CHCS II Provider Advanced Skills Lesson Plan

COMPOSITE HEALTH CARE SYSTEM II

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Preparation for Delivery

The lesson plan is designed to teach Providers advanced CHCS II skills at each MTF.

Materials Needed

- ✓ CHCS II Sign-In Roster (Electronically or Paper Form)
- ✓ CHCS II Provider Advanced Skills Course Lesson Plan
- ✓ CHCS II Provider Advanced Skills Presentation
- ✓ CHCS II Provider Advanced Skills Student Guide (one per seat)
- ✓ CHCS II User Manual (one per classroom)
- ✓ Latest Release Notes
- ✓ CHCS II Evaluation Form (one per student)

Note: *Training items are to be left in the classroom. The Evaluation Form is to be completed by each student and left with the instructor upon completion of the class.*

Tasks To Be Completed Prior to Class

Set-up classroom with one workstation per student and one for the instructor, each workstation loaded with the following:

- ❒ CHCS II Training System (CTS)
- ❒ CHCS II Provider Course presentation (instructor workstation only) updated with instructor name and current date.

Tasks To Be Completed at the End of Class

Distribute the evaluation forms and collect them from the students before they leave the classroom. Ensure that users include comments for any line item rated “3” or lower.

DURATION	TRAINING ACTIVITES	INSTRUCTOR NOTES
INTRODUCTION		
	WELCOME/LOGISTICS ***Next Slide*** ➢ Logistics o Room location in building, fire escape routes, restrooms, kitchen facilities, smoking area ➢ Workstations ➢ Instructional material ➢ Pagers and cell phones o Off or on vibrate mode ➢ Breaks ➢ Resources o Indicate how to obtain additional information regarding additional support on the system. ➢ Parking Lot	❑ **Slide 1: CHCS II Provider Advanced Skills Course**
	Introductions Instructor and students exchange personal introductions, providing relevant background information.	❑ **Slide 2: Logistics and Introductions**

CHCS II OVERVIEW

What is CHCS II?

- [ ] **Slide 3: What is CHCS II?**

Next Slide

CHCS II is a computer-based patient record (CPR) system selected by the Department of Defense to meet the requirements of the Military Health System.

CHCS II provides:

- A graphical user interface that networks with existing systems.
- Efficient means of creating, managing and retrieving medical records.
- Anytime, anywhere delivery of patient records to the point of care.
- Future access to military records for health studies worldwide.

Add this brief comment as a transition to next slide:

One of the greatest benefits of CHCS II is that it is an electronic patient record. Not only does this help to meet the Presidential directive for a “comprehensive, life-long medical record,” but it also eliminates some of the risks and inefficiencies of paper-based medical records.

Next Slide

Security

- ❑ **Slide 4: CHCS II Security**

Security is a crucial requirement of patient medical records.

- CHCS II security is multi-leveled and conforms to HIPAA/MHS Security standards.
- User access to patient information is based on user role.
- Roles and privileges are tied to unique user name and password.

Next Slide

Expectations/Agenda

- ❑ **Slide 5: Expectations**

Upon completion of training, service-directed expectations will be used as guidelines for each site as they ramp up to 100% productivity in CHCS II.

To accomplish this:

- 100% of designated Providers shall attend scheduled classroom training.
- 100 % of patient encounters shall be documented in CHCS II.

Next Slide

	➢ Review Class Agenda ***Next Slide***	❑ **Slide 6: Agenda**

LESSON 1: QUESTIONNAIRE SETUP/PATIENT QUESTIONNAIRES

Lesson Goal

The goal of this lesson is to enable the user to set up and run patient questionnaires in CHCS II.

Learning Objectives

Upon completion of this lesson, the user will be able to:

- ✓ Create and release a questionnaire.
- ✓ Edit an existing questionnaire.
- ✓ Change the status of a questionnaire.
- ✓ Select and use a questionnaire in a patient interview.
- ✓ Set viewing options for administering a questionnaire.
- ✓ Add a comment to a questionnaire as it is being administered.
- ✓ Edit a response in a saved questionnaire.
- ✓ Append a completed questionnaire.
- ✓ Associate a questionnaire with an encounter.

❑ **Slide 7: Questionnaire Setup/Patient Questionnaires Learning Objectives**

Questionnaire Setup

The **Questionnaire Setup** module allows the user to create and modify questionnaires. Once created, the questionnaire can be modified, copied, deleted, or marked as obsolete. If a questionnaire is marked as obsolete, the questionnaire cannot be used.

Note the following exceptions in deleting a questionnaire or attempting to use a questionnaire that has been marked obsolete:

- When a questionnaire is marked as obsolete, it cannot be used.
- When a questionnaire has been used, it is tied to a patient record and cannot be deleted.

The status of the questionnaire indicates level of development or use of a questionnaire. You can choose from three questionnaire types when setting up a questionnaire:

In Development

The new questionnaire is being created.

Ready for Use

Questionnaire is ready for use.

Obsolete

Questionnaire has been removed from circulation.

Explain:

- Allows you to create and modify Questionnaires.
- Once Questionnaires are created, you can modify, copy, delete and mark them obsolete.
  - An open encounter is not required for Questionnaires to be created or modified.
  - As you add each question, you also specify the format of the answers and enter the answers you want for each question.

Note: *With this module, you can format your answers as multiple choice (patient can only select one of the provided answers), multi-select (patient can select more than one of the provided answers), yes or no, number, and date.*

DEMONSTRATION – CHCS II TRAINING SYSTEM

DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.

Scenario 1

The Family Practice Clinic has just been brought up on CHCS II. The clinic has the patients complete the Adult Patient Questionnaire – 18 years and older each year and places the completed

Note: Questionnaires can be edited prior to marking as Done. If a questionnaire is marked Done, the user will need to Append the questionnaire (the Edit icon is

	questionnaire in the outpatient medical record. You have been asked to add this form as a Questionnaire in CHCS II for the clinic. 1. In the *Folder List* under the Tools folder, click the **Questionnaire Setup** icon. 2. On the Action Bar, click the **New** icon to create a new questionnaire. 3. In the Name field, enter: **Adult Patient Questionnaire > 18 years**. 4. In the Instructions to Display field, enter these instructions: **PLEASE COMPLETE ALL QUESTIONS BY CLICKING IN THE APPROPRIATE BOX/CIRCLE. YOUR ANSWERS CAN HELP US WITH YOUR MEDICAL CARE. WE WILL DISCUSS YOUR ANSWERS WITH YOU OR SCHEDULE ANOTHER APPOINTMENT TO DISCUSS THEM.** 5. Click the drop-down arrow next to the Level field and select **Clinic**. 6. Click the drop-down arrow next to the Owner field and select **CHCS II Test Clinic**. 7. Click the **Add** button. 8. In the **Question Test** field, add each question below, click the **Answer Type** field drop-down arrow to select the answer type, and enter each possible answer in the space provided.	***not available).***

Question	Answer Type	Possible Answers	Action
Do you have any problems or trouble with the following:	Multi Select	Vision Hearing Walking Eating Preparing meals Cleaning yourself	Add
Do you feel sad or depressed much of the time?	Yes/No	Yes No	Add
Are you experiencing emotional, physical or sexual abuse?	Yes/No	Yes No	Add
Do you have a problem with alcohol or drug use?	Multiple Choice	Yes No Not sure (Do not hit enter)	Add
Have you lost or gained more than 10 lbs without any reason in the past 6 months?	Yes/No	Yes No	Add
Do you have pain that affects your daily activities?	Yes/No	Yes No	Add
Rate the level of pain with 0 = Pain Free and 10 = Totally Disabling	Number	0,1,2,3,4,5,6,7,8,9, 10	Add
Is it hard to understand instructions from your doctor or nurse?	Yes/No	Yes No	Add
Do you have any social, religious, cultural or ethnic concerns that may affect the medical treatment we give you?	Yes/No	Yes No	Add
Do you have a living will or advance medical directive?	Yes/No	Yes No	Add
What is the date on your living will or advance medical directive? (Do not click Add)	Date	Date	Do not click Add

***Note**: Do not hit Enter after the last answer selection. Click Add for next questions. Do not click Add after the last question/answer.*

9. Click the **Save** icon on the Action Bar.
10. Highlight the Questionnaire just saved and click the **Mark Ready** icon.
11. Close the Questionnaires Setup module.

Scenario 2

The Diabetic Clinic has requested a change in their Diabetes – Each Visit questionnaire. They would like the first question to read: How well do you feel you are managing your diabetes? You will now edit this questionnaire and make the change.

1. Click **+** next to the Tools folder in the Folder List.
2. Click **Questionnaire Setup**.
3. Click **+** next to Personal.
4. Click **+** next to Questionnaires.
5. Highlight **Diabetes – Each Visit**.
6. Click the **New Version** icon on the Action Bar.
7. Change the first question to read: **How well do you feel you are managing your diabetes?**

8. Click **Save** on the Action Bar.

Scenario 3

The Diabetic Clinic has told you that they no longer use their Diabetes Follow-up questionnaire. You will now inactivate the questionnaire.

1. Click **+** next to Personal.
2. Click **+** next to Questionnaires.
3. Highlight **Diabetes Follow-up**.
4. Click **Mark Obsolete** on the Action Bar.
5. Click **Close** on the Action Bar.

Patient Questionnaires

The **Patient Questionnaires** module allows the user to administer questionnaires created in the Questionnaire Setup module. Questionnaires can be administered in a single question view or multiple question view. Once completed, the user can view, modify, and/or associate the questionnaire to a patient encounter. If associated to an encounter, the user must select Questionnaires as part of their AutoCite preferences in order to have the questionnaire as part of the patient's eSF600. Once

AutoCited, the questionnaire will populate to the S/O portion of the eSF600.

There are two options for how you use a questionnaire to collect patient information:

- Patient interview: The user enters the patient's responses into the Questionnaire.
- The patient takes the Questionnaire at a kiosk in the clinic: This enables the patient to manually enter the answers from a workstation setup in the clinic.

DEMONSTRATION – CHCS II TRAINING SYSTEM

DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.

Scenario 1

We will set the properties for the Patient Questionnaire module and administer a questionnaire to CAPT Clayton Williams.

1. Single-click on CAPT Williams' appointment.
2. Click **Patient Questionnaires** icon under Health History.
3. Click **Options** on the Action Bar.
4. Review the two options in the drop-down menu.
5. Select **Multiple Question View** for the default.

6. Click **OK**.
7. Single-click on CAPT Williams' appointment.
8. Click **+** next to Health History folder.
9. Click **Patient Questionnaires** icon.
10. Click **Interview** icon on the Action Bar.
11. Click **+** next to Clinic.
12. Click **+** next to Questionnaires.
13. Click **+** next to CHCS II Test Clinic.
14. Highlight **Adult Patient Questionnaire 18 + yrs**.
15. Ask patient each question and document answer.
16. Add the following comment to question number 5: **GAINED 6 LBS.**
17. Click **Save** on Action Bar.

Note: *Do not close Patient Questionnaire module.*

Scenario 2

We just finished the questionnaire and CAPT Williams tells you he made a mistake on the date of his living will. It was actually revised last month. You now will edit the response on the questionnaire. Remember, you can only edit a questionnaire that has a status of Incomplete.

1. Review the **Status/Score** of the questionnaire.
2. Highlight the **Adult Patient Questionnaire 18+ yrs**.
3. Click **Edit** on the Action Bar.
4. Modify the date on **Question number 11**.
5. Click **Done** on the Action Bar.

Note: *Do not close the Patient Questionnaire module.*

Scenario 3

CAPT Williams now tells you that he is getting a hearing aid next week and forgot to tell you during the questionnaire interview. You need to add this information to the questionnaire. Since the status of the questionnaire is now complete, you can only append the questionnaire.

1. Review the **Status/Score** of the questionnaire.
2. Highlight the **Adult Patient Questionnaire 18+ yrs**.
3. Click **Append** on the Action Bar.
4. Click **Append Comment** on **Question number 1**.
5. Type **PATIENT STATES HE IS GETTING A HEARING AID FOR HIS RIGHT EAR NEXT WEEK**.

6. Click **Save** on the Action Bar.
7. Click **Close** on the Action Bar.

Scenario 4

Now that the information has been completed, we will check-in CAPT Williams for his appointment today and then associate the questionnaire to today's encounter. We will then set the options for the results to AutoCite into the encounter note.

1. Click **CAPT WILLIAMS** on the appointment screen.
2. Click the **Check-In** icon on the Action Bar.
3. Scroll to the right to view the Encounter column.
4. Write down or remember the **encounter numbe**r.
5. Click **Patient Questionnaires** under Health History.
6. Highlight the **Adult Patient Questionnaire 18+ yrs**.
7. Click **Encounter** on the Action Bar.
8. Select Encounter #**XXXX**.
9. Click **OK**. Note the questionnaire display now shows the encounter number.
10. Click **Close**.
11. Click **Open Appt** on the Action Bar.
12. Click **Options** on the Action Bar.
13. Click the check box next to Questionnaires under AutoCite preferences.

14. Click **OK**.
15. Click **AutoCite** at the top of the encounter note.
16. View questionnaire responses.
17. Click **Close** on the Action Bar.
18. Clear **Patient**.

Exercises

- Complete the exercises.
- Check for understanding and answer participant questions.

Summary

- ✓ Create and release a questionnaire.
- ✓ Edit an existing questionnaire.
- ✓ Change the status of a questionnaire.
- ✓ Select and use a questionnaire in a patient interview.
- ✓ Set viewing options for administering a questionnaire.
- ✓ Add a comment to a questionnaire as it is being administered.
- ✓ Edit a response in a saved questionnaire.
- ✓ Append a completed questionnaire.

	✓ Associate a questionnaire with an encounter. ***Next Slide***	

LESSON 2: IMMUNIZATIONS

Lesson Goal

The goal of this lesson is to enable the user to view a patient's immunization record in CHCS II.

Learning Objectives

Upon completion of this lesson, the user will be able to:

- ✓ View a patient's immunization history.
- ✓ Add an immunization to a patient's history.

The **Patient Immunizations** module is used to manage and track patient immunization records and vaccine history. The Immunizations module contains two tabs: Individual Immunizations and Vaccine History. The Immunizations module is patient-specific; therefore, a patient's record must be loaded to the desktop to access this module.

When immunizations are due, but have not yet been given, the column under Next Due displays in red. Once the required immunizations have been given through the Give Vacc function, the column changes to green.

The **Individual Immunization** tab displays all immunizations the

- ❑ **Slide 8: Immunizations Learning Objectives** patient is required to have based on the vaccination groups to which the patient is assigned.

There is an option to print the worksheet and DD Form 2766C from the Individual Immunization window. The report prints to your default printer.

To print immunization records:

- **Print Worksheet**: Use this function to print required immunizations for the selected patient.
- **Print DD 2766C**: Use this function to print a Vaccine Administration Record.

DEMONSTRATION – CHCS II TRAINING SYSTEM

DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.

Mr. Clayton Williams tells the user that two months ago he was on vacation and stepped on a rusty nail. He was treated in a civilian emergency room and received a tetanus shot. The user asks you to assist in documenting this vaccine.

1. Click the **Vaccine History** tab.
2. Click **Add**.
3. Select the **List All Immunizations** check box.
4. Select **Tetanus toxoid** in the listing.

5. Click **Select**.
6. Click the [...] (ellipsis) button next to the **Vacc Date** field.
7. Click the [<] button next to the month and year twice to select a date two months ago.
8. Click **OK**.
9. Click **Update**.
10. Select the **Individual Immunizations** tab.

Note: *If connected to a printer, the user can print a copy of the patient's immunization record.*

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11. Select **Print Preview** from the File-> Print Preview-> DD2766 menu.
12. Click ▸ twice at the top of the Print Preview screen to view the Immunization Record.
13. Click the **Red X** at the top of the Print Preview screen.
14. Click **Close** on the Action Bar to close the Immunizations module.
15. Click **Close** on the Action Bar to close the eSF600.

Exercises

- ➢ Complete the exercises.
- ➢ Check for understanding and answer participant questions.

Summary

- ✓ Viewed a patient’s immunization history.
- ✓ Added an immunization to a patient’s history.

Next Slide

LESSON 3: DOCUMENTING AND MANAGING THE S/O

Lesson Goal

The goal of this lesson is to enable the user to document the S/O portion of the patient's eSF600 utilizing advanced search options.

Learning Objectives

Upon completion of this lesson, the user will be able to:

- ✓ Save S/O documentation as an S/O Template.
- ✓ Use Browse From Here for MEDCIN® terminology.
- ✓ Use IPrompt.

CHCS II gives the user numerous options to search for and find terms within the database. These options include Find Term, Dx Prompt, Browse From Here, Prompt, IPrompt, and List Size.

- ➢ **Dx Prompt** creates a list of findings based on a diagnosis. This is helpful in selecting terms for a template built around a diagnosis.
- ➢ **Find Term** searches for a specific term within the MEDCIN® tree.
- ➢ **List Size** creates a broader or narrower list of findings.

- ❑ **Slide 9: Documenting and Managing the S/O Learning Objectives**

There are three levels.

- **Browse From Here** displays the highlighted finding as it appears within the MEDCIN® tree. Related findings can be seen and selected.
- **IPrompt** builds a list of terms based on the documentation in the Narrative pane. Once terms have been documented, click IPrompt on the Action Bar to view a list of additional terms.

DEMONSTRATION – CHCS II TRAINING SYSTEM

DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.

Scenario 1

The user is now ready to examine CAPT Clayton Williams and complete the visit or S/O note. The user will start with a visit template and add additional items using the Prompt, Browse From Here and IPrompt functions. The user will then choose to save the note as a S/O template.

1. Highlight CAPT Clayton Williams' appointment.
2. Click **Open Appt** on the Action Bar.
3. Click **S/O**.
4. Click **Template Mgt**.
5. Type **ADULT** in the Name Contains: box.

6. Click **Find Now**.
7. Select **Visit-Generic Adult**.
8. Click **Load** on the Action Bar.
9. Confirm the **HPI** tab is selected.
10. Click **+** next to The Chief Complaint.
11. Type **HEADACHE** in the free text field.
12. Select the **Notepad** icon in the upper right corner of the MEDCIN pane.
13. Type **PHYSICAL EXAM**.
14. Click **OK**.
15. Click the **ROS** tab.
16. Select **Headache**.
17. Flip to **HPI**.
18. Select the **Prompt** button on the Dashboard.
19. Select the **ROS** button.
20. Click **+** next to chronic/recurring headache.
21. Click **+** next to tired eyes.
22. Click the **PMH** tab.
23. Click history of **SINUSITIS**.
24. Click **Go back >>**.
25. Click the **PE** tab.
26. Click **Vital Signs Reviewed, Nasal Discharge, and Pharynx Inflammation**.

27. Negate **Submandibular Lymph Nodes Enlarged and Axillary Lymph Nodes Enlarged**.
28. Click the **Browse From Here** icon on the Action Bar.
29. Scroll down to **Ears, Nose, Throat** and expand.
30. Expand **Pharynx**.
31. Expand **Tonsils**.
32. Click **Swelling, Erythema, Inflammation**.
33. Negate **Exudate**.
34. Click the **IPrompt** button on the Dashboard.
35. Expand **Nasal Discharge Rhinorrhea**.
36. Click **Bilaterally**.
37. Click the **Save As** icon on the Action Bar.
38. Save in **Personal**.
39. Type **S/O—Sinusitis—XX** as the name of the S/O template.
40. Select **Family Medicine** as the Specialty.
41. Deselect Shared.
42. Select **Add to Favorites**.
43. Click **Save**.
44. Click **Close**.
45. Click **Close**.

Scenario 2

The user now wants to delete one of his personal S/O templates that is no longer used. The user will open a patient's electronic medical record and then find and delete the template.

1. Click the **S/O** button.
2. Click **Template Mgt.**
3. Type **Sinusitis** in the Name Contains: box.
4. Click **Find Now**.
5. Select **SO—SINUSITIS—XX**.
6. Click the **Delete** icon on the Action Bar.
7. Click **Yes** in the confirmation window.
8. Click **Close**.
9. Click **Close**.
10. Click **Close**.

Exercises

- Complete the exercises.
- Check for understanding and answer participant questions.

Summary

- ✓ Saved S/O documentation as an S/O template.
- ✓ Used Browse From Here for MEDCIN® terminology.
- ✓ Used IPrompt.

Next Slide

LESSON 4: TEMPLATE MANAGEMENT

Lesson Goal

The goal of this lesson is to enable the user to modify encounter templates and commonly used Order Sets.

Learning Objectives

Upon completion of this lesson, the user will be able to:

- ✓ Edit an Encounter template.
- ✓ Create an Order Set in A/P.
- ✓ Customize an Order Set.
- ✓ Merge an Order Set with an Encounter Template.
- ✓ Modify an Order Set.
- ✓ Import and Export Encounter templates.
- ✓ Delete an Encounter template.

- ❑ **Slide 10: Template Management Learning Objectives**

Explain: Order sets currently in CHCS must be recreated for use in CHCS II.

Explain: Mention that Encounter templates can also be created from existing encounters and from previous encounters. Both require editing because actual patient encounters are tailored to the specific circumstances. Therefore, they need to be generalized to be

		used as templates.
	DEMONSTRATION – CHCS II TRAINING SYSTEM ***DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.*** **Scenario 1** The user wants to build an encounter template for Hyperlipidemia. The template will contain an S/O template, Diagnoses, Procedures, and Other Therapies. 1. Expand **Tools** in the Folder List. 2. Click **Template Management**. 3. Click the **New** icon on the Action Bar. 4. Click **Add** in the Notes Templates window. 5. Click **Search**. 6. Highlight **Visit—Hyperlipidemia**. 7. Click **Add Items**. 8. Click **Done**. 9. Click **Add** in the Diagnoses window. 10. Type **Hyperlipidemia** in the Search Term box. 11. Click **Search**. 12. Hold down the **CTRL** key and highlight **Hyperlipidemia**, **Familial Hypercholesterolemia**, and	***Explain: Point out the five main components of the encounter template: diagnoses, notes templates (visit, S/O), other therapies, procedures, and order sets.*** ***Explain: Mention that the top four sections (Associated Reasons for Visit, Associated Appointment Types, Associated Problems, and Items to AutoCite into Notes) are not used.*** ***Explain: Discussion of Order Sets will follow the***

	Hyperlipoproteinemia. 13. Click **Add Items**. 14. Click **Add** in the Procedures window. 15. Type **EKG** in the Search Term box. 16. Click **Search**. 17. Hold down the **CTRL** key and highlight **Echo (2-D) and Electrocardiogram**. 18. Click **Add Items.** 19. Click **Add** in the Other Therapies window. 20. Type **Nutrition**. 21. Highlight **Consultation with a Nutritionist**. 22. Click **Add Items**. 23. Click the **Save As** icon on the Action Bar. 24. Save in **Personal**. 25. Type **ENC—Hyperlipidemia—XX** for name of template. 26. Select **Family Medicine** for Specialty. 27. Deselect **Shared**. 28. Click **Save**. 29. Click the **Close** icon on the Action Bar.	***building of the parts of the template mentioned above.*** ***Explain: When adding to diagnosis, show how to do multiple searches and select results before clicking the Done button.*** ***Explain: When adding therapies, show double-clicking to add, rather than using the Add Items button.*** ***Explain: When adding procedures, show entry of multiple selections pressing CTRL key.***

Scenario 2

The user would like to create/add an order set template. The user will then go back in and modify the order set template.

1. Open an encounter on a patient.
2. Click the **A/P** button.
3. Click the **Order Lab** tab.
4. Type **Lipid** in Search.
5. Click **Search**.
6. Select **Lipid Panel Complete**.
7. Click **Save to Queue**.
8. Type **Cholesterol** in Search.
9. Click **Search**.
10. Select **Cholesterol**.
11. Click **Save to Queue**.
12. Type **Triglyceride**.
13. Click **Search**.
14. Select **Triglyceride**.
15. Click **Save to Queue**.
16. Repeat for **CBC** and **Urinalysis**.
17. Click the **Order Rad** tab.
18. Type **Chest** in Search.

	19. Select **Chest, PA and Lateral**. 20. Type **Hyperlipidemia** in the Clinical Impression box. 21. Click **Save to Queue**. 22. Click the **Order Med** tab. 23. Type **Lipitor** in Search. 24. Click **Search**. 25. Select **Atorvastatin**. 26. Type in SIG: **1 tab qs #90**. 27. Click **Save to Queue**. 28. Type **Lisinopril** and add all three doses. 29. Type **Prevacol**. 30. Select **Pravastatin** and add. 31. **Save to queue**. 32. Click the **Order Set** tab. 33. Click **Save as Order Set**. 34. Save in: **Personal**. 35. Template Name: **ORD—Hyperlipidemia—XX**. 36. Click **Save**. 37. Click **Close** on the Action Bar. 38. Click **Yes** on the A/P warning screen. 39. Click **Close**.	

Scenario 3

The user would like to remove one order from the order set and then merge the hyperlipidemia order set with the hyperlipidemia encounter template.

1. Click **+** next to Tools in the Folder List.
2. Click the **Template Management** icon under Tools.
3. Click **Search** on the Action Bar.
4. Search for **XX**.
5. Press **CTRL** and highlight both the **ORD** and **ENC** templates.
6. Click **Merge** on the Action Bar.
7. Remove **Pravastatin** from the Order Sets window.
8. Click **Save As** on the Action Bar.
9. Change Template Name to **Comp—Enc—Hyperlipidemia—XX**.
10. Select **Family Medicine** as the Specialty.
11. Click **Save**.

Scenario 4

The user would now like to delete an order template.

1. Click **Search** on the Action Bar.
2. Search for **ORD—Hyperlipidemia—XX**.
3. Highlight the template.
4. Click the **Delete** icon on the Action Bar.
5. Click **Yes** on the confirmation window.

Scenario 5

The user is PCSing to another MTF and would like to take his templates to the new site. The user will need to export the encounter templates. You remind the user to use the Search/Browse tab in Template Management unless it is an S/O template. If you are exporting an S/O template, you must be in the S/O template management function within the S/O module.

1. Click the **Search** icon on the Action Bar.
2. Type **Enc—Hyperlipidemia—XX**.
3. Click **Search**.
4. Highlight **Enc—Hyperlipidemia—XX**.
5. Click the **Export** icon on the Action Bar.

6. Click on the **Desktop** icon.
7. Click **Save**.

Scenario 6

The user is PCSing here from another MTF and would like to import his templates. You remind him to import encounter templates he needs to use the Search/Browse tab of Template Management and for S/O templates he needs to be in S/O module.

1. Click the **Import** icon on the Action Bar.
2. Expand the **C:**.
3. Open **Documents and Settings**.
4. Open your folder.
5. Click **Desktop**.
6. Select **Enc—Hyperlipidemia—XX**.
7. Click the **>** button.
8. Deselect **Shared**.
9. Select **Add to Favorites**.
10. Click the **Import** button.
11. Click **Close** on the Action Bar.

Exercises

- ➢ Complete the exercises.
- ➢ Check for understanding and answer participant questions.

Summary

- ✓ Edited an Encounter template.
- ✓ Created an Order Set in A/P.
- ✓ Customized an Order Set.
- ✓ Merged an Order Set with an Encounter template.
- ✓ Imported and Exported Encounter templates.
- ✓ Deleted an Encounter template.

Next Slide

LESSON 5: LIST MANAGEMENT

Lesson Goal

The goal of this lesson is to enable the user to create and manage Favorites Lists of diagnoses and procedures for streamlining selection in the Screening, Problems, and A/P modules.

- [ ] **Slide 11: List Management Learning Objectives**

Learning Objectives

Upon completion of this lesson, the user will be able to:

- ✓ Create lists of favorite Diagnoses and Procedures.
- ✓ Create a Clinic Favorites List.
- ✓ Delete items from lists.

DEMONSTRATION – CHCS II TRAINING SYSTEM

DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.

After talking to the user, it is decided they do not want Upper Respiratory Infection on their favorites list. They would like to add flu shot to their procedures list and have electrocardiogram as the last procedure on the list.

To begin, click the **List Management** folder in the Folder List.

To delete Upper Respiratory Infection from the Diagnosis favorites:

1. Click **+** to expand My Favorites and click **+** to expand My Diagnosis. A list of favorite diagnoses will be displayed.
2. Click on **UPPER RESPIRATORY INFECTION** to select it.
3. Click the **Delete** icon on the Action Bar. Upper Respiratory Infection will be deleted from the Favorite List.

To add flu shot to the procedures favorites list:

1. Click to highlight **My Procedures**.
2. Click the **Add** icon on the Action Bar. The Select Procedure window will display.
3. Type **flu shot** in the Search field.
4. Click **Search**. Terms related to flu shot will be displayed.
5. Click **+** to expand **Vaccines Viral Influenza**.
6. Click For **Live, Intranasal Use 90660** to select it.
7. Click **OK**. The For Intranasal Use procedure will be added to the Procedure Favorite List.

To move the electrocardiogram procedure to the bottom of the Procedures favorites list:

1. Click **Electrocardiogram** in the Procedures favorites list.
2. Click the **Move Down** icon on the Action Bar. Electrocardiogram will be moved to the bottom of the list.

Exercises

- ➢ Complete the exercises.
- ➢ Check for understanding and answer participant questions.

Summary

- ✓ Created lists of favorite Diagnoses and Procedures.
- ✓ Created a Clinic Favorites List.
- ✓ Deleted items from lists.

Next Slide

LESSON 6: TELEPHONE CONSULTS

Lesson Goal

The goal of this lesson is to enable the user to use some advanced features in the Telephone Consults module in CHCS II.

- ❑ **Slide 12: Telephone Consults Learning Objectives**

Learning Objectives

Upon completion of this lesson, the user will be able to:

- ✓ Edit a call back phone number.
- ✓ Explain how to transfer a telephone consult to a different Provider.
- ✓ Cancel a Telcon.
- ✓ Add a cosigner to a telephone consult.

Explain: Reason for Telcon field and Note field. Both must be completed. Lower case terms in diagnosis list are symptoms. Review quick entry screen.

DEMONSTRATION – CHCS II TRAINING SYSTEM

DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.

Anna Wunderlich (w8118) phones the clinic to report that she has lost her Zyrtec allergy medication. You review the appointment note and return her call. You speak to her, but need to transfer the TelCon to Dr. Doctor. She indicates that she is leaving her office and wants her call returned at a different number: (703) 555-9999. You also need to cancel LCDR Eduardo Suarez's telcon as he has just reported to the emergency room. You will document Evelyn Alexander's Telcon but would like Dr. Doctor to review it and co-sign it.

Explain: Rather than signing the note and designating a Physician as the cosigner, a user could transfer the Telcon to the Physician for their signature using the Action Bar icon.

To transfer a Telcon:

1. Select Anna Wunderlich's Telcon appointment.
2. Click **Edit Phone #** on the Action Bar.
3. Change the Callback Phone Number to **(703) 555-9999**.
4. Click **OK**.

Note*: Notice the callback phone number has changed in the type column.*

5. With Ms. Wunderlich's Telcon highlighted, select the **Transfer** icon on the Action Bar.
6. Select **Doctor, David** from the New Provider drop-down list.

Clarify: 99371 code will convert to 99499 for noncredentialed providers.

Explain: Some nurses may not have ordering privileges.

	7. Click **OK**. **To cancel a Telcon:** 1. Select Suarez, Eduardo A.'s Telcon from the Telcon list. 2. Select the **Cancel** icon on the Action Bar. 3. Select **Facility Cancelled** from the Reason for Cancellation drop-down list. 4. Click **OK**. **To complete a Telcon and add a co-signer:** 1. Select Alexander, Evelyn L.'s Telcon from the Telcon list. 2. Click the **Open** icon on the Action Bar. 3. Type **CALLED MOM AND INFORMED HER TO ALTERNATE GIVING CHILDREN'S TYLENOL AND CHILDREN'S MOTRIN EVERY 4 HOURS. IF NOT BETTER IN THE AM, BRING EVELYN INTO THE CLINIC TOMORROW** in the Provider Note box. 4. Select **Otitis Media Acute Serous** from the Patient Problem List (Acute). 5. Click the **Add** button. 6. Accept default of **Save and Sign** and click **OK**. 7. Select the check box next to **Cosigner Required**. 8. Click the **Search** button. 9. Type **DOCTOR** in the Name field.	***Explain: May need to renew prescriptions by clicking "more detail" button in live system and select an ordering provider.***

10. Select **Doctor, David** and click **Select**.
11. Click **Sign**.

Exercises

- ➢ Complete the exercises.
- ➢ Check for understanding and answer participant questions.

Summary

- ✓ Edited a call back phone number.
- ✓ Explained how to transfer a telephone consult to a different Provider.
- ✓ Cancelled a Telcon.
- ✓ Added a cosigner to a telephone consult.

Next Slide

LESSON 7: FLOWSHEETS

Lesson Goal

The goal of this lesson is to enable the user to view and print Flowsheets.

❑ **Slide 13: Flowsheets Learning Objectives**

Learning Objectives

Upon completion of this lesson, the user will be able to:

- ✓ View a Flowsheet.
- ✓ Print a Flowsheet.

DEMONSTRATION – CHCS II TRAINING SYSTEM

DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.

Note: To print the entire Flowsheet, click the Print Flowsheet button.

You need to view and print a copy of Eduardo Suarez's vital signs. There is no current encounter so you would like to use the Flowsheets module.

1. Click the **Flowsheets** folder in the Folder List. The Flowsheets window will display.

2. Select **Vital Signs** in the drop-down filter window.
3. Highlight the **BP**, **HR**, and **RR** portion of the Vital Signs.
4. Click the **Print Flowsheet Portion** button.
5. Click the **Close** icon on the Action Bar.

Exercises

- Complete the exercises.
- Check for understanding and answer participant questions.

Summary

- ✓ Viewed a Flowsheet.
- ✓ Printed a Flowsheet.

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COURSE SUMMARY

Learning Objectives

The student should now have achieved the specified learning objectives for all modules:

- ✓ Questionnaire Setup/Patient Questionnaires
- ✓ Immunizations
- ✓ Documenting and Managing the S/O
- ✓ Template Management
- ✓ List Management
- ✓ Telephone Consults
- ✓ Flowsheets

Next Slide

- ❑ **Slide 14: Course Summary**

Other Help Resources

- ➢ CHCS II User Manual
- ➢ Application Help Menu

- ❑ **Slide 15: Other Help Resources**

Be sure to remind students of the other resources available to them.