COMPOSITE HEALTH CARE SYSTEM II

CHCS II Clerk Student Guide

Updated CHCS II Course Curriculum – Clerk Student Guide

December 2004
Rev 1.2

PLEASE DO NOT REMOVE FROM CLASSROOM

Change History			
Date	**Name**	**Change Description**	**Source:**
10/27/2004	Kathleen Chapman	Created	Consolidation of materials
11/05/2004	Kathleen Chapman	Updated	CITPO comments
12/01/04	Juanita Stuckey	Revised	Services Comments

Table Of Contents

Lesson 1: Navigation

CHCS II is modeled on the design of Microsoft Outlook, with a Folder List, Workspace, File Menu, Shortcuts Bar, and an Action Bar. This design provides users with multiple navigation options for accessing system features and functionality. Many of the icons or buttons common to a Windows-based application are also used by CHCS II. For example, the icons in the top right hand corner of the screen are Minimize, Maximize, and Close. The ⊞ and ⊟ buttons in the Folder List are used to expand and collapse folders. Note that when a topic is selected in the Folder List, the folder is highlighted.

Lesson Goal:
The goal of this lesson is to enable you to access and navigate within the CHCS II application.

Learning Objectives:
Upon completion of this lesson, you will be able to:

- Log in to the CHCS II application
- Access modules quickly using Folder List
- Open and close an application module
- Exit the CHCS II application
- Lock CHCS II session

Exercises – CHCS II Training System

Open the CHCS II Training System and complete the exercises below.

Scenario 1

Practice CHCS II navigation using the CHCS II Training System by following these steps:

1. Double-click the CHCS II Training System icon on the computer desktop. Press the escape key (Esc) on your keyboard twice to progress through the informational messages.
2. Verify the Appointments module is open.
3. The list of current appointments will display.
4. Review the icons in the Action Bar for Appointments. Icons in the Action Bar are relevant to the module that is open. Icons that are used in one module might not be used in another, so what appears in the Action Bar changes.
5. Click the **Co-signs** folder in the Folders List to open the Co-signs module. The Co-signs module will display.
6. Click the **Close** icon on the Action Bar to close the Co-signs module.
7. Click the Close **X** button on the upper right corner of the Title Bar to end CHCS II. A confirmation message will display.
8. Click **Yes** to confirm the exit

Lesson 2: Patient Search and Appointments

The Search module enables you to locate and select a patient chart for use in CHCS II. This is synonymous with pulling a paper chart. After you open a patient chart, you have access to the range of patient-specific modules and functions.

The Appointments module is used to view, manage, and open patient appointments. This module displays appointments created in both CHCS and CHCS II. Scheduled appointments, including same-day scheduled appointments, are still created in CHCS. CHCS II pulls scheduled appointments from CHCS on a nightly basis and approximately every fifteen minutes during the day.

Lesson Goal:
The goal of this lesson is to enable you to locate a patient record in CHCS II and use the appointment functions.

Learning Objectives:
Upon completion of this lesson, you will be able to:

- Search for a patient record.
- Set search selection display for the appointments module
- Change and save the column order
- View and Add appointment comments
- Create a walk-in appointment
- Check-in a patient and Check-out a patient
- Cancel an appointment
- Transfer an appointment to another provider

Exercises – CHCS II Training System

Open the CHCS II Training System and complete the exercises below.

Scenario 1

Col. Violet Alexander has come in today complaining of a cough. We need to search for Col. Alexander ’s record, set the appointment filters and create a new appointment.

1. Open the CHCS II Application.

NOTE: By default the Appointment module displays

2. Click the **Search** folder in the Folders List to search for a patient. The Patient Search window will display
3. Type ***ALEXANDER*** in the Last Name: field and click **Find** for a list of names.
4. Click on ***ALEXANDER, VIOLET W*** in the list of names and click **OK**. Col. Alexander’s information will appear on the Patient ID line and the Appointments List will display.

Scenario 2

Today you want to set your properties for the Appointments module to display patient visits for all of your clinics, and visits for the current date plus incomplete appointments. You also wish to change the column order so that the Type of visit column is between the Patient and Status columns.

1. Click the **Change Selections…** button in the top left corner of the **Appointments** module.
   a. In the *Clinic* section, click the radio button for **All My Clinics**
   b. In the *Provider* section, select the radio button **Me**.
   c. In the *Dates* section, select the correct radio button to show today's appointments.
   d. Click the **Set Selections as Default** button to save your changes.
2. To move a column:
   a. Scroll to the right just until the **Type** column is visible.
   b. Click the **Type** column heading and hold down the left mouse button.
   c. Drag the **Type** column horizontally right (or left).

Release the left mouse button when the **Type** column is between the **Patient** and **Status** columns. Practice moving columns until the *Appointments* screen is most useful for you.

If you wish to save the new column arrangement, click the **Change Selections** button. Then click the **Set Column Order as Defaults**.

Scenario 3

You need to Create a New Unscheduled Appointment for Col. Alexander.

1. Click new appointment on the Action Bar. A New Appointment confirmation window will display.
2. Click **Yes** to complete the New Appointment information for Col. Alexander.
3. Click on ***ACUTE APPT (ACUT$) 30*** to select the acute appointment type.
4. Type ***cough*** in the Reason for Appointment field and click **OK** to complete the new appointment process for Col. Alexander.
5. Col. Alexander will now appear at the bottom of the Appointment list with a status of CheckedIn.

Scenario 4

Maria Alexander arrives at the clinic for her scheduled appointment, she has a sprained ankle. You check her in CHCS II.

1. Highlight Maria Alexander's appointment in the appointment list.
2. Click **Check-in** on the Action Bar.

3. Notice the Status Column has changed to **CheckIn Status.**

The Provider has just completed LCDR Eduardo Suarez diabetes follow-up visit. LCDR Suarez is ready to be checked-out. He request a copy of his SF600 form.

1. Highlight LCDR Suarez's diabetes follow-up visit.
2. Click Check-out on the Action Bar. The check-out box will display.
3. Select **Print SF600**, click **Print Preview** to view SF600.
4. Click **Cancel** (cancel print), then click **OK** to complete his check-out.

Scenario 5

Marie Alexander's (a5743) Provider had an emergency, so it is necessary to transfer her appointment to a different Provider. Use the **Transfer** icon on the Action Bar to transfer the appointment.

1. In the appointment list, select to highlight Marie Alexander's appointment.
2. Click the **Transfer** icon on the Action Bar.
3. Select **DOCTOR, DAVID** from the dropdown list.

Click **OK**. Notice that Ms. Suarez's name disappears from your appointment list.

Lesson 3: Telephone Consults

The Telephone Consults module enables telephone calls to be recorded and tracked. The Telephone Consult (Telcons) window displays telephone consults for specified clinics, users, dates and statuses. From the Telephone Consults module, Telcons can be created, viewed, transferred to another user, and cancelled. Phone numbers can be edited, notes viewed and an encounter can be opened for that appointment.

Lesson Goal:
The goal of this lesson is to enable you to use the Telcon function in CHCS II.

Learning Objectives:
Upon completion of this lesson, you will be able to:

- Set search selections for the telephone consults module
- Create a Telcon
- Transfer a Telcon to a different provider
- Edit a call back phone number

Exercises – CHCS II Training System

Open the CHCS II Training System and complete the exercises.

Scenario 1

To set Telcon display properties:

1. Click **Telephone Consults** from the Folder List. The Telephone Consults module opens.
2. Click the **Urgency** column and drag it to the left of the Status column.
3. Click **Change Selections**. The Telephone Consults Search Selec- tions window opens.
4. In Dates area, select the **All Outstanding** checkbox.
5. Click **Set Selections as Default**.

Scenario 2

You receive a call from retired **CAPT Clayton Williams (w8867).** He states that he needs a refill for his Hypertension medication, Lisinopril. You create a level one telephone consult for a Med refill. You ask CAPT Williams if the phone number listed in the callback field is correct. He indicates that he has moved and provides a new number: (123) 223-4444.

1. Click the **New Telcon** icon on the Action Bar. The Patient Search window will display:
2. Type **(w8867)** in the Quick Search Field and click the **Find** button. Highlight CAPT Clayton Williams' name in the Patient Name area.
3. Click **OK**. The New Telcon window will display.
4. Change the Callback Phone Number to (123) 223-4444.

5. Type *Med Refill* in the Reason for Telcon Consult field.
6. Type *Pt request refill, Lisinopril PO 20mg T* in the notes field and click **OK**.
7. The Telcon Quick Entry screen will display.
8. In the appointment list, select to highlight CAPT William's appointment.
9. Click the **Transfer** icon on the Action Bar.
10. Select **DOCTOR, DAVID** from the dropdown list.
11. Click **OK**. Notice that CAPT William's name disappears from your appointment list.

Scenario 3

Anna Wunderlich (w8118) phones the clinic to report that she has lost her Zyrtec allergy medication. She indicates that she is leaving her office and wants her call returned at a different number: 555-9999.

1. Select Anna Wunderlich's Telcon appointment.
2. Click **Edit Phone #** on the Action bar.
3. Change the Callback Phone Number to (123) 555-9999.
4. Click OK. Notice that the Callback Phone has changed.
5. Click **Close** on the Action bar.

Lesson 4: Demographics

The demographics module contains pertinent information about the patient pulled from CHCS. Certain information such as the patient's home address, city, state, zip code, country, home and work phone numbers, religion, email address, and location of the patient's medical records can be viewed within the demographics module.

Lesson Goal:
The goal of this lesson is to enable you to verify demographic information in CHCS II.

Learning Objectives:
Upon completion of this lesson, you will be able to:

- Verify patient demographic information

Exercises – CHCS II Training System

Open the CHCS II Training System and complete the exercises.

Scenario 1

CAPT. Clayton Williams informs you that he has moved since his last visit, and you want to verify that you have his latest demographic information. Using his open encounter,

1. Click on the **Demographics** folder in the Folder List. The Demographics module will display.
2. Verify his home address as 877 Main Street.
3. Click the **Close** icon on the Action Bar to close the module.

Note: Changes to demographics or insurance information should not be made in CHCS II, as these changes do not write back to CHCS I. Follow your MTF's normal business rules to make any required changes.

Lesson 5: Patient List

The Patient List module allows you to display your customized list of patients. Your list can contain your frequently seen patients or patients that are specific to your caseload. Patient records can be accessed from this list.

Lesson Goal:
The goal of this lesson is to enable you to create a patient list in CHCS II.

Learning Objectives:
Upon completion of this lesson, you will be able to

- Add patients to a patient list
- Delete a patient from a patient list
- Delete the patient list

Exercises – CHCS II Training System

Open the CHCS II Training System and complete the exercises.

Scenario 1

You are asked to ensure that patients seen for hypertension are keeping their follow-up appointments. You decide to make a patient list to help you keep track of patients who need to have follow-up appointments. **Col. Violet Alexander (a5743)** needs to be added to your list.

1. Click **Patient List** in the *Folder Menu*.
2. Click **Add** on the Action Bar. The *Patient Search* window opens.
3. Conduct a patient search for **Col. Violet Alexander**.
4. Repeat this process and add **LCDR Eduardo Suarez (s3217)**.

Note: You can repeat this process until all desired patient names have been added.

5. Close the Patient List module.

Scenario 2

LCDR Suarez is no longer being seen in your clinic for hypertension. You need to remove him from your Patient List.

1. Click on the **Patient List** in the *Folder Menu*.
2. Select **LCDR Eduardo Suarez** from the *Patient List* window.
3. Click **Delete** on the Action Bar.
4. The *Delete patient from list* confirmation window appears. Click **OK.**
5. LCDR Suarez has now disappeared from the list.
6. **Close** the Patient List module.

Scenario 3

Deleting the entire patient list

1. With the Patient List module open, click the **Delete List** icon on the Action Bar.
2. A **Delete All Patients** window will appear asking if you want to delete all patients from the current list.
3. Click **OK**. The Patient List module will redisplay with all the names removed.
4. Click **Close** on the Action Bar to close the Patient List module.

Lesson 6: Health History Folder

The Health History module displays patient historical data from various modules in one window. The window can be customized to show different modules containing the patient's historical information based on user preference.

Lesson Goal:
The goal of this lesson is to allow you to set up and customize the Health History module.

Learning Objectives:
Upon completion of this lesson, you will be able to:

- Setup Health History patient data modules
- View Problems
- View Lab results
- View Radiology results
- View Medications
- View Allergies

Exercises – CHCS II Training System

Open the CHCS II Training System and complete the exercise.

Scenario 1

The user would like to set up the Health History folders to display Problems, Allergies, Rads, Labs and Allergies. To select this module you will need to pull LCDR Eduardo Suarez's record.

1. Click the **Health History** folder in the Folders List. A warning message may appear: Click the **OK** button to remove the message.
2. Click the **Options** button on the Patient ID line. The Health History Design Summary screen will display.
3. Click the check box next to the Problems, Allergies, Lab, Rad and Meds. The Design Summary window will look like this (the Module Options are "stacked" on top of each other).
4. Click in the center of the Meds box in the Design Summary window and drag it to the upper left of the design area.
5. Click and drag the Rads box to the center left of the design area.
6. Click and drag the Labs box to the lower left of design area.
7. Click and drag the Allergies and problems to an unoccupied design area.
8. Click the **Align** button to view the format:
9. Click the **OK** button to view the results:
10. Click the **Close** icon on the Action Bar to close the module.