CHCS II Support Staff/Clerk Advanced Skills Lesson Plan

May 2005
Rev 1.0

CHANGE HISTORY			
Date	**Name**	**Change Description**	**Source**
5/12/2005	Elizabeth Burrows	New Release	837.4 Release
5/18/2005	Pamela Mankoff	Formatting and Revising	837.4 Release
5/27/2005	Patrick Wilshire	Formatting and Editing	837.4 Release

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Preparation for Delivery

The lesson plan is designed to teach Support Staff and Clerks advanced CHCS II skills at each MTF.

Materials Needed

- ✓ CHCS II Sign-In Roster (Electronically or Paper Form)
- ✓ CHCS II Support Staff/Clerk Advanced Skills Course Lesson Plan
- ✓ CHCS II Support Staff/Clerk Advanced Skills Presentation
- ✓ CHCS II Support Staff/Clerk 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 the classroom with one workstation per student and one for the instructor. Each workstation must be loaded with the following:

- ❒ CHCS II Training System (CTS)
- ❒ CHCS II Support Staff/Clerk 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 Introductions Instructor and students exchange personal introductions, providing relevant background information.	❑ **Slide 1: CHCS II Support Staff/Clerk Advanced Skills Course** ❑ **Slide 2: Logistics and Introductions**

CHCS II OVERVIEW

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.

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

Next Slide

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.

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- **Slide 4: CHCS II Security**

Expectations/Agenda

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 Support Staff/Clerks shall attend scheduled classroom training.
- 100 % of patient encounters shall be documented in CHCS II.

- **Slide 5: Expectations**

	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 mark 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.

    a. 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 questionnaire in the outpatient medical record. You

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 not available).

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 the following 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 **Add**.
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.

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 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: VITAL SIGNS ENTRY

Lesson Goal

The goal of this lesson is to enable the user to set their default properties in the Vital Signs Entry module in CHCS II.

- ❑ **Slide 8: Vital Signs Entry Learning Objectives**

Learning Objectives

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

- ✓ Set Default Properties.
- ✓ Change Default Properties for a single patient.

DEMONSTRATION – CHCS II TRAINING SYSTEM

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

Note: You have to close the Vital Signs Entry module to get CHCS II to accept the default settings just selected.

Setting the Scene: You are assisting a user for the first time in documenting Vital Signs. The user would like to see the last 15 sets of vital signs. They also document the height of patients in feet and inches and the weight in pounds. Assist the user in setting these defaults.

1. Open Mr. Clayton Williams' eSF600.
2. Click the **Vitals** button on the eSF600.

3. Click **Options** on the Patient ID line.
4. Click the **Default Time** button.
5. Select the **Last 'N'** radio button.
6. Click **OK**.
7. Click the Height drop-down list and select **ft./in**.
8. Click **OK**.
9. Click **Close** on the Action Bar.
10. Click the **Vitals** button on the eSF600.
11. Document a Ht. Of 68 inches.
12. Select **in.** from the Ht. drop-down list.
13. Type **68** in the Ht. window.

Exercises

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

Summary

- ✓ Set Default Properties.
- ✓ Change Default Properties for a single patient.

Next Slide

LESSON 3: 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 patient is required to have based on the vaccination groups to

- ❑ **Slide 9: Immunizations Learning Objectives**

	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 4: DOCUMENTING THE S/O

❑ **Slide 10: Documenting the S/O Learning Objectives**

Lesson Goal

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

Learning Objectives

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

- ✓ Load an S/O template.
- ✓ Document S/O note using an S/O template.

DEMONSTRATION – CHCS II TRAINING SYSTEM

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

Since Col. Alexander has come in today complaining of a cough, we will document Col. Alexander's visit using a standard URI template. We need to document the following:

1. Click the **S/O** button on the electronic version of the SF600 to open the S/O module. The S/O screen will display.
2. Click the **Template Mgmt** icon on the Action Bar.

	3. In the Name Contains field, enter **URI** and click **Find Now**. 4. Select the **VISIT-URI-MEDCIN** template. You can review the template in the Template Preview pane. 5. Click **Load** on the Action Bar. 6. Once the template is loaded, the S/O module starts with the HPI tab selected. 7. Select Chief Complaint is: **URI symptoms as a positive finding**. 8. Select a **cough** as a positive finding. 9. Click on the **Duration** grid icon on the Dashboard. 10. Select **2** and **Days**. 11. Type **MAINLY AT NIGHT** in the Free Text area of the Dashboard and press the **ENTER** key. 12. Select **sore throat** as a negative finding. 13. Click on the free text **Note Pad** icon in the S/O MEDCIN pane. The Preliminary Background HPI window for entering free text will display. 14. Type **PT SAW DR AT UCC** in the Preliminary Background HPI area and click **Save** and **Close** to save the information. 15. Click the **PMH** tab. 16. Click **+** to expand Smoking. 17. Click **+** to expand Cigarettes. 18. Click **Plus Sign** to select for ____ pack-years. 19. Type **12** in the Value Field on the Dashboard and press	

[Enter].

20. Select history of ACUTE BRONCHITIS as a negative finding.
21. Select history of ASTHMA as a negative finding.
22. Click **+** to expand history of DIABETES MELLITUS.
23. Click the **Plus Sign** to select TYPE II.
24. Click the **FamHist** drop-down button on the Dashboard to select Maternal History.
25. Click the **ROS** tab.
26. Select **sinus pain** as a positive finding.
27. Select **headache** as a positive finding.
28. Select **chest pain** as a negative finding.
29. Click the **PE** tab.
30. Select **vital signs (Reviewed)** as a positive finding.
31. Select **nasal discharge** as a positive finding.
32. Select **auscultation wheezing** as a positive finding.
33. Click **AutoNeg**.
34. Review the information in the narrative pane to ensure that everything is correct.
35. Click on the **Close** icon on the Action Bar.

Exercises

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

Summary

- ✓ Loaded an S/O template.
- ✓ Documented S/O note using an S/O template.

Next Slide

LESSON 5: S/O TEMPLATE MANAGEMENT

Lesson Goal

The goal of this lesson is to enable the user to manage their S/O templates.

Learning Objectives

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

- ✓ Create a Procedure template.
- ✓ Modify a Procedure template.
- ✓ Add a template to Favorites.
- ✓ Remove a template from Favorites.
- ✓ Delete an S/O template.

❑ **Slide 11: S/O Template Management Learning Objectives**

DEMONSTRATION – CHCS II TRAINING SYSTEM

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

Scenario 1

The user frequently performs dressing changes and would like an S/O note template to document them.

1. Open an appointment.
2. Click the **S/O** button.
3. Click the **PE** tab.
4. Select the notepad icon in the upper right corner of the MEDCIN window.
5. Type ***PROC-DRESSING CHANGE***, and press **CTRL+ENTER**.
6. Type ***WOUND DESCRIPTION***, and press **CTRL+ENTER**.
7. Type ***CLEANSING AGENT***, and press **CTRL+ENTER**.
8. Type ***DRESSING APPLIED***, and press **CTRL+ENTER**.
9. Press **ENTER**.
10. Click **OK**.

Scenario 2

The user reviewed the S/O template and would like to add a list of cleaning agents to the Cleansing Agent section.

1. Open an appointment.
2. Click the **S/O** button.
3. Click the **Template Management** icon on the Action Bar.
4. Type **DRESSING**.
5. Click **Find Now**.
6. Highlight **PROC-DRESSING CHANGE-XX**.
7. Click the **Edit** icon on the Action Bar.
8. In the documentation window, confirm that the words "Template edit mode" are displayed.
9. Highlight the text in the documentation window.
10. In the Entry details for current selection window add the following, and press **CTRL+ENTER**:
    a. ***Alcohol:~***
    b. ***Hydrogen Peroxide:~***
    c. ***Normal Saline:~***
11. Press **ENTER**.
12. Click the **Save** icon on the Action Bar.
13. Click **Save** on Save List Note Template window.
14. Click **Replace** on This Template Name already exists

window.

15. Click **Close**.

Scenario 3

The user would like to add the SUPPORT—Chest Pain template to their favorites folder.

1. Open an appointment.
2. Click the **S/O** button.
3. Click the **Template Management** icon on the Action Bar.
4. Type **SUPPORT** in the Name Contains: field.
5. Click **Find Now**.
6. Highlight **SUPPORT—Chest Pain**.
7. Click the **Save As** icon on the Action Bar.
8. Click the drop-down on Save In and select **Personal**.
9. Change Template Name to SUPPORT—Chest Pain—XX.
10. Click **Add to Favorites**.
11. Click **Save**.

Scenario 4

The user would like to remove the SUPPORT—Back Pain template from their favorites folder.

1. Open an appointment.
2. Click the **S/O** button.
3. Click the **Template Management** icon on the Action Bar.
4. Type **SUPPORT** in the Name Contains: field.
5. Click **Find Now**.
6. Highlight **SUPPORT—Back Pai**n.
7. Click the **Delete** icon on the Action Bar.
8. Click **Yes** on the List Tool Templates window.
9. Click **Close** on the Action Bar.
10. Clear **Patient**.

Exercises

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

Summary

- ✓ Created a Procedure template.
- ✓ Modified a Procedure template.
- ✓ Added a template to Favorites.
- ✓ Removed template from Favorites.
- ✓ Deleted an S/O template.

Next Slide

LESSON 6: TEMPLATE MANAGEMENT

Lesson Goal

The goal of this lesson is to enable the user to view and manage encounter templates.

❑ **Slide 12: Template Management Learning Objectives**

Learning Objectives

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

- ✓ Search for template.
- ✓ View details.

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

Explain: Mention that encounter

	✓ Add template to favorites. ✓ Remove a template from favorites. ✓ Load an Encounter template.	***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.*** ***Point out the five main components of the encounter template: diagnoses, notes templates (visit, S/O), other therapies, procedures and order sets.*** ***Mention that the top four sections (Associated Reasons for Visit, Associated***

		Appointment Types, Associated Problems and Item to AutoCite into Notes) are not used. ***Discussion of order sets will follow the building of the parts of the template mentioned above.*** ***When adding a diagnosis, show how to do multiple searches and select results before clicking the Done button.*** ***When adding therapies, show double-clicking to add, rather than using the Add Items button.*** ***When adding procedures, show entry of multiple***

		selections pressing the CTRL key.
	DEMONSTRATION – CHCS II TRAINING SYSTEM ***DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.*** The user would like to search for an encounter template and view the details before adding the template to their favorites. The user decides to remove a template from their favorites while on the screen. After removing the template, they will load the Asthma_starter kit template to the patient's current encounter. 1. Open an appointment. 2. Click **+** to expand Tools. 3. Click the **Template Management** icon on the Folder List. 4. Click the **Search** icon on the Action Bar. 5. Click the **Search** button on the Encounter Template Search window. 6. Click **OK** on the Military Clinical Desktop window. 7. Highlight **Asthma_starter kit**. 8. Click the **View/Edit** icon on the Action Bar. 9. Review the details of the encounter template. 10. Click the **Search/Browse** tab.	

11. Click the **Add Favorite** icon on the Action Bar.
12. If you get an error message, click **OK**.
13. Click the **Template Selection** tab.
14. Click **+** to expand My Favorites. Note that the Asthma_starter kit has been added.
15. Highlight **URI Encounter**.
16. Click the **Remove Favorite** icon on the Action Bar.
17. Click **Yes** to warning message. Not that the URI Encounter template has been removed.
18. Highlight **Asthma_starter kit.**
19. Click the **Add** button.
20. Click **OK** and the encounter template loads.
21. Click **Close** on the Action Bar.
22. Clear **Patient**.

Exercises

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

Summary

- ✓ Search for template.

	✓ View details. ✓ Add template to favorites. ✓ Remove a template from favorites. ✓ Load an encounter template. ***Next Slide***	

Lesson Goal

The goal of this lesson is to enable the user to view and manage encounter templates.

Learning Objectives

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

- ✓ Set Processing priority.
- ✓ View active orders.
- ✓ Discontinue submitted orders.
- ✓ Modify an order.
- ✓ Renew an active order.
- ✓ Associate an order to a diagnosis.

The **Order Entry** module enables entry of new outpatient medication, laboratory, and radiology orders and modification of previously processed orders of all three types. The orders are validated based on pre-defined knowledge, duplicate orders,

❑ **Slide 13: Order Entry Learning Objectives**

	patient allergies, and drug interactions that are stored in CHCS. In the case of invalid orders, CHCS generates warnings and error messages.	
	DEMONSTRATION – CHCS II TRAINING SYSTEM ***DIRECTIONS: Open the CHCS II Training System and complete the following demonstration material.*** 1. Open LCDR Eduardo's appointment. 2. Click the **A/P** button. 3. Click **Order Lab** tab. 4. Type **CBC** in the New Lab Order window. 5. Click **Search**. 6. Highlight **CBC W/O diff**. 7. Click **ASAP** in the Processing Priority window. 8. Click the **More Detail** button. 9. Change Collection Priority to **ASAP**. 10. Change Collection Method to **Ward or Clinic to Collect**. 11. Click the **Submit** button. 12. Click the **Show Orders** button. 13. View **Active Lab** orders in the Laboratory Orders window. 14. Highlight **LIPID PROFILE**. 15. Click the **Discontinue** button.	

	16. Click **Yes** in the Confirm Discontinue Order window. 17. Type **PROVIDER REQUEST**. 18. Click **OK**. 19. Highlight **HEMOGLOBIN A1C**. 20. Click **Modify**. 21. Type **PROVIDER REQUEST**. 22. Click **OK**. 23. Click the **More Detail** button. 24. Change the **Start Date** to today. 25. Click **Submit**. 26. Highlight **OCC Liver**. 27. Click **Renew+Modify**. 28. Type **PROVIDER REQUEST**. 29. Click the **More Detail** button. 30. Change the **Start Date** to today. 31. Click **Submit**. 32. Type ***PROVIDER REQUEST***. 33. Click **OK**. 34. Type ***PROVIDER REQUEST*** on the duplicate order screen. 35. Click the **Diagnosis** tab. 36. Highlight **DIABETES MELLITUS**. 37. Click **Add to Encounter**.	

38. Highlight **HEMOGLOBIN A1C** in the Orders & Procedures window.
39. Click the **< >** button to associate with the highlighted diagnosis.
40. Click the **Close** icon on the Action Bar.

Exercises

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

Summary

- ✓ Set Processing priority.
- ✓ View active orders.
- ✓ Discontinue submitted orders.
- ✓ Modify an order.
- ✓ Renew an active order.
- ✓ Associate an order to a diagnosis.

Next Slide

Lesson Goal

The goal of this lesson is to enable the user to manipulate the Procedure tab of the A/P module.

Learning Objectives

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

- ✓ Add a procedure to their Favorites List.
- ✓ Associate a procedure with a diagnosis.

The **Procedure** tab allows you to document and take credit for in-office procedures. Workload credit can be given to the clinical team member performing the procedure as well.

- ❑ **Slide 14: Procedure Learning Objectives**

DEMONSTRATION – CHCS II TRAINING SYSTEM

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

While in the clinic, a Fingerstick cholesterol was performed on LCDR Suarez. You need to document the cholesterol procedure.

1. Reopen LCDR Eduardo Suarez's encounter and open the A/P module.
2. Click the **Procedure** tab.
3. Type ***Cholesterol*** in the Search field.
4. Expand **Serum Lipoproteins** and select **Total Cholesterol**.
5. Click **Add to Favorites List**.
6. Click **Add to Encounter**.
7. Click the **< >** button to associate with the highlighted diagnosis.
8. Click **Close** on the Action Bar.

Exercises

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

	Summary ✓ Add a procedure to favorites list. ✓ Associate a procedure with a diagnosis. ***Next Slide***	

LESSON 9: ORDER CONSULTS

Lesson Goal

The goal of this lesson is to enable the user to order consults within the A/P module.

Learning Objectives

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

- ✓ Submit an order consult.

The **Order Consults** tab allows you to enter a consult request for a specific encounter.

- ❑ **Slide 15: Order Consults Learning Objectives**

DEMONSTRATION – CHCS II TRAINING SYSTEM

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

1. Open CAPT Clayton Williams' appointment.
2. Click **A/P**.
3. Click the **Order Consults** tab.
4. Confirm the **Military/Tricare (SF 513)** is selected in Consulting Network.
5. Click the drop-down on the **Refer To:** field.
6. Select **CONSULT (SCHEDULED)**.
7. Click the drop-down on the **Specialty:** field.
8. Select **NUTRITION**.
9. Click the drop-down on the **Clinic:** field.
10. Select **Family Practice Clinic**.
11. Click in the Reason for Request window or press the down arrow.
12. Type **INSTRUCT IN 1800 CALORIE DIET**.
13. Click in the Provisional Diagnosis window.
14. Type **WEIGHT REDUCTION**.
15. Enter **2** in the **No. of Visits:** field.
16. Accept the default for the **Auth. Until:** field.
17. Accept the default for the **Consulting Provider:** field or

choose desired consultant.

18. The Provider's Duty Phone defaults in.
19. Click the drop-down on the **Priority:** field.
20. Select **72 Hours**.
21. Click the drop-down on the **Output Method:** field.
22. Select **Send** and **Print**.
23. Click the **Submit** button.
24. Click **Close**.

Note: *Tech/Support staff cannot document on order consult.*

Exercises

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

Summary

- ✓ Submitted an order consult.

Next Slide

LESSON 10: PREVIOUS ENCOUNTERS

Lesson Goal

The goal of this lesson is to enable the user to use the Previous Encounters module in CHCS II.

- **Slide 16: Previous Encounters Learning Objectives**

Learning Objectives

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

- ✓ Display a previous patient encounter.
- ✓ Append a narrative to a completed encounter.
- ✓ Amend a completed encounter.
- ✓ Copy Forward a previous encounter.

The **Previous Encounters** module displays a list of a patient’s completed CHCS II encounters. Select a previous encounter to view the signed electronic SF600 in the bottom of the workspace. You must select a patient record to view previous encounters. You can append a narrative, amend an encounter, create a new Encounter Template from a completed encounter and “copy forward” the details of a previous encounter to the current encounter, easing effort and saving time in documenting follow-up visits.

DEMONSTRATION – CHCS II TRAINING SYSTEM

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

The provider needs to annotate that LCDR Eduardo Suarez's diabetes is now controlled by adding a note to his Diabetes Mellitus Type II – Uncontrolled encounter.

To annotate an encounter:

1. From the list of appointments, click on any of LCDR Suarez's appointments to pull his record.
2. Click the **Previous Encounters** module in the Folder List.
3. Highlight the **Diabetes Mellitus Type II – Uncontrolled** encounter.
4. Click the **Append Narrative** icon on the Action Bar. The Encounter Note window will display.
5. Type **DIABETES** in the Note Category field.
6. Type **DIABETES CONTROLLED** in the Note Title field.
7. Type **BASED ON THE PT A1C, HIS DIABETES SEEMS UNDER CONTROL. PT WILL CONTINUE TO MONITOR HIS GLUCOSE LEVEL** in the text area.
8. Click the **Save and Sign** button. The Sign Appended Note window will display.
9. Click the **Sign** button to sign the encounter.

Note: *The status has changed from completed to updated.*

10. Click the **Close** icon on the Action Bar to close the module.

To amend a completed encounter:

The user would like to add the results of the Lipid Panel tests to LCDR Eduardo Suarez's completed encounter.

1. In the appointment list, select LCDR Eduardo Suarez's Diabetes follow-up appointment to pull his patient record.
2. Click **Previous Encounter**s in the Folder List.
3. Highlight the Screening exam **Lipoid Disorders** note.
4. Click **Amend Encounter** on the Action Bar. Notice the SF600 displays.
5. Open the S/O section. Click the **Edit Note** button.
6. Click on the **Test** tab.
7. Click the **Find Term** icon on the Action Bar.
8. In the Search String field, type **cholesterol**.
9. Expand **Serum Lipoproteins**.
10. Select Total Cholesterol as a negative finding. Enter **171** in the Value field on the Dashboard.

11. Click **Sign** on the Action Bar. Review Change History.
12. Click the **Sign** button on the Sign encounter window.

Note: *The encounter status has changed.*

To copy forward a previous encounter:

The provider is seeing LCDR Eduardo Suarez for his follow-up appointment. You would like to use the information from his previous encounter to document his follow-up appointment.

1. Select the **diabetes follow-up** appointment for LCDR Suarez.
2. Click the **Open Appt** icon on the Action Bar.

Note: *LCDR Suarez's ELECTRONIC MEDICAL RECORD will open.*

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3. Click the **Previous Encounters** icon in the Folder List. The Previous Encounters window will display.
4. Highlight LCDR Suarez's **Diabetes Mellitus Type II** encounter.
5. Right-click on the highlighted appointment.
6. Click the **Copy Forward** button. The Previous Encounters

window will close.

7. Click the **S/O** button on the ENCOUNTER WINDOW. The copy forward template will display.
8. Since none of LCDR Suarez's symptoms or findings have changed, we can quickly document the abnormal and normal findings in all tabs by clicking the **AutoEnter** button.
9. Click the **Close** icon on the Action Bar to close the ENCOUNTER WINDOW.

Exercises

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

Summary

- ✓ Display a previous patient encounter.
- ✓ Append a narrative to a completed encounter.
- ✓ Amend a completed encounter.
- ✓ Copy Forward a previous encounter.

Next Slide

LESSON 11: PROBLEMS

Lesson Goal

The goal of this lesson is to enable the user to add and update patient problems in CHCS II.

Learning Objectives

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

- ✓ View a patient's Problem list and associated encounters.
- ✓ Add a family history to a Problem list.
- ✓ Update a problem, family history, or historical procedure.

- ❑ **Slide 17: Problems Learning Objectives**

DEMONSTRATION – CHCS II TRAINING SYSTEM

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

Retired VADM Olaf Berg's (b8943) father has Essential Hypertension. This needs to be added to his Problems List in the Problems module under Health History.

1. Search for **Ret. VADM Olaf Berg** in the Search module to pull his patient record.
2. In the Folder List, click the **Problems** module located under Health History.
3. Expand the **Problem list** to view VADM Berg's Acute/Chronic problems.
4. Highlight **Family History**.
5. Click **Add** on the Action Bar.

Note: *The Select Diagnosis window appears with Clinic List selected by default.*

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6. Select the **Search** tab.
7. Type **Hypertension** in the Find field.
8. Select **Essential Hypertension**.
9. Click **OK**.
10. Click the **down arrow** next to the Onset Date to display the date calendar.
11. Enter the Onset Date: **06 Dec 2000**.
12. User the **< >** to select the December.
13. Click on the year to display up/down arrows to select the year **2000**.
14. Click on **day 6.**
15. Select **Father** from the drop-down Relationship list.

16. In the Status field, accept default: **Active**.
17. In the Chronicity field, accept default: **Chronic**.
18. In the Source field, accept default: **Patient**.

Exercises

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

Summary

- ✓ Viewed a patient's Problem list and associated encounters.
- ✓ Added a family history to a Problem list.
- ✓ Updated a problem, family history, or historical procedure.

Next Slide

Lesson Goal

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

Learning Objectives

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

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

- ❑ **Slide 18: Flowsheets Learning Objectives**

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 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 to close the module.

Exercises

- There are no exercises for this lesson.

Summary

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

Next Slide

COURSE SUMMARY

Learning Objectives

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

- ✓ Questionnaire Setup/Patient Questionnaires
- ✓ Vital Signs Entry
- ✓ Immunizations
- ✓ Documenting the S/O
- ✓ S/O Template Management
- ✓ A/P Order Entry
- ✓ Procedure
- ✓ Order Consults
- ✓ Previous Encounters
- ✓ Problems
- ✓ Flowsheets

Next Slide

❑ **Slide 19: Course Summary**

Other Help Resources

- CHCS II User Manual
- Application Help Menu

- **Slide 20: Other Help Resources**

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