CHCS II Records Reviewer Student Guide

Updated CHCS II Course Curriculum – Records Reviewer Student Guide

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PLEASE DO NOT REMOVE FROM CLASSROOM

Change History			
Date	**Name**	**Change Description**	**Source:**
10/27/2004	Kathleen Chapman	Created	Consolidation of materials
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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

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.

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

- Set startup options
- Search for a patient

Exercises – CHCS II Training System

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

Scenario 1

As a Records Reviewer you would like to have the Patient Search module open when logging into CHCS II everyday. To change your startup options log into CHCS II.

1. Click the **Tools** on the Menu Bar.

2. Click **Startup options**.

3. The Startup option screen will display. Select the **Patient Search** radial button and click **OK**.

4. Exit the CHCS II application.

5. Re-enter the CHCS II application to verify Patient Search module startup.

Scenario 2

The Records Reviewer would like to view **Col. Violet Alexander's** patient reccord.

Open the CHCS II Application.

NOTE: By default the Appointment module displays

1. Click the **Search** in the Folders List to search for a patient. The Patient Search window will display

2. Type *ALEXANDER* in the Last Name: field and click **Find** for a list of names.

3. 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.

<u>Lesson 3: Demographics</u>

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 third-party insurance and 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 4: Previous Encounters

The Previous Encounter module displays a list of a patient's completed encounters. You can append a narrative, amend an encounter, create a new template from the completed encounter and "copy forward" the results of a previous encounter to the current encounter easing effort and saving time in documenting follow-up visits.

Lesson Goal

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

Learning Objectives

Upon completion of these modules, the user will be able to:

- Display a previous patient encounter
- Print SF600

Exercises – CHCS II Training System

Open the CHCS II Training System and complete the exercises.

Scenario 1

You are reviewing LCDR Eduardo Suarez's patient record and need to see encounters documented in CHCS II.

1. Click on the **Search** in the Folder List.

2. Type *s3217* in the Quick Search: field and click **Find** for a list of names.

3. Click on *SUAREZ, EDUARDO* in the list of names and click **OK**. LCDR Suarez's information will appear on the Patient ID line.

4. Click **Previous Encounters** in the Folders List. The Previous Encounters module displays.

5. Highlight *Essential Hypertenson* encounter listed in the top display window and view details in bottom display window.

6. To print highlighted encounter, click the **File** menu.

   - Point out feature only

Lesson 5: 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 Problem
- 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.

Lesson 6: Readiness

The Readiness module displays information to determine whether the patient is ready for deployment. An encounter must be open to access the Readiness module. Most of the data displayed on the Readiness window is received from other sources. Data edited in the Readiness window does not update data in its original source.

NO Exercises

Lesson 7: Reports

Lesson Goal

The goal of this lesson is to understand how to run and print reports.

Learning Objectives

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

Run a report
View a Report

Exercises – CHCS II Training System

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

Scenario 1

An end user wants to run a customized Appointments report for the clinic/lab for the last year. The report should be run in a separate window and should be grouped by end user.

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

2. Click the *Report on*: drop-down to get a list of report types.

3. Click on *Appointments* to select it. The Reports window will re-display.

4. Complete the following fields:

   - With Scope of: - *Clinic/Lab*

   - From: field - One year prior to the To: field

   - Click to select the ☐ Display in separate window check box

   - Click to select the ☐ Provider check box

5. Click the **Run Report** button. The report will be run and the result displayed in a separate window.

6. Click the **Close** icon in the upper right of the screen to close the Print Preview window. The Reports window will re-display.

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