CHCS II Clerk Student Guide

PLEASE DO NOT REMOVE FROM CLASSROOM

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Change History			
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Table Of Contents

Lesson 1: Navigation

CHCS II is modeled on the design of Microsoft Outlook, with a Folder List, Workspace, File Menu 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
- Lock CHCS II session
- Exit the CHCS II application

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. 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.

4. Verify the Appointments module is open.

5. The list of current appointments will display.

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 in the Action Bar changes.

7. Click **Telephone Consults** in the Folders List to open the Telephone Consults module. The Telephone Consults module will display.

8. Click the **Close** icon on the Action Bar to close the Telephone Consults module.

9. To Lock the CHCS II application follow the menu path **File > Lock.**

10. The screen will minimize.

11. To reopen the application click the application located on the desktop tool bar area.

12. Click OK.

Note: CHCS II restores back to previously used screen

13. Click the Close **X** button on the upper right corner of the Title Bar to end CHCS II. A confirmation message will display.

14. 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. 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.

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
- Create a walk-in appointment
- View and Add appointment comments
- Check-in a patient
- Transfer an appointment to another provider
- Cancel an appointment
- Clear patient record

Exercises – CHCS II Training System

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

Scenario 1

CAPT Heather Cloud (c0058) has arrived at your clinic complaining of low back pain. You need to search for CAPT Cloud'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 *CLOUD* then click **Find** for a list of names.

4. Click on *CLOUD, HEATHER* in the list of names and click **OK**. CAPT Cloud's information will appear on the Patient ID line and the Appointments List will display.

Scenario 2

You want to set your properties for the Appointments module to display patient visits for this clinic and visits for the current date 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. Verify the following:

   a. In the *Clinic* section: **This Clinic.**

   b. In the *Provider* section: select the correct radio button to **All for this Clinic(s)**.

   c. In the *Dates* section, select the correct radio button to show **Today's Only** 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).

   d. 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 **CAPT Cloud (c0058)**.

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 CAPT Cloud.

3. Click on *ACUTE APPT (ACUT$) 30* to select the acute appointment type.

4. Type *low back pain* in the Reason for Appointment field

5. In the Comments section type *Pt states she has had pain for 2 days.*

6. Click **OK** to complete the new appointment process for CAPT Cloud. (The Allergy synchronization simulation from CHCS will begin.)

7. CAPT Cloud's appointment will now appear at the bottom of the Appointment list with a status of **CheckedIn**.

8. Highlight **CAPT Cloud's** low back pain 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.

Scenario 4

LCDR Eduardo Suarez (s3217) arrives at the clinic for his scheduled appointment, a diabetes follow-up. You check him in CHCS II.

1. Highlight LCDR Suarez's appointment in the appointment list.

2. Click **Check-in** on the Action Bar.

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

Scenario 5

LCDR Suarez's (s3217) Provider had an emergency, so it is necessary to transfer his 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 LCDR Suarez's appointment.

2. Click the **Transfer** icon on the Action Bar.

3. Select **DOCTOR, DAVID** from the dropdown list.

4. Click **OK**.

5. Notice that LCDR Eduardo Suarez's appointment has been transferred to Doctor, David. See the Provider column in the Appointment List.

Scenario 6

While managing today's appointments you notice that **Ret. VADM Olaf Berg** is a "No Show".

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 VADM Olaf Berg's appointment now displays a *No-Show* status.

Scenario 7

To Clear the patient from the Patient ID line.

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**.

4. Notice that the Patient ID displays *No Patient Selected* and the Folder List no longer displays the patient specific information.

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 status. 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 module 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 Selections window opens.
4. In the Clinics area, select **This Clinic**.
5. In Provider area, select **All for this Clinic(s)**.
6. In Dates area, select the **Today Only** radio button.
7. Click **Set Selections as Default**.

Scenario 2

You receive a call from retired **CAPT Clayton Williams (w8867).** He states that he needs a refill of his Hypertension medication, Lisinopril. You create a low urgency 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. 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.

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.

9. The encounter note displays. Click **Close** on the Action Bar to return to the Telephone Consults module.

You need to transfer the Telcon to Doctor David who needs to consult with CAPT Williams before refilling his medication.

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 Telcon has been transferred to Doctor, David. See the Provider column in the Telcon list.

Scenario 3

Anna Wunderlich (w8118) phones the clinic regarding her med refill Telcon. She indicates that she is leaving her office and wants her call returned at a different number: (123)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 DEERS and 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. 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.

5. Clear the patient from the Patient ID line. (See Lesson 2, Scenario 6)

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

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 view and customize the Health History module.

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

- Setup Health History Folder
- View patient data modules

Exercises – CHCS II Training System

Open the CHCS II Training System and complete the exercise.

Scenario 1

To view **CAPT Clayton William's (w8867)** Health History folder:

1. Click the **Health History** folder in the Folders List.

2. 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**.

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.

6. Clear the patient.

7. Click the **X** in the upper right corner to close the application.