Provider Ambulatory Training Activities

In Class Activities and Exercises	Trainee to write down the answers on the lines below or to take notes

Activity 1. Provider: Navigation and Clinical Home Screen Activity
 	
▪ **Locate test patient on the schedule**
▪ **Locate the special indicator**
▪ **Locate the status of the appointment**
▪ **Determine the order icon on the patient cell**
▪ **Add the test provider AmbDoctor, ZZTemplate as the covering provider**
   o Select "Edit coverage"
   o Search for a provider (type in "zz" and select AmbDoctor, ZZTemplate)
   o Add the name to the list, make sure it is green in colour
   o Create a favourite title
   o Select the save button
   o Turn coverage on and off.
 	
▪ **Search for the Resource group "Fracture Clinic Providers.**
   o Click on the Resource button to view the search field
   o Use the Ctrl F keys to search and type in the words Fracture
   o Find the name of the first provider on the list
 	
▪ **Add your favourite link to the Quick links field**
   o Click on the More Menu and click on EMR User Preferences
   o Click Web EHR then Home/Schedule, scroll down to the Quick Links section
   o Enter the URL of website you frequently visit and then the name link
 	
▪ **Respond to Workload received**
   o Open a workload message
   o Add a recipient in the class
   o Complete the message
   o Confirm the receipt of the message
 	
▪ **Search for the patient AMB, TWO**
   o Click on the "Find Patient" field and type the last name "AMB," first name, "Two"
   o Select the patient AMB, TWO
▪ **Select Central Registration from the "more" menu**
	Check off what you find and write down your findings. What/who is the:
	
	☐ Patient Name's _____
	☐ Special Indicator/s_____
	☐ Reason for visit_____
	☐ Status of the appointment_____
	☐ Order for that is populated on the cell?_____
	☐ Link added to Quick Links_____
	☐ Symbol to indicate that the schedule coverage is activated_____
	☐ The first provider on list under your resource group title Fracture Clinic_____
	☐ Newest Workload message from?
	_____
	☐ MRN# for test patient AMB,TWO_____
	☐ Number of patients on the Central Registration page Friday May 28, 2021
	☐ Patient with an appointment at 0900 in the Fracture Clinic RmC Multi Phys_____
	☐ What colour is the dot of the patient appointment mean?

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○ Click on the More button on the schedule ○ Click on the left arrow beside the current date ○ Determine how many patients are on the list ▪ **Find a patient with a schedule on the scheduling grid under the resource group, "Fracture Clinic RmC Multi Phys on Week of 06 Apr 2021 on Wednesday April 7, 2021.** ○ Click the resources button and search for "Fracture Clinic RmC Multi Phys" ○ Move the schedule dates back with the arrows to the Week of April 6, 2021 ▪ **Quick Book a patient** ○ Select today's date by clicking on the "Now" button under the date display button ○ 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 ○ On the Quick Book Screen, book the appointment, FC Consult ○ Type in the provider's name "ZZTemplate, AmbDoctor in the Visit Reason Field. ○ Type in visit reason, fractured tibia ○ Click save	
Activity 2: Chart Activity **Access a patient Chart** ▪ **Search for patient** ○ **Amb, Eleven 36, M03/03/1985, HCN# , 1234567897-ze, MRN# V000000361** ▪ **Review the PFSH on the Reference Region** ▪ **Change the Flowsheet in view to the Hypertension Flowsheet** ○ Select the flowsheet tab ○ Click on the "Viewing" button ○ Search for and select "Hypertension" ○ Find the patient's temperature	**Check off what you find and write down your findings. What/who is/are the:** ☐ **Problems listed on the Reference Region widgets**_____ _____ _____ _____ _____

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Review the History and Problems List **Click on the provider notes tab to review a document/report** - Click on the AMB Orthopedics Office visit ? RT Scaphoid ER F/U isigned - Click on the document icon **Access the eMAR** - 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** - 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 for your patient** - Open the chart - Click on the "No Resuscitation" red text on the Header - Select the "Change" button - Click on the "Code Status" field and select the "Full Resuscitation" status - Click the "Sign" button - Click "Yes" on the Confirmation overlay - Enter the PIN number **Print a note from the chart** - Click on Provider Notes - Click on a document in "Signed" status - 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	**What is the Surgical History_____** **Temperature of Amb, Eleven on Ambulatory Office Visit 20/11/2020_____** **Who last updated the medical history on 23/02/2021 @ 09:20_____** **iSigned Satus on the AMB Orthopedics Office visit ? RT Scaphoid ER F/U document mean?_____** **Medication on the Home Medications list_____** **Button name to exit the chart viewer: _____**
Activity 3: Widgets **Special Indicator entry** - Select the Special Indicator widget on the Reference Region - Click in the search field and select Falls Risk, the click the save button **Modify Widgets on the Summary Tab** - Select the Cog wheel - Within Widget Preferences, on the Summary Tab click "Add New Widget" and then select MOH COVID-19 screening	

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- Click on the widget and uses the arrows to move it up the list, to the left to the right column - Click the Save button	
Activity 4: Problem List Management ■ **Enter an Active Problem** - 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** - 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**	**List the problems that are present on the problem list within the reference region.** _____ _____

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- 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	
Activity 5. Past Medical Surgical Social Family History (PMSFH/PFSH) **To document PMSFH/PFSH** - PFSH - Medical History - Demonstrate how to enter the Medical history of Lupus - Surgical History - Review surgical history, enter surgical history of cataracts, select history and change the status to surgical and click save. - Family History - 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	

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○ Click on the Gender identity, living situation, etc. Explain the difference queries, comment boxes and then select "Save"	

Activity 6: Allergies

To document allergies access your test patient:

- Add a new allergy of "Pollen" by clicking on the Allergies widget on the reference region
- Click on the search field and type in the word "Pollen"
- Select "Grass Pollen"
- Select the following options on the Allergy/AdvReac overlay
    - 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
    - Type: Reaction
    - Severity: severe
    - Reaction: hives
    - Click the save button
- Remove Allergy
    - To remove the allergy, click on the problem widget
    - Select the allergy to Banana.

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o Click on the box beside the title banana and then select the bottom left button "remove" to remove the allergy from the list or click the red X to the right of the line item.	
Activity 7: Provider Documentation and DMO **Enter Weight** ▪ Enter the clinic document ▪ Click on vital signs ▪ Click in the white column in the white box for weight ▪ Enter a weight for the patient, select lb/oz or Kg for your preferred measurement of entry ▪ Click Save **Create Quick Text** ▪ Click on the Clinic Note ▪ Select the "A" on the Meditor bar to "insert text" ▪ Click Quick Text from the menu ▪ On the Quick Text overlay select "Edit" ▪ Click on "Create New Trigger" ▪ Type the trigger code in the box, .iax and type in a description in Descrition in the Description field titled – "Initial Assessment" ▪ Type in the statement in the text field, "Ms. X came to the clinic for an initial assessment to assess her current health problem [].	

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▪ Once complete click Save and then insert **Enter Canned Text** ▪ Click on the Clinic Note ▪ Select the "A" on the Meditor bar to "insert text" ▪ Click on Canned Text ▪ Click on the search Canned Text Field and type in the letter F for "Focus" and select "F.Family/Caregivers" ▪ Click the "insert" button on the upper right-hand corner **Enter Formatted Data** ▪ Click on the Clinic Note ▪ Select the "A" on the Meditor bar to "insert text" ▪ Click on the "search formatted data" field and type in Vital signs ▪ Click on the star for "Last Response Vitals" to "favourite" this option ▪ Select "Last Response Vitals" ▪ Click Insert **Practice DMO** **Add an addendum** ▪ Open your signed note ▪ Click Addendum ▪ Type in changes in the open text ▪ Select the sign button and enter PIN number ▪	

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Activity 7b: Clinical Documentation Enter Weight ▪ Enter the clinic document ▪ Click on vital signs ▪ Click in the white column in the white box for weight ▪ Enter a weight for the patient, select lb/oz or Kg for your preferred measurement of entry ▪ Click Save	
Activity 8: Enter an order **Lab** • 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	

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• 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 to enter the four-digit PIN number • Click the "Sign button once the number is entered **If the Print screen overlay presents:** • 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. **DI** • Click on the Search Orders/Sets search field and enter RAD Abdomen 1vw • 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 change the service date to the next two dates by clicking on the calendar • 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"	

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• 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 to enter the four-digit PIN number to register the order • Click the "Sign button once the number is entered **Med Admin Orders** • Click on the Search Orders/Sets search field and enter Med Admin • Select the general order Med admin or select , click on the start to add it as a favourite orders and click on the Medication Admin order to change it turn a green colour. • Click the "Save button" • Locate the order on the Orders Management screen. Click on the chevron for the order string. • Select a medication such as Dilaudid for administration by putting a checkmark in the box. • Change the medication dose to 2 mg tab and add the text "pain" to the reason field and keep the frequency to once and schedule at PRN • Deselect any pre-entered medications • Enter in a location for where the patient will take the dose such as "Ambulatory Care" • Click the "sign" button to enter the four-digit PIN number to register the order • Click the "Sign" button once the number is entered	

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If the provider dispenses the medication to the patient, enter that the medication was given in the provider note: • Click on the Document icon on the Navigation Bar Review the Reference Region "Outstanding Orders" to review the medications for order. Nursing will action the medication order and document in the document for office procedure**s**	
Activity 9: Home Medications Entry and Medication Reconciliation **Access your patient from the Clinical Home Screen** • Click on the patient from the schedule to open the chart • Click on the orders button on the Navigation Bar • Click on the Reconcile Button	