

**USAMITC
ESSENTRIS™ INSTRUCTOR
TRAINING GUIDE**



NURSE

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Preparation for Delivery

This Instructor guide is designed to provide the instructor for the nurse training all the materials required to teach the class.

Materials Needed for Class

- Training Guide
- 10 to 12 computers with Essentris loaded and tested
- Class attendance roster
- Initial Passwords for all users
- Course evaluation
- Skills check sheets (one per student)

Tasks to be completed prior to class

- Verify that all computers are functional
- Verify that the overhead projector works
- Verify that the classroom is the appropriate temperature
- Lay out all handouts one at each terminal
- Provide each Desk (student) a test patient.

Tasks to be completed at the end of class

- Ensure that all students signed in
- Pass out the class evaluation forms, to be filled out before the student leaves. Make sure there is a comment for any score of 3 or below
- Make sure all skills assessment check lists are completed

Duration	Essentris Overview	Instructor Notes
	Location of: Restrooms: Fire Escapes: Exits: Cell phones pagers: Off or on Vibrate Breaks:	The instructor will fill in this section.
	Introductions	
	Instructor and students exchange relevant information	
	Subject of the class	
	<p>The class will cover the basic functionality of the Essentris Inpatient Records System as it applies to the nursing staff. Training will focus on specific patient care activities that nurses are required to document in Essentris.</p> <p>Duration: This class will be divided into four 50 minutes blocks of instruction</p>	

Duration	Description of the Training	Instructor Notes
	This class will not teach all the functionality of Essentris. Additional details and functions will be taught in sustainment training as needed. The class will be divided into platform demonstrations followed by hands-on practice. The instructor will demonstrate a task and then allow time for any questions. This will be followed by a hands-on practice session with the students performing the task and the instructor providing assistance as needed. At the end of the training, a skills assessment check sheet will be completed as well as a course evaluation.	Fetal Monitoring will only be covered if the students have that capability on their unit.
	Training Goal	
	Provide students with the required information and skills needed to complete the documentation of patient care in Essentris.	
	Terminal Learning Objective	
	The student will demonstrate the ability to use the information provided in this class to complete the documentation of standard nursing procedure in Essentris.	
	Learning Objectives	
	<ol style="list-style-type: none"> 1. Demonstrate the skills necessary to navigate within Essentris. 2. Describe Security Features. 3. Understand the five (5) major applications of Essentris. 4. Effectively document clinical data on Essentris Flowsheets. 5. Demonstrate an understanding of the Order Entry functions in Essentris. 6. Demonstrate the ability to document clinical notes on patients in Essentris. 7. Demonstrate the ability to add and update the problem list. 	

Duration	System Description	Instructor Notes
	Essentris is an inpatient medical records system that automates inpatient treatment documentation. It has the capability to connect to external monitoring devices such as mother/baby fetal monitoring and EKG machines. Essentris also receives information (ADT, Lab data) from external systems such as CHCS.	
	System Benefits	
	<ul style="list-style-type: none"> • Replaces the handwritten chart • Allows multiple users to simultaneously access patient information • Reads data from bedside devices and other systems (Lab, ADT) • Calculates IV Drips, I&O, etc. • Data is stored electronically for future retrieval 	
	Areas of Teaching	
	Logging into Essentris Keyboard Short Cuts The Major Applications of Essentris Flowsheets <ul style="list-style-type: none"> • Vital Signs Flowsheets • Fluid I&O Flowsheets • Medication Flowsheets • Lab Entry Flowsheets • Treatment Flowsheets Administration (ADT and Orders Entry) Notes & Interdisciplinary Care Plans Review Screens Status Boards Admitting, Discharging and Transferring a Patient	

Duration	Logging into Essentris	Instructor Notes
	<ol style="list-style-type: none"> 1. Click on the Essentris icon and wait a couple of seconds for program to locate the server 2. Enter your assigned username (your three initials/maybe number) press the tab-key and enter your password. 3. Click on change password. Then type in your username, old password and new password (at least 8 characters). <p>Once password setup is complete you will need to log into Essentris again.</p>	<p>Tell the students not to start any of the other programs while Essentris is loading because if you start another program Essentris will stop trying to locate the server.</p>
	Key Board Short Cuts	
	<p>Navigation Keys: [Alt] and [Ctrl] – These keys are used in combination with other keys to provide keyboard access to the menu bar and shortcuts. [Enter] Key- In many circumstances, the [Enter] key must be pressed for data to be entered into a cell or field.</p> <p>[Tab] Key – In windows containing fields (such as dialog boxes), the [Tab] key moves the cursor forward to select the next field. In Flowsheets, the [Tab] key moves the cursor forward to the first row of the next section.</p>	

Navigation Keys	
	<p>[Shift] [Tab] – In windows containing fields (such as dialog boxes), the [Shift] [Tab] key moves the cursor backwards to select the previous field. In Flowsheets the [Shift] [Tab] moves the cursor backwards to the last row of the previous section.</p> <p>Directional [Arrows] – The Directional Arrow keys move the cursor between the rows and columns on the Flowsheets and may also be used for menu bar and choice navigation.</p> <p>[Page Up] Key - The [Page Up] key moves the cursor up one display page.</p> <p>[Page Down] Key - The [Page Down] key moves the cursor down one display page.</p> <p>[Space Bar] Key – The [Space Bar] key with the [Enter] key deletes data from a cell on Flowsheets.</p>
Essentris Security	
	<p>Your password in Essentris is the same as your signature. It should not be given to anyone. If it is compromised the users are required to notify the system administrator as soon as they discover that the password has been compromised so the password can be deactivated.</p>
Major Applications of Essentris	
	<p>Essentris has five major applications and several sub applications. The major applications are:</p> <ul style="list-style-type: none"> • Flowsheets • Administration (ADT & Orders) • Interdisciplinary Notes & Care Plans

Duration	Major Applications of Essentris	Instructor Notes
	<ul style="list-style-type: none"> • Review Screens • Status Boards 	<p>Note: The care plan area can be used for interdisciplinary plans of care to assist the hospital meet JCAHO guidelines.</p>
	Patient Control Screen	
	<p>The main screen of Essentris is the Patient Control Screen. Based on the user's system configuration this is the first screen that will be displayed. It has the Title Bar, Menu Bar, Patient Header Bar and Standard Tool Bar. Below these are the Application Bar, Unit Bar, Application Display and Status Bar.</p> <p><u>Application Bar</u> – Lists all the major applications and sub applications. Everything that is listed in the Application Bar can also be accessed via the Menu Bar and by right clicking the mouse.</p> <p><u>Unit Bar</u> – Lists all the units that the user has access to view.</p> <p><u>Application Display</u> – Shows the patients on the selected unit by bed number. The Application Display is auto set for bed number but can be sorted by any category i.e. name, fmp-ssn, admit date, attending.</p> <p><u>Status Bar</u> – Located at the bottom of the screen, displays User ID, Host Name and IP. Address, Current Time, Status of Joint Context.</p>	

Duration	Title Bar & Menu Bar	Instructor Notes
	<p>The Title Bar displays the title of the currently selected application.</p> <p>The Menu Bar is a Windows®-standard format. The menu names displayed on the Menu Bar and its drop-down menus will vary depending on the system configuration, the unit selected, and the application being used. Menu items on the menu bar are highlighted in blue when the mouse hovers over them.</p> <p>Menu Bar Selections</p> <p>File Menu – The File Menu has the following Submenus: Print Screen, Join Context, Log Out and Exit.</p> <p>Edit – The Edit Menu has the Following Submenus: Cut, Copy Right Pane, Copy Right Pane (BMP), and Paste.</p> <p>View – The View Menu has the following submenus: One Pane, To PatCtrl, To Provider List, Refresh PatCtrl, App Bar and Status Bar.</p> <p>ENV – Allows the user the ability to select the environment to work in, such as ICU or Training. By changing environments the user can access a note or template that is not available in the currently selected environment.</p> <p>Admin – This menu provides selections for all the admin functions such as Find Patient, Admit Patient, Transfer, Discharge, Lab Stats, Tracking board, and other selections based on hospital configuration.</p> <p>Flowsheets – The menu selection displays the Flowsheet selections are based on the users hospital configuration. Some examples are Vitals, I&O, Meds, Treatments.</p> <p>Notes – Displays Notes that are available in the current selected environment.</p>	<p>Tell the students the Menu Bar selections will change based on the area you are in.</p>



Duration	Title Bar & Menu Bar	Instructor Notes
	<p>Orders – Displays the order entry screen.</p> <p>Summary Screens – Essentris Summary Screens display information categorized into tabular windows and plots for a selected patient.</p> <p>Waveforms – Waveforms are graphical displays of various monitored parameters, such as Pulmonary Artery Pressure (PAP) and Arterial Blood Pressure. Bedside monitors should be used when making a medical decision.</p> <p>Tools – The tool section describes enhanced printing functions, access to CQL, Check Updates, Automatic.</p> <p>Web Links – Allows the user to access the local reference library.</p> <p>Options – Displays the various options the user has for viewing information on the screen. Some options are: Tree View, List View Font, Find Patient View Font.</p> <p>Help – The Help Menu has the following submenus: Contents, Help Topics, and About Essentris.</p> <p>Flowsheets Actions – The items in this menu will vary based on the flowsheet being viewed. Some selections are: Copy Forward, Describe Item, Enter Time, Find Row, Refresh Flowsheet and others.</p> <p>Print Special – The Print Special Menu has the following Submenus: Print, Print All Pages, Print Preview and Print Setup.</p>	





Duration	Patient Header Bar	Instructor Notes
	<p>Display Choices Patient information is displayed in all application screen headers. The display can be configured for each unit to show selected patient data. CliniComp Client Services will make configuration changes. The default display includes all choices:</p> <ul style="list-style-type: none"> Patient Name Patient Age Patient Gender Unit Bed Patient Allergies MRN Billing Number Date of Birth Admit Date Physician Military Rank 	
	Standard Toolbar	
	<p>1. One Pane/Three Pane The One Pane option extends the application pane to fill the entire screen. Select the 1 icon to change to a single pane view. One Pane/Three Pane can also be selected from the View menu. The Three Pane option restores the multiple-pane view. Users can toggle between a single workspace or pane, and multiple panes at anytime. This process will be explored further later in this class.</p> <p>2. Screen Lock Screen Lock is used to prevent others from altering or accessing information when the user is temporarily away from the workstation.</p>	<p>Show this function to the students in class so they understand the difference between One Pane and Three Pane</p> <p>Tell the students that if they leave a workstation they should lock the screen.</p>




Duration	Standard Toolbar	Instructor Notes
	<p>Patients This is a list of the most recently selected patients. Each patient name in the list retains the patient's environment and the application in which the patient was previously viewed.</p> <p>4. Recent Views This is a list of the most recently viewed application windows. The most recently viewed application is at the top of the list.</p> <p>5. Previous Screen/ Next Screen These arrows display the application screens that the user has recently accessed.</p> <p>6. Work Processes This is a drop-down list of process names. The Work Processes are listed alphabetically. Each environment can be configured with six Work Processes.</p> <p>7. ProcessSteps For each Work Process, a list of process steps such as Flowsheets, Notes, and Growth Charts are contained in the ProcessSteps list.</p> <p>8. PatCtrl Use the PatCtrl icon to return to the Patient Control screen. PatCtrl can also be selected from the View menu.</p> <p>9. ProviderList A designated provider, such as a doctor, can use the Provider List icon to return to the provider patient list from another application within Essentris.</p> <p>10. Refresh PatCtrl The Refresh PatCtrl updates the display with changes entered elsewhere in the facility.</p> <p>11. Join Context Joint Context is a single sign-on user authentication system that verifies valid users to all applications in a multi-vendor environment. [Not Used in Most AMEDD Hospitals]</p> <p>12. Help Essentris includes online Help that can be accessed by using the F1 key, the Help menu in the Menu Bar, or by selecting the question mark button on select windows and dialog boxes.</p>	


Duration	Standard Toolbar	Instructor Notes
	<p>13 Shortcut Button Six shortcut buttons can be configured to link to selected applications. (Note that the Progress Notes application <i>cannot</i> be linked to a shortcut button.)</p> <p>14. Allergy Box The Allergy Box is part of the patient header bar. Note: the allergies displayed here are not in AHLTA and the allergies listed in AHLTA are not listed here.</p>	
	Finding a Patient	
	The Find Patient function is used to locate patient's name, the physician's name or the patient's medical record number.	
	Finding a Patient Practice Exercise	
	<ol style="list-style-type: none"> 1. Select Find Patient from the Admin Menu. 2. Enter name as "LASTNAME, FIRSTNAME. The patient information must be entered correctly or the patient will not be found. 3. If patient is listed in 'archive" then proceed with admission into CHCS. 4. If patient being admitted is listed in any unit other than "archive" than he/she must be put into "archive" prior to admission in CHCS. 5. Click the OK button. 	<p>The instructor must provide the students with a patient's name.</p> <p>Inform the students Clicking the Pin Icon in the upper right part of the screen will put this window on top of all other windows.</p> <p>Note: this PIN functions differently on different screens.</p>

Duration	Manual Force Archiving of a Patient's Chart	Instructor Notes
	<p>If a patient is being admitted and the record is still in the active system, it must be archived. Follow this procedure to manually archive a patient's record.</p> <ol style="list-style-type: none"> 1. Left click on patient that you want to archive 2. Left click on "Tools" button on left tool bar 3. Left click on "CQL" button within "Tools" tool bar 4. Enter Essentris username and hit enter 5. Enter Essentris password and hit enter 6. Select #32 and hit enter 7. Enter part or whole patient name at prompt and hit enter 8. Select patient by number that you want to manually force into an archive status. Check the patient name and FMP/SSN to ensure the information is correct and then hit enter 9. Press Y or N based upon appropriate patient and hit enter 10. Select N at next prompt and hit enter 11. Select #48 to exit CQL menu and hit enter <p><i>Note: Search for patient again to ensure patient is archived</i></p>	<p>This information is provided in the event you need to force a record into the archive state.</p>


Duration	Flowsheets	Instructor Notes
	<p>Basics Flowsheets within Essentris can be configured based on hospital and unit needs. Some Flowsheet configurations are restricted by charting protocols.</p> <p>Patient data within a Flowsheet is organized into rows and columns in a grid-like format. Each row contains data items and each column represents a time interval.</p> <p><i>Source: Essentris Users Manual Page 71</i></p>	<p>There is a picture of a standard Flowsheet in the student guide. If possible show the Flowsheet on the screen.</p>
	<p>When Flowsheet bars are blue and close together the rows are collapsed. This provides more viewing area for the other rows. <u>To expand the rows click in the blue row.</u></p>	
	<p>Flowsheet Icons</p> <p></p> <p>Start Row Stop Row Markers: In standard rows, Start Row and Stop Row markers are use to draw attention to a series of columns.</p> <p></p> <p>Read Monitor: Imports data from a connected, pre-configured device such as a physiological monitor or ventilator into an Essentris Flowsheet. This is used to read the monitor one time after the button is pressed.</p>	


Duration	Flowsheets Icons	Instructor Notes
	 <p>Auto Read Monitor: Imports data from a connected, pre-configured device such as a physiological monitor or ventilator into an Essentris Flowsheet. Auto Read Monitor stays on until turned off or a pre-configured amount of time has passed.</p>	
	 <p>Annotation: This feature is used to add an annotation to a data cell. An annotation is used to provide more detailed information of an issue or event that is discrete to a specific time. An annotation should always be added if a medication is held.</p>	
	 <p>View History: This feature is used to view changes that have been made in the data cell.</p>	
	 <p>Describe Item: This feature is used to view information such as: full name, display name, data value, the user's name that stored the information and unit (if stored in the cell).</p>	

Duration	Flowsheets Icons	Instructor Notes
	<p data-bbox="480 261 579 363"></p> <p data-bbox="489 394 1455 500">Enter Time Icon (Clock): This feature is used to add a new column between configured columns on a Flowsheet or reposition the Flowsheet to a specific time.</p> <p data-bbox="480 574 585 683"></p> <p data-bbox="489 703 1409 842">Refresh Icon: This is used to refresh the screen. If other staff members are working on the same patient their saved data will appear on your screen when you refresh. *Caution, if a screen is refreshed before data is saved any unsaved data will be lost.</p> <p data-bbox="489 862 602 987"></p> <p data-bbox="489 992 1434 1094">Store (Save) Icon: This feature is used to save or store your data. If the icon is grayed out as shown here there is no data available to save.</p>	

Duration	Flowsheets Navigation	Instructor Notes
	<p style="text-align: center;">Navigation Icons</p>  <p>The Navigation Icons are located on the right side of the Flowsheet Navigation Menu. The key icons are NOW, PREV and NEXT. The icons are in addition to horizontal scrolling.</p> <p>NOW Icon Click the Now icon to position the Flowsheet in the most recent time column.</p> <p>PREV Icon Use the PREV icon to move the Flowsheet display one page of data back in time. The PREV icon is grayed out when there are no previous pages.</p> <p>NEXT Icon Use the NEXT icon to move the Flowsheet one page forward in time. The NEXT icon is grayed out when there are no later pages.</p> <p>Scroll Bar The Scroll Bar can function similarly to the PREV and NEXT icons. Click on the right end of the scroll bar to move the display forward in time one page, or click on the left end of the scroll bar to move the display backwards in time one page. Click and hold down the mouse key on the left or right end arrow to scroll continuously through the Flowsheet.</p> <p>Scroll with the Mouse The mouse wheel can be used to scroll up and down within any flowsheet.</p>	

Duration	Vital Signs Flowsheets	Instructor Notes
	<ol style="list-style-type: none"> 1. Click on Flowsheets, select Vitals 2. Click on a data cell to enter data i.e. Temp, HR, NBPs/d. type in the desired number 3. Store the data by pressing the Enter Key, by moving down one cell with the arrow keys, or by clicking the Store Icon <p><i>Note: Clicking (Ctrl+s) will also bring up the store screen as well.</i></p>	
	Entering Time in a Flowsheet	
	Use the Enter Time feature to add a new column between configured columns on a flowsheet, or to reposition the flowsheet at a specific date/time column.	
	Entering Time in a Flowsheet Practice Exercise	
	<ol style="list-style-type: none"> 1. Select Enter Time from the Flowsheet Actions on the Menu Bar or Click the Enter Time Icon 2. Click on the date or time on the Enter Time dialogue box. 3. Modify the value using the small arrows 4. Click the large down arrow to select a date from a drop-down calendar 5. Click Ok 	<p>The instructor should demonstrate this to the students before they complete the exercise.</p> <p>The instructor should tell the students what to enter.</p>

Duration	Vital Signs Flowsheets	Instructor Notes
	<p>Erasing Data To erase data before it is stored and the cell is still selected press the Space Bar, otherwise select the Cell then press the Space Bar.</p> <p>Modifying Data</p> <ol style="list-style-type: none"> 1. Click on the cell to be modify 2. Modify the data 3. Select the Store icon. <p>Making Annotations</p> <ol style="list-style-type: none"> 1. Place the cursor in a cell and right click. 2. Select annotation or the annotation Icon.  A box will open. 3. Type the note. 4. Once the Note is completed, click OK or press the Enter key. This will place an asterisk in the cell. <p>To read an annotation right click and select annotation. To see who wrote the annotation right click, then select view edit history.</p>	<p>The instructor should demonstrate Erasing Data, Modifying Data and Making Annotations in class.</p>


Duration	Using Event Markers	Instructor Notes
	<p>Events are charted in the Plot section of the Vitals Flowsheet. They are useful for displaying additional information about time-sensitive events or monitoring changes in data trends.</p> <p>To add an event marker:</p> <ol style="list-style-type: none"> 1. Place cursor in the appropriate time column of the Plot section; the field will become highlighted and a drop-down list will appear. 2. Select an event from the pick list or free type an event into the column. 3. Press the Enter key. <p>The event will display vertically in the column. Only one event can be entered in a single column.</p> <p>To document multiple events for a given time, it is necessary to add <u>additional time</u> columns, spaced 1 minute apart for each event. Use the  icon to insert new time columns.</p> <p>To use the Add Row feature add an optional row or group of rows to standard Flowsheets i.e. Circulation Check, PCA etc.</p> <ol style="list-style-type: none"> 1. Select a date and time column for Start Row marker. 2. Click on the Flowsheets Actions menu bar and select Add Row option or Right click on an existing row and select Add Row from Shortcut Menu. <p>To add a single row from Add Row Dialog box click on row name in Optional Items window and click the Add button. To add a group of rows click on group name in Add Group window and click Add button.</p>	


Duration	Vital Signs Flowsheets Practice Exercise	Instructor Notes
	<p>Select the test patient that was provided at the start of the class and enter the following information in the appropriate box.</p> <p><i>Note: If your computer has timed out, login again</i></p> <p>Enter the following information in the appropriate box.</p> <p>Temp 99.7 BP 130/70 Resp 18 Make an annotation that the patient “appeared anxious” Change the Temp to 100.1 Store the information</p>	
	Fluid Balance (I&O) Flowsheet	
	<p><i>Source: Essentris Users Manual</i></p> <p>Use the Fluid Balance (or Intake and Output) flowsheet to chart intake and output values. Intake and output totals are automatically calculated to show fluid balance for patients. The Fluid Balance (I&O) Flowsheet contains the following specialized features:</p> <ul style="list-style-type: none"> • Summary Box • Daily Summary section • Totals Section • Weight Section • Intake and Outputs Section <p>The intake and output sections of the flowsheet can be configured with subsections to further organize fluids.</p>	



Duration	Fluid Balance (I&O) Flowsheet	Instructor Notes
	<p>Intake and output fluids are sorted into categories within the sections of the flowsheet. The categories that are commonly used are: Output, IV, Drug, TPN, Meds, Oral, NG, Crystalloid, Colloid, Blood, Urine, Chest Tube Output, Blood Outputs, and Irrigations. As fluids are assigned, they are sorted and placed in the flowsheet using the criteria in the order specified below.</p> <ol style="list-style-type: none"> 1. By Fluid – Intake or Output 2. By Fluid Category 3. By Fluid Name in alphabetical order 4. By Order of Time Assigned 	
	<p>Intake Flowsheet row typically display the following information:</p> <ul style="list-style-type: none"> • Name • Site • Label Comment • Rate at Date / Time of Active Cell • Volume (in ml) 	
	Fluid Balance (I&O) Flowsheet Practice Exercise	
	<p>To Add IV site:</p> <ol style="list-style-type: none"> 1. Select the I&O Flowsheet. 2. Click on desired data cell. 3. Right click, select change site. 4. Select appropriate IV site. 5. Click OK. The IV site will appear on the left screen in the same box as IV solution. 6. To Change IV Rate place cursor in time block desired and press the (Shift-key+@). simultaneously) and then enter the new flow rate. 7. Press enter and new rate will appear on screen next to IV solution. 8. To save your data click on the storage disc. 	


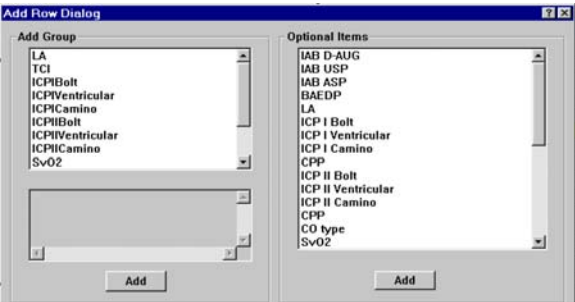
Duration	Fluid Balance (I&O) Flowsheet Practice Exercise	Instructor Notes
	<p>To Annotate Hanging a New Bag of the IV Fluid</p> <ol style="list-style-type: none"> 1. Click on the desired cell that you want to document hanging a new bag. 2. Press the (Shift-key+^ simultaneously). 3. Enter amount of fluid (500 or 1000). 4. Press the Enter Key. 5. Click on the Store icon to save your data. 	
	<p>Special Keys:</p> <ul style="list-style-type: none"> • @ = Rate [Shift 2], type rate value, and press [Enter] • ~ = Site [Shift ~] and press [Enter] • ^ = Hang a new bag [Shift 6], type volume value, and press [Enter] • Insert Key = Enters the amount of IV fluid delivered since the last entry of IV fluid. Daily weights are documented at the bottom of the Flowsheets. 	
	Medication Flowsheet (Medication Administration Record)	
	<p>Use the Medications Flowsheet to chart medication orders. Orders can be delivered, discontinued, held, or rescheduled on the Medications Flowsheet. Remarks can also be created to note important information about a medication order.</p> <p>The Medications Flowsheet is divided into sections that are configurable to the requirements of each hospital. Sections of medication orders can be configured in the following two ways:</p> <ol style="list-style-type: none"> 1. According to medication schedule For example: PRN, Scheduled, STAT 2. According to medication type For example: Antibiotics, IV Fluids, Pain Medications <p>Flowsheet Box colors</p> <ul style="list-style-type: none"> Green Box – Medication is due, but not past due Red Box – Medication is past due 	<p>There is a picture showing the Green and Red boxes in the student guide</p>

Duration	Medication Flowsheet (Medication Administration Record)	Instructor Notes
	<p>Medication rows can display the following information:</p> <ul style="list-style-type: none"> Name of medication Route Dosage Frequency Schedule Markers <p>Order Comment - This comment originates in the Order Editor and is a permanent part of the order. It cannot be altered.</p> <p>Remarks - Use Medication Remarks to display information that is pertinent to a medication. A Remark can be edited or deleted (unlike an Order Comment that cannot be edited or deleted).</p>	
	Delivery Comment	
	<p>Delivery Comment - A comment can be placed in the data cell for the delivered medication. Select the data cell and enter the comment. Comments must begin with an alpha character. The comment appears on the second line of the data cell, under the dose line.</p> <p><i>Source Essentris Users Manual</i></p>	

Duration	Medication Flowsheet (Medication Administration Record)	Instructor Notes
	<p>Giving a Medication</p> <ol style="list-style-type: none"> 1. Select a data cell for medication delivery 2. Select Give Med from the Flowsheet Action drop-down menu on the Menu Bar or select the Give Med icon.  	<p>Tell The students the following:</p> <ol style="list-style-type: none"> a. You can also right click on the data cell and select Give Med from the shortcut menu. b. A delivery marker is displayed in the selected data cell and is displayed as either a check mark or a dose delivered. c. The dose ordered can be keyed-in. The check mark appears when the keyed-in dose matches the ordered dose, including character spacing and case. <p>The check mark function is configurable.</p>

Duration	Medication Flowsheet (Medication Administration Record)	Instructor Notes
	<p>Hold Medication Delivery Use the following steps to hold medication</p> <ol style="list-style-type: none"> 1. Select the data cell in a time column for the medication held. 2. Select Hold Med from the Flowsheet action dropdown menu or select the Hold Medication icon.  	<ol style="list-style-type: none"> a. The user can right click on the data cell and select Hold Med from the shortcut menu. b. Hold orders will display "Held" in the medications Flowsheet time column. c. If a medication is held, an annotation must be entered.
	Discontinue a Medication	
	<p>A medication row that is discontinued drops off of the flowsheet screen after a specified time period. A medication row that is discontinued is discontinued on every flowsheet the medication appears on. For sites with a pharmacy interface, external orders can be discontinued from a flowsheet. This option is configured by CliniComp Client Services</p>	

Duration	Treatment Flowsheets	Instructor Notes
	Treatment Flowsheet are used to document such procedures as General Education, Hygiene and Teaching of Safety procedures.	
	Treatment Flowsheets Practice Exercise	
	<p>To access the Treatment Flowsheets</p> <ol style="list-style-type: none"> 1. Click on Flowsheets, select Treatments. 2. The highlighted boxes indicate when a treatment is due. 3. Put an X, (completed) or noted in the data cell. You can select all the boxes one at a time and store them together by using the store disk icon. 4. Once you have completed this, click the Store Icon. Your username will appear in the data cell. 	
	Modifying a treatment schedule time	
	<p>To modify a treatment schedule time:</p> <ol style="list-style-type: none"> 1. Click in the desired cell 2. Right click and select the action. Available options are Set Frequency, Reset 3. Schedule, Set Schedule and Delay Schedule. 4. Insert a new time column using the  icon when needed to document that a treatment was given. 	
	Making an Annotation	
	<p>To Make an Annotation</p> <ol style="list-style-type: none"> 1. Place cursor in cell 2. Right click select annotation or select the Annotation icon  3. Type your annotation 4. Click OK or press the Enter key This will place an asterisk in the cell. 	




Duration	Adding a Row to a Treatment Flowsheet	Instructor Notes
	<p>Rows can be added to a Treatment Flowsheet. Treatments that the user is required to completed may not be on the default Flowsheet. Those treatments can be added to the Flowsheet.</p>	
	<p>To add a row to a treatment Flowsheet do:</p> <ol style="list-style-type: none"> 1. In the Treatment Flowsheet select an empty cell and right click the mouse. 2. A pop-up selection box will appear, Select Add Row from the selection list 	
	<p>Another pop-up selection box will appear. You can select a group of treatments or an individual treatment.</p>  <ol style="list-style-type: none"> 3. Select an individual treatment. 4. Click the Add button. <p>The treatment is added to the treatment Flowsheet.</p>	

Duration	Laboratory Flowsheets	Instructor Notes
	<p>Use the Laboratory Entry Flowsheet to chart the results of lab tests. Data can be entered directly in the Laboratory Entry Flowsheet, or information can be sent through an interface to a laboratory computer system. The Laboratory Entry Flowsheet contains the following specialized features:</p> <p>High/Low Flags Toggle Tooltip</p> <p>High/Low Flags High and low flags can be configured to indicate when lab results have values outside a specified normal range. A value that is higher than the normal range is indicated with an H and a value that is lower than the normal range is indicated with an L. These flags are only displayed for data received through an interface.</p> <p>Toggle Tooltip The Toggle Tooltip feature displays a high/low flag, if any, followed by the normal range for the lab test.</p>	

Duration	Orders Entry Module	Instructor Notes
	<p>Essentris Order Entry is a permissions-driven application for placing orders, communicating orders, tracking orders, and maintaining an audit trail of orders. Currently Lab, Pharmacy and Radiology orders that are entered into Essentris are not sent to CHCS for actual order completion and resulting. This means that some orders must be entered into CHCS. Those types of orders are Laboratory, Pharmacy and Radiology orders. Once the Laboratory, Pharmacy and Radiology orders are entered in CHCS and completed, the results are sent back to Essentris.</p>	<p>Make sure the students understand the following:</p> <p><u>Order Entry is completed by the physician. It is taught here because there may be a rare occasion that requires entry of verbal orders.</u></p>
	<p>Medication orders are entered into Essentris. The pharmacy process can be accomplished in one of two ways. Either the Pharmacy can receive the order on its Essentris printer and then transcribe the order into CHCS, or the pharmacy can receive the orders electronically onto a Pharmacy Status Board. Either way, the pharmacy staff must still enter the order into CHCS.</p>	
	<p>Some hospitals have the ability to send information to other external systems. For instance, WRAMC sends dietary orders to their diet system. Check with your local instructor for any specific interfaces at your facility.</p>	

Duration	Standard Order Sets	Instructor Notes
	<p>Within Essentris, order sets can be established to promote speed of entry and to support clinical pathways/best practices/practice guidelines. A Standard Order Set is a named collection of orders. Standard Order Sets are used to enter a group of orders which are commonly used together as part of a standard treatment regimen. Standard Order Sets are typically used either as an all-inclusive group of orders with the entire group assigned to the patient, or cafeteria style where individual items are assigned a la carte. Order Sets are primarily done by the physicians, but can also be used by other services such as Nursing for an order set of Nursing Initiated Orders for admission protocols. This training will cover how to pick an order set but you will need to work with your local administrator to build specific order sets.</p>	<p>Note: Resource Essentris Users Manual</p>
	Accessing Order Entry	
	<p>Order Entry can be accessed from the Application Bar or the Menu Bar. To access Order Entry, a patient must be selected and the active unit must be an Order Entry unit. On the Application Bar the Order Entry button is located in the Orders pane.</p>	
	<p>Some Order Entry actions can be invoked directly from a Flowsheet, such as placing a New Order and DCing an existing order (available Flowsheet capabilities depend on Flowsheet configuration).</p>	
	<p>Nurses will enter nursing initiated orders (NIO's) and Acknowledge/verify physicians orders and enter minimal verbal orders based upon local policy. This section will guide the student through entering a medication order.</p>	

Duration	Order Entry Practice Exercise	Instructor Notes
	<ol style="list-style-type: none"> 1. Select the Order Entry button on the Application Bar. 2. Select the New icon. 3. Select the category of the Order, which for this exercise will be medication (you can also type the first letter of the category). 4. Click OK. <p>Orders can have subcategories as well. The Sub Categories will appear once the Category has been selected.</p> <p>Once the category is selected the Order Editor appears.</p> <ol style="list-style-type: none"> 5. Select the Order time from the drop down. 6. Select the Start time from the Start Time drop down list. 7. Select the Stop time from the Stop Time drop down list. 8. Select a medication from the medication drop down list (Name field). 9. Select the Dose field and enter the dose. 10. Select the Route field and enter the Route. 11. Select the Priority field and enter the Priority. 12. Select the provider from the Provider drop down list. 13. If it is a Verbal Order, <u>Check the Verbal/Telephone Read-Back Box.</u> 14. Click the Check icon to store the order. 	<p>Make sure the students understand the following:</p> <p><u>Order Entry is completed by the physician. It is taught here because there may be a rare occasion that requires entry of verbal orders.</u></p> <p>Order Editor has numerous drop down selection lists. Some of these lists are templates which the local hospital develops. One example is the pharmacy choice list. It is based upon the local hospitals formulary.</p> <p>Note – This is based upon local formulary as noted above. Your instructor will tell you what to select.</p>

Duration	Acknowledge an Order	Instructor Notes																						
	<p>Acknowledge an Order is typically associated with the RN. After the physician completes the medication order and signs it the order goes into a pending status. The ACK Column is blank indicating that the order has not been acknowledged, as shown below:</p>  <table border="1" data-bbox="499 418 1404 521"> <thead> <tr> <th>ENT</th> <th>ACK</th> <th>SIGN</th> <th>Pending DC</th> <th>DC ENT</th> <th>DC ACK</th> <th>DC SIGN</th> <th>Start Time</th> <th>Stop Time</th> <th>Name</th> <th>Dose</th> </tr> </thead> <tbody> <tr> <td>SGD</td> <td></td> <td>SGD</td> <td></td> <td></td> <td></td> <td></td> <td>1400 4 Mar 2002</td> <td></td> <td>ACETAMINOPHEN TABS</td> <td>325 MG</td> </tr> </tbody> </table>	ENT	ACK	SIGN	Pending DC	DC ENT	DC ACK	DC SIGN	Start Time	Stop Time	Name	Dose	SGD		SGD					1400 4 Mar 2002		ACETAMINOPHEN TABS	325 MG	
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SGD		SGD					1400 4 Mar 2002		ACETAMINOPHEN TABS	325 MG														
	<p>The nurse completes the following steps to acknowledge the order:</p> <ol style="list-style-type: none"> 1. Select the row with the order that needs to be acknowledged. 2. Right click on the selected row and select Acknowledge. <p>Three asterisks appear in the ACK column of the selected row, as shown below:</p>  <table border="1" data-bbox="499 727 1404 846"> <thead> <tr> <th>ENT</th> <th>ACK</th> <th>SIGN</th> <th>Pending DC</th> <th>DC ENT</th> <th>DC ACK</th> <th>DC SIGN</th> <th>Start Time</th> <th>Stop Time</th> <th>Name</th> <th>Dose</th> </tr> </thead> <tbody> <tr> <td>SGD</td> <td>***</td> <td>SGD</td> <td></td> <td></td> <td></td> <td></td> <td>1400 4 Mar 2002</td> <td></td> <td>ACETAMINOPHEN TABS</td> <td>325 MG</td> </tr> </tbody> </table>	ENT	ACK	SIGN	Pending DC	DC ENT	DC ACK	DC SIGN	Start Time	Stop Time	Name	Dose	SGD	***	SGD					1400 4 Mar 2002		ACETAMINOPHEN TABS	325 MG	
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	<p>Store the order</p> <ol style="list-style-type: none"> 3. Once the order is acknowledged, the initials of the nurse storing the order are displayed in the ACK column as shown below.  <table border="1" data-bbox="499 984 1404 1102"> <thead> <tr> <th>ENT</th> <th>ACK</th> <th>SIGN</th> <th>Pending DC</th> <th>DC ENT</th> <th>DC ACK</th> <th>DC SIGN</th> <th>Start Time</th> <th>Stop Time</th> <th>Name</th> <th>Dose</th> </tr> </thead> <tbody> <tr> <td>SGD</td> <td>SGN</td> <td>SGD</td> <td></td> <td></td> <td></td> <td></td> <td>1400 4 Mar 2002</td> <td></td> <td>ACETAMINOPHEN TABS</td> <td>325 MG</td> </tr> </tbody> </table>	ENT	ACK	SIGN	Pending DC	DC ENT	DC ACK	DC SIGN	Start Time	Stop Time	Name	Dose	SGD	SGN	SGD					1400 4 Mar 2002		ACETAMINOPHEN TABS	325 MG	
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Duration	Clinical Notes	Instructor Notes
	<p>The Notes Application allows the user to create, edit and navigate clinical notes as well as the ability to add and edit a care plan.</p> <p>Notes can be configured based on hospital or individual inpatient unit requirements. There are many different types of Notes within Essentris. Some of these include MD Progress Note, Nursing Assessment Note, Occupational Therapy Note, Discharge, etc.</p>	<p>a. The configuration of Essentris Notes will be based on the latest AMEDD guidelines. No new data elements will be added to the Essentris data base without approval of the AMEDD.</p> <p>b. Show the students how to pull Notes from other Environments.</p>
Accessing Clinical Note Practice Exercise		
	<ol style="list-style-type: none"> 1. Select the Notes from the Application menu on the left side of the screen or from the menu bar. 2. Select the New Note Menu icon. <p>The Notes Selection Box will appear.</p> <ol style="list-style-type: none"> 3. Select the appropriate Note (Admission Nursing Assessment or Progress Note). 4. Click OK. <p>If the Clinical Note requires a Topic, the Notes Topics Window will appear. (This Note does not require a topic so you will not see this screen for the training exercise.)</p> <ol style="list-style-type: none"> 5. Select the Source of Entry Drop Down list and select _____ 6. Select Subject of Note Drop Down list and select _____ 7. Select the Text of Note, Enter _____ 	<p>The instructor will need to provide the drop down lists selections.</p>

Duration	Edit a Note	Instructor Notes
	<p>From the Notes Action menu, select the Edit Note option. A validation Dialog box will appear. Enter your user name and password. The note opens in the edit mode. The editable fields in the note are identified by thick borders. Once you have edited the note use the Close Note menu selection to close the note. Select Close Note from the Notes Menu. You can also click the X in the upper right corner to prompt for a username/password box.</p> <p>A validation Dialog box will appear. Enter your Name and password. Click OK.</p>	
	Copy Forward an Existing Note	
	<p>Essentris has the ability to copy a patients' note forward. If a patients' condition is unchanged or has shown minor changes, the Note from the last shift can be copied forward and changes made an stored as a new note.</p> <p><u>Extreme caution must be used when using this functionality. The Note that is copied forward must have an update on the patient's current condition after the note is copied forward.</u></p> <p>To copy a note forward:</p> <ol style="list-style-type: none"> 1. From the Notes menu select the Note you want to copy forward. 2. Right click on the selected Note and select "Copy Forward" 3. Enter the required information 4. Store the Note. 	

Duration	Interdisciplinary Care Plans	Instructor Notes
	<p>Care Plans are preconfigured guidelines, which can be tailored to the needs of a particular patient. When the Care Plan function is entered, the Active Problems window is the default display. Toggle to view All Problems by selecting the All/Active Problems option in the Care Plan menu. Use the Care Plan menu to assign and update Care Plan problems.</p>	<p>The care plan area can be used for interdisciplinary plans of care to assist the hospital meet JCAHO guidelines.</p>
	Interdisciplinary Care Plans Practice Exercise	
	<ol style="list-style-type: none"> 1. Select the New Problem / Assign Problem Icon. 2. Select a problem from the Topic list. 3. Enter a Date and Time, click OK. 4. Enter the Note and select Store Changes. <p style="padding-left: 40px;">A validation Dialog box will appear.</p> <ol style="list-style-type: none"> 5. Enter your Name and password. 6. Click OK. 7. Select Close Note from the Care Plan Note Menu. 	
	Status Boards	
	<p><i>Source CliniComp Essentris Users Manual Ver. 1.4.2</i></p> <p>The Status Board application retrieves patient information and displays it in a summary chart. Columns can be configured to display various types of patient information. The columns can be configured to sort the various displays. The status board can determine the physical location and status of a patient from any physical location and any Essentris PC within the health care facility. Patient information is dynamically updated. Some columns can be edited, however most are not.</p>	

Duration	Summary Screens	Instructor Notes
	<p>The Essentris Summary Screens display information categorized into tabular windows and plots for a selected patient. Each summary screen covers a specialized clinical aspect of patient care. The user is provided with a choice list of screens to select for viewing.</p> <p>To access the Summary Screens, perform the following steps:</p> <ol style="list-style-type: none"> 1. Select the patient to view. <p>Select the Summary Screen tab from the Application Bar and click on Summary Screen.</p>	
	Admitting a Patient	
	<p>Admitting a patient is a Patient Administration Division (PAD) function. It is taught in this class so you will understand how it is done. If this is not done correctly Laboratory, Radiology, or Pharmacy functions cannot be documented correctly for the patient. Also, the likelihood of duplicate charts that cannot be merged is increased if the person who manually admits the patient enters incorrect or misspelled information.</p>	
	Admitting a Patient Practice Exercise	
	<p>New patients can be admitted to Essentris by using the Admit option. To admit a patient, follow the steps below,</p> <ol style="list-style-type: none"> 1. Select the Admit Tab in the Applications Menu 2. Enter the required information in the Bed/Unit Fields 3. Enter the required information in the Enter Admission Data 4. Enter the required information in the Enter Admission Data fields 5. Click on the OK button to complete the Admission. Validation Dialog pop-up will appear 6. Enter your user name and password 7. Click OK The PatCtrl pop-up will appear 8. Click OK 	

Duration	Discharging a Patient Practice Exercise	Instructor Notes
	<p>To discharge a patient complete the following steps:</p> <ol style="list-style-type: none"> 1. Select the patient to be discharged. 2. Select [Discharg] from the Admin menu. A pop-up will appear asking for your name and password. 3. Enter your name and password. 4. Click OK. <p>A Dialog box will appear asking if you want to Discontinue All Active Orders.</p> <ol style="list-style-type: none"> 5. Click Yes, to complete the discharge. 	<p>Note: You can also do this by dragging and dropping the person into the Discharge environment</p>
	Transferring a Patient	
	<p>In Essentris, it is possible to transfer patients from one bed to another within the same unit or between units.</p>	
	Transferring a Patient Practice Exercise	
	<ol style="list-style-type: none"> 1. In the Application Display select the Patient you want to transfer. 2. Select Transfer from any of the Admin menus and perform the following steps: Enter the required information in the Transfer window. 4. Once the appropriate information is entered click the Transfer Arrow. The password Dialog Box will appear. 5. Enter your user name and password. 6. Click Yes to Discontinue Active Orders 	<ol style="list-style-type: none"> a. You cannot transfer a patient into an occupied bed or to a unit that is inaccessible. b. It is usually a good idea to make sure there is a bed available where the patient is to be transferred. c. This can be accomplished by simply dragging and dropping the selected patient onto the PatCtrl screen

Duration	Menu Selections	Instructor Notes
	Help Menu	
	On each screen in the middle right of the screen there is a help button that contains an online manual. Help topics can be accessed by clicking the index tab located on the upper left side or by typing in a question.	
	Tools	
	The tools menus has the following selections: Enhanced print options, Access to CQL, Check Updated, an automatic update feature and change password.	
	Change Environment	
	To change the environment: 1. Right click on the patient's name and select ENV. 2. Slide the mouse to the right. 3. Pick the desired environment for viewing notes.	
	Flowsheets and Orders Your Environment	
	This can be used if the patient was admitted to the Emergency Department and transferred to one of the units. If the ED did not finish a note and they look the patient up after the patient has been transferred they will get the previous unit's notes. To see the ED notes they would have to change their environment.	