CHCS II Support Staff Lesson Plan

COMPOSITE HEALTH CARE SYSTEM II

February 2005
Rev 2.2

Change History

Date	Name	Change Description	Source:
10/20/04	Kathleen Chapman	New Course created from consolidation of service materials	[Authorizor communication]
11/5/04	Erin Chesnut	Updated	CITPO comments
12/6/04	Melissa Bickham	Revised	Service comments
12/16/04	Melissa Bickham	Revised	Build 837.2 Release Notes
01/11/05	Juanita Stuckey	Revised	Service comments
02/01/05	Juanita Stuckey	Build Enhancement	Build 837.4 Release Notes

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Preparation for Delivery

This lesson plan is designed to teach Support Staff at each MTF.

Materials Needed

- CHCS II Sign-In Roster (Electronically or Paper Form)
- CHCS II Support Course Lesson Plan
- CHCS II Support Presentation
- CHCS II Support 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 Evaluation Form is to be completed by each student and left with instructor upon completion of the 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:
    1. CHCS II Training System (CTS)
    2. CHCS II Support Course PowerPoint Presentation (instructor workstation only) updated with instructor name and date
- Reset data (**Encounter Data** button) for each CTS prior to starting class daily.
- 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 users have included a comment for any line item rated “3” or lower.

<table>
<tr><th>Duration</th><th>Training Activities</th><th>Instructor Notes</th></tr>
<tr><td colspan="3">Introduction</td></tr>
<tr><td></td><td>Welcome/Logistics

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Logistics: Room location in building, fire escape routes, restrooms, kitchen facilities, smoking area.
Workstations
Instructional material
Pagers and cell phones: Off or on vibrate mode
Breaks
Resources: Indicate how to obtain additional information regarding additional support on the system.
Parking Lot

Introductions
Instructor and students exchange personal introductions, providing relevant background information.

Next Slide</td><td>❑ Slide 1: CHCS II Support Course

❑ Slide 2: Logistics and Introductions</td></tr>
</table>

Duration	Training Activities	Instructor Notes
CHCS II Overview		
	What is CHCS II? 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: CHCS II provides: • 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 **Add this brief comment as a transition to the next slide:** 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. ***Next Slide***	❑ **Slide 3: What is CHCS II?**
	Limitations of Paper-based Medical Records • Paper charts are lost • No automatic drug interaction alerts • Penmanship counts • Only one person can access a record at a time ***Next Slide***	❑ **Slide 4: Limitations of Paper Based Medical Records**

Duration	Training Activities	Instructor Notes

	CHCS II Benefits
	• Interfaces with MHS standard systems, e.g. CHCS & ADM
	• Uses MEDCIN (structured language that captures ICD-9 and CPT codes)
	• Facilitates compliance through electronic capture of elements required for:
	  ◦ 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, will provide access to patient records anywhere, anytime
	• Maintains security
	Next Slide
		❑ **Slide 5: CHCS II Benefits**
		Elaborate on each benefit.

	Security Security is a crucial requirement of patient medical records. • 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. ***Next Slide***	❑ **Slide 6: Security**

Duration	Training Activities	Instructor Notes
	Expectations 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. To accomplish this: • 100% of CHCS II users shall attend scheduled classroom training • Support Staff receive On-the-Job Training (OJT) • 100% of patient encounters shall be documented in CHCS II	❑ **Slide 7: Expectations**
	CHCS II Training 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. 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. ***Next Slide***	❑ **Slide 8: Training Schedule**

Duration	Training Activities	Instructor Notes
	Key Information Technology Training Resources MTF CHCS II Team • MTF Project Officer • Facility Training Coordinator • Clinical Champion/SuperUser Unisys On-Site Team • Site Training Coordinator • ILT Trainers • OJT Trainers ***Next Slide***	❑ **Slide 9: Key Information Technology Training Resources** These resources are available during the training implementation. **Note:** Provide the name and contact information for each team member.
	System Demonstration	
	Go to Appendix A ***Next Slide*** **Course Goal** The goal of this course is to enable Support staff to access, navigate, and use CHCS II to document patient encounters. *Next Slide*	❑ **Slide 10: Systems Demonstration** **Suggestion:** Invite class participation to assist with roles in demonstration. ❑ **Slide 11: Course Goal**

Duration	Training Activities	Instructor Notes
	CHCS II Training System **Explain:** • 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 ***Next Slide***	❑ **Slide 12: CHCS II Training System** **Elaborate on each bullet point**
	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***	❑ **Slide 13: Training and MTF Business Rules**

Duration	Training Activities	Instructor Notes
	Course Agenda • Navigation • Patient Search and Appointments • Patient Encounter • Previous Encounters • Telephone Consults • Health History Folders • Questionnaires Setup and Patient Questionnaires ***Next Slide***	❑ **Slide14: Course Agenda**

Duration	Training Activities	Instructor Notes
Lesson 1: Navigation		
	Lesson Goal The goal of this lesson is to enable the user to access CHCS II and navigate within the application. **Learning Objectives** Upon completion of this lesson, the user will be able to: • Log onto 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	❑ **Slide 15: Navigation Learning Objectives** **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.
	Basic Navigation **Explain:** General layout of the screen (similar to Outlook) • Title Bar	**Explain:** Functionality within lessons will be demonstrated. Users will practice by completing

Duration	Training Activities	Instructor Notes
	• Main menu • Action Bar • Folder List **Demonstrate:** Log on to the system, view the current list of appointments and open and close modules 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. 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. 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.** **Point out that the in the live system user will have to enter their assigned password before reentering CHCS II.** **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	exercises in the student guide. The Action Bar icons change according to the active module.

Duration	Training Activities	Instructor Notes
	confirmation message will display. 14. Click **Yes** to confirm the exit **Key Points:** • Module access • For navigating, the Folder List and Action Bar are the most efficient methods. **Exercises** • Complete the exercises. • Check for understanding and answer participant questions. ***Next Slide***	
	Security and Session Management **Explain:** • 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. **Changing passwords:** This cannot be demonstrated on the CHCS II Training System. Advise the students they will be instructed how to change their passwords in OJT session. **SUMMARY** • Navigation • Security ***Next Slide***	**Note**: Emphasize passwords **must** be changed in CHCS II.

Duration	Training Activities	Instructor Notes
Lesson 2: Patient Search and Appointments		
	Lesson Goals The goal of this lesson is to enable the user to locate a patient record and use the appointment module in CHCS II. **Learning Objectives** Upon completion of this lesson, the user will be able to: • Search for a patient record • Set search selections for appointments • Change and save the column order • Create a walk-in appointment • Transfer an appointment • Cancel an appointment • Clear patient record	❑ **Slide 16: Patient Search & Appointments Learning Objectives**

Duration	Training Activities	Instructor Notes
	Patient Search Module To Pull a Patient Record: ▪ There are different search methods available ▪ The Patient must have a record in CHCS ▪ "Search CHCS" is an option **Appointment Module** Module specific screen features: • Module title bar • Appointment list • Columns • Appointment properties setup options	**Explain:** Appointment types and statuses **Explain:** Scheduled appointments are still made in CHCS and come over to CHCS II nightly and throughout the day.
	Patient Search and Appointments **Demonstrate:** Open the CHCS II Application **NOTE:** By default the Appointment module displays Wilma Wunderlich's (w8118) mother brings her to the clinic. She states that Wilma Wunderlich has a cough, sore throat, and runny nose. We need to search for Wilma Wunderlich's record, set the appointment filters and create a new appointment. 1. Open the CHCS II Application. The application starts in the Appointments module. 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 *WUNDERLICH*; then click **Find**. 4. Click on **WUNDERLICH, WLIMA C** in the list of names and click **OK**. Wilma Wunderlich's information will appear on the Patient ID line. **To set the appointment filters**	**Explain** the five setup options: 1. Column Order 2. Clinic (Clinic assignments defined in CHCS) 3. Provider 4. Date 5. Status Selection Point out how to use **Change Selections** or **Options** button to set appointment filters/properties. **Explain:** In the Live system, *Today plus Incomplete* pulls

Duration	Training Activities	Instructor Notes
	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**	in "old" appointments from CHCS. Suggest using *Today Only* to view the current day's appointments only.
	3. Once all the information has been entered, click the **Set Selections as Default** button to change the default settings.	Show how to filter using drop-down box in upper – right corner of workspace.
	To change column order 1. Click and drag the **CheckedIn Time** column header to move next to the Appt. Date /Time column. 2. 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	Point out **Check-in** button is used to check in patient appointments created in CHCS.
	To create new unscheduled appointment 1. Click **New Appt** on the Action Bar. A New Appointment confirmation window will display. 2. Click **Yes** create a new appointment for Wilma Wunderlich. 3. Click on **ACUTE APPT (ACUT$) 30** to select the appointment type. • Point out the **Related to Injury/Accident** checkbox 4. Type ***cough*** in the Reason for Appointment field and click **OK** to complete the new appointment process for Wilma Wunderlich. **(The allergy synchronization with CHCS begins).** 5. Wilma Wunderlich's appointment will now appear at the bottom of the Appointment list with a status of **CheckedIn**.	**Explain:** The Related to Injury/Accident checkbox.
	To Transfer an appointment to a different provider **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	Do not show all steps in Add Provider, but point out Action Bar icon.

Duration	Training Activities	Instructor Notes
	appointment. 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**. Notice that Ms. Alexander's Appointment has been transferred to Doctor, David. See the Provider column in the Appointment List. **To Cancel an appointment** While managing today's appointments you notice that Sugarman, Reginald 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 Mr. Sugarman's appointment now displays a *No-Show* status **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**. Notice that the Patient ID displays *No Patient Selected* and the Folder List no longer displays the patient specific information.	**Note:** Add Providers allows other providers and para-professionals to document and receive credit for their work.

Duration	Training Activities	Instructor Notes
	Key Points: • Locate a patient • Walk-in appointments are can be created in CHCS II • Scheduled appointments in CHCS can be managed in CHCS II • Point out the Add Providers icon. (Patient encounter must have status of **CheckedIn,** Waiting, or In Progress.) **Exercises** • Complete the exercises. • Check for understanding and answer participant questions.	
	SUMMARY • Patient search • Appointment list properties • Change display selections • Create a new appointment • Transferred a patient to another provider • Cancelled an appointment • Cleared a patient from the patient ID line ***Next Slide***	
Lesson 3: Patient Encounter		
	Lesson Goals The goal of this lesson is to document the patient encounter in CHCS II. **Learning Objectives**	❑ **Slide 17: Patient Encounter Learning Objectives**

Duration	Training Activities	Instructor Notes
	Upon completion of this lesson, the end-user will be able to: • Open the encounter • Setup Encounter Summary Properties • Document “reason for visit” • Verify patient’s allergies • Document patient’s vital signs • Document A/P • Create an Order Set	
	AutoCite Information	
	Explain: As encounters are completed for a patient, information from them is accessible through several modules from the Folders List. Information from some of these modules can be selected for display in the electronic SF 600 of a new encounter that is opened for the patient. These modules are referred to as AutoCite modules. You make selections for display of information from these modules in the *Encounter Summary Properties* window when you set up your system for personal use. Information in some of these modules can also be edited and modified by additions and deletions that are appropriate outside of encounters. AutoCite modules include: • Problems module • Lab module • Radiology module • Meds module • Allergy module • Vital Signs Review module • Questionnaires Problems, Allergy, Meds, and Vital Signs Review modules are located in the Health History Folder in the Folder List. AutoCite information for these modules appears in the AutoCite section of the SF 600.	**Briefly discuss. You will update autocite preferences in the next scenario.** **Note:** The provider

Duration	Training Activities	Instructor Notes
	of the SF 600. The Lab module and the Radiology module are directly accessible in the patient's folder. Information from these modules, when selected for AutoCite display, appears in the S/O section of the SF 600. The AutoCite button on the SF 600 refreshes all information selected for AutoCite display regardless of where it appears.	selections appear on the SF 600 despite any selection made by support.
	Screening and Vitals Modules **Screening and Vitals** • Screening • Vital signs Once the patient has been checked in, it is now time to document screening and vitals signs for the patient. Appointments with a status of "**CheckedIn**" which indicates the patient is ready for screening.	**Review screen layout and point out electronic SF 600 features.**
	Screening and Vitals **Demonstrate:** Before you screen Wilma Wunderlich (w8118), you need to update your AutoCite preferences; then you screen the patient, enter vital signs and review the information in the electronic SF 600. After the provider reviews the SF 600, the provider requests you order a throat culture. You document the procedure in A/P. **Update AutoCite preferences and document the patient encounter using the following information:** Open the encounter	**Review Screen Layout.** Click Options on the SF 600 to update AutoCite/Encounter Summary Properties **Note:** Questionnaires can be autocited into the SF 600. The provider will need to AutoCite Questionnaires properties as well. **Explain:** Use of the Screening module to document: • Appointment "reason for visit" and comments.

Encounter Summary Properties	
Active Problems	[Accept default]
Allergies	[Accept default]
Active Medications	[Select]
Questionnaires	[Select]

<table>
<tr><th>Duration</th><th>Training Activities</th><th>Instructor Notes</th></tr>
<tr><td></td><td>
<table>
<tr><td>Questionnaires</td><td>[Select]</td></tr>
<tr><td colspan="2">Screening</td></tr>
<tr><td>In the Search field</td><td>[Enter] cough and click Find Now.
Select a cough and click Add.
[Enter] nasal discharge and click Find Now select nasal discharge and click Add</td></tr>
<tr><td>Verify Allergy</td><td>[Select] No known Allergy
[Select] Verified This Encounter
[Click] Close</td></tr>
<tr><td colspan="2">Vitals</td></tr>
<tr><td>BP
Rt arm
Pediatric cuff</td><td>110/70
[Select]
[Select]</td></tr>
<tr><td>HR
Radial
Regular</td><td>95
[Select]
[Select]</td></tr>
<tr><td>RR</td><td>24</td></tr>
<tr><td>Temperature F
Oral</td><td>99 F
[Select]</td></tr>
<tr><td>Ht</td><td>[Enter] 42 in</td></tr>
<tr><td>Wt</td><td>55 lbs</td></tr>
<tr><td colspan="2">Pain Severity</td></tr>
<tr><td></td><td>[Select] 1 Hurts a little bit</td></tr>
<tr><td>Where is pain located?</td><td>Throat

NOTE: Add comments when pain scale is selected (other than “0 pain free”).</td></tr>
<tr><td colspan="2">Save Vitals</td></tr>
<tr><td></td><td>[Select] Save Vitals
(Action Bar Icon)</td></tr>
</table>
</td><td>

Verification of allergies (only performed in Screening module)
Special Work Status
Use of allergy icons in the patient ID line for quick assessment of the status of the patient’s allergies

Explain: Difference between NASAL DISCHARGE (Diagnosis) and nasal discharge (Symptom)

To review, ask students in which module allergies are verified. Answer: Screening (not Allergy)

Point out Save Vitals icon and Vital Signs Review tab.
</td></tr>
</table>

Duration	Training Activities	Instructor Notes
	[Select] Close (Action Bar Icon) **Key Points:** • Reason for Visit is a structured term and may be more accurate than Reason for Appointment • Screening during the patient encounter is the only module where a patient's allergies can be verified	
	Exercises	
	• Complete the exercises. • Check for understanding and answer participant questions. **Summary** • Open the encounter • Setup AutoCite properties • Document "reason for visit" • Verify patient's allergies • Document patient's vital signs	**Review screen layout.** **Show how to:** • select/deselect • expand/collapse **Explain** searches can be performed using: • WHO language • CPT Codes • Partial Words **Explain**: User can delete a diagnosis, procedure, or
	Assessment/Plan Module	
	Assessment/Plan The Assessment and Plan module allows you to document procedures, order laboratory and radiology tests, and create order sets. **A/P Processes** ▪ Codes are captured with procedures ▪ Labs and Rads can be submitted or saved to queue	

Duration	Training Activities	Instructor Notes
	▪ Order Sets can be created to easily select and submit orders. When a procedure is added, the associated CPT code is included.	order that was documented in error. Point out Show Orders button. Discuss pros and cons of saving to queue. • Show how to delete before submitting queued. • Recommend submit over save to queue.
	Assessment/Plan	
	Demonstrate: Now we can document the throat culture for Wilma Wunderlich and create an order set. Documenting the note: 1. Click **A/P** on the electronic SF 600 to open the A/P module. The A/P screen will display with the Diagnosis tab selected: 2. Click the **Procedure** tab. 3. In the Search field, enter *Specimen Handling* and click **Find Now.** The search results appear. *4.* Highlight to select *Dr. Supervised Specimen Handling/ Transfer office to Lab 99000* 5. Click **Add to Encounter**. 6. Click the **Order Lab** tab. 7. In the New Lab Order field, enter *Throat Culture* and click **Search**. 8. Select THROAT CULTURE. 9. Click **Save To Queue**. 10. Click **Order Sets** tab. 11. Click **Save As Order Set.** The Save Encounter Template window opens. 12. In the **Template Name** field, enter ***Throat Culture--Orders--Test*** and click **Save.** 13. Click **Submit.** **(**Point out **Submit All** icon on the Action Bar**.)** 14. To close the A/P module, click **Close** on the Action Bar. 15. Click **Yes** on the A/P Warning window. You are returned to the SF 600. 16. Click **Close** to return to the appointments list. **Key Points:**	Explain benefits of creating order sets.

Duration	Training Activities	Instructor Notes
	• Document Screening and Vital on the encounter note • Document procedures in A/P • Create Order Sets	
	Exercises • Complete the exercises. • Check for understanding and answer participant questions. **Section Summary** • Document A/P • Explained how codes are captured with procedures • Labs and Rads can be submitted or saved to queue • Explained how to create order sets. Next Slide	
Lesson 4: Previous Encounters		
	Lesson Goal The goal of this lesson is to enable the user to view Previous Encounters in CHCS II. **Learning Objectives** Upon completion of these modules, the user will be able to: • Display a previous patient encounter **Previous Encounters**	❑ **Slide 18: Previous Encounters Learning Objectives**

Duration	Training Activities	Instructor Notes
	Demonstrate: You need to view the previous encounter for **LCDR Suarez (s3217)**. 1. From the list of appointments, click on LCDR Eduardo Suarez's appointment to pull his record. 2. Click **Previous Encounters** in the Folder List. The Previous Encounters window will display. 3. View the previous encounters for LCDR Suarez. 4. Click the **Close** icon on the Action Bar to close the module. 5. Clear Patient **Key Points:** • Access to past encounters is available at any workstation with CHSC II access.	**Previous Encounters will only list encounters completed CHCS II.**
	Exercises • Complete the exercises. • Check for understanding and answer participant questions. **Summary** • Display a previous patient encounter ***Next Slide***	
Lesson 5: Telephone Consults		
	Lesson Goals	❑ **Slide 19: Telephone Consults Learning**

Duration	Training Activities	Instructor Notes
	The goal of this lesson is to enable the user to use the Telephone Consults 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	**Objectives**
	Telephone Consults Module **Demonstrate:** **To set the telephone consults filters:** 1. Click **Telephone Consults** in the Folder List. The Telephone Consult window will display: 2. Click **Change Selections** button in the Telephone Consults list workspace. The Telephone Consults Search Selections window will display. 3. Click the following radio buttons for the associated field: **Clinics: This Clinic** (Default) **Providers: Me** **Dates: Today Only** **Status Selection: Any Status** (Default) 4. Click the **Set Selections as Default** button to change the default settings. 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.	Telcons created in CHCS must be completed in CHCS and vice versa.

Duration	Training Activities	Instructor Notes
	To Create a Telcon and Edit the Callback Phone Number: You receive a call from retired **CAPT Clayton Williams (w8867).** He states he needs a refill for 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. You edit the Callback Phone Number. 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. Type *Pt request refill, Lisinopril. 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** in 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 the 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**. 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.	**Explain:** Reason for Telcon field and Notes 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.

Duration	Training Activities	Instructor Notes
	To edit a Callback number Evelyn Alexander's mother phones and states that she is not a 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. 6. Clear patient **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 address questions.	
	SUMMARY	
	• Explained search selections for telephone consults module • Created a telephone consult appointment • Transfer a telephone consult to a different Provider • Edited a call back phone number Next Slide	

Duration	Training Activities	Instructor Notes

Lesson 6: Health History Folder

	Lesson Goal 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. **Learning Objective** Upon completion of this lesson, the end-user will be able to: • Setup Health History Folder • View Demographics information • View and modify patient Problems information • View and copy Lab results into an encounter • View and copy Radiology results into an encounter • View and modify patient Allergy information • Setup and review the properties for Vitals Signs Review	❑ **Slide 20: Health History Learning Objectives**
	Health History	
	Demonstrate: The user would like to view health history information for **CAPT Clayton Williams**, as well as, customize display to see pertinent information for all patients. **To view CAPT Clayton Williams' Health History folder:** 1. From the list of appointments, click on CAPT Williams' 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.	**Explain:** • How to view and customize a display of selected patient health history information for quick review. • Setup can be done from either the Tools menu or from the **Options** button. • The same setup applies to all patient records.

Duration	Training Activities	Instructor Notes
	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. Deselect the box next to Problems. Notice there's an unoccupied space on the design summary window. 3. Check the box next Vitals Signs Entry. The Vitals Sign Entry box displays in the middle of the design window. Click and drag the box up to the unoccupied space and release mouse. 4. Click the **Align** button to view the format. 5. Click the **OK** button to view the results. 6. 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	Mention modules can also be auto cited in SF 600. To access a module: • Click on the module • Use the folder list under Health History • Double-click in the module window within Health History display window
	Demographics	**Review screen layout**
	Explain: Demographics module displays patient's demographic information. Demographic and third party insurance information may be viewed in CHCS II, but any required changes should be done in the respective legacy systems. Follow your MTF business rules. Capt. Clayton Williams informs you he has moved since his last visit. You have updated his demographics information and need to verify you have his new address. **To verify demographic information** 1. Double-click in Demographics window in the Health History display window. 2. The Demographics module will display. 3. Verify his home address as 877 Main Street.	**Explain:** • 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

Duration	Training Activities	Instructor Notes
	4. Click the **Close** icon on the Action Bar to close the module.	does not write back from CHCS II to CHCS. Advise users to follow your MTF policy for collecting third party insurance information.
	Problems Module	
	Explain: Information from completed encounters is available in the Problems module. In this module, information from all previous encounters is accumulated and organized according to the problems that have been identified in encounters. Not only can you view this information, you can also add or delete problems, as appropriate. **CAPT Clayton Williams (w8867)** has previously been diagnosed with cancer of the gallbladder. This needs to be added to his Problems List in the Problems module under Health History. 2. Select (highlight) CAPT Williams' name in the list of appointments. The patient's name must show in the ID line. 3. In the Folder List, click the **Problems** module located under Health History. 4. Expand the Problem list to view CAPT William's Acute/Chronic problems. 5. Click **Add** on the Action Bar 6. The Select Diagnosis window appears with Clinic List selected by default. 7. Select the **Search** tab. 8. Type *Gallbladder cancer* in the Find field. 9. Select GALLBLADDER NEOPLASM MALIGNANT 156.0 10. Click **OK**. 11. Click the down arrow next to the Onset Date to display the date calendar. 12. Enter the Onset Date: **06 Dec 2000**. 13. Use the < > to select the December. Click on the year to display up/down arrows to select the year 2000. Click on day 6. 14. In the Status field accept default: **Active** 15. In the chronicity field accept default: **Chronic** 16. In the Source field accept default: Patient	**Review screen layout** **Explain:** Review screen layout and quickly review default options. • Click the **Options** button to set the Lab Results Properties.). • Select the *Filter* tab radio button: *All labs*. • In the Preferences tab. • Time Options section, select Default Time*: All Time Periods.* • Click the **OK** button. • Click the **OK** button to display the list of labs.

Duration	Training Activities	Instructor Notes
	Lab Module	
	Set the Scene: Dr. Test User tells you he has just talked to patient LCDR Suarez and wants to see him to discuss his previous Lab and Rad results. Dr. User has asks that when LCDR Suarez arrives for his appointment he would like you to add the results to his encounter. 1. Create a **(ROUT) 15** appointment for LCDR Suarez. Reason for visit is to *Review test results* 2. Open the encounter. 3. Click **Lab** in the Folder List. *Review what appears based upon the default settings.* 4. Provider User is specifically interested in the results of the *Microalbumin, urine test*. 5. Highlight the Microalbumin, urine lab result. The result details display in the lower section of the screen. Use the **Display Criteria** to select **Ref Range/Units**. 6. Highlight the result details and right-click. Note the two options: **Copy**: puts the results onto the clipboard and they can be pasted into another document **Copy to Note:** enters the results onto the patient encounter in the S/O portion 7. Select **Copy to Note**. 8. Close the **Lab** module. Notice the Microalbumin, urine results appear in the S/O portion of the encounter note. Do not close SF 600. **Caution:** The system does not alert you when you have **Copied to Note**; however, results are copied. Selecting **Copy to Note** again results in multiple copies that cannot be deleted.	**Explain:** The difference between **Copy** and **Copy to Note**. **Review the screen layout.**
	Radiology Module	
	Set the Scene: Add the following Radiology results to LCDR Suarez's Encounter note. 1. In the Folder List, click the **Radiology** icon. The results of three tests appear.	**Explain:**

Duration	Training Activities	Instructor Notes
	• Point out the visual cue color code for normal/abnormal results. 2. Highlight the Sinus Series Report. 3. Review what appears in the lower section. (Scroll down to view the results of selected test.) 4. Left click and hold on **Report Text:** Drag mouse to bottom of report to highlight. Right-click and copy to note. • Point out you can also copy and paste results to the Add Notes section of the encounter. 5. Close the Radiology module 6. Close the encounter.	• Select All Results • How to select several reports using the Ctrl key. **Review the screen layout.**
	Meds Module	**Explain:** Point out that the order, renew and modify buttons are accessible from the Meds module, but do not attempt to use them. This functionality does not work in the CHCS II Training System. Providers will find it easier to order prescription medications through A/P, but, in the live system, medication can be ordered, renewed and modified from the Meds module. To do this, an encounter must be open.
	Explain: • The Medications module lists the patient's past and present medications. • It includes all over-the-counter (OTC), outside, also CHCS and CHCS II-ordered medications. • Ordered meds appear once the prescription is filled at the pharmacy. **Set the Scene: Col Violet Alexander (a5743)** tells you that she has added taking Motrin each day to her daily routine as suggested earlier by Dr. David Doctor. Check her medication health history and update it with the new medication. 1. Search for **Col Violet Alexander (a5743)** to open her patient record. 2. In the *Folder List* under Health History, click **Meds**. In the Meds module, the **Search Filter** field default is **Outpatient Current**. 3. Review the functions available using the Action Bar icons: **Add**, **Details**, **Discontinue**, **Modify** and **Renew**. 4. Click the drop-down arrow for the **Search Filter** field and review the options. Change the selection to **All**. 5. Select an existing medication and, on the Action Bar, click the **Details** icon.	

Duration	Training Activities	Instructor Notes
	6. Click **Discontinue** on the Action Bar. 7. An error box appears indicating this action requires an open encounter (for documentation). Click ***OK*** 8. The **Search Filter** selection changes back to **Outpatient Current**. 9. Click the **Add** icon to record Motrin. 10. Click the Record OTC/Outside Medication button. 11. Click the **Medications** button to begin searching for **Motrin** in the *Healthcare Data Dictionary Search* window. 12. Select *IBUPROFEN (MOTRN) 800 MG, (U/D)--PO, 800 MG* and click the **OK** button. 13. Complete all required fields (including the **Sig: 1 TAB QD**) and add a comment that med was a suggestion by her doctor for muscle aches. 14. Click the **OK** button. Note the checkmark in the **OTC** column, which indicates this is an over-the-counter medication. 15. Close the Meds module. 16. Close the encounter. 17. Clear Patient	**Review the screen layout.**
	Allergy Module	
	Explain: • Keeps track of a patient's reactions to specific allergens • Allergy icons: NKA, nose, and nose with question mark • Allergy synchronization occurs when the appointment is created and when the Allergy module opened • A common list of allergens can also be specified to make entering data more convenient **Set the Scene: MG Ramona Marcos (m9876)** is on the telephone requesting that her CHCS II allergies record be updated. She was stung by a wasp last month and had a reaction to the sting. 1. Search for MG Marcos' patient record and load her name to the patient ID line.	**Note:** Allergy Icon on the Patient ID line: Explain visual cues: • NKA • Allergies not verified • Known allergies

Duration	Training Activities	Instructor Notes
	2. Open the **Allergy** module from the Folder List. 3. Click the **Add** button to display the *New Allergy* section. 4. Click the **Allergen** button and search for **wasp** in the *Health Care Dictionary Search for Allergens* window. 5. Double-click **WASP VENOM (WASP VENOM)** to add it as an allergen. 6. Click the **Reaction** button and search for **BRONCHOCONSTRICTION** as a reaction. 7. Highlight **BRONCHOCONSTRICTION** in the left column of the *Health Data Dictionary Search for Reactions* window and click the **Add>>** button to move it to the right column. 8. Click the **OK** button to close the window. 9. Enter the following information: **Field** / **Data** Info Source / Patient Onset / [four weeks ago] Entered by / [accept default] 10. Click the **Save** button. The clinic has had several patients recently report an allergic reaction to wasp venom, so it needs to be added to the drop-down list of common allergens. 1. Click **Options** to open the *Properties* window. 2. Click **Add** to open the *Add Common List Items* window. Search for and select to highlight ***wasp venom*** and click the **Add to Common List** button. 3. Click **Close**. 4. Click **Save** and **OK** to close the properties window. 5. Click the **Add** button in the Action Bar, and review the **Allergen** drop-down list. Notice that **WASP VENOM (WASP VENOM)** has been added. • Point out allergens can also be deleted using **Options** in the CTS and live CHCS II system,	

Duration	Training Activities	Instructor Notes
	6. Close the Allergy module and return to the Appointments module. 7. Clear patient	
	Vitals Sign Review	**Review screen layout**
	Demonstrate: **Set the Scene: LCDR Suarez' (s3217)** comes in for his diabetes follow-up exam. Review and graph his past vitals. 1. Open the **Appointment** module. 2. Click once to highlight LCDR Suarez Diabetes follow-up visit in the appointment list to pull his patient record. 3. Verify that LCDR Suarez is now listed in the Patient ID line. 4. Open the **Vitals Sign Review** module from the Folder List. 5. Click the **Search Type** button to open the *Time Search* screen. 6. Select the **Sliding Time Range** radio button and select **2 months** as the time range. 7. Click **OK**. 8. Click the **Refresh** button to the right of the time period display. 9. Highlight a single line and click the **Graph Vitals** icon on the Action Bar to open the *Graph Vitals* window. 10. Select each of the **Graph Options**, **Chart Types**, and **Vitals Keys** in turn to review their functions. 11. Click **OK** to exit and return to the Review role with LCDR Suarez' vitals. 12. Highlight the **BP** and **HR** columns. Click the **Graph Vitals** button. 13. Click **OK** after review graph. 14. Click **Close** on the Action Bar to close module. **Key Points:**	

Duration	Training Activities	Instructor Notes
	• Add/Inactivate Problems • Copy Lab and Rad Results to encounter • Add/Discontinue Meds • Add/Delete Allergies • Review and graph Vitals	
	Exercises	
	• Complete Exercises • Check for understanding and answer participant questions	
	Summary	
	• Setup Health History Folder • Viewed Demographics information • Viewed and modified Problem information • Viewed and copied Lab results • Viewed and copied Radiology results • Viewed and modified Medications • Viewed and modified Allergy information • Set and review the properties for the Vital Signs Review module • Graph vital signs ***Next Slide***	
Lesson 7: Questionnaire Setup & Patient Questionnaires		
	Questionnaire Setup	
	Lesson Goal: The goal of this lesson is to enable the user to set up patient questionnaires in CHCS II.	❑ **Slide 21: Questionnaire Setup & Patient Questionnaires Learning Objectives**

Duration	Training Activities	Instructor Notes
	Learning Objectives Upon completion of this lesson, the end-user will be able to: • Create and release a Questionnaire • Change the status of a Questionnaire • Interview Patient **Explain:** • Questionnaire Setup allows you to create and modify questionnaires. • Mark ready • An open encounter is not required to create or modify a questionnaire.	
	Creating a New Questionnaire	
	1. Expand Tools, and select **Questionnaire Set Up**. 2. Click the **New** icon on the Action Bar. 3. In Name field enter *Asthma*. 4. Click the drop down arrow next to the Level field and select **Clinic**. 5. Click the drop down arrow next to the Owner field and select **CHCS II Test Clinic** 6. Click the Add button. You can now create questions for your questionnaire. 7. In the Question text field, enter: How would you rate your asthma compared to your last visit? 8. From the Answer Type drop-down list, select Multiple Choice. 9. Next to Choice 1, enter **Better** and press Enter. 10. Next to Choice 2, enter **Worse** and press Enter. 11. Next to Choice 3, enter **Same**. DO NOT press Enter this time. 12. Click the Add button. 13. Question #2: Do you have an asthma action plan? 14. From the Answer Type drop-down list, select Yes/No. 15. Click the Add button. 16. Question #3: How many times a week has worsening of your asthma required a use of your inhaler?	

Duration	Training Activities	Instructor Notes
	17. From the Answer Type drop-down list, select Number. 18. Min value: 0 19. Max value: 100 20. Click the Add button. 21. Question #4: What seems to trigger a worsening of your asthma? 22. From the Answer Type drop-down list, select Multi-select. 23. Next to Choice 1, enter Exercise and press Enter. 24. Next to Choice 2, enter Common cold and press Enter. 25. Next to Choice 3, enter Dust and press Enter. 26. Next to Choice 4, enter Animal fur and press Enter. 27. Next to Choice 5, enter Unknown. DO NOT press Enter this time. 28. Click the Add button. 29. Question #5: What date was your last asthma attack? 30. From the Answer Type drop-down list, select Date. DO NOT press Enter. 31. Click the Save icon on the Action Bar. 32. Click the Mark Ready icon on Action Bar. 33. Close the Questionnaire Setup module	
	Complete a Questionnaire via Interview	
	Explain: • Use the interview when talking with the patient. • Answers are entered directly into the application. 1. Create a new appointment for **Edward Alexander (a5743)**, reason for appointment **Asthma follow up**. Open the encounter 2. In the **Health History** folder, select **Patient Questionnaires**. 3. Click the **Interview** icon on the Action Bar to select a Questionnaire. 4. Expand **Clinic > Questionnaires > CHCS II Clinic** 5. Click **Select** to start the Questionnaire. 6. Click the **Options** button and show Properties. In the Questions drop down box, select **Single Question View**. 7. Click **OK**. 8. Select the appropriate answer for each question and follow the hyperlink **Next Question** to navigate through the questions. 9. Proceed to answer questions:	

Duration	Training Activities	Instructor Notes
	10. Answer #1: **Better** 11. Answer #2: **Yes** 12. Answer #3: **2** 13. Answer #4: **Animal fur.** 14. Click the **Add Comment** hyperlink to add the following comment: **Patient wheezes after being around cats**. Click **OK**. 15. Answer #5: **1st of month** using format ddmmyyyy 16. Mark Questionnaire as **Done**. 17. Click the **Encounter** button in the Action bar 18. Show how to link Questionnaires to a specific Encounter 19. Close the Patient Questionnaires module 20. Close encounter note. Next Slide **Exercises** • Complete the exercises. • Check for understanding and answer participant questions. **Summary** • Create and release a questionnaire • Edit an existing questionnaire • Interview patient	
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 Appointments • Patient Encounter	❑ **Slide 22: Course Summary** **Summarize course based on modules taught.**

Duration	Training Activities	Instructor Notes
	• Previous Encounter • Telcons • Health History Folder • Creating and Administering Patient Questionnaires	
	What Do I Do If I Encounter a Problem While Working with CHCS II?	❑ **Slide 23: 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 Screen Shots** 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).	

Duration	Training Activities	Instructor Notes
	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
		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.
		
		Address all questions from users.

	Questions and Answers	**Course Evaluation Forms:** Ensure users include a comment for any item marked as “3” or lower.

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.

<table>
<tr><th>Role/Function</th><th>Field</th><th>Data</th></tr>
<tr><td rowspan="4">CLERK:
Creates a walk-in appointment for CPT Heather Cloud (c0058).</td><td colspan="2">Patient Search</td></tr>
<tr><td>Quick Search</td><td>C0058</td></tr>
<tr><td colspan="2">New Unscheduled Appointment/Telcon Visit</td></tr>
<tr><td>Appointment Type

Reason for Appointment

Injury/Accident Related</td><td>Acute Appt (ACUT$) 30

Turned Rt ankle

[Select]
[Select] Other Accident</td></tr>
<tr><td rowspan="5">SUPPORT STAFF:
Documents screening, verifies allergies, and enters vitals.</td><td colspan="2">Appointments Module</td></tr>
<tr><td></td><td>[Select] CPT Cloud’s walk-in appt. and open encounter note (SF 600).</td></tr>
<tr><td colspan="2">ENCOUNTER NOTE (SF 600)</td></tr>
<tr><td colspan="2">Screening</td></tr>
<tr><td>Search field

Verify Allergy

Comments</td><td>[Enter] reported trauma ankle and click Find Now.
Expand reported trauma ankle scroll down to
Expand Right
Expand to [Select] Turned in
Click Add to Encounter

[Select] No known Allergies
[Select] Verified This Encounter

Pt states not pregnant
[Click] Close on the Action Bar</td></tr>
</table>

	Vitals	
	BP Rt arm Adult cuff	125/77 [Select] [Select]
	HR Radial Regular	88 [Select] [Select]
	RR Temperature F Oral	21 98.6 F [Select]
	Ht	[Enter] 62 in
	Wt	124 lbs
	Habits	
	Tobacco	[Select] No
	Alcohol	[Select] Yes
	Pain Severity	
	Where is pain located?	[Select] **6** [Enter] *Rt. ankle* **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

NURSE: Provider asks nurse to order Lab and Rad STAT for patient.	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: *CBC* Click **Search** [Select] **CBC W/AUTO DIFF** [Select] Processing Priority: **STAT** [Select] **Submit**
	Radiology	[Select] Rad Tab [Enter] New Rad Order: *ankle* Click **Search** [Select] **ANKLE TRAUMA RT** [Enter] *R/O ankle fracture* [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
PROVIDER: Loads the Ankle Sprain Right visit template and examines the patient. Enters diagnosis, associates Lab, Rad orders and orders medication.	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] *ankle sprain* [Click] **Find Now** [Select] *Visit – Ankle Sprain – Right Side* [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: *Turned ankle while running* [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**

	PE	[Select] **+ vital signs reviewed** **+ ankle tenderness on palpation right** **+ ankle swelling on the right anterior** AutoNeg
	Test Find Term	[Enter] *ankle fracture* [Click] **OK** [Select] **- X-Ray Ankle Fracture** **Right Talus** Click the **A/P** icon on the Action Bar
	A/P	
	Diagnosis Search field Injury/Accident Box	[Enter] *ankle sprain right* [Click] **Find Now** [Select] **ANKLE SPRAIN RIGHT 845.00** Click **Add to Encounter** [Enter] *Location of accident* [Click] **Find Now** Expand **Location of accident E849.9** [Select] **at home E849.0** Click **Add to Encounter** [Enter**] Date: 1 day prior** [Click] **OK**

	Associate Orders Order Med Tab New Med Order Sig	[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] *Tylenol* [Select] **Tylenol #3 (OR SUBT) -- PO TAB** [Enter] *T 1 Tab TID x 10 days #30 RF0* [Press] **Enter** on your keyboard [Click] **Submit** [Click] **Close**
		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] *strapping* [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	[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] *crutches* [Select] **CRUTCHES E00112** **Add to Encounter** **Repeat Modifiers process** [Click] **Close**
PROVIDER: Discusses diagnosis and treatment with patient. Completes Disposition and Signs encounter.	Disposition Profile	Return to Encounter note [Click] Close on Action Bar [Select] **Release w/work/duty Limitations** *One Month against running and prolong standing.*
	Follow-up Discussed Items E & M Code Sign	[Select] **with PCM** [Select] **When** [Enter] **2 and weeks** [Select] **Diagnosis, Medication(s)/Treatment** Verify coding [Select] **Sign** on Action Bar Preview SF 600 [Click] **Sign** button
CLERK:	Appointments Module	

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