

Non-Provider Ambulatory Training Activities

In Class Activities and Exercises	Trainee to write down the answers on the lines below or to take notes
<p>Activity 1: Clinical: Navigation and Clinical Home Screen Activity Locate test patient on the schedule</p> <ul style="list-style-type: none"> ▪ Accessing the Clinical Home Screen <ul style="list-style-type: none"> ○ Clicking on Ambulatory – Clinical Home Screen <ul style="list-style-type: none"> • If you open the Clinical Home Screen and you get Sign On error, click Return To • Close the Clinical Home Screen, change the subdivision ○ Some users may be required to change the subdivision <ul style="list-style-type: none"> • Click Subdivisions • Enter the AMB facility into the facility field • Click OK • Click Clinical Home Screen ▪ Create your PIN (This is your electronic signature and should not be shared with others) <ul style="list-style-type: none"> ○ Click on the More Menu and click on AMB Preferences ○ Change PIN – Yes ○ Enter New PIN ○ Re-enter new PIN ▪ Set your EMR User Preferences <ul style="list-style-type: none"> ○ Click on the More Menu and click on EMR User Preferences ○ Click Web EHR then Home/Schedule ○ Set all preferences on first box to YES ○ Scroll down to the Quick Links section ○ Enter the URL of website you frequently visit and then the name link ▪ Exit and Relaunch Expanse to activate the preferences <ul style="list-style-type: none"> ○ Click on the Return To button and select Close All 	<p>Check off what you find and write down your findings. What/who is/are the:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Patient Name's booked at 0930 _____ <input type="checkbox"/> Special Indicator/s _____ <input type="checkbox"/> Reason for visit _____ <input type="checkbox"/> Status of the appointment _____ <input type="checkbox"/> Order for that is populated on the cell? _____ <input type="checkbox"/> Link added to Quick Links _____ <input type="checkbox"/> The first provider on list under your clinic resource group _____ <input type="checkbox"/> Newest Workload message from? _____

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<ul style="list-style-type: none"> ▪ Access the Clinical Home Screen (see above) ▪ Search for the Resource group RVH: Fracture Clinic, HHCC: Ortho, CGMH: Orthopaedics, GBGH: Ambulatory Care Rooms. <ul style="list-style-type: none"> ○ Click on the Resource button to view the search field ○ Use the Ctrl F keys to search and type in the words (see site specific info above) ○ Find the name of the clinic on the list ▪ Change schedule date to view previously booked appointments <ul style="list-style-type: none"> ○ Click on the Calendar button ○ Navigate to April 7 2021 using the arrows on the calendar overlay ▪ Locate the special indicator ▪ Locate the status of the appointment ▪ Determine the Order icon on the patient cell ▪ Click on Today to return to todays schedule ▪ Searching for a patient using the Find Patient Field <ul style="list-style-type: none"> ○ Click on the “Find Patient” field and type the last name “AMB,” first name, “Two” ○ Select the patient AMB, TWO ▪ Submit a Workload message to the provider (Communication with provider in clinic will most likely be verbal) <ul style="list-style-type: none"> ○ Click on the compose button (black navigation bar) ○ Select Clinical message/task type ○ Enter a Subject “Patient Request” ○ Add a recipient ○ Complete the message e.g. patient request refill on prescription ○ Click Save to send the message ▪ View message in the patients chart <ul style="list-style-type: none"> ○ Click Chart on black navigation bar ○ Click on the Other Clinical folder 	

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<ul style="list-style-type: none"> ○ Expand Workload Items folder 	
<p>Activity 2: Chart Activity</p> <p>Access a patient Chart</p> <ul style="list-style-type: none"> ▪ Search for patient <ul style="list-style-type: none"> ○ Amb, Eleven ▪ Review the PFSH on the Reference Region ▪ Change the Flowsheet in view to the Hypertension Flowsheet <ul style="list-style-type: none"> ○ Select the flowsheet tab ○ Click on the “Viewing” button ○ Search for and select “Hypertension” ○ Find the patient’s temperature ▪ Review the History and Problems List ▪ Click on the provider notes tab to review a document/report <ul style="list-style-type: none"> ○ Click on the AMB Orthopedics Office visit – Service date 08/06/2021 Problem: ? RT Scaphoid ER F/U isigned ○ Click on the document icon ○ To print the report click the printer icon on the upper hand right corner ○ The report appears, select the printer icon again and select destination to print then select print ▪ Review Medications <ul style="list-style-type: none"> ○ Click on the Medications Tab ○ Click on the Current Infusion/Titration button (display view button) ○ Select the Home Medications Option ○ Expand the details of the medication by clicking on the chevron ▪ Access the Chart Viewer <ul style="list-style-type: none"> ○ Click the More Button on the Navigation Bar ○ Select the Chart Viewer Option ○ Separate the chart view from the browser to open two chart browsers ▪ Enter the Resuscitation Status <ul style="list-style-type: none"> ○ Click on the “No Resuscitation” red text on the Header 	<p>Check off what you find and write down your findings. What/who is/are the:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Problems listed on the Reference Region widgets _____ _____ _____ <input type="checkbox"/> What is the Surgical History _____ _____ <input type="checkbox"/> Temperature of Amb, Eleven on Ambulatory Office Visit 20/11/2020 _____ <input type="checkbox"/> Who last updated the medical history On what date _____ At what time _____ <input type="checkbox"/> iSigned Satus on the AMB Orthopedics Office visit ? RT Scaphoid ER F/U document mean? _____ _____ <input type="checkbox"/> Medication on the Home Medications list _____

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<ul style="list-style-type: none"> ○ Select the “Change” button ○ Click on the “Code Status” field and select the “Full Resuscitation” status ○ Click on the Resuscitation Decision Obtained from field and select “Capable Patient” ○ Click the “Sign” button ○ Add an ordering provider and source (e.g. , click the Save button) ○ Click “Yes” on the Confirmation overlay ○ Enter the PIN number 	<p><input type="checkbox"/> Button name to exit the chart viewer:</p> <p>_____</p>
<p>Activity 3: Accessing the Scheduling Grid – Booking a patient</p> <p>(This may only be applicable for a select few clinicians) Required during training in order to continue with training</p> <ul style="list-style-type: none"> ▪ Quick Book your test patient <ul style="list-style-type: none"> ○ From the Clinical Home Screen, click the More button on the schedule window ○ Select Scheduling Grid ○ Select the Resource Group (see site specific clinic resource groups above) ○ Left click on the schedule time slot ○ Select the option for Quick book, type in your patient’s name (last name, first) ○ Select the patient, (select new account if you get the account search pop up, If patient has special indicators review and close the overlay) ○ On the Quick Book Screen, select an appointment type on the appointment field ○ Visit Reason – copy appointment type into visit reason add additional info e.g. of what it might look like: FC Consult R foot fracture ○ Type in the provider’s name “ZZTemplate, AmbDoctor ○ Click save 	

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<ul style="list-style-type: none"> ○ Return to the Clinical Home Screen – Click the Home button 	
<p>Activity 4: Widgets</p> <p>From the Clinical Home Screen access your test patient</p> <ul style="list-style-type: none"> ▪ Special Indicator entry <ul style="list-style-type: none"> ○ Select the Special Indicator widget on the Reference Region ○ Click in the search field and select Falls Risk, then click the save button ▪ View the Summary & Reference Region Widget Templates (Do Not Modify these templates at this time) <ul style="list-style-type: none"> ○ Select the Cog wheel ○ Within Widget Preferences, on the Summary ○ Review the widgets present ○ Click on the widget Template change it to the AMB Front Office Sum. Template ○ Click the CANCEL button <p>** In the future you will be able to modify the template and add widgets that you would like to see within the patients Summary tab.</p> 	
<p>Activity 5: Clinical Documentation</p> <p>Document on Clinic Specific Document/Notes:</p> <ul style="list-style-type: none"> • Click on the Document button on the black navigation bar • Access documentation either by clicking on the patient document status or by clicking on the patient cell and selecting the document button on the navigation bar. • On the 'Select Document's screen, search for your specific clinic document (every clinic/ambulatory document is different) e.g. example search for/select the Day Rehabilitation Visit document and click on the document tile. NOTE: Documents are available based on site specific clinics 	

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<ul style="list-style-type: none"> • Set a document preference by selecting the star – only preferred documents will display on the select document screen. You can still search for document using the search new document field if the document doesn't display • Once the document is open click on the Save button • Click the Rapid Entry button and compare the document in the 'refine and review' view or rapid view and determine your preferred view • Intake Document section <ul style="list-style-type: none"> ○ For documents that have Intake sections, the visit reason is displayed (Do not remove the visit reason) additional visit reasons can be added (e.g. Pain). Then enter the rest of the patient data details in the document. ▪ For 'Interpreter required' enter: Yes, and then select the drop-down arrow beside it to enter the type of interpretation requirements for the patient. <p>Activity 6: To document allergies (this can also be done through the allergies widget on the reference region)</p> <ul style="list-style-type: none"> ▪ Click on space under the Allergies and Adverse Reactions section of the Intake document section (This will launch the Allergy/AdbReac Overlay) ▪ Add a Pollen allergy; Click on the search field and type in the word "Pollen" ▪ Select "Grass Pollen" <ul style="list-style-type: none"> ○ Type: Allergy ○ Severity: Intermediate ○ Status: Will always default to "Verified" ○ Reaction – Difficulty breathing ○ Enter a comma beside difficulty breathing and additional text. ○ Enter in comments below, "Patient take Benadryl" ▪ Add an allergy to Banana <ul style="list-style-type: none"> ○ Type: Adverse Reaction ○ Severity: Severe ○ Reaction: Hives 	

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<ul style="list-style-type: none"> ○ Click the save button ▪ Click save once allergies are entered <ul style="list-style-type: none"> ○ Document will be updated with documented allergies and last updated date and user will be added to the document ▪ Remove Allergy using the widget <ul style="list-style-type: none"> ○ To remove the allergy, click on the allergies widget ○ Select the allergy to Banana ○ Click Remove ○ Enter Removal Reason ○ Click Save <p>Activity 7: Home Medications Entry and Medication Reconciliation</p> <ul style="list-style-type: none"> ▪ Click on space under the Active Medications section of the Intake document section (if the vitals warning overlay displays – click Go To Reconcile, the Reconcile Medications overlay will launch) Alternatively, you can launch the Reconcile Medications by: <ul style="list-style-type: none"> ▪ Click on the orders button on the Navigation Bar ▪ Click on the Reconcile Button <p>Or Clicking on the Medications Widget heading Clicking on the Reconcile Button</p> <p>Vital Signs documentation</p> <ul style="list-style-type: none"> ○ In the Vitals section of the document, click on the white boxes that correspond with height and weight to enter the following values: Height = 165 cm and Weight 70 Kg ○ Then click the Save button and notice your name and the “Last Saved at” date and time stamp appear at the upper right side of the document. 	

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<p>Activity 8: Problem List Management</p> <ul style="list-style-type: none"> ▪ Enter an Active Problem <ul style="list-style-type: none"> ○ Click on the Problem Widget on the Reference Region ○ Click on the Search for: New Problem field and type in “COPD” ○ CLICK on the Star for COPD to add the problem to the favourites list ○ Select the “Active” button for COPD to add the problem to the Active List ○ Add another problem of “Pain” in the similar fashion ▪ Enter Surgical Problem <ul style="list-style-type: none"> ○ Click on the Search for: New Problem field and type in “biopsy” ○ Select the “History” button for Hx of biopsy to add the problem to the surgical history list which will populate the Medical History list ○ Click on the chevron of the Hx of biopsy problem ○ Find the Category label and click on the caret beside Medical ○ From the Drop down menu select “Surgical” ○ Hx of biopsy should now be located under the Surgical History section ○ Select the “Save” button ▪ Inactive Problem <ul style="list-style-type: none"> ○ Click on the Problem Widget on the Reference Region ○ Click on the yellow star beside the “New Problem” field to view the favourites list ○ Click on the problem “Pain” ○ Locate the Status label and click on the caret beside the “Active” status ○ Change the status to “Resolved” by clicking the radio button (circle button) on the on the R/I/R side ○ Select Save 	
<p>Activity 9: Activity Past Medical Surgical Social Family History (PMSFH/PFSH)</p> <p>Document PMSFH/PFSH on the Health Summary Document Section</p> <ul style="list-style-type: none"> ▪ PFSH 	

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<ul style="list-style-type: none"> • Medical History <ul style="list-style-type: none"> ○ Demonstrate how to enter the Medical history of Lupus • Surgical History <ul style="list-style-type: none"> ○ Review surgical history, enter surgical history of cataracts, select history and change the status to surgical and click save. • Family History <ul style="list-style-type: none"> ○ Add the new family member select 'father' and click the "Add" button, select the "Add new problem" ○ Type in lymphoma and type the enter key, select from the ICD 10 code list, click Save • Social History <ul style="list-style-type: none"> ○ Click on the Gender identity, living situation, etc. Explain the difference queries, comment boxes and then select "Save" 	
<p>Activity 10: Clinical Documentation</p> <p>Document Chargeables:</p> <ul style="list-style-type: none"> • Click on Document • Search for Chargeable Items • Select cast and indicate the side • Click Complete • Copy account number • Print Report <ul style="list-style-type: none"> ○ Click the More button on the black navigation bar ○ Select Custom Reports ○ Select Retail Goods Invoice ○ Paste Account number ○ Click Print (bottom of the screen) 	
<p>Activity 11: Entering Orders</p> <p>Lab</p>	

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<ul style="list-style-type: none"> Click on the Orders button on the black navigation bar If a warning sign appears that indicates that Height, Weight, Enter Vitals or Go To Reconcile have not been entered (this displays if the vitals were not capture on the intake section) select “Enter Vitals” and complete the vitals within the Intake document section of the report Type in CBC in the Search Order/Sets search field Select CBC [Complete Blood Count] and click on the start to add it to the favourites list Locate the CBC order on the Favourites list on the Order Management screen Click on the chevron for the CBC order string to expand the order details screen Click on the Frequency field and change the input from “Routine” to “Urgent,” the location from “Laboratory Services to Determined” by patient and change the service date to the next date by clicking on the calendar Click on the Specimen field and select “Send patient for collection.” Click the sign button Add an ordering provider and source Click sign enter your PIN number Click the enter once the number is entered <p>If the Print screen overlay presents:</p> <ul style="list-style-type: none"> Click the Apply button On the Print Destination screen select the room training printer or All RVH Printer, the select the Dummy Printer and leave 1 in the Copies box. Click the “Apply” button. Click the Apply button again. Verify that the order has been entered on the Manage Orders List. <p>DI (Same day orders)</p> <ul style="list-style-type: none"> Click on the Search Orders/Sets search field and enter RAD Abdomen 1vw 	

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<ul style="list-style-type: none"> Click on the chevron for the DI order string to expand the order details screen Click on the Frequency field and change the input from “Routine” to “Urgent,” the location from “Imaging” to “Determine by patient” and the service date to should be T (Today) Note: Do not enter a future order date Click on the “Relevant Clinical Information” required field and enter/type in “abdominal pain” Identify that the patient is not pregnant by clicking on the “No” button Click on the field history of falls and select the option, “fell in the last 31-90 days” Select the Problem field, it will open the Problems and History List overlay, select a diagnosis to add to the order by check a box “Add to Order” then click Save. Click the sign button Add an ordering provider and source Click sign enter your PIN number Click the enter once the number is entered 	
<p>Activity 12: Med Admin Orders - For Nurse Administered Medication</p> <p>Note: If the provider dispenses the medication to the patient, the physician will document the medication administration in their dictated report</p> <ul style="list-style-type: none"> If entering the order on behalf of the provider; Click on the Search Orders/Sets search field and enter Med Admin Select the Medication Admin Order (click on the start to favourite your orders) Locate the order on the Manage Orders section. Click on the chevron for the order string. Confirm the order details (acetaminophen 500mg etc) Click the sign button Add an ordering provider and source (e.g. , click the Save button) 	

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<ul style="list-style-type: none"> • Click sign enter your PIN number • Click enter once the number is entered • Click on Home button to return to home screen – see the O indicator (O indicates that there is a medication administration order) <p>Nurse Administers the Medication and documents the administration</p> <ul style="list-style-type: none"> • Click on Document to return to your document • Click on the Procedures document section • Click on the Medication Order (Medication name) • Complete administration documentation • Click save • Review the Reference Region “Outstanding Orders” medication will display as Documented as Given <p>Nurse Administered medication collected from pharmacy – physician written paper order or Patient provided medication with physician order</p> <ul style="list-style-type: none"> ▪ In the document, click on the Procedures document section ▪ Click Add Procedure ▪ On the Search field, search for Medication Administration ▪ Click on chevron to the left of Medication Administration to expand documentation queries ▪ Enter in the ordering provider ▪ Order source ▪ Select “yes” for Did Patient Supply Medication (Used if patient supplied medication only) ▪ Document Tylenol in the Medications Given field ▪ Document 325mg for medication dosage given ▪ Document PO for route ▪ Then select “Save”Click Save 	
<p>Activity 13: Completing Documentation and viewing it in the EMR</p> <ul style="list-style-type: none"> ▪ Once the Clinic Documentation is complete click the Complete button 	

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<ul style="list-style-type: none">▪ Click the Chart button on the black navigation bar▪ Click the Nursing/Allied Health folder▪ Expand the Ambulatory Clinic folder to view completed Clinic Document▪ Expand the Financial folder to view the Chargeable Items Document				
<p>Activity 13: Workload Case Statistics Entry (Allied Health Staff Only)</p> <ul style="list-style-type: none">▪ Service Recipient<ul style="list-style-type: none">○ Search for the Workload document template and click on it○ Enter in 15 min for each category and then select complete▪ Non-Service Recipients<ul style="list-style-type: none">○ Click the Return To button○ Go to the main menu and select Clinical and then PCS Status Board○ Select Indirect on the right menu○ Select your outpatient clinic○ Click open○ Select the “add” button○ Select NSR – Functional Centre Activity 15 min○ Click next and then select Research activity 90 min○ Select the “ok” button○ Input a checkmark in the “Now” box for each category then select “Document”○ Add an assigned user if required				
<p>Nursing/Allied Health Case Scenario 1.</p> <table><tr><td>open patients chart</td></tr><tr><td>Click Document on Black Navigation Bar</td></tr><tr><td>Open clinic document</td></tr></table>	open patients chart	Click Document on Black Navigation Bar	Open clinic document	
open patients chart				
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Open clinic document				

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<div>Click SAVE to save document as draft</div> <div>Complete documentation</div> <div>Add additional signers to document if required</div> <div>Complete the document</div>	
Nursing/Allied Health Case Scenario 2. (Adding Additional Document Sections) <div>Click gear icon on blue bar</div> <div>Click add content</div> <div>Search and select appropriate content</div> <div>Click apply (content will be added to the end of the document)</div>	
Nursing/Allied Health Case Scenario 3. IPAC <div>"Complete Intake Section - Triage Assessment - MOH Covid-19 Screening If a positive COVID Screen is generated Complete Additional Precautions section "</div> <div>Contacts IPAC team for consult - (phone call)</div> <div>Provides consultation to nursing/allied health staff</div> <div>Goes to patients chart and Documents Comments within the Intake document section of the report</div>	