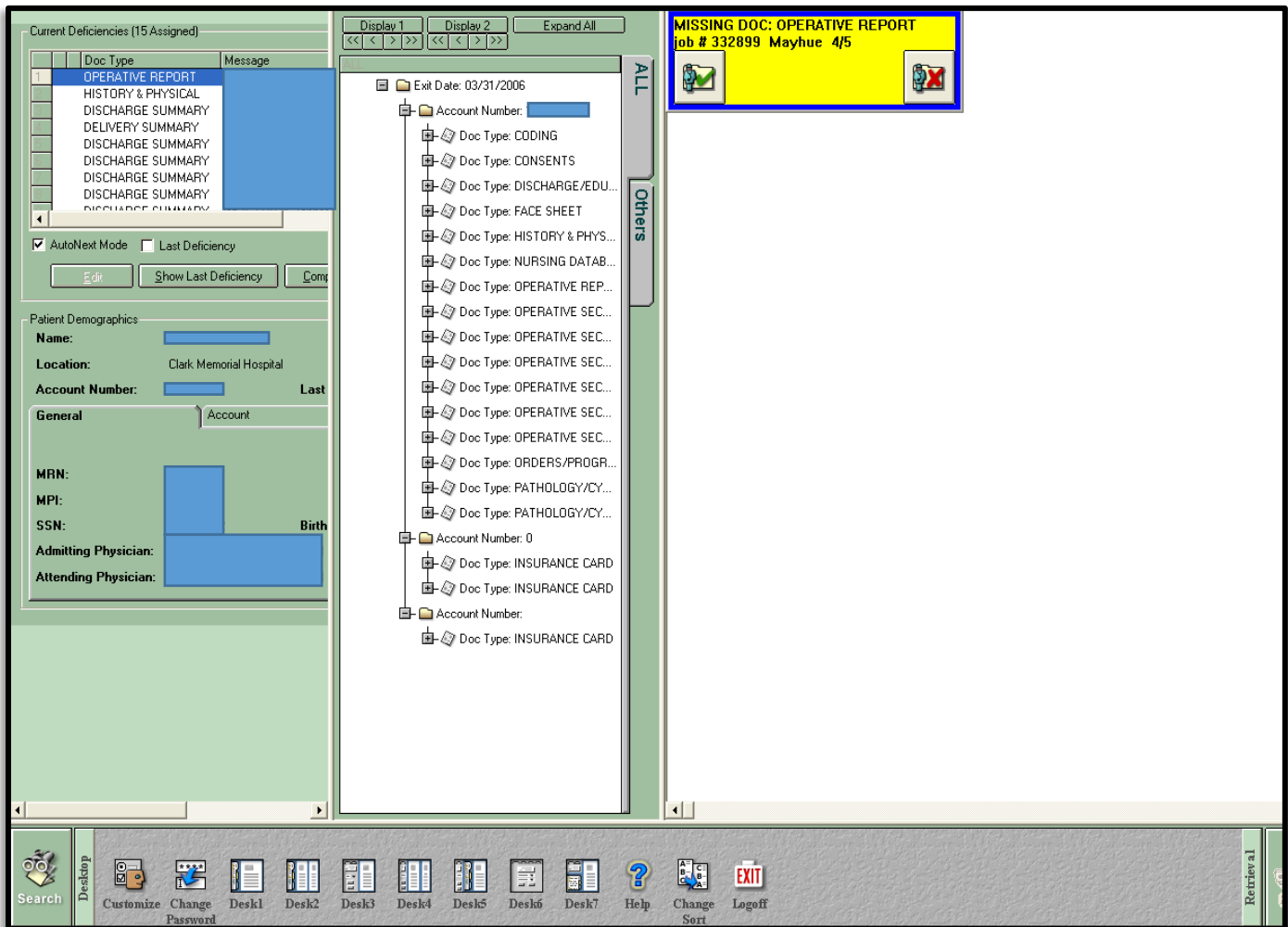
**Description:** My Deficiencies

**Search Criteria:**

Deficiency Info   Modify Scope   Retrieve   Search Manager   Close

# Provider CPOM Training

2. The information you need to complete your deficiencies is contained on this desktop.





# Provider CPOM Training

**Current Deficiencies (21 Assigned)**

Doc Type	Message
CONSULTATION	
RADIOLOGY	
CONSULTATION	
RADIOLOGY	please attach "sticky note" with missing
DISCHARGE SUMMARY	job # 323477 Bacala 3/14
SHORT STAY	job #322701 Godlstein, Steven 3/13
DISCHARGE SUMMARY	job #50013694 Mayhue 3/15
SHORT STAY	job #323906 Howerton, D. 3/15
DISCHARGE SUMMARY	job #50013695 Mayhue 3/15

☒ AutoNext Mode ☐ Last Deficiency

Buttons: Edit, Show Last Deficiency, Complete, Reject, Undo

**Patient Demographics**

**Name:** TEST, SOVERA  
**Location:** Clark Memorial Hospital  
**Account Number:** 14109938 **Last Updated:** 06/08/2006 09:14

General | **Account** | Site Definable

**Admit Date:** 11/26/2001 **Discharge Date:**  
**Patient Type:** 0

Display 1 | Display 2 | Expand All

Exit Date: 11/26/2001

Account Number: 14109938

- Doc Type: CONSENTS
- Doc Type: CONSULTATION
- Doc Type: EMERGENCY ROOM DOCUMENTATION
- Doc Type: FACE SHEET
- Doc Type: FACE SHEET
- Doc Type: H&P OFFICE
- Doc Type: LABS
- Doc Type: MEDICATION

**results**

Search | Desktop | **Retrieval** | Viewer1

PrevPage NextPage GotoPage Add Edit Magnifier Z  
Sticky ... Sticky ...

**Callout 1:** This is a list showing all of your Deficiencies. To sort these, you can Click on the headers that you want it to sort by -- Doc type, message, delinquent Date, Account or Type (scroll to the right to see all columns.)

**Callout 2:** Be sure to have a check mark in the "AutoNext Mode." (click on box to check)

**Callout 3:** This is where you will find the Name and account number. Click on the account tab to see the admit and discharge date. The general tab will give you the MR# Birth date and attending physician.

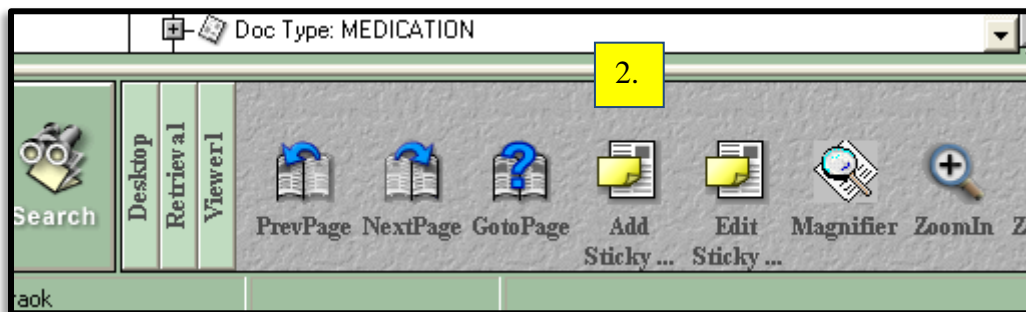
**Callout 4:** This is where you will see the list of documents for the selected account. On the right is where you can view the document

# Provider CPOM Training

## Placing a “Sticky Note” on the Chart

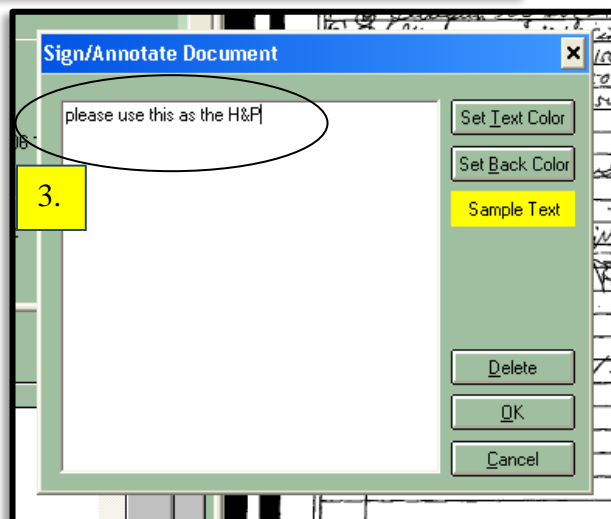
- ✎ Please note: If you reject a missing document; for example, an H&P because you want to use the H&P you entered in a Progress Note, you need to put a “sticky note” stating this in the Progress Notes where you wrote the H&P. This will be permanently placed and viewable in the chart. Any notes you type in the box you receive when you reject the deficiency are only seen by the analyst and is not permanently placed in the chart.

1. Select the page from the medical records you want to place the sticky note on. (it is selected when you can see it in the right-hand pane.
2. Then click on “add sticky”

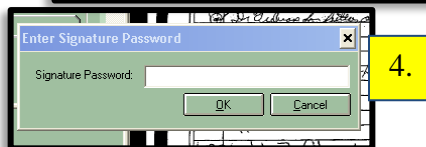


3. You will then see this window open.

Type your note in this box.  
(remember, this will be viewable on the chart). Then click “ok”.



4. You will then get a signature box.  
Type in your 5 digit logon (you will only need to do this the first time you sign) and select “ok”.



5. You will now see your sticky note on the page to your right. If you left click and hold on that box, you can drag it to where you want to place it on the page.