CHCS II Records Reviewer Student Guide

PLEASE DO NOT REMOVE FROM CLASSROOM

February 2005
Rev 2.2

Change History			
Date	**Name**	**Change Description**	**Source:**
10/27/2004	Kathleen Chapman	Created	Consolidation of materials
11/05/2004	Kathleen Chapman	Updated	CITPO comments
12/01/2004	Juanita Stuckey	Revised	Services Comments
12/16/2004	Juanita Stuckey	Build Enhancement	Build 837.2 Release
01/11/2005	Juanita Stuckey	Revised	Services Comments
02/01/2005	Juanita Stuckey	Build Enhancement	Build 837.4 Release

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 in the Action Bar for Appointments. Icons in the Action Bar are relevant to the module that is open. Icons that are used in one module might not be used in another, so what appears in the Action Bar changes.
7. Click the **Search** folder in the Folders List to open the **Search** module. The **Search** module will display.
8. Click the **Cancel** to close the **Search** 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. The simulated password will repopulate; live system will require you to enter your password
13. Click OK

Note: CHCS II restores back to previously used screen

14. Click the Close **X** button on the upper right corner of the Title Bar to end CHCS II. A confirmation message will display.
15. 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.

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** radio 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

You would like to view **Col. Violet Alexander's** patient record.

1. Open the CHCS II Application. The Patient Search window will display.
2. Click in the Last Name field and type ***ALEXANDER***, then 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.

Lesson 3: 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 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. Clear Patient.
4. 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. Follow your MTF's normal business rules to make any required changes.

<u>Lesson 4: Previous Encounters</u>

The Previous Encounter module displays a list of a patient's completed 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 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 a***5743*** in the Quick Search: field and click **Find** for a list of names.
3. Click on ***ALEXANDER, VIOLET*** in the list of names and click **OK**. Col. Alexander’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 HYPERTENSION*** encounter listed in the top display window and view details in bottom display window.
6. To print highlighted encounter, click the **File** menu. (Note: This step is only to show where the print command is located.)

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 Folder
- View patient data modules

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.

To view Col Violet Alexander's (a5743) 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.

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 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

You want to run an 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 to open the **Reports** folder in the Folder List.
2. Click the on **Reports** icon in the Reports folder. The Reports module will display.
3. Click the ***Report on***: drop-down to get a list of report types.
4. Click on ***Appointments*** to select it. The Reports window will re-display.
5. Complete the following fields:
   - With Scope of: ***Clinic/Lab***
   - From: field **One year prior to the** To: field

   Note: A calendar will appear. Use the < > to navigate months. Click on year to display up and down arrows to navigate years.

   - Click to select the **Display in separate window** checkbox
   - Click to select the **Provider** checkbox
6. Click the **Run Report** button. The following message will appear: *This report may take several minutes based on: The date range selected. Do you want to continue?*
7. Click **Yes**. The report will be run and the result displayed in a separate window.
8. After reviewing the report, click the **X** in the upper right of the screen to close the Print Preview window. The Reports window will re-display.
9. Click the **Close** icon on the Action Bar to close the module.
10. Click the **X** in the upper right corner to close the application.