CHCS II Clerk Lesson Plan

COMPOSITE HEALTH CARE SYSTEM II

December 2004
Rev 2

Change History

Date	Name	Change Description	Source:
10-25-2004	Kathleen Chapman	Created	Consolidation of Services materials
11-5-2004	Kathleen Chapman	Updated	CITPO comments
12-01-2004	Juanita Stuckey	Revised	Services Comments
12-16-2004	Juanita Stuckey	Build Enhancement	Build 837.2 Release

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Preparation for Delivery

This lesson plan is designed to teach Clerks at each MTF.

Materials Needed

- CHCS II Sign-In Roster. (Electronically or Paper Form)
- CHCS II Clerk Course Lesson Plan
- CHCS II Clerk Presentation
- CHCS II QRC (one per student)
- CHCS II Clerk Training Student Guide (one per seat)
- CHCS II User Manual (one per classroom)
- Addendum to the Release Notes (one per instructor; supplied by MTF)
- CHCS II Training Course Evaluation Form (one per student)

Note: Students can keep the QRC; other training items are to be left in the classroom. The Student Evaluation Forms are to be completed by each student and left with instructor upon completion of 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 Clerk Course PowerPoint Presentation (instructor workstation only) updated with instructor name and current date.
- Reset data (**Encounter Data** button) for each CTS prior to starting class daily. **Note**: The entire database should be refreshed weekly after the last Clerk's class to ensure that CHCS II does not generate messages saying that templates created during class already exist because students created them in a previous class.
- Become aware of local policies and variations with respect to such things as template naming conventions, pharmacy locations and other similar factors relevant to training. The site coordinator and the MTF's CHCS II training team are resources for this type of information.
- From the lead instructor, find out how students can obtain copies of the CHCS II User Manual at each site.
- Review the release notes addendum (a.k.a. Disclaimer List).

Tasks to be Completed at the End of Class

- Distribute the Training Course Evaluation forms and collect them from the students before they leave the classroom.

- Explain to the class how assistance will be provided the first time they attempt to use their account in the live system.

Duration	Training Activities	Instructor Notes
Introduction		
	Welcome/Logistics ***Next Slide*** **Logistics**. Room location in building, fire escape routes, restrooms, kitchen facilities, smoking area **Workstations** **Instructional material** **Pagers and cell phones.** Off or on vibrate mode **Breaks** **Resources.** Indicate how to obtain additional information regarding additional support on the system. **Parking Lot**	❑ **Slide 1: Clerk Training Course**
	Introductions Instructor and students exchange personal introductions, providing relevant background information. ***Next Slide***	❑ **Slide 2: Logistics and Introductions**

<table>
<tr><th>Duration</th><th>Training Activities</th><th>Instructor Notes</th></tr>
<tr><td colspan="3">CHCS II Overview</td></tr>
<tr><td></td><td>What is CHCS II?

CHCS II is a computer-based patient record (CPR) system selected by 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 the retrieval of medical records
Anytime, anywhere delivery of patient records to the point of care
Future access military records for health studies worldwide
Add this brief comment as 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</td><td>❑ Slide 3: What is CHCS II?</td></tr>
<tr><td></td><td>Limitations of Paper Based Medical Records
Paper charts are lost
No automatic drug interaction alerts
Penmanship counts
Only one person can access a record at a time
Next Slide</td><td>❑ Slide 4: Limitations of Paper Based Medical Records</td></tr>
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Duration	Training Activities	Instructor Notes

	CHCS II Benefits
	• Interfaces with MHS Standard systems, e.g. CHCS I & ADM
	• Uses a standard, structured language, which is Medcin, which has the ICD-9 and CPT codes tied to those structured terms.
	• Facilitates compliance through electronic capture of elements required for:
	  ◦ JCAHO (Joint Commission on Accreditation of Healthcare Organizations)
	  ◦ Evaluation & Management (E&M) coding
	• Supports team-based health care and clinic workflow, providing appropriate access for each team member and simultaneous multi-user access
	• Supports problem-oriented health care
	• Accumulates data for reports and studies, such as clinical and population health
	• When fully implemented world-wide, will provide access to patient records anywhere, anytime
	• Maintains security
	Next Slide
		❑ **Slide 5: CHCS II Benefits**
		Elaborate on each benefit.

	Security Security is a crucial requirement of patient medical records. CHCS II security is multi-leveled and conforms with HIPAA/MHS Security standards. User access to patient information within the application is based on user role. • The system administrator assigns passwords that can be changed later by the user. • Users must have a CHCS account prior to registering for a CHCS II account. • The CHCS II password replaces CHCS verify code. • Roles and privileges are tied to unique user name and password. ***Next Slide***	❑ **Slide 6: Security**

Duration	Training Activities	Instructor Notes
	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 CHCS II users shall attend scheduled classroom training • Clerks shall receive On-the-Job Training (OJT) • 100% of encounters shall be documented in CHCS II	❑ **Slide 7: Expectations**
	CHCS II Training Classroom training is accomplished using Clinical Scenarios appropriate to each user's role. Clerk and Support have four hours of Instructor-Led Training and four hours of On the Job Training. Providers have eight hours of Instructor-Led Training, while Nurses have six hours of Instructor-Led Training. Providers and Nurses have sixteen hours of On the Job Training. Records Reviewer receive two hours of Instructor–Led Training and two hours of On-the-Job Training. ***Next Slide***	❑ **Slide 8: Training Schedule**

Duration	Training Activities	Instructor Notes

	Key Information Technology Training Resources
	• MTF CHCS II Team
	  • MTF Project Officer
	  • Facility Training Coordinator
	  • Clinical Champion/SuperUser
	• Unisys On-Site Team
	  • Site Training Coordinator
	  • ILT Lead
	  • OJT Lead
	  • Trainers
	Note: Provide the names of those filling these roles locally and an indication of how they might be contacted.
	Next Slide
		❑ **Slide 9: Key Information**
		These resources are available during the training implementation.

	System Demo	
	Go to Appendix **A** ***Next Slide***	❑ **Slide 10: Systems Demonstration** **Note:** Invite class participation to assist with roles in demonstration.
	Course Goal The goal of this course is to enable Clerks to access, navigate, and use the CHCS II application to document patient encounters in the clinic. *Next Slide*	❑ **Slide 11: Course Goal**
	CHCS II Training System • Click the caduceus icon on the desktop to start **Explain:** • Stand-alone practice version of CHCS II • Used for training only • Simulates CHCS II functionality • Very limited choices for labs, rads and meds • Patient data is fictitious • Slight variations between the CTS and the application in the field • Users are automatically logged on as a Provider • Live system access may vary depending on roles • The role assigned to you in the live CHCS II system may not allow you to perform all tasks covered in training – duties of staff vary from clinic to clinic.	❑ **Slide 12: CHCS II Training System**

	Next Slide **Training MTF Business Rules** ***Next Slide*** **Course Agenda** ***Next Slide***	❑ **Slide 13: Training and MTF Business Rules** ❑ **Slide14: Course Agenda** ❑

Lesson 1: Navigation		
	Lesson Goal The goal of this lesson is to enable the user to access and navigate within the CHCS II application. **Learning Objectives** Upon completion of this lesson, the user 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	❑ **Slide 15: Navigation Learning Objectives** **Note:** At a CHCS II workstation equipped with a CAC reader, users will have the option of using their personal CAC to log into CHCS II.
	Basic Navigation **Explain:** General layout of the screen (similar to Outlook) • Title Bar • Main menu • Action Bar **Demonstrate:** Log on to the system, view the current list of appointments and open and close modules 1. Double-click the CHCS II Training System icon on the computer desktop. A Role identification screen will appear, the medical radial button is selected by default. 2. Click **OK**. 3. Press the escape key (Esc) on your keyboard twice to progress through the informational messages. 4. Verify the Appointments module is open.	**Explain:** You will demonstrate each lesson first and after each lesson demonstration the class will practice these lessons by performing the exercises in the Student Guide. The Action Bar icons change according to the active module

	5. The list of current appointments will display. 6. 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. 7. Click **Co-signs** in the Folders List to open the Co-signs module. The Co-signs module will display. 8. Click the **Close** icon on the Action Bar to close the Co-signs module. 9. Click the Close **X** button on the upper right corner of the Title Bar to end CHCS II. A confirmation message will display. 10. Click **Yes** to confirm the exit **Key Points:** Module access • For navigating, the Folder List and Action Bar are the most efficient method. **Exercises** • Complete the exercises. • Check for understanding and answer participant questions. ***Next Slide***	**Note:** Emphasize how the desktop can be customized.
	Security and Session Management **Explain:** • Passwords expire every 85 days – user is prompted at 80 days to change. • Password can be changed prior to expiration. • CHCS II password and CHCS verify codes are synchronized. • Two or more users can have their own session open on a single workstation. **Changing passwords:** This cannot be demonstrated on the CHCS II Training System; you will be shown how to change your password in your OJT session.	**Note**: Emphasize that passwords **must** be changed in CHCS II.

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Demonstrate:

- User has the option to lock the session to avoid system time-out.
  - Press **Ctrl-Z**. (Can also select the **Lock** command in the **Tool** menu.)
  - To unlock the session, maximize the application and click the **OK** button. (In the live system, you will be asked for your password.)

SUMMARY

- Navigation
- Security

Next Slide

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Recommend: Have Students Lock their CHCS II Sessions before going on breaks throughout the course.

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Lesson 2: Patient Search and Appointments

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Lesson Goals

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

Learning Objectives

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

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

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❑ **Slide 16: Patient Search & Appointments Learning Objectives**

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	Patient Search Module Pulling a Patient Record features: ▪ Different search methods available ▪ Patient must have a record in CHCS ▪ "Search CHCS" is an option	

	Appointment Module
	Module specific screen features:
	• Module title bar
	• Appointment list
	• Columns
	• Access to properties setup options:
	  • Drop-down box
	  • Options
	  • Change selections
		Explain specific *Appointment* screen features.
		
		Explain: Scheduled (future) appointments are still made in CHCS and come over to CHCS II nightly and every 15 minutes throughout the day.

	Patient Search and Appointments **Demonstrate:** 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 **Search** in the Folders List to search for a patient. The Patient Search window will display 3. Click in the Last Name field and type ***ALEXANDER*** then 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.	**Explain:** Appointment display options: • Column order • Clinic (Clinic assignments are in CHCS) • Provider • Date • Status Selection **Explain:** Appointment types and statuses. Do not need to show all steps in Transfer and Cancel appointments—but, do point out these functions.

	To set the appointment filters 1. Click **Change Selections** button in the Appointment list workspace. The Appointment Search Selections window will display. 2. Click the following radio buttons for the associated Field: **Clinics: This Clinic** **Providers: All for this Clinic** **Dates: Today Only** **Status Selection: Any Status** 3. When the information has been completed, select the **Set Selections as Default** button to change the default settings. 4. To change column order, click and drag the **CheckedIn** column header to move next to the Appt. Date /Time column. 5. Click **Change Selections** button in the Appointment list workspace, select the **Set Column Order as Default** button to change the default settings. The Appointment List will re-display. **To create a new unscheduled appointment** 1. Click **New Appt** 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. (The Allergy synchronization simulation from CHCS will begin.) • Point out how a clerk can add comments to an appointment, as well as how to view and edit those comments. • Point out the **Related to Injury/Accident** checkbox. 5. Col. Alexander appointment will now appear at the bottom of the Appointment list with a status of **CheckedIn**. **Check-in patients with scheduled appointments** **Maria Alexander (a5743)** arrives at the clinic for her scheduled appointment, she has a sprained ankle. You check her in CHCS II.	**Explain:** Live system, *Today plus Incomplete* pulls in old appointments from CHCS. Suggest using *Today Only* to view current day's appointments **Explain:** The Related to Injury/Accident checkbox, a HIPAA 837 compliant feature.

	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.** **Key Points:** • Point out the **Transfer** icon. • Point out the **Cancel** icon. • Point out the **Check-out** icon. **Exercises** • Complete the exercises. • Check for understanding and answer participant questions.	**Explain:** You can Check–in scheduled appointment in CHCS II.
	SUMMARY • Patient search • Appointment list properties • Change display selections • Created a new appointment • Check-in and Check-out • Explain how to view and add comments • Pointed out function for transferring appointments to other Providers ***Next Slide***	

Lesson 3: Telephone Consults

Lesson Goals

The goal of this lesson is to enable the user to use the Telcon function in CHCS II.

Learning Objectives

Upon completion of this lesson, the user 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

❑ **Slide 17: Telephone Consults Learning Objectives**

Telephone Consults Module

Demonstrate:

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.

To set the Telephone Consults filters

1. Click the **Telephone Consults** in the Folder List. The Telephone Consult window will display:
2. Click **Change Selections** button in the Telephone Consults workspace. The Telephone Consults Search Selections window will display.
3. Verify the following radio buttons for the associated Field:

   Clinics: This Clinic (Default)
   Providers: All for this Clinic(s) (Default)
   Dates: Click **Today Only**
   Status Selection: Any Status (Default)

Telcons created in CHCS must be completed in CHCS.

In order to access and complete a Telcon in CHCS II the Telcon must be created in CHCS II.

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4. When the information has been completed, select the **Set Selections as Default** button to change the default settings.
5. To change column order, click and drag the **Reason for call** column header to move next to the Patient column.
6. Click **Change Selections** button in the Telephone Consults workspace, select the **Set Column Order as Default** button to change the default settings.

To Create and Transfer Telcon New Telcon

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**. (The Allergy synchronization simulation from CHCS will begin.)
7. The Telcon Quick Entry screen will display.
8. Click **Cancel** to close the Telcon Quick Entry screen.
   - Point out the Telcon Quick Entry Screen is for Providers
9. The encounter note displays. Click **Close** on the Action Bar to return to the Telephone Consults module.
10. Click the **Transfer** icon on the Action Bar.
11. Select **DOCTOR, DAVID** from the dropdown list.
12. Click **OK**.
13. Notice that CAPT William's appointment has been transferred to Doctor, David. See the Provider column in the appointments list.

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Explain: Reason for Telcon field and Note field. Both must be completed.

NOTE: If the user has the provider role assigned to their log on, they will receive the Quick Entry Screen after clicking OK. Any other user will be taken back to the Telephone Consults module

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	Exercises • Complete the exercises. • Check for understanding and answer participant questions. **SUMMARY** • Explained default search and display telephone consults appointment list options • Created a telephone consult appointment • Explained how to transfer a telephone consult to a different Provider • Edited a call back phone number Next Slide	
Lesson 4: Demographics		
	Lesson Goals The goal of this lesson is to enable the user to verify third-party insurance and demographic information in CHCS II. **Learning Objectives** Upon completion of this lesson, the user will be able to: • Verify patient demographic information	❑ **Slide 18: Demographics Learning Objectives**

Demographics

Demonstrate:

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. In the Appointments list, highlight CAPT William's appt.
2. Click on **Demographics** in the Folder List. The Demographics module will display.
3. Verify his home address as: 877 Main Street.
4. Click the **CLOSE** icon on the Action Bar to close the module.

Key Points

- Demographic and third party insurance information may currently be viewed in CHCS II, but any required changes should be done in the respective legacy systems. Follow your MTF business rules.

- Use the Demographic module to verify patient demographic information.
- Address and phone number information should not be updated in CHCS II. Changes in CHCS II do not write back to CHCS.
- To update this information, continue to follow current MTF policies.
- Insurance information does not write back from CHCS II to CHCS. Continue to follow your MTF policy for collecting third party insurance information.

Exercises

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

SUMMARY

- Verified patient demographic information

Next Slide

Lesson 5: Patient List		
	## Lesson Goals The goal of this lesson is to enable the user to create a patient list in CHCS II. ## Learning Objectives Upon completion of this lesson, the user will be able to • Add patients to a patient list • Delete a patient from a patient list • Delete the patient list	❑ **Slide 19: Patient List Learning Objectives**
	Patient List ## Demonstrate: The user would like to create a list of their frequently seen patients. **Creating a patient list** 1. Click **Patient List** in the Folder List to open the Patient List. The Patient List window will display: 2. Click the **Add** icon on the Action Bar to open the Patient Search window. 3. Type ***WUNDERLICH*** in the Last Name field and click the **Find** button. 4. Highlight WUNDERLICH, ANNA W and click **OK**. 5. Repeat steps 2-4 to add the whole Wunderlich family to the patient list. **Deleting a patient from the list** 1. With the Patient List module open, highlight WUNDERLICH, HERMAN. 2. Click the **DELETE** icon on the Action Bar. A Delete patient from list window will appear.	**Note:** This list can be used to provide a way to do a Quick Search for a frequently seen patient.

3. Click **OK**. The Patient List module will redisplay with Herman Wunderlich's name removed.

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.

Exercises

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

SUMMARY

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

Next Slide

Lesson 6: Health History Folder

Lesson Goal

The goal of this lesson is to setup and customize the Health History module and enable the user to access and modify selected patient information accumulated from earlier encounters and outside the current encounter..

Learning Objective

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

- Setup Health History patient data modules
- View Problem information
- View Lab results
- View Radiology results
- View Medication information
- View Allergy information

Health History

Demonstrate:

To view a patient's Health History folder.

1. In the Appointment list, highlight LCDR Eduardo Suarez's appt.
2. Click the **Health History** folder in the Folders List.
3. The Health History module displays with default modules selected.

To customize the Health History folder:

1. Click the **Options** button on the Patient ID line. The Health History Design Summary screen will display.
2. Uncheck the boxes next to Problems and Demographics.

❑ **Slide 20: Health History Learning Objectives**

Explain:

- Use this module to set up a display of selected patient health history information for quick review.
- The first time you access the module, you will be prompted by Warning message prior to setup.
- Setup can be done from the Options button.
- the same setup applies to all patient records.

3. Click the **Align** button to view the format.
4. Click the **OK** button to view the results.
5. Click the **Close** icon on the Action Bar to close the module.

Key Points:

- Can be changed to fit the current requirements

Exercises

- Students follow along with the Instructor
- Check for understanding and answer participant questions

Summary

- Explained Health History folder
- Setup Health History patient data modules
- Viewed Problem information
- Viewed Lab results
- Viewed Radiology results
- Viewed Medications
- Viewed Allergy information

Next Slide

Course Summary

	Briefly summarize the course and open to questions and answers. Overview of the system, the training, the expectations Basic skills: navigating through documenting MEDCIN and templates Ancillary modules Alerts Previous Encounters	❑ **Slide 22: Course Summary** **Summarize course based on modules taught**
	What Do I Do If I Encounter a Problem While Working with CHCS II? • Write down any error message received. • Remember what action was taken before the error message was received. • Take screen shots • Report the problem to your local Help Desk. \\ **Demonstrate:** **Capturing Screens** To capture screens: 1. On the workstation keyboard, press **PrtScrn**. 2. Open PowerPoint. 3. To paste the screen capture into PowerPoint right mouse click and select **Paste.** 4. Save the screen capture to the appropriate folder on the workstation. In many clinics, there is a specific folder on a shared network drive for storing these files.	❑ **Slide 23: What Do I Do If I Encounter a Problem While Working with CHCS II?**

	Ensuring Patient Data is concealed in the Screen Capture 1. In PowerPoint, use the drawing tools to conceal any patient-specific information on the screen. 2. From the View menu, select Slide Show. 3. On the workstation keyboard, press PrtScrn. 4. Exit the slide show to return to the normal view by pressing Esc on the workstation keyboard. 5. On the PowerPoint toolbar, click the new presentation icon (i.e., the blank piece of paper). 6. To paste the screen capture into the new presentation, right mouse click and select Paste. 7. Save the screen capture (in the new presentation) to the appropriate folder location on the workstation. 8. Close the original screen capture without saving the document. **Next Slide**	
	Other Help Resources	

	• QRC's.
	• CHCS II User Manual. Should be available in each clinic.
	• Application Help menu.
	  • Detailed information on use of modules
	  • Step-by-step procedures
	
	Explain: Both are readily available within the application help files. Help is structured like other Windows application help files.
	
	Next Slide
		❑ **Slide 24: Other Help Resources**
		
		Remind the class that the student guide is not to be removed from the classroom, and inform them about the process for obtaining their own copies at the site.
		
		Emphasize the use of Help in the application.

	Questions and Answers	

Appendix A: System Demonstration

System Demonstration Scenario

Note: You may choose to invite your co-instructor or a class member to assist you in the role-play demo.

Set the scene for the class, you will demonstrate the flow of the clinic for a ‘walk-in’ patient. You will play each role, the clerk who will check in the patient, the Tech who will triage the patient, the Provider who will exam and disposition the patient and the nurse who will provide patient education and submit the orders for the provider:

A patient comes in needing to be seen by the provider. The clerk creates a walk-in appointment. The tech will perform the screening and vitals. The provider examines the patient. He hands the orders to the nurse who will submit them and send the patient to Lab and Radiology clinics. When the patient returns the provider reviews the results and determines a diagnosis. He gives the patient a prescription and instructs the nurse to provide patient education. The provider completes disposition and signs the encounter. The patient is checked out.

Role/Function	Field	Data
CLERK: Creates an Acute $30 walk-in appointment for Col. Violet Alexander (A4211). Reason for appointment – Shortness of Breath.	Patient Search	
	Quick Search	w8118
	New Unscheduled Appointment/Telcon Visit	
	Appointment Type	Acute Appt (Acut$) 30
	Reason for Appointment	Cough, runny nose
SUPPORT: Performs screening, document female only data, verify allergies. Record vitals, document performing a Peak Flow under the AP portion of the SF600.	Appointments	
		[Select] Col Alexander's walk-in appt. Doubleclick appt. to open SF 600
	Screening	
	In the Search field	[Enter] a cough and click **Find Now**. Select a cough and click **Add**. [Enter] nasal discharge and click **Find Now** select nasal discharge and click **Add**
	Verified This Encounter	[Select to verify allergies]
		[Click] Close (Action Bar Icon)
	Vitals	
	BP Rt arm Pediatric cuff	110/70 [Select] [Select]
	HR Radial	95 [Select]

	Regular	[Select]
	RR Temperature F Oral	13 99 F [Select]
	Ht	[Enter] 52 in
	Wt	70 lbs
	Habits	
	Tobacco	[Select] No
	Alcohol	[Select] No
	Pain Severity	
		[Select] 1 Hurts a little bit
	Where is pain located?	Throat NOTE: Add comments when pain scale is selected (other than "0 pain free").
	Save Vitals	
		[Click] Save Vitals (Action Bar Icon) [Select] Close (Action Bar Icon) to retur to SF600
	SF600	[Click] Close and return to Appts. Module

PROVIDER: Sees the patient. Reviews what has been documented so far and loads the URI template. After documenting he uses Auto Neg – where appropriate.	Appointments	
		[Select] Col Alexander's walk-in appt. Doubleclick appt. to open SF600
	S/O	
		[Select] S/O Button on SF600
	Favorites List	[Select] Visit--URI From the favorites drop-down window.
	HPI *Find Term*	[Select] + CC: URI Symptoms a cough coughing up sputum shortness of breath [Select] << Go Back button to return to URI Template.
	PMH	[Select]+ History of Asthma
	ROS	[Select] + nausea [Select] — vomiting
	PE	[Select] + Vital signs reviewed All general apprearance terms Auscultation Wheezing AutoNeg

		[Click] Close (Action Bar Icon) to return to SF600
	SF600	[Click] Close (Action Bar Icon) to return to Appts. Module
NURSE: Enters the AP section and orders the Lab and Rad tests.	Appointments	
		[Select] Col Alexander's walk-in appt. Doubleclick appt. to open SF600
	A/P	
	Order Lab Tab Routine	 [Select] [Type] CBC w/auto Diff in New Order field. [Click] Search [Select] CBC w/auto Diff in lab field. [Select] [Click] Submit
	Order Rad Tab Clinical Impression Routine More Details	 [Select]Chest [Type] Chest in the new order field. [Click] Search [Select] Chest in the new order field. [Enter] r/o pneumonia [Select] [Select] Ordering Provider [Click] Submit [Click] Close

		(Action Bar Icon)
	SF600	[Click] Close (Action Bar Icon) to return to Appts. module
NURSE: Reviews Results and copies results to encounter	**RESULTS ARE READY!!!**	
	Lab	
		Open module Highlight Result Copy to Note
	Rad	
		Open module Highlight Result Copy to Note
PROVIDER: Returns to patient to discussed results and give a Diagnosis. He then completes the Disposition and Signs encounter.	Apointments	
		[Select] Col Alexander's walk-in appt. Doubleclick appt. to open SF600
	A/P	
	Diagnosis	[Select] Asthma (to associate orders w/diagnosis)
	Order Meds Sig	[Type] Albuterol in new order field [Click] Search [Select] Albuterol [Enter]

		[Click] Submit
	Other Therapies	[Type] Patient Education [Select] Patient Education Patient Education
	Disposition and Sign	
	Release w/out limitations	[Select]
	Follow-up	[Select] with PCM [Enter] 2 and weeks
	Discussed Items	[Select] Discussed all items
	E & M Code	Verify coding
	Sign	[Select] Sign (Action Bar Icon) Close SF600
CLERK: Clerk Checks out the patient and provides patient with a copy of the signed encounter.	Appointments	
		[Select] Col Alexander's walk-in appt. [Select] Check out on Action Bar Print patient a copy of SF600

As the **CLERK:** Col. Violet Alexander walks into your clinic complaining of shortness of breath, she does not have an appointment but needs to see her PCM – Dr. Test User. You create an (Acute $) 30 walk-in appointment for the patient and enter the reason for appointment as shortness of breath.

SUPPORT/TECH calls Col. Violet Alexander into the screening room. Open the SF600 and go to the Screening tab. In the Search box enter Upper Respir and press Find Now. Highlight the words and Add Upper Respiratory Infection to the Selected Reason for Visit. Complete the lower half of the screen – Female Only Data. You also need to verify the allergies for the patient. Next you will enter the patient vital signs.

BP	110/70
HR	75
RR	35
°F	99
Ht	5’ 6”
Wt	140

Enter Peak Flow of 92, and Oxygen Sat. 92%, Note: you will get a low warning for the Oxygen Sat., enter yes. Notice the Oxygen Sat. will be bolded to indicate an abnormal result.

Close. Go to the A/P tab and enter the Peak Flow under the Procedure Tab. Enter Peak Flow in the Search box and push Find Now. Select the term. Note the term will go to the right side of the screen under orders and procedures. When you close this you will get a warning. Enter Yes. When you see the SF600 it will show the procedure as unassociated.

Close the encounter and select the refresh button. Notice the appointment status is now Waiting or In Progress.

The **PROVIDER** opens this encounter. He/she reviews the vitals and goes to the SO. He/she loads the URI template from the drop-down window. The Provider enters the + for chief complaint (URI symptoms).
Also select cough and coughing up sputum and search using Find Term – shortness of breath, select the << to go back to the URI template. Now click on the PMH tab.
Select + for History of Asthma
Click on the ROS tab select + for nausea and – for vomiting
Click on the PE tab select + for Vital signs reviewed, and all of the general appearance terms and well as Auscultation Wheezing, AutoNeg all of the other terms because you have performed these checks and found them to be normal.
You close the SF600. You tell the patient you want them to go to Lab to have a CBC and Radiology to have a chest X-Ray, when they have been performed to come back to you. You (the provider) give the nurse the orders to enter into the system and see the next patient.

The **NURSE** now opens the SF600 and goes to the A/P section. She enters the CBC w/o diff under Lab and the Chest X-Ray under radiology. When the rad is entered the nurse needs to put in the clinical impression. The note the provider has entered is rule out pneumonia. She/he verifies the ordering Provider by clicking the more details tab. She/he then submits the test. The nurse then closes the module once again getting the warning she/he clicks yes then closes the encounter.

When the patient returns the provider sees her. She/he opens the encounter and goes to her Lab. The lab work is in, the provider wants to add this to the encounter.   Highlight the CBC and the results will show under the results portion of the module. Left click and drag the mouse to the end the results. Press the right mouse and two entries will appear click the copy to note. Close the module, view the SF600 and notice the results are under the SO portion of the note. (Note: there is no chest x-ray result in the system for this patient).

The **PROVIDER** then goes to the A/P and enters the diagnosis of asthma then associates the orders and procedures to the diagnosis. The provider places the order for albuterol under the Rx module. The provider also enters the patient education under the other therapies tab. The provider enters: Patient Education Asthma Exposure to Triggers, Patient Education Asthma Metered Dose inhaler, Patient Education Peak Flow Monitor.

The **PROVIDER** now selects disposition and enters in the follow-up section: with PCM in 2 weeks, in the comments section enter – sooner, if needed. Check the discussed all box in the discussed section. Verify the E & M code and sign the encounter.

The **NURSE** then returns the signed encounter and double clicks it. This will take you to the previous encounter. The nurse highlights the encounter and selects the Append Narrative on the action bar. This will open the encounter note. The nurse will import the nebulizer treatment word document. The nurse will also indicate the second peak flow result after the treatment on the note. She/he saved the note and goes to sign the encounter. The nurse will add the provider as the co-signer of the note. The encounter will have the status of updating until the provider enters the countersignature. The status will change to updated.

NOTE: Make sure the Nebulizer treatment note is added to the word documents before the demonstration.