



CHCS II Records Reviewer Lesson Plan



February 2005
Rev 2.2

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 Records Reviewers at each MTF.

Materials Needed

- CHCS II Sign-In Roster. (Electronically or Paper Form)
- CHCS II Records Reviewer Course Lesson Plan
- CHCS II Records Reviewer Presentation
- CHCS II Records Reviewer Training Student Guide (one per seat)
- CHCS II User Manual (one per classroom)
- Addendum to the Release Notes
- CHCS II Training Course 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 Records Reviewer 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.
- 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="296 704 926 737">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 1101 1020 1162" style="text-align: center; border: 1px solid gray; padding: 2px;"><i>Next Slide</i></div>	<p data-bbox="1583 282 1948 349">Slide 1: Records Reviewer Training Course</p> <p data-bbox="1583 425 1881 492">Slide 2: Logistics and Introductions</p>

Duration	Training Activities	Instructor Notes
CHCS II Overview		
	<p data-bbox="296 253 1562 297">What is CHCS II?</p> <p data-bbox="296 318 1562 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="380 461 1314 651" style="list-style-type: none"> <li data-bbox="380 461 1230 493">• A Graphical user interface that networks with existing systems <li data-bbox="380 509 1314 542">• Efficient means of creating, managing and retrieving medical records <li data-bbox="380 558 1272 591">• Anytime, anywhere delivery of patient records to the point of care <li data-bbox="380 607 1220 639">• Future access to military records for health studies worldwide <p data-bbox="296 721 982 753">Add this brief comment as transition to next slide:</p> <p data-bbox="296 774 1562 878">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="848 899 1016 948" style="text-align: center;"><i>Next Slide</i></p>	<p data-bbox="1583 282 1955 315">Slide 3: What is CHCS II?</p>
	<p data-bbox="296 979 1010 1011">Limitations of Paper Based Medical Records</p> <ul data-bbox="348 1049 978 1211" style="list-style-type: none"> <li data-bbox="348 1049 659 1081">• Paper charts are lost <li data-bbox="348 1097 858 1130">• No automatic drug interaction alerts <li data-bbox="348 1146 646 1179">• Penmanship counts <li data-bbox="348 1195 978 1227">• Only one person can access a record at a time <p data-bbox="848 1276 1016 1325" style="text-align: center;"><i>Next Slide</i></p>	<p data-bbox="1583 1008 1898 1112">Slide 4: Limitations of Paper Based Medical Records</p>

Duration	Training Activities	Instructor Notes
	<p data-bbox="296 180 579 215">CHCS II Benefits</p> <ul data-bbox="348 250 1503 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 1394 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 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 <p data-bbox="848 764 1016 800" style="text-align: center;"><i>Next Slide</i></p>	<p data-bbox="1585 207 1940 237">Slide 5: CHCS II Benefits</p> <p data-bbox="1585 261 1923 290">Elaborate on each benefit.</p>
	<p data-bbox="296 841 432 876">Security</p> <p data-bbox="296 901 1062 930">Security is a crucial requirement of patient medical records.</p> <ul data-bbox="443 1016 1562 1276" style="list-style-type: none"> • User access to patient information is based on user role • Roles and privileges are tied to unique user name and password • Users must have a CHCS account prior to receiving a CHCS II account • Passwords are assigned that may be changed later by the user, depending upon your site • The CHCS II password replaces CHCS verify code • CHCS II security is multi-leveled and conforms to HIPAA/MHS security standards <p data-bbox="848 1304 1016 1339" style="text-align: center;"><i>Next Slide</i></p>	<p data-bbox="1585 865 1814 894">Slide 6: Security</p>

Duration	Training Activities	Instructor Notes
	<p data-bbox="298 297 506 337">Expectations</p> <p data-bbox="298 358 1554 431">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="298 448 554 483">To accomplish this:</p> <ul data-bbox="348 508 1234 630" style="list-style-type: none"> <li data-bbox="348 508 1234 544">• 100% of CHCS II users shall attend scheduled classroom training <li data-bbox="348 552 1234 587">• Records Reviewers shall receive On-the-Job Training (OJT) <li data-bbox="348 596 1234 630">• 100% of patient encounters shall be documented in CHCS II 	<p data-bbox="1587 207 1877 240">Slide 7: Expectations</p>
	<p data-bbox="298 748 594 789">CHCS II Training</p> <p data-bbox="298 812 1562 915">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="298 937 1545 1076">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 1159 1016 1195" style="text-align: center;"><i>Next Slide</i></p>	<p data-bbox="1587 776 1953 808">Slide 8: Training Schedule</p>

Duration	Training Activities	Instructor Notes
	<p data-bbox="300 240 1083 277">Key Information Technology Training Resources</p> <p data-bbox="300 302 569 329">MTF CHCS II Team</p> <ul data-bbox="394 339 831 443" style="list-style-type: none"> <li data-bbox="394 339 709 367">• MTF Project Officer <li data-bbox="394 375 825 402">• Facility Training Coordinator <li data-bbox="394 410 831 443">• Clinical Champion/SuperUser <p data-bbox="300 451 579 479">Unisys On-Site Team</p> <ul data-bbox="394 488 768 592" style="list-style-type: none"> <li data-bbox="394 488 768 516">• Site Training coordinator <li data-bbox="394 524 611 552">• ILT Trainers <li data-bbox="394 560 615 592">• OJT Trainers <p data-bbox="848 613 1016 662" style="text-align: center;"><i>Next Slide</i></p>	<p data-bbox="1587 269 1934 370">Slide 9: Key Information Technology Training Resources</p> <p data-bbox="1587 394 1965 495">These resources are available during the training implementation.</p> <p data-bbox="1587 573 1959 711">Note: Provide the names of those filling these roles locally and an indication of how they might be contacted</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>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 • Folders 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. 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 on the Action Bar changes. 	<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>

	<p>7. Click the Search module in the Folders List to open the Search module. The Search module will display. Notice the Action Bar has changed.</p> <p>8. Click the Close icon on the Action Bar to close the Search 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 user will enter their assigned password before reentering CHCS II in the live system.</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 style="text-align: center;"><i>Next Slide</i></p>	
	<p>Security and Session Management</p> <p>Explain:</p> <ul style="list-style-type: none"> • Passwords expire every 85 days – user is prompted at 80 days to change. 	<p>Note: Emphasize passwords must be changed in CHCS II.</p>

	<ul style="list-style-type: none"> • 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="border: 1px solid black; background-color: #cccccc; text-align: center; padding: 2px;">SUMMARY</div> <ul style="list-style-type: none"> • Navigation • Security <div style="border: 1px solid black; background-color: #cccccc; text-align: center; padding: 2px;"><i>Next Slide</i></div>	<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

	<p>Lesson Goals</p> <p>The goal of this lesson is to enable the user to locate a patient record 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"> • Set startup options • Search for a patient • Open patient specific information 	<p>☰ Slide 16: Patient Search Learning Objectives</p>
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	<p>Patient Search Module</p> <p>Pulling a Patient Record features:</p>	
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	<ul style="list-style-type: none"> • Different search methods available • Patient must have a record in CHCS • “Search CHCS” is an option 	
	<p>Patient Search</p> <p>Demonstrate:</p> <p>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.</p> <ol style="list-style-type: none"> 1. Click the Tools on the Menu Bar. 2. Click Startup options. 3. The Startup option screen will display. Select the Patient Search radio button and click OK. 4. Exit the CHCS II application. 5. Re-enter the CHCS II application to verify Patient Search module startup. <p>You need to view LCDR Suarez’s patient record.</p> <ol style="list-style-type: none"> 1. Click in the Last Name field and type SUAREZ then click Find for a list of names. Click on SUAREZ, EDUARDO in the list of names and click OK. LCDR. Suarez’s information will appear on the Patient ID line and the Appointments List will display <p>Key Points:</p> <ul style="list-style-type: none"> • Startup options <p>Exercises</p> <ul style="list-style-type: none"> • Complete the exercises. • Check for understanding and answer participant questions. 	<p>NOTE: By default the Appointment module displays</p>

SUMMARY

- Set startup options
- Searched for a patient
- Viewed patient information

Next Slide

Lesson 3: Demographics		
	<p>Lesson Goals</p> <p>The goal of this lesson is to enable the user to verify 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> Slide 17: Demographics Learning Objectives</p>
	<p>Demographics</p> <p>Demonstrate:</p> <p>To verify patient demographic information for retired CAPT Heather Cloud (c0058).</p> <ol style="list-style-type: none"> 1. Click Search in the Folder List. 2. Type c0058 in the Quick Search field and click Find for a list of names. 3. Click on CLOUD, HEATHER in the list of names and click OK. CAPT Cloud's information will appear on the Patient ID line. 4. Click on the Demographics in the Folder List. The Demographics module will display. 5. Verify his home address as: 456 Main St. 6. Point out Clear Patient before Close 7. Click the CLOSE icon on the Action Bar to close the module. 	<ul style="list-style-type: none"> • 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

	<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>write back from CHCS II to CHCS. Continue to follow your MTF policy for collecting third party insurance information.</p>
<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"> • Verified patient demographic information <p style="text-align: center;">Next Slide</p>	

Lesson 4: Previous Encounters

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 SF 600

Previous Encounters

Demonstrate:

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

1. Click **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 *DIABETES MELLITUS TYPE II – UNCONTROLLED* encounter listed in the top display window. Details will display in bottom window.
 - Review record
 - Point out print feature

Slide 18: Previous Encounters Learning Objectives

NOTE: Previous Encounters will only list/show encounters completed in CHC II

	<p>Key Points:</p> <ul style="list-style-type: none"> • Access to past encounters is available at any workstation which has CHSC II access. <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"> • Display a previous patient encounter • Explain how to print SF600 <p style="text-align: center;"><i>Next Slide</i></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 selected patient information accumulated from earlier encounters.</p> <p>Learning Objectives</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 <p>Health History</p>	<p>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.
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Demonstrate:

To view LCDR Eduardo Suarez's (s3217) 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.

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

Note: student already has LCDR Suarez's record pulled

	<ul style="list-style-type: none"> • Setup Health History folder • Viewed patient data modules <p style="text-align: center;">Next Slide</p>	
Lesson 6: Readiness		
	<p>Lesson Goal The goal of this lesson is to introduce the Readiness module in CHCS II.</p> <p>Learning Objectives Upon completion of this lesson the end-user will be able to:</p> <ul style="list-style-type: none"> • Access and view the Readiness module <p style="text-align: center;">Readiness</p> <p style="text-align: center;">Preview Readiness module ONLY</p> <p style="text-align: center;">Exercises</p> <ul style="list-style-type: none"> • No exercises. <p style="text-align: center;">Summary</p> <ul style="list-style-type: none"> • View and explained the readiness module <p style="text-align: center;">Next Slide</p>	<p>Slide 20: Readiness Learning Objectives</p> <p>NOTE: Point out the four main features of the module.</p> <p>Explain: How this captured data will affect the military personnel readiness for combat duty status</p>

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 user will be able to:

- Run a report
- View a report

Slide 21: Reports Learning Objectives

Reports

Demonstrate:

We want 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** 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** checkbox
 - Click to select the **Provider** checkbox
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.	
	Exercises	
	<ul style="list-style-type: none"> • Complete the exercises. • Check for understanding and answer participant questions. 	
	Summary	
	<ul style="list-style-type: none"> • Run a report • View a Report 	

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
- Demographics
- Previous Encounters
- Health History Folder
- Readiness
- Reports

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.

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.

Slide 22: Course Summary

Summarize course based on modules taught

Slide 23: What Do I Do If I Encounter a Problem While Working with CHCS II?

All workstations may not have PowerPoint. This can also be done in Word or Paint.

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 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.

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

<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