



CHCS II Clerk Lesson Plan



February 2005
Rev 2.2

Change History

| Date | Name | Change Description | Source: |
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| 10-25-2004 | Kathleen Chapman | Created | Consolidation of Services materials |
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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 Clerk Training Student Guide (one per seat)
- CHCS II User Manual (one per classroom)
- Addendum to the Release Notes
- CHCS II Evaluation Form (one per student)

Note: Training items are to be left in the classroom. The CHCS II Evaluation Form is 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
- 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 Training 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 evaluation forms and collect them from the students before they leave the classroom. Ensure that the student included a comment if rated "3" or lower.

| Duration | Training Activities | Instructor Notes |
|---------------------|--|---|
| Introduction | | |
| | <p data-bbox="296 253 600 293">Welcome/Logistics</p> <div data-bbox="842 370 1020 431" style="text-align: center; border: 1px solid gray; padding: 2px;"><i>Next Slide</i></div> <p data-bbox="296 508 1509 574">Logistics: Room location in building, fire escape routes, restrooms, kitchen facilities, smoking area.</p> <p data-bbox="296 597 485 630">Workstations</p> <p data-bbox="296 651 604 683">Instructional material</p> <p data-bbox="296 704 930 737">Pagers and cell phones: Off or on vibrate mode.</p> <p data-bbox="296 758 401 790">Breaks</p> <p data-bbox="296 812 1497 878">Resources: Indicate how to obtain additional information regarding additional support on the system.</p> <p data-bbox="296 899 470 932">Parking Lot</p> <p data-bbox="296 953 520 985">Introductions</p> <p data-bbox="296 1013 1423 1079">Instructor and students exchange personal introductions, providing relevant background information.</p> <div data-bbox="842 1105 1020 1167" style="text-align: center; border: 1px solid gray; padding: 2px;"><i>Next Slide</i></div> | <p data-bbox="1583 285 1955 358"><input type="checkbox"/> Slide 1: Clerk Training Course</p> <p data-bbox="1583 435 1927 508"><input type="checkbox"/> Slide 2: Logistics and Introductions</p> |

| Duration | Training Activities | Instructor Notes |
|-------------------------|---|---|
| CHCS II Overview | | |
| | <p data-bbox="296 253 594 293">What is CHCS II?</p> <p data-bbox="296 318 1549 386">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.</p> <p data-bbox="296 407 541 440">CHCS II provides:</p> <ul data-bbox="348 467 1283 634" style="list-style-type: none"> • 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 <p data-bbox="296 708 982 740">Add this brief comment as transition to next slide:</p> <p data-bbox="296 756 1549 862">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.</p> <p data-bbox="846 886 1014 927" style="text-align: center;"><i>Next Slide</i></p> | <p data-bbox="1587 285 1955 358"><input type="checkbox"/> Slide 3: What is CHCS II?</p> |
| | <p data-bbox="296 963 1010 1003">Limitations of Paper Based Medical Records</p> <ul data-bbox="348 1032 978 1198" style="list-style-type: none"> • Paper charts are lost • No automatic drug interaction alerts • Penmanship counts • Only one person can access a record at a time <p data-bbox="846 1260 1014 1300" style="text-align: center;"><i>Next Slide</i></p> | <p data-bbox="1587 992 1944 1097"><input type="checkbox"/> Slide 4: Limitations of Paper Based Medical Records</p> |

| Duration | Training Activities | Instructor Notes |
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| | <p data-bbox="296 180 579 215">CHCS II Benefits</p> <ul data-bbox="348 250 1533 737" style="list-style-type: none"> • Interfaces with MHS standard systems, e.g. CHCS & ADM • Uses MEDCIN (structure language that captures ICD-9 and CPT codes) • Facilitates compliance through electronic capture of elements required for: <ul data-bbox="394 375 1396 444" style="list-style-type: none"> • JCAHO (Joint Commission on Accreditation of Healthcare Organizations) • Evaluation & Management (E&M) coding • Supports team-based health care and clinic workflow, providing 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, CHCS II will provide access to patient records anywhere, anytime • Maintains security <p data-bbox="848 764 1014 800" style="text-align: center;"><i>Next Slide</i></p> | <p data-bbox="1587 212 1871 282"><input type="checkbox"/> Slide 5: CHCS II Benefits</p> <p data-bbox="1587 305 1923 334">Elaborate on each benefit.</p> |
| | <p data-bbox="296 837 432 873">Security</p> <p data-bbox="296 899 1062 928">Security is a crucial requirement of patient medical records.</p> <ul data-bbox="443 976 1545 1240" style="list-style-type: none"> • 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. • The system administrator assigns passwords that may be changed later by the user. • Users must have a CHCS account prior to receiving a CHCS II account. • The CHCS II password replaces CHCS verify code. <p data-bbox="848 1268 1014 1304" style="text-align: center;"><i>Next Slide</i></p> | <p data-bbox="1587 870 1860 906"><input type="checkbox"/> Slide 6: Security</p> |

| Duration | Training Activities | Instructor Notes |
|----------|---|--|
| | <p data-bbox="300 240 506 277">Expectations</p> <p data-bbox="300 302 1549 370">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.</p> <p data-bbox="300 391 552 423">To accomplish this:</p> <ul data-bbox="348 451 1230 570" style="list-style-type: none"> <li data-bbox="348 451 1230 483">• 100% of CHCS II users shall attend scheduled classroom training <li data-bbox="348 493 999 526">• Clerks shall receive On-the-Job Training (OJT) <li data-bbox="348 535 1167 570">• 100% of patient encounters shall be documented in CHCS II | <p data-bbox="1587 212 1923 250"><input type="checkbox"/> Slide 7: Expectations</p> |
| | <p data-bbox="300 581 594 618">CHCS II Training</p> <p data-bbox="300 643 1560 743">Training is accomplished using Clinical scenarios appropriate to each user’s role. In order to better demonstrate system functionality the clinical scenarios presented may not always follow clinical standards of care.</p> <p data-bbox="300 768 1545 906">Providers receive eight hours of Instructor-Led Training (ILT), while Nurses receive six hours of ILT. Providers and Nurses receive sixteen hours of OJT. Clerks and Support staff receive four hours of ILT and four hours of OJT. Records Reviewers receive two hours of ILT and two hours of OJT.</p> <p data-bbox="848 938 1016 976" style="text-align: center;"><i>Next Slide</i></p> | <p data-bbox="1587 613 1871 683"><input type="checkbox"/> Slide 8: Training Schedule</p> |
| | <p data-bbox="300 1010 1079 1047">Key Information Technology Training Resources</p> <p data-bbox="300 1071 569 1104">MTF CHCS II Team</p> <ul data-bbox="394 1114 831 1214" style="list-style-type: none"> <li data-bbox="394 1114 831 1146">• MTF Project Officer <li data-bbox="394 1149 831 1182">• Facility Training Coordinator <li data-bbox="394 1185 831 1218">• Clinical Champion/SuperUser <p data-bbox="300 1222 579 1255">Unisys On-Site Team</p> <ul data-bbox="394 1260 774 1360" style="list-style-type: none"> <li data-bbox="394 1260 774 1292">• Site Training Coordinator <li data-bbox="394 1295 611 1328">• ILT Trainers <li data-bbox="394 1331 611 1364">• OJT Trainers <p data-bbox="848 1393 1016 1430" style="text-align: center;"><i>Next Slide</i></p> | <p data-bbox="1587 1044 1808 1114"><input type="checkbox"/> Slide 9: Key Information</p> <p data-bbox="1587 1138 1965 1239">These resources are available during the training implementation.</p> <p data-bbox="1587 1317 1965 1455">Note: Provide the names of those filling these roles locally and an indication of how they might be contacted.</p> |

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| | System Demo | |
| | <p>Go to Appendix A</p> <p><i>Next Slide</i></p> | <p><input type="checkbox"/> Slide 10: Systems Demonstration</p> <p>Suggestion: Invite class participation to assist with roles in demonstration.</p> |
| | Course Goal | <p><input type="checkbox"/> Slide 11: Course Goal</p> |
| | <p>The goal of this course is to enable Clerks to access, navigate, and use the CHCS II application.</p> <p style="text-align: center;"><i>Next Slide</i></p> | |
| | CHCS II Training System | <p><input type="checkbox"/> Slide 12: CHCS II Training System</p> <p>Elaborate on each bullet point.</p> |
| | <p>Explain:</p> <ul style="list-style-type: none"> • CTS desktop icon • Stand-alone practice version of CHCS II • Used for training only • Simulates CHCS II functionality • Patient data is fictitious • Very limited choices for labs, Rads and meds • Slight variations between the CTS and the live system • Users are automatically logged on as a Provider • Live system access may vary depending on roles <p style="text-align: center;"><i>Next Slide</i></p> | |

Training and MTF Business Rules

- Training exercises do not imply that your clinical role or privileges change
- Training scenarios represent user's role
- Roles and privileges vary from MTF or clinic
- MTF and service-specific business rules are to be followed when using CHCS II

Next Slide

Course Agenda

- Navigation
- Patient Search and Appointments
- Telephone Consults
- Demographics
- Health History Folder

Next Slide

Slide 13: Training and MTF Business Rules

Slide14: Course Agenda

| Lesson 1: Navigation | | |
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| | <p>Lesson Goal</p> <p>The goal of this lesson is to enable the user to access CHCS II and navigate within the application.</p> <p>Learning Objectives</p> <p>Upon completion of this lesson, the user will be able to:</p> <ul style="list-style-type: none"> • Log in to the CHCS II application • Access modules quickly using Folder List • Open and close an application module • Lock CHCS II session • Exit the CHCS II application | <p><input type="checkbox"/> Slide 15: Navigation Learning Objectives</p> <p>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.</p> |
| | <p>Basic Navigation</p> | |
| | <p>Explain: General layout of the screen (similar to Outlook).</p> <ul style="list-style-type: none"> • Title Bar • Main menu • Action Bar • Folder List <p>Demonstrate:</p> <p>Log on to the system, view the current list of appointments and open and close modules</p> <ol style="list-style-type: none"> 1. Double-click the CHCS II Training System icon on the computer desktop. A Role identification screen will appear, the medical radio button is selected by default. 2. Click OK. 3. Press the escape key (Esc) on your keyboard twice to progress through the informational messages. | <p>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.</p> <p>The Action Bar icons change according to the active module</p> |

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| | <p>4. Verify the Appointments module is open.</p> <p>5. The list of current appointments will display.</p> <p>6. Review the icons on the Action Bar for Appointments. Icons on 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 on the Action Bar changes.</p> <p>7. Click Telephone Consults in the Folders List to open the Telephone Consults module. The Telephone Consults module will display. Notice the Action Bar has changed.</p> <p>8. Click the Close icon on the Action Bar to close the Telephone Consults module.</p> <p>9. To Lock the CHCS II application follow the menu path File > Lock.</p> <p>10. The screen will minimize.</p> <p>11. To reopen the application click the application located on the desktop tool bar area</p> <p>12. Click OK.</p> <p style="text-align: center;">Point out that the in the live system user will have to enter their assigned password before reentering CHCS II.</p> <p>Note: CHCS II restores back to previously used screen</p> <p>13. Click the Close X button on the upper right corner of the Title Bar to end CHCS II. A confirmation message will display.</p> <p>14. Click Yes to confirm the exit</p> <p>Key Points:</p> <ul style="list-style-type: none"> • Module access • For navigating, the Folder List and Action Bar are the most efficient method | <p>Note: Emphasize how the desktop can be customized.</p> |
| | <p>Exercises</p> <ul style="list-style-type: none"> • Complete the exercises • Check for understanding and answer participant questions | |
| | <p>Security and Session Management</p> <p>Explain:</p> | <p>Note: Emphasize passwords must be changed in CHCS II.</p> |

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| | <ul style="list-style-type: none"> • 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 <p>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.</p> <div style="text-align: center; border: 1px solid black; background-color: #e0e0e0; padding: 5px;">SUMMARY</div> <ul style="list-style-type: none"> • Navigation • Security <div style="text-align: center; border: 1px solid gray; padding: 5px;"><i>Next Slide</i></div> | <p>II.</p> <p>Recommend: Have Students Lock their CHCS II Sessions before going on breaks throughout the course.</p> |
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| Lesson 2: Patient Search and Appointments |
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| | <p>Lesson Goals</p> <p>The goal of this lesson is to enable the user to locate a patient record and manage appointments in CHCS II.</p> <p>Learning Objectives</p> <p>Upon completion of this lesson, the user will be able to:</p> <ul style="list-style-type: none"> • Search for a patient • Set search selections display for the appointments module • Change and save the column order • Create a walk-in appointment • View and Add appointment comments • Check-in a patient • Transfer an appointment • Cancel an appointment | <p><input type="checkbox"/> Slide 16: Patient Search & Appointments Learning Objectives</p> |
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| | <ul style="list-style-type: none"> • Clear a patient record | |
| | <p>Patient Search Module</p> <p>Pulling a Patient Record features:</p> <ul style="list-style-type: none"> • Different search methods available • Patient must have a record in CHCS • “Search CHCS” is an option <p>Appointment Module</p> <p>Module specific screen features:</p> <ul style="list-style-type: none"> • Module title bar • Appointment list • Columns • Access to properties setup options: <ul style="list-style-type: none"> • Drop-down box • Options • Change selections | <p>Explain specific <i>Appointment</i> screen features.</p> <p>Explain: Scheduled (future) appointments are still made in CHCS and come over to CHCS II nightly and throughout the day.</p> |
| | <p>Patient Search and Appointments</p> <p>Demonstrate:</p> <p>Open the CHCS II Application</p> <p>NOTE: By default the Appointment module displays CAPT. Paula Flanagan has come in today complaining of a cough. We need to search for CAPT Flanagan’s record, set the appointment filters and create a new appointment.</p> <ol style="list-style-type: none"> 1. Click Search in the Folders List to search for a patient. The Patient Search window will display. 2. Click in the Last Name field and type FLANAGAN, then click Find for a list of names. 3. Click on FLANAGAN, PAULA Z in the list of names and click OK. CAPT Flanagan’s information will appear on the Patient ID line. | <p>Explain: Appointment display options:</p> <ul style="list-style-type: none"> • Column order • Clinic • Provider • Date • Status Selection <p>Explain: Appointment types and statuses.</p> <p>Do not need to show all steps in Transfer and Cancel appointments—but, do point out these functions.</p> |

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| | <p>information will appear on the Patient ID line.</p> <p>To set the appointment filters</p> <ol style="list-style-type: none"> 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. <p>To create a new unscheduled appointment</p> <ol style="list-style-type: none"> 1. Click New Appt. on the Action Bar. A New Appointment confirmation window will display(CTS only). 2. Click Yes to complete the New Appointment information for CAPT Flanagan (f1115). 3. Click on ACUTE APPT (ACUT\$) 30 to select the acute appointment type. <ul style="list-style-type: none"> • Point out the Related to Injury/Accident checkbox 4. Type cough in the Reason for Appointment field 5. In the comments section type <i>Pt states she has had a cough for 2 days.</i> 6. Click OK to complete the new appointment process for CAPT Flanagan. (The Allergy synchronization simulation from CHCS will begin.) | <p>Explain: Live system, <i>Today plus Incomplete</i> pulls in old appointments from CHCS. Suggest using <i>Today Only</i> to view current day's appointments</p> <p>Explain: The Related to Injury/Accident checkbox, an OSHA compliant 837 feature for workman's compensation</p> |
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| | <ul style="list-style-type: none"> • Point out how a clerk can view/edit comments entered when the appointment was created <ol style="list-style-type: none"> 7. CAPT Flanagan’s appointment will now appear at the bottom of the Appointment list with a status of CheckedIn. 8. Highlight CAPT Flanagan’s appointment in the appointment list. 9. To ensure you entered the correct comment, click the View Comments icon on the Action Bar to view the comment you entered. <p>Check-in patients with scheduled appointments</p> <p>Maria Alexander (a5743) arrives at the clinic for her scheduled appointment, she has a sprained ankle. You check her in CHCS II.</p> <ol style="list-style-type: none"> 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. <p>To Transfer an appointment to a different provider</p> <p>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.</p> <ol style="list-style-type: none"> 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. 4. Click OK. <p>Notice that Ms. Alexander’s Appointment has been transferred to Doctor, David. See the Provider column in the Appointment List.</p> <p>To Cancel an appointment</p> | <p>Explain: You can Check-in scheduled appointment in CHCS II.</p> <p>Check out will need to be addressed in OJT after have completed appointments</p> |
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| | <p>While managing today’s appointments you notice that Sugarman, Reginald is a “No Show”.</p> <ol style="list-style-type: none"> 1. Click the Cancel icon on the Action Bar. 2. The Cancel Appointment window displays 3. Select the No-Show radio button 4. Click OK 5. Notice that Mr. Sugarman’s appointment now displays a <i>No-Show</i> status <p>To Clear the patient from the Patient ID line.</p> <ol style="list-style-type: none"> 1. Click Go on the Menu Bar to display the dropdown menu. 2. Select Patient > to display the sub-menu. 3. On the sub-menu, click Clear Patient. <p>Notice that the Patient ID displays <i>No Patient Selected</i> and the Folder List no longer displays the patient specific information.</p> <p>Key Points:</p> <ul style="list-style-type: none"> • Locate a patient record • Walk-in appointments are can be created in CHCS II • Scheduled appointments in CHCS can be managed in CHCS II <p>Exercises</p> <ul style="list-style-type: none"> • Complete the exercises • Check for understanding and answer participant questions | |
| | <p style="text-align: center;">SUMMARY</p> <ul style="list-style-type: none"> • Patient search • Appointment list properties | |

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| | <ul style="list-style-type: none">• Change display selections• Created a new appointment• Added and viewed comments• Check-in scheduled appointment• Transferred an appointment to a different provider• Canceled an appointment• Cleared a patient from the patient ID line | |
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Next Slide

Lesson 3: Telephone Consults

Lesson Goals

The goal of this lesson is to enable the user to use the Telcon module 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:

To set the Telephone Consults filters / display properties

1. Click **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)
4. Click the **Set Selections as Default** button to change the default settings.

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.

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

You receive a call from **Col Violet Alexander (a5743)**. She states that she needs a refill of her Hypertension medication, HCTZ. You create a low urgency telephone consult for a Med refill. You ask Col Alexander if the phone number listed in the callback field is correct. She indicates that she is not at home and gives you her cell phone number: (123) 222-5656.

1. Click **New Telcon** icon on the Action Bar. The Patient Search window will display.
2. Type **(a5743)** in the Quick Search Field and click the **Find** button. Highlight Col Violet Alexander's name in the Patient Name area.
3. Click **OK**. The New Telcon window will display.
4. Change the Callback Phone Number to (123) 222-5656.
5. Type *Med Refill* in the Reason for Telcon Consult field.
6. Type *Pt request refill, HCTZ. Follow-up appointment in two week* 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.
 - Point out the Encounter Note SF 600.

To Transfer a Telcon

1. In the Telcon list, highlight Evelyn Alexander's Telcon.
2. Click the **Transfer** icon on the Action Bar.
3. Select **DOCTOR, DAVID** from the dropdown list.
4. Click **OK**.

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

NOTE: If the user has the provider access they will receive the Quick Entry Screen after clicking OK. Other users will return to the Telephone Consults module.

5. Click **Refresh**. Notice that Evelyn Alexander's appointment is no longer in the Telcon list.
6. Click **Close** on the Action Bar to close module.

To edit a Callback number

Evelyn Alexander's mother phones and states that she is not at home and needs Evelyn's provider to call her on her cell phone.

1. Select Evelyn Alexander's Telcon appointment.
2. Click **Edit Phone #** on the Action bar.
3. Change the Callback Phone Number to (123) 222-5656.
4. Click **OK**. Notice that the Callback Phone has changed.
5. Click **Close** on the Action bar.

Key Points:

- Telcon visual cues such as: Red for High Urgency
- Explain reason for Telephone Consult vs. Notes section

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
- Explained how to transfer a telephone consult to a different Provider
- Edited a call back phone number

Next Slide

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| Lesson 4: Demographics | | |
| | <p>Lesson Goals</p> <p>The goal of this lesson is to enable the user to verify third-party insurance and demographic information in CHCS II.</p> <p>Learning Objectives</p> <p>Upon completion of this lesson, the user will be able to:</p> <ul style="list-style-type: none"> • Verify patient demographic information | <p><input type="checkbox"/> Slide 18: Demographics Learning Objectives</p> |
| | <p>Demographics</p> <hr/> <p>Demonstrate:</p> <p>LCDR Eduardo Suarez 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,</p> | <ul style="list-style-type: none"> • Use the Demographic module to verify patient demographic information. |

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| | <ol style="list-style-type: none"> 1. In the Appointments list, highlight LCDR Suarez’s appt. 2. Click on Demographics in the Folder List. The Demographics module will display. 3. Verify his home address as: 233 Main St. 4. Click the CLOSE icon on the Action Bar to close the module. <p>Key Points</p> <ul style="list-style-type: none"> • 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 <p>Exercises</p> <ul style="list-style-type: none"> • Complete the exercises • Check for understanding and answer participant questions | <ul style="list-style-type: none"> • 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. |
| | <p style="text-align: center;">SUMMARY</p> <ul style="list-style-type: none"> • Verified patient demographic information <p style="text-align: center;">Next Slide</p> | |

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| | | |
| Lesson 5: Health History Folder | | |
| | <p>Lesson Goal</p> <p>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.</p> <p>Learning Objective</p> <p>Upon completion of this lesson, the end-user will be able to:</p> <ul style="list-style-type: none"> • Setup Health History Folder • View patient data modules <hr/> <p>Health History</p> <p>Demonstrate:</p> <p>To view LCDR Eduardo Suarez’s Health History folder</p> <ol style="list-style-type: none"> 1. From the list of appointments, click on LCDR Suarez’s appointment to pull his record. 2. Click the Health History folder in the Folders List. 3. The Health History module displays with default modules selected. <p>To customize the Health History folder</p> <ol style="list-style-type: none"> 1. Click the Options button on the Patient ID line. The Health History Design Summary screen will display. | <p><input type="checkbox"/> Slide 19: Health History Learning Objectives</p> <p>Explain:</p> <ul style="list-style-type: none"> • Use this module to set up a display of selected patient health history information for quick review. • Setup can be done from the Options button. • The same setup applies to all patient records. |

2. Uncheck the boxes next to Problems and Demographics.
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:

- Health History may be changed to fit current requirements
- Preview several ancillary modules in same window

Exercises

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

Summary

- Explained Health History Folder
- Setup Health History Folder
- Viewed patient data modules

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
- Patient Search and managing Appointments
- Telcons
- Demographics
- Health History Folder

Slide 20: 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

Slide 21: What Do I Do If I Encounter a Problem While Working with CHCS II?

USE AS REFERENCE ONLY

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.

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

- 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

Questions and Answers

Slide 22: 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.

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 can play each role, the clerk who will check in the patient, the Support Staff who will triage the patient, the Nurse who will assist the provider with tests orders the Provider who will exam and disposition the patient.

Setting the scene

A patient comes to the clinic. The clerk creates a walk-in appointment for patient. The Support Staff screens patient, verifying allergies and enter vitals. The Nurse, assisting the Provider orders Lab and Rad tests STAT. Once test results are in, the Provider reviews the results and examines the patient. The Provider determines diagnosis then orders a medication. The Provider has the Nurse perform a procedure and issue medical equipment to the patient; The Nurse enters procedures in A/P and assigns herself as additional provider. The provider discusses diagnosis and treatment with patient, completes disposition and signs the encounter. The patient is checked out by the Clerk. The following day: The Records Reviewer has to view all encounters completed yesterday in CHCS II for this clinic.

| Role/Function | Field | Data |
|--|---|---|
| CLERK: Creates a walk-in appointment for CPT Heather Cloud (c0058). | Patient Search | |
| | Quick Search | C0058 |
| | New Unscheduled Appointment/Telcon Visit | |
| | Appointment Type | Acute Appt (ACUTS) 30 |
| | Reason for Appointment | <i>Turned Rt ankle</i> |
| Injury/Accident Related | [Select] [Select] Other Accident | |
| SUPPORT STAFF: Documents screening, verifies allergies, and enters vitals. | Appointments Module | |
| | | [Select] CPT Cloud's walk-in appt. and open encounter note (SF 600). |
| | ENCOUNTER NOTE (SF 600) | |
| | Screening | |
| | Search field | [Enter] <i>reported trauma ankle</i> and click Find Now . Expand <i>reported trauma ankle</i> scroll down to Expand <i>Right</i> Expand to [Select] <i>Turned in</i> Click Add to Encounter |
| | Verify Allergy | [Select] No known Allergies [Select] Verified This Encounter |
| Comments | <i>Pt states not pregnant</i> [Click] Close on the Action Bar | |

| | |
|------------------------|---|
| Vitals | |
| BP | 125/77 |
| Rt arm | [Select] |
| Adult cuff | [Select] |
| HR | 88 |
| Radial | [Select] |
| Regular | [Select] |
| RR | 21 |
| Temperature F | 98.6 F |
| Oral | [Select] |
| Ht | [Enter] 62 in |
| Wt | 124 lbs |
| Habits | |
| Tobacco | [Select] No |
| Alcohol | [Select] Yes |
| Pain Severity | |
| Where is pain located? | [Select] 6 [Enter] <i>Rt. ankle</i> NOTE: Add comments when pain scale is selected (other than "0 pain free"). [Click] OK |
| | Return to encounter note [Click] Close Return to Appts. Module |

| | | |
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| <p>NURSE: Provider asks nurse to order Lab and Rad STAT for patient.</p> | Appointments Module | |
| | | [Select] CPT Cloud's walk-in appt. and open the encounter note (SF 600) |
| | ENCOUNTER NOTE (SF 600) | |
| | A/P | |
| | Lab | [Select] Lab Tab [Enter] New Lab Order: <i>CBC</i> Click Search [Select] CBC W/AUTO DIFF [Select] Processing Priority: STAT [Select] Submit |
| | Radiology | [Select] Rad Tab [Enter] New Rad Order: <i>ankle</i> Click Search [Select] ANKLE TRAUMA RT [Enter] <i>R/O ankle fracture</i> [Select] Processing Priority: STAT |
| Receive A/P Warning | [Select] Submit [Click] Close on Action Bar [Select] Yes | |
| | Return to encounter note [Click] Close on Action Bar | |
| <p>PROVIDER: Loads the Ankle Sprain Right visit template and examines the patient. Enters diagnosis, associates Lab, Rad orders and orders medication.</p> | Appointments Module | |
| | | [Select] CPT Cloud's walk-in appt. and open the encounter note (SF 600). |

| S/O | |
|--|--|
| Template Mgmt | [Select] on Action Bar [Enter] <i>ankle sprain</i> [Click] Find Now [Select] <i>Visit – Ankle Sprain – Right Side</i> [Click] Load icon on Action Bar |
| HPI Structured Term Note Pad Structured Term Duration Grid | [Select] + CC: Possible ankle sprain right [Select] Note pad icon to insert text: <i>Turned ankle while running</i> [Click] OK [Select] + localized soft tissue swelling right ankle [Click] Duration Grid on Dashboard Duration x 1 day [Select] - joint stiffness of the right ankle + joint pain in the right ankle on the outer side |
| PMH | [Select] + past medical history [Select] - poor physical condition |
| ROS | [Select] + joint in the ankle worse with weight bearing [Select] + limping |

| | | |
|---|--|--|
| | Associate Orders | [Select] ANKLE SPRAIN [Select] CBC W/AUTO DIFF [Click] <> button to associate Lab with ANKLE SPRAIN [Select] ANKLE, TRAUMA RT [Click] <> button to associate Rad with ANKLE SPRAIN [Select] [Enter] <i>Tylenol</i> [Select] Tylenol #3 (OR SUBT) -- PO TAB [Enter] <i>T 1 Tab TID x 10 days #30 RFO</i> [Press] Enter on your keyboard [Click] Submit [Click] Close |
| | Order Med Tab New Med Order Sig | |
| | | Return to encounter note |
| NURSE: Wraps patient's ankle and issues crutches. Nurse enters procedures in A/P and adds self as additional provider #1. | Appointments Module | |
| | | [Select] CPT Cloud's walk-in appt. and open SF 600 |
| | A/P | |
| | Associate Procedures Procedures Search field Modifiers | [Select] ANKLE SPRAIN [Enter] <i>strapping</i> [Click] Find Now Expand Orthopedic Strapping 29799 [Select] Ankle 29540 Add to Encounter [Click] Modifiers icon on Action Bar [Click] ... button |

| | | |
|---|--|--|
| | Additional Providers #1 Name Field | <p>[Enter] Nurse and click Find Now [Select] Nurse, Karen [Click] Role dropdown arrow [Select] Nurse [Select] Checkbox next to Additional Provider #1 [Click] OK [Select] HCPCS [Enter] <i>crutches</i> [Select] CRUTCHES E00112 Add to Encounter</p> <p>Repeat Modifiers process</p> <p>[Click] Close</p> |
| PROVIDER: Discusses diagnosis and treatment with patient. Completes Disposition and Signs encounter. | Disposition Profile | <p>Return to Encounter note [Click] Close on Action Bar [Select] Release w/work/duty Limitations <i>One Month against running and prolong standing.</i></p> |
| | Follow-up Discussed Items E & M Code Sign | <p>[Select] with PCM [Select] When [Enter] 2 and weeks</p> <p>[Select] Diagnosis, Medication(s)/Treatment</p> <p>Verify coding</p> <p>[Select] Sign on Action Bar</p> <p>Preview SF 600 [Click] Sign button</p> |
| CLERK: | Appointments Module | |

| | | |
|---|---------------------------------|---|
| Clerk Checks out the patient | | <p>[Select] CPT Cloud's walk-in appt.</p> <p>[Select] Check out on Action Bar. Click OK on dialog box.</p> <p>In the menu line, [Select] G0 > Patient > Clear Patient to close CPT Cloud's medical record.</p> |
| THE NEXT DAY | | |
| <p>RECORDS REVIEWER: Searches for CPT CLOUD in CHCS II to pull her patient record and view her Previous Encounter.</p> | Patient Search Module | |
| | <p>Last name First Name</p> | <p>[Enter] CLOUD [Enter] H [Click] Find button [Select] CLOUD, HEATHER and click OK</p> |
| | Previous Encounters | |
| | Encounter | [Select] Turned Rt. Ankle Appt. to view/print encounter |