## CARE4 MODULE NAME: AMBULATORY OP Physiotherapy

Once you log into Expanse, under the physiotherapy job, you want to ensure that you change your subdivision if needed to an AMB facility; if RVH then RVH AMB, if CGMH then CGMH AMB. Some of you have been set to automatically go to your AMB facility. If you haven't then you will need to change this every time you log in.

Clinical			
Administrative	•		
Ancillary	-	Billing Clerk	
Financial		Office Staff	
Ambulatory		Scanning Desktop	
Info Systems		OV Results	
Message/Task	System	Co-Signer Assignment	
CGMH Report		Reports	
GBGH Reports		Custom Reports	
HHCC Reports		Dictionaries	
RVH Reports	· · · ·	Manage Pregnancies	
Change Your	Jser's PIN	Clinical Home Screen	
Enter/Edit Ter	nporary Location		
		~	Subdivisions
	Facility	Collingwood Ger	
	HIM Departmer Business Unit		
	Oncology Clinic		
	Oncology Clinic		
	Time Zone	Eastern - US & 0	Canada

Once you have picked the correct subdivision, click "ok" on the bottom right corner of the screen.

Restore Defaults Cancel OK ? 分奇资 经公



You will then proceed to click Ambulatory then clinical home screen to open the application.

Clinical Administrative Ancillary Financial	<ul> <li>▶</li> <li>▶</li> <li>Billing Clerk →</li> <li>♦</li> <li>Office Staff</li> </ul>
Ambulatory	Scanning Desktop
Info Systems Message/Task System	OV Results Co-Signer Assignment Reports
CGMH Reports GBGH Reports HHCC Reports	Custom Reports
RVH Reports Change Your User's PIN Enter/Edit Temporary Location	Manage Pregnancies Clinical Home Screen

#### WPL Expanse will now open up to your home screen

E G	ane ∣ - Worl	" <sup>0</sup>						<i>y</i> <b>e e e e e e e e e e</b>			<b>Jan</b> Sign		⊞ 🏟 🛞 More
Kerry M	ccartney	, RN									C Find Pati	ent	
Schedule									Мо	on 23 August 2021 3:44p	Workload		
Aug 2021	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Fri 27	Sat 28		Today	More	Recently Accessed		
2021				tney,Kerry			•		Time*	•	Name		Visit Date Close Chart
											Amb, Bev		
											AMB, EIGHT		19/08/2021
											AMB, FOUR		19/08/2021
											AMB, SEVEN Ann		
											AMB, TWO		19/08/2021
											Care4-Cgmh, Maverick1		
											Care4-Cgmh, Maverick2		
				1							Cgmh, Parallelob3		
				'							Lane, Daisy		
											Test, Age		
											Test, Cgmh22		
											Traincg, Ip01_0822		
											Training, Bob		
											Training, One		
											Quick Links		
											PDR		

You are now going to click on your name and find the appropriate clinic you are looking for. \* Hint, once you have the menu open press Ctrl + F to bring up a search menu and start typing the clinic you are working in for that day.

edule	artney ,	KIN							Mon 23 Aug	ust 2021 3:48p	C <sup>.</sup> Workload	Find Patient	
Aug 2021	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Fri 27	Sat 28	Today	ſ	More	Recently Accessed		
2021		-		tnev.Kerry			•	Time*		•	Name		
			Physia Joint Physia Physia Mack Physia Genera Provid Akiny	nced Pract lo otherapists io Jan Abbe io Pat Geracher io Sarah Ev al Surgeon	- ott wert s						AMB, EIGHT AMB, FOUR AMB, SEVEN Ann AMB, SEVEN Ann AMB, TWO Care4-Cgmh, Maveri Cgmh, Parallelo3 Cgmh, Parallelo3 Lane, Dalsy Test, Age Test, Cgmh22 Traincg, Ip01_0822 Traincg, Ip01_0822		

Or



Apps 📃 CGMH	Surge Lear	ין <b>פ</b>	1 rvh Share poi	ntExp 🚺 (	Care4 Document	ati 🚺 V	/orkflow-Inventory.	🚺 onenote Weekly A	MEDITECH - Custo	a doctestingamb.xlsx 🕻 A	MB Time Tracker.x	Preference C physical	1/ //11 Sign
erry Mcc												C	
edule										Mon 23 August	2021 3:51p	Workload	
Aug	Sun	Mon	Tue 24	Wed 2.5	Thu 26	Fri	Sat				ore	<b>Recently Accessed</b>	
2021	22	23		25 nev.Kerry	26	27	28		Time*	[MI	,	Name	
			Paediat Paedia Physio Physio Hip Physio Physio Andree Physio Knee	otherapist	) Jen 1							AMB, EIGHT AMB, FOUR AMB, SEVEN Ann AMB, TWO Care4-Cgmh, Maver Cgmh, Parallelob Lane, Daisy Test, Age Test, Cgmh22 Traincg, Ip01_0822 Training, Bob	

Or you are free to scroll through the list until you find the clinic you are looking for. Once you have selected a clinic, the list of patients booked/arrived will appear for that day.

Schedu	le									Mo	n 23 August 2021 3:56p	Wor
A	ia	Sun	Mon	Tue	Wed	Thu	Fri	Sat				Rece
20		15	16	17	18	19	20	21		Today	More	
				Physiothe	erapists - J	oint		*		Time*	•	Name
11:45	Unav	vailable										Amb
	Physic	Pat MacKerac	her									AMB
	A A	MB, TWO				17/05					Pending	AMB
12:00		est bundled	joint booki	ing		36 F			D op of coo		, chang	AMB
						Abbott	,Jan					
12:30		vailable										AMB
	Lunch	) Pat MacKerac	her									Care
									N. 0			Care
13:30		MB, FOUR est 2 bundle	d ioint			23/05 39 F	5/1982		No Show		Pending	Cgm
10.00		be 2 banaie	a joint				racher,Pat					Lane
15:00	Unav	vailable										Test
	Physic	o Pat MacKerac	her									Test
												Trair
												an

From this schedule you are able to change the date to view other dates if wanted by either clicking on the date you want within the top header or by clicking on the calendar and choosing a date. \*\*Caution with doing this please ensure you do not document on the wrong date; nothing will stop you from documenting on the wrong date if you select that date and open documentation/the chart under that visit date. \*\*

The patient's status will remain in "Booked" status until they arrive and are registered. Once registered, the status will change to "Arrived". The patients will automatically be set to departed/no show at midnight if not done so.

\*Note, you can change the way that your home screen is displayed by clicking on the "Time" bar and selecting how you would like to appointments to appear. In this example, they are appearing by time first then by status.



	Today	Mor
	Time*	
	Time <sup>1</sup> Status <sup>2</sup>	-
Departed	Image: Booked         Image: Arrived         Image: Waiting         Image: Exam         Image: Departed	
No Show		

	Time*	
		-
	Attended	
	Pending	- 1
Visit	Status Duration	_
App	t Type	
Prov	vider	
Patie	ent Name	

The lovely <u>h</u> beside the patient's name indicates a critical indicator that can be seen if you click on the triange.

	Physio Pat mackeracher
12:00	AMB, TWO test bundled joint booking
12:30	Unavailable
	Lunch Physio Pat MacKeracher
Falls Ris	AMB, FOUR
Potentia	Reactive Behaviour
IPAC C.d	lifficile

Once ready, select the patient you would like to chart on/see chart. You can click anywhere in the box with the

patient's information in it. This will launch you into the patient's chart. You can tell where you are in the chart by the op folders.

		· · ·					
E 🖆 🖄	Ð		Chart Document Orders				
Diagno	stics	Provider Notes	Nurse/Allied I	Health	Medications	C	
History & P	roblems	Administrative	Other Clin	ical			Amb,Four
Summ	arv	Activity	Flowshee	ts	Health Mgmt		39, F · 23/05/1982
	,	,					HCN# 3177154287-CB MRN# M000000058
<ul> <li>Summary</li> </ul>						No S	how SCH AMB, M.BNDJNT
		Viewing date range: 08/07/20	21 - 19/08/2021 Get all data			Visit	Date: 19/08/2021
Patient Demographics			<ul> <li>Medical Summary</li> </ul>			Most Recen	Code Status Not Addressed
Employment	RE			No Data to Dis	play		No Hx Avail
Portal	Enrolled					Sear	ch Chart
Preferred Phone	(999)999-9999		Goals and Barriers			-/	▲ M G
Address	123 Test ST			No Data to Dis	play		Special Indicators
	Penetanguishene, ON LO	K 1G1					apecial indicators
lext of Kin			<ul> <li>Immunizations</li> </ul>			Falls	Risk
Person to Notify				No Data to Dis	play		ntial Reactive Behaviour
Primary Insurance	Self Pay		✓ Last Assessment and Pla	an an			tance Use Disorder
PESH							C.difficile
		NSET	ISigned - 09/02/2021 07:4	47			
MEDICAL HISTORY Abscess	0	1050	Scanned Documents			×	Allergies
Inemia				No Data to Dis	play		
inxiety	U	Inknown				Penio	
Chest pain			✓ • <u>Visit-Level Care Team</u>			morp	
liabetes			Pending Physician	Family	/ Provider	×	Lab Results Last Value
ERD (gastroesophageal reflux	disease)		Pat Mackeracher	Attend	ding Provider		
ITN (hypertension) Iyperlipidaemia			Paul Matos	Referri	ing Provider		No Data to Display
1enorrhagia			✓ Visits				Medications
lormal coronary anglogram							
steoporosis			> Future			~ A0	tive
chizo-affective schizophrenia			✓ Past			One Year	taminophen
itress at work			DATE	NTION/	PROBLEM		) mg po once
Syncope			PROV	VIDER			taminophen
SURGICAL HISTORY	0	NSET	19/08/2021 Bun	dled Joint QBP	test 2 bundled joint		) ma po once

When you look at the top black tool bar you see that chart icon is highlighted in grey; this indicates that you have the chart open. The summary section of the chart is open indicated by the word "Summary" appearing on the left side of the chart. If you were to click on another tab in the chart this will change.

The right side of the screen is the reference region of the chart. This section will remain the same no matter what you are doing in this patient's chart or documents. It will display the patient's demographics, the status of the appointment, the appointment type and visit date, all at the top of the reference region. Under that are widgets that are used for a quick reference while you are navigating the chart. The reference area includes special indicators, allergies, lab results, home medications, any orders that are



on the patient. Some of these "widgets" can be customized. To close all the widgets so that it is easier to find what you want just hit the little square with the arrow in it.

Diagnostics	Provider Notes	Nurse/Allied Health	Medications	C		0
History & Problems	Administrative	Other Clinical		Ĩ	Amb,Four	
Summary	Activity	Flowsheets	Health Mgmt		39, F - 23/05/1982 HCN# 3177154287-CB MRN# M000000058	*0
Summary				No S	Show SCH AM	MB, JNT
	Viewing date range: 08/07/202	21 - 19/08/2021 Get all data		Visit	Date: 19/08/2021	
Patient Demographics		> Medical Summary	Most Recent		Code Status Not Addresser	d
PFSH		Goals and Barriers		100	No Hx Avail	×
MOH COVID-19 Screening		> Immunizations		500	I M G	
Bulletin Board		Last Assessment and Plan		-		
Lab Results Last Value	Most Recent	Scanned Documents		>	Special Indicators	
My_Widget		• Visit-Level Care Team		3	Allergies	
Documents	Most Recent	Visits				
Personal Notes				>	Lab Results Last Value Most Recent	
Vital Signs				>	Medications	
				>	Problems	
				>	Outstanding Orders	
				>	My Widget	
				>	Visits	

This makes it easier to see what is within each section. You can click on the side > to open each section individually when needed. To view other sections of the chart just click on the tab that you would like to open. The "History and Problems" tab will include the patient's medical, surgical, social and family history, which can also be updated if needed from this section.

	Diagnostics	Provider Notes	Nurse/Allied Health	Medications	C	•
	History & Problems	Administrative	Other Clinical		Amb,Four	
	Summary	Activity	Flowsheets	Health Mgmt	39, F - 23/05/1982 HCN# 3177154287-CB MRN# M000000058	4
•	History and Problems				No Show SCH AMI M.BNDJI	IB, NT
~ N	ledical, Surgical, Family, and Social History				Visit Date: 19/08/2021	
	Medical History	Last Updated 14/06/2021 @ 14:25 by Amb Docto	or Care4 Training, MD		Code Status Not Addressed	
× :	Surgical History Edit	Last Reviewed 05/02/2021 @ 09:00 by Jocelyn N	furton, MD		Search Chart	
	HISTORY ITEM		ONSET			
	Hernia of abdominal wall Hx of appendectomy 2010				> Special Indicators	
	Previous cesarean section				> Allergies	
~ 1	Family History Edit	Last Updated 17/02/2021 @ 10:45 by Jocelyn Me	urton, MD			
	RELATIVE	PROBLEM	ONSET AGE	COMMENT	Lab Results Last Value     Most Recent	
	Grandmother	Anxiety Deceased		=	> Medications	
	Gunamotier	Colon cancer		Ē.	> Problems	
> :	Social History	Last Updated 17/02/2021 @ 15:45 by Jocelyn M	urton, MD			
✓ P	Problems				> Outstanding Orders	
	Active				> My Widget	
	Resolved/Inactive/Ruled-Out All				> Visits	

Notice that the "History & Problems" tab is now in bold and just under the "summary" tab now states History and Problems, indicating that you are currently in the History and Problems tab of the chart. Also note that the "reference" region remained unchanged letting you know whose chart you are currently navigating. The "Diagnostics" tab will house any lab work and imaging results. Any reports can be found under the "Provider Notes" tab (including other physiotherapy/rehab visits). "Nursing/Allied Health" tab will show any nursing/allied providers notes, or documentation from other outpatient visits, as well as financial statements. "Activity" tab houses all the patient's activity, including booked appointments, hospital stays...

To start documenting on this patient's current visit, click on the document tab found in the middle of the black tool bar located at the top of the screen. Then you will click on "ALL" to see if a document has been started by another team member.



elect Document						T						C	
				M	Y	ALL						39, I HCN#	mb,Four - 23/05/1982 3177154287-CB # M000000058
hysiotherapy Clinic Visit ending				Select the	doc	ument that is a	Irea	dy opened if yo	u w	ant to		No Show	SCH AMB, M.BNDJNT
lackeracher.Pat				chart on the second	ne sa	ame document	. If r	ot open anothe	r do	ocument		Visit Date: 19/0	8/2021
ncounter:19/08/2021 12:51				or note.									atus Not Addressed No Hx Avail
ld New Document							S	ow All Q. Search New Do	cumen	ts		Search Chart	(m)
dvanced Practice Physio Note	•	Chargeable Items - CGMH	•	General Surgery Clinic Note	•	General Surgery Clinic Report	•	Gynecology Clinic Visit	*	Gynecology Clinic Visit Report	-	+	N G
valiced Plactice Physic Note	×	Chargeable Items - Comm	×	General Surgery Clinic Hote	<b>-</b>	General Surgery Clinic Report	- <b>X</b>	Gynecology clinic visic	×	Gynecology Clinic Visit Report		> Special I	ndicators
												> Allergies	
and Clinic Report	*	MSK RAC Clinic Report	*	Nursing Progress Note	*	Orthopaedic Clinic Report	*	Orthopaedic Clinic Visit Note	*	Orthopedic/Cast Tech Note 🥤		> Lab Resu	lts Last Value
TN Clinic Visit Note		Paediatric Clinic Report	_	Paeds Asthma Clinic Report	-	Pharmacy Note	_	Physiotherapist Progress Note	_	Physiotherapy Clinic Visit 🧹	5	> Medicatio	ons
IN Clinic Visit Note	*	Paediatric Clinic Report	*	Paeus Astrima Clinic Report	*	Pharmacy Note	*	Physiotherapist Progress Note	Ŷ	Physiotherapy Clinic Visit	3	> Problems	i
hab Assistant Note	*	RT Progress Note	*	Wound Care Clinic Report	*	Wound Care Clinic Visit Note	*					> Outstand	ing Orders

If no other document for this Patient visit has been initiated, then select the document type that you would like to use. For a **note**, please select the <u>note type document</u> and for the <u>visit</u> document, select the <u>visit document or report.</u>

				You ha	MY ve no open doo	ALL suments for this	visit	/	;	Sea	rch
Add New Document								s	how All Q Search New	Docume	ents
					X						
Benign Hematology Clinic Note		Benign Hematology Visit Report	☆	Breast DAP Clinic Repo	ort ☆	Chargeable Items -	RVH		Chiropody Clinic Visit Note	☆	COPD Clinic Visit Note
Day Rehabilitation Visit	¢	Dysphagia Clinic		EEG Report	☆	ENT Clinic Report			Geriatric Clinic Visit Note		Geriatric Clinic Visit Repor
Gestational Diabetes Note	☆	Getational Diabetes Report	☆	Hand Therapy	☆	Hearing Aid Dispens	ing Note	☆	Heart Function Clinic Report	☆	Internal Med Clinic Report
Internal Medicine Clinic Note	☆	Laser Clinic Visit Report	☆	LTC Outreach Clinic Re	eport 🏠	Lymphedema Asses	sment	☆	Lymphedema Letter to Physici	an 🏠	Lymphedema Progress No

You can use the search bar to find your document, or you may scroll through until you find what you are looking for. To save a document to your favorites click on the star, it will turn yellow and from now on when you open documents, your stared documents will be the only ones that appear, unless you hit the "show all" box.



E 🗴 🚰 Return To Home Workload	Chart Document	Ei Orders	Sign Sign	Compose More	
Physiotherapy Clinic Visit	Preview Rapid Entry Typi	cals	Save	) <mark>C</mark>	
Contributor: Kerry Mccartney, RK	ment and Plan RA / PTA Plan and Treatment Progres	\$		Amb,E 30, F · 03/ HCN# 12345 MRN# M00	02/1991 567897-AA
∽ Intake			Typicals View Previous		DEP AMB.
∽ Intake				Departed	M.PHYSIO
Visit Reasons				Visit Date: 19/08/2021	
post op rt total hip				FULL Result	scitation
Patient Identification 2 × 2 **If Other is Selected Comment what Identifier Used**	Collapse all headers			• V	G G
Interpreter Required	button			> Special Indicat	ors
Accompanied by	L]		<b>X</b>		
Appointment Occured Permission Obtained for Electronic Correspondence				> Allergies	
Allergies/Adverse Reactions		Last Updated 2	0/07/2021 by Terri Finnigan, RN	Lab Results Las	st Value
Allergies and Adverse Reactions				Most Recent	
clindamycin Allergy (Severe, Verified 20/07/2021 08:23)				> Medications	
Fever house dust Allergy (Intermediate, Verified 02/06/2021 23:14)				> Problems	
Agitation		Defenses			
		Reference r		> Outstanding Or	rders
Allergy Alert On Active Medications		is still there		> My Widget	
Acuve medications					
Comments				> Visits	

Now you have a document open. The name of the document appears in the top left corner "Physiotherapy Clinic Visit".

- 1. The first thing you need to do is hit the "Save" button at the top right corner of the document, this will then add you as a "Contributor" to this documentation, which will appear under the document name in the top left corner
- You then will want to hit the "Rapid Entry" button in the top middle of the document. This will change the look of your documentation, and will be easier to fill in.
- 3. If the screen looks too busy then hit the square with the arrow; that will collapse all the headings. Now you can open what you would like to by picking it out of the blue header or pick it out from the list you just created down the left side of the screen.

E A I I A	Chart Document Orders
Physiotherapy Clinic Visit	Preview Rapid Entry Typicals Recall
Contributor: Kerry Mccartney, RN	
Intake Health Summary Assessments Scales 8	& Questionaires Treatment and Plan RA / PTA Plan and Treatment Progress
> Intake	
> AMB Triage Assessment	You can also move on to
> Vital Signs	another section by selecting
> dealth Summary	from the top light blue header
> Injury Assessment	Clicking on the > will expand
> Cervical Spine Assessment	that section so that you can document.
> Shoulder Assessment	Please fill in the document
> Elbow Assessment	sections that you need to.
> Hand Assessment	
> Digit Assessment	
> Lumbar Spine Assessment	
> Hip Assessment	
N 1/ A	



\*\*Note you can also edit the patient's history from this section of the document, and it will update the "History & Problems" tab of chart as well. If you updated the patient's history under the "History & Problems" tab of the chart section it will update in this section as well and show by whom and when it was last updated.

Physiotherapy Clinic Visit	Preview Review and Refine Typicals Recall	Save
Contributor: Kerry Mccatney, RN Intake Health Summary Assessments Scales & Questionaires Treatment and Vicion Signis	nd Plan RA / PTA Plan and Treatment Progress	
Health Summary Reviewed All     Add Content		
✓ PMFSH		
Medical History Asthma BCC (basal cell carcinoma of skin) Carpal tunnel syndrome Gallbladder & bile duct stone with obstruction		Last Reviewed 09/03/2021 @ 09:23 by Kerry Mccartney, RI Onset Date
Surgical History Reviewed Family History Reviewed View By Problem		Last Reviewed 09/03/2021 @ 09:23 by Kerry Mccartney, Rf <i>Onset Date</i> Last Updated 13/07/2021 @ 15:43 by Paul Matos, Mf
Mother         Congestive heart failure           Father         Diabetes           Brother         No problems noted		Onset Age
Social History Reviewed How often does anyone, frequently including family, friends and others, physically hurt you How often does anyone, fairly often including family, friends and		Last Updated 02/06/2021 @ 23:32 by Tiffany Niles-Queensborough, MI
others, İnsult oʻr talk down to you How often does anyone, frequently including family, friends and others, threaten you with harm How often does anyone, fairly often including family, friends and others, scream or curse at you		

E 🏠					
Return To Home W	orkload			Chart	Document Orders
Physiotherapy Cli Contributor: Kerry Mccartn				Preview Review and	Refine Typicals Recall
		Scales & Questionaires	Treatment and Plan	RA / PTA Plan and Treatme	ent Progress
<ul> <li>Injury Assessment</li> </ul>					
> Referral Info					
> Symptoms/ Asses	sments				
<ul> <li>Cervical Spine Asse</li> </ul>	essment				
> Objective Data					
> Neurological Exam	ination				
> Movement Testing					
✓ Shoulder Assessme	nt				
> Shoulder Goniome	tric ROM				
> Gross Shoulder St	rength				
✓ Elbow Assessment					
> Girth					
> ROM					
> Strength					
✓ Hand Assessment					
> Hand Functional S	cale				
> Mallet					
> Composite Fist					
> Wrist ROM					

The Assessment section of the physiotherapy document is for recording referral information as well as general symptoms. It then is broken down further by joint/body part. Again, only fill in the documentation sections that you require.

If you open a section and you see an "Add" button, click on it to pick an "instance", then hit save for the rest of the documentation to appear. Please note you can only pick

each "instance" once. i.e., you can only pick right once, or left once, but you can pick both if you require, but only one at a time, then go back to add and pick the other.



✓ Hip Assessment				
→ Hip Goniometric ROM Add				
> Right				
✓ Hip Gross Strengtn Add			-	
✓ Right			Ad	d Hip Exit Save
Flexion Grade				nt) (Left)
5			Kig	
Extension Grade			_	
4				
Abduction Grade			If the bay bee thr	ee little lines at the end
✓ Referral Info				
(Toronto East General Hospital		<del>(</del>		nburger") it indicates I a comment if you
Date of Initial Assessment				ist need to click on that
23/08/2021				on and a text box will
· · · · · · · · · · · · · · · · · · ·				ote that most of these
				to 75 characters, but
Date of Surgery				of other comment
03/08/2021				ocumentation if you
Onset			need it.	
Insidious				
Sudden		= (0		
Sudden		0		
		Charles and Develt		0:**
(Pain		Shortness of Breath	=	Stiffness
Pain Scale 0-10	· ·			
9 🔳 =				
Pain Description	=	Cramping	=	
Aching				Crusning
Aching Constant		Decreasing (Getting Better		(Crushing (Hot
		Decreasing (Getting Better	) =	
Constant			) =	Hot
Constant Intermittent		Increasing (Getting Worse)	)	Hot
Constant Intermittent Pinching		Increasing (Getting Worse)		Hot Numbness Radiating

When the answer/bubble is light green that indicates that you have selected it and it will appear on the output of the document.

When you see an arrow instead of the "hamburger" button and you want to select that option as one of your answers then click on the arrow. It will expand and more documentation will appear to be filled out that is associated with that answer. If the arrow is bolded in green that means that you have filled in information in that section.



Physiotherapy Clinic Visit	Preview Review ar	
Contributor: Kerry Mccartney, RN		The Scales & Questionnaires
Intake Health Summary Assessments Scales & Questionaires Treatment and Plan	RA / PTA Plan and Treatr	section houses scales that
Berg Balance Assessment Add Questionnaire		can be used for assessing a
> Evaluation		patient's condition, and are
Lower Extremity Scale Add Questionnaire		set to calculate for you.
> Lower Extremity Scale		*Again, only use what you
Neck Disability Index Add Questionnaire		need, not every scale is
> Questions		required for you assessment.
Patient Rated Wrist Evaluation Add Questionnaire		
> Instructions		
> Pain		
> Function - Specific Activities		The Treatment and Plan,
> Function - Usual Activities		houses the Treatment
> Score		Analysis, Goals and their
V Quick DASH Add Questionnaire		status, Physiotherapist
> Instructions		Treatment, and the Home Treatment Plan, Which are
> The Quick DASH: Questions		areas to be filled in by the
> DASH Score		Physiotherapist.
Roland Morris Questionaire     Add Questionnaire		Thysiotherapist.
√ Treatment and Plan Add Content		View Previous
Treatment and Plan Aud Content     Treatment Analysis		(Ven Flevious
> Goals		
> Physiotherapist Treatment		
> Home Treatment Plan		

Note the "View Previous" box located on the right-hand corner of the section. This can be used to view the previous documentation in the section of the document, including who documented it and when. From this the ability to recall this documentation into your current document is also possible for things that remain the same from treatment to treatment, such as goals. Once recalled into your document you have to ability to alter or change this documentation, i.e., change a goal from created to continued or reassessed..., or if the same treatment was provided and just the weight and reps changed, you can recall it and change the variables that need changing.

Physiotherapy Clinic Visit	Preview Rapid Entry Typicals Recall	Save Sign C
Contributor: Kerry Mccartney, RN		A
Intake Health Summary Assessments Scales & Questionaires Treatment and Plan RA /	PTA Plan and Treatment Progress	30, F
	19/08/2021 Kerry Mccartney	Recall
TUG (Timed Up and Go)		
TUG Time Up & Go Asses     Treatment and Plan     Treatment Analysis     Upper Extremity Function     Treatment Analysis	The ability to scroll back to look at earlier	▲ e: 19/08 FULL
P opper Externity Function Date of Initial Assessment: 23/08/2021     Treatment and Plan Add c Goal 1:     Goals: Improve Gait	documentation is also an option by pressing this arrow. The other side will turn white	thart
Treatment Analysis     Percent Changed: 50     Number of Weeks: 5     Goal Progress: Created	indicating you can scroll forward again. This	ecial Ir
Goals     Goals: Increase ROM     Percent Changed: 30	is a quick way to look at the last visit	Reactiv
Physiotherapist Treatmen     Number of Weeks: 6     Goals of Treatment Agreed to By Patient: Yes     Goals Progress: Created		it Hyper
KA / PTA Plan and Treatment s:     comment section of the goals, has spell check in these boxes		ergies

Recall is available when it is bolded in white like you see here. When recall is clicked, all the information in the overlay will be added to the current document. \*Note that the overlay displays when this was documented and by whom at the top in the middle.



The Recall function can also be utilized when leaving instruction or treatments for the RA/PTA to fulfill at the next scheduled appointment. The assistant can recall the instructions into their documentation and complete their treatment.

	19/08/2021 Kerry Mccartney		Recall
Document: Physiotherapy Clinic	Visit		
RA / PTA Plan and Treatmer Assigned Treatment Plan RA to continue with THA protocol on next ap test t test or you can fill in treatment in the next Rehab/Physio Assistant Treatment 1: Treatment: Other Treatments, Alternati Ce Pack Duration (Min): 10 Minutes Recommendations / Instructions: do before other treatments, ensure ice is no 2: Treatment: Hip, Hip Abduction, Range Position: Sidelying Number of Reps: 10	nt ppointment, start with icing outer hip x 10 min, followed by AA Abductions of the section for the RA to recall into the next visit. re Modalities to be Utilized: Ice/Heat Location: rt outer hip ot dirrectly on skin of Motion Type: Active Assisted Range of Motion		
ີ he <mark>"Progress"</mark> sec າ.	ction of the document includes a	SOAP note type format to	be filled
Progress Add Content		Vie	v Previous
Treatment Progress			
Jbjective			
jective			
alysis			
an			
esponse to Treatment			
Follow Up Required in 1 Week	Follow Up Required in 2 Week to Progress Exercises	Goals Reached	
	Patient to Call if Problems, if No Contact Within 1 Month		
Patient Discharge	Discharge	Dther	
<ul> <li>Treatment Progress</li> <li>Subjective</li> </ul>	e option to view previous docum		ded.
₽ i ⊔ № € ₪	Ϫ ℡ 븝 Ϫ ≔ ー ☆ 분 ₽ ₽ ₽ Ξ Α		
Dbjective			

\*Note, the tool bar that appears in the text box sections when they are clicked in. In this type of "text boxes" you are able to use "Quick Text" which is a pre made text that you have saved to insert when you need it. You can alter this text after it is inserted into the text box if needed. There are two ways you can add a "quick text" to a text box;



ſ

1. You can click on the A and a drop-down box will appear, pick quick text, then select the quick text you would like to add, and select "Insert".

Intake Health Summary Assessments Scales & Questionalities The	aument and Plan RA / PTA Plan and meatine	nt Progress					HCN#1
RA / PTA Plan and Treatment Add Content						View Previous	MRN#
Progress Add C AMB,EIGHT 30 F 03/02/1991 Allergy/Adv: dindamyci	n haura durt					Can	cel Insert
Progress Add c AMB,EIGHT 30 F 03/02/1991 Allergy/Adv: clindamydi	n, maaar daax	LITTLE C	FOIT				1
Y Treatment Prog		VIEW	EDIT				
Subjective .amb	Description						
♣ B <i>i</i> ⊥.cgmh	test						/
.ch	[] on today's date [] for the following user	[], is this user set	us [ves/po]			/	/
Objective .cv	[] on cool o date [] for the following oper	[]	ao (jeo)				
.DEB							
Analysis .iud							
.piccblood							
Plan pt to return on fr -piccr						/	
Response to Treatme .portblood							
.prn							
Follow Up .test							
Follow Up Requi							
V Progress Add Content							
✓ Treatment Progress							
Subjective							
				1 5 5	~ *		
<b>♣ B i U [▶] ♣ E</b> 歳 ⊑				AA	0 66		
[] on today's date [] for the following user []. is	s this user set us [yes/no].◀						
Objective							

2. Or, you can type the trigger word that you have created for the quick text and hit space bar, and your quick text will appear. Note for this reason it is suggested that you place a "." at the front of your quick text so that you do not activate it by mistake. (ex .THA)

From this quick text over lay box, you are also able to create new quick text or edit ones you have already created. These quick texts are only for your use, they will not be available for everyone to use. If you create it, you are the one who can use it. If you would like to see what the document will look like before you sign it, click on the "Preview" button at the top right middle of the blue tool bar. An overlay will appear with the document as it will look when it is signed, showing only responses selected by you and other contributors. Note that the document will be split up by section, but will list which user documented what.

	Preview   Review and Refine   Typicals   Recall   Save   Si	gn C
	Last Saved at 23/08/2021 1	
sessments Scales & Questionaires	Treatment and Plan RA / PTA Plan and Treatment Progress	
review		
MB,EIGHT 30 F 03/02/1991 Allerg	y/Adv: clindamycin, house dust	Clo
ntake		
Visit Reasons post op rt total hi	P	
ergies and Adverse Reactions		
-		
damycin Allergy (Severe, Verified 20	/07/2021 08:23)	
Fever use dust Allergy (Intermediate, Verifi	ed 02/06/2021 23:141	
Agitation		
ssessments		
jury Assessment		
Referral Info		
Reason For Referral	right total hip replacement	
Referring Facility	Mount Sinai Hospital	
Date of Initial Assessment	23/08/2021	
Date of Surgery	03/08/2021	
Mechanism of Injury	Surgery	
Previous Treatment for Current	No	
Previous Treatment for Current Problem		
Previous Treatment for Current Problem Symptoms/ Assessments	No	
Previous Treatment for Current Problem		9,
Previous Treatment for Current Problem Symptoms/ Assessments	No	g,
Previous Treatment for Current Problem Symptoms/ Assessments Symptoms Being Experienced	No	g,
Previous Treatment for Current Problem Symptoms/ Assessments Symptoms Being Experienced Aggravating Factors	No	g,
Previous Treatment for Current Problem Symptoms/ Assessments Symptoms Being Experienced Aggravating Factors Easing Factors	No	g,
Previous Treatment for Current Problem Symptoms / Assessments Symptoms Being Experienced Aggravating Factors Easing Factors Sleep Positions	No	g,
Previous Treatment for Current Problem Symptoms / Assessments Symptoms Being Experienced Aggravating Factors Easing Factors Sleep Positions Able to Lay on Affected Side	No	g,



Goals	
Goal 1:	
Goals	Improve Gait
Percent Changed	50
Number of Weeks	5
Goal Progress	Created
Goal 2:	
Goals	Increase ROM
Percent Changed	30
Number of Weeks	6
Goals of Treatment Agreed to By Patient	Yes
Goal Progress	Created
Goal Comments	comment section of the goals, has spell check in these boxes
Physiotherapist Treatment	
1:	
Treatment	Hip Hip Exercises: Calf Raises Range of Motion Type: Active Assisted Range of Motion
Position	Standing
Recommend Outpatient Physiotherapy Gym Program	Yes
Recommendations / Instructions	stand against the wall for support, or use a chair
Treatment Completed This Visit?	Yes Tolerance: Fair
Exercise Handout Given to Patient	Yes
2:	
Treatment	Hip Hip Exercises: Hip Abduction Range of Motion Type: Active Assisted Range of Motion
Position	Sidelying
Number of Reps	10 Reps
Recommend Outpatient Physiotherapy Gym Program	Yes
Treatment Completed This Visit?	Yes Tolerance: Fair
Exercise Handout Given to Patient	Yes

When you are finished documenting you can now sign your document. After you sign your document, you will not be able to alter it, you will only be able to add an addendum to it.

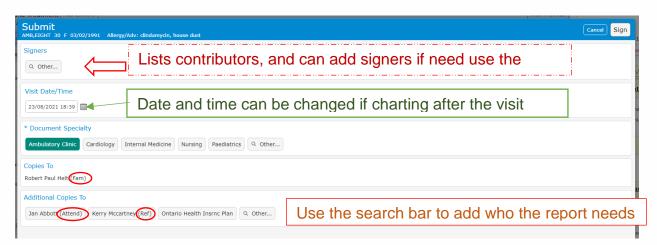
 Physiotherapy Clinic Visit
 Preview
 Review and Refine
 Typicals
 Recall
 Save
 Sign

 ntributor: Kerry Mccantney, RN
 Last Saved at 23/09/2011 59:001
 When you click on "sign" you will see an overlay that will offer information on the document, such as all the signers/ contributors to this document. Keeping that in mind if you know that someone still needs to add to the document you can add them as a signer so that they can access the document after you sign it.

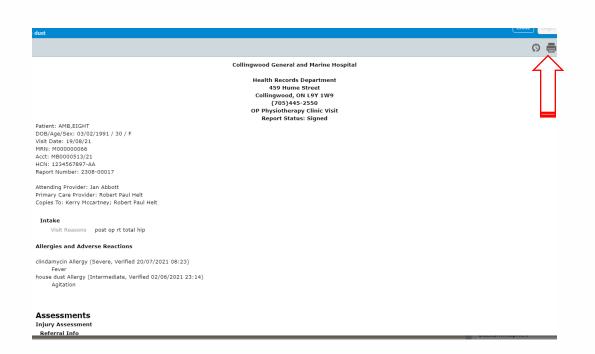
It also shows the date and time of the visit, the document specialty, which can be changed if needed.

It shows who is going to receive copies of this document/report and how they are related to the patient's circle of care.

Then the option to add who you would like the report to go to is also here if a cc required.



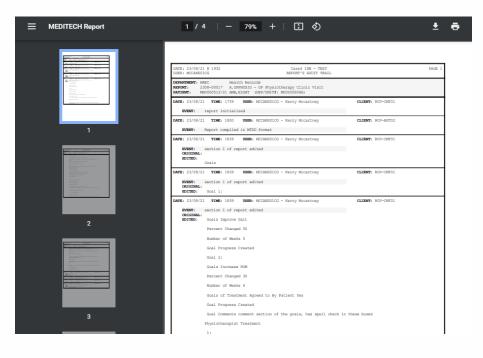




This is what the report will look like once it is signed. You can find this under the provider notes.

The ability to print this report is possible if needed by hitting the "printer" icon in the top right of the overlay.

The little clock beside the printer icon, will show the audit trail of the report if that is needed.





Sign	Compose	₩ More	\$	× Close
	G			0
	HC	<b>Amb,Ei</b> D,F · 03/0 N# 123456 RN# M000	2/1991 7897-AA	
ategory 🖷	Departed		DEP A M.PHY	
Filter	Visit Date: 1	9/08/2021		
	I	FULL Resuse	itation	

\*Note that there will no longer be recurrent visits. To see the account number, you must hit the little blue circle with the (\*) in it in the reference region.

More Patient Information MB_REGHT 30 F 03/02/1991 Allergy/Adv: dindamycin, house dust					Close
	MAIN	CODE STATUS			
Account Number: MB0000513/21 Ted Rec Num: M000000066 Health Care Num: 1234567897-AA E	MR Num: E00000228				
Location M.PHYSIO					
Insurances Preferred Phone Ontario Health Insmc Plan - 5322811273-KB (999)999-9999 Self Pay					
Special Indicators Potential Reactive Behavlour; Malignant Hyperthermia; Falls Risk					
PORTAL USER RELATIONSHIP		LAST ACCESSED DATE/TIME	E		
AMB,EIGHT Self / Same As Patient		19/08/2021 17:56			
Allergies					
ALLERGY/ADVERSE REACTION TYPE	SEVERITY	RE	ACTION	STATUS	DATE
clindamycin Allergy	Severe	Fe	ver	Verified	20/07/2021
house dust Allergy	Intermediate	Ag	litation	Verified	02/06/2021

A "More Patient Information" overlay will appear, you will need the account number if you are going to print off a chargeable item bill/receipt

To return to the home screen and close the chart click the green box with the white E in it, located in the top right of the screen, then you can either click the x beside the patient's name and this will close the chart, or you can just return click on home screen.

Return To	verkload 1
Кетту Мсса	ntney , RN
S I Mail - McCartney, Kerry - Outloo × ← → C I ehrtest.partners4	Chart - MEDITECH ×
E CGMH S Surge Learn	ing Syst 🚺 rvh Share pointExp 🛛 Car
EIGHT AMB - Patient Chart	Provi Adm
Clinical Home Screen Fac: Collingwood General Hosp AMB	
Main Menu: ** TEST ** Care4 (ROV TEST - TEST) Job: Z.BUILDTEAM ProviderType: Registered Nurse	X
Office Staff Home Fac: Collingwood General Hosp AMB	×
Workload User: Mccartney,Kerry Fac: Collingwood General Hosp AMB	× 999
	Georgian Drive e, ON L4M 6K2
Next of Kin	

## Please remember the more items open in the return menu the slower the system will run.

Or you can just click on the house (home) button. This will not close the patient's chart.

From clicking the "Return To" button, you can then click on the x to close the chart, or click on what you would like to open. The list of items open will be in chronological order, so the last application or chart you were in will be on the top.

It is possible to have multiple charts open at the same time, so always ensure you are documenting on the correct chart by checking in the reference region for account details.



Log into Expanse and open your Ambulatory Clinical Home Screen. Once on the clinical home screen you can hit the "more" button located under the date and time.

hedule									Tue 24 August 2021 9:10	a Workloa
Aug 2021 22	Mon 23	Tue 24 Mccar	<sup>Wed</sup> 25 rtney,Kerry	Thu 26	Fri 27	Sat 28		Today Time*	More	Recention Name
										Amb, Be
av	More		Recently	, and the second	1101		ynu you ne		k on the <mark>"Reso</mark>	urce
lay	More						0 ,			
Print Scheo	dule		me		- Gro	<mark>up"</mark> bo	ox and sele	ct the cor	rect resource g	
	dule		ne 1b, Bev		- Gro	<mark>up"</mark> bo	0 ,	ct the cor	rect resource g	
Print Scheo	dule Grid		me hb, Bev 1B, EIG	, ;нт	- Gro	<mark>up"</mark> bo	ox and sele	ct the cor	rect resource g	
Print Scheo Scheduling	dule Grid I Registrati	ion	ne hb, Bev 1B, EIG 1B, FOL	/ SHT JR	- Gro	<mark>up"</mark> bo	ox and sele	ct the cor	rect resource g	
Print Sched Scheduling Centralized	dule Grid I Registrati	ion intment	ne hb, Bev IB, EIG IB, FOL	/ SHT JR /EN An	- Gro	<mark>up"</mark> bo	ox and sele	ct the cor	rect resource g	

пТо н	ome Workload	Chart	Document Orders	
Appt I	Waitlist	My Schedule Resource Group		Now
∰¢	<u>Mon, 23/08</u> [0]	Tue, 2 phy	5/08	8 <u>Thu, 26/08</u> [0]
08:00		Physio Education Class Physiotherapists Physiotherapists - Join Physiotherapy Physiotherapy		
30				

From this grid you have the ability to print the daily schedule, by clicking on the "Appt List" button located in the left upper corner under the home button. You also have access to the wait list, if there is one.



Return T	_	Wartist	Chart Documen Physiotherapists on Resource		4 Aug 2021	Þ		Compose More	
E	Be F	Physiotherapists						Clos	
		Include Meetings 303 AMB,SEVEN Ann (999)999-9999 Cell Phone Physio Jan Abbott Physio Jan Abbott	☐ Include Ins Verification Status 02/	02/1986 35/F		Include Group Mer	nbers	M000000	2
±≱ 30		Dintments on Waitlist	-				[0] 0%]	Filter	Close
		Patient	Appointment [Duration]	Set	Status Appt Date	Priority Sh	ort Notice Wait	Resource	•

#### Booking a Follow Up Appointment Using the Copy Feature

Rebook

Rebook

Priority 1

Yes

If you are booking a follow up appointment using the same appointment type and reason, you need to Right click your mouse on the current appointment booking, and a menu will appear. You are going to choose copy.

E A E Arrange Constant Constan	Chart Document	Orders	Compose More Close
C Appt List Waitlist	Physiotherapists on 4	Tue 24 Aug 2021	E Q 🕖
	Resource	Now	
Jan Abbott		Pat M. [0] 0%	
RT click your mouse on the	Cut Copy	Ve> Xists> 	
correct patient's appointment that you are booking a follow up for. Then "Copy" that appointment	Get Appointment from W Move Appointment to Wa		

Physio Treatment [15] follow up

Physio Treatment [15] follow up

06/06/1956 M

Unrecorded M

Cgmh,Intfive (555)555-5555

TRAINCG,AMB10

iome Workload		Chart	Document		<u> </u>				
List Waitlist		Physiotherapis	sts on		Tue 2	24 Aug	2021		
		Resource	( **	) 🗐	) AL	iqust 20	21		
	Jan Abbott		s	м	T	w	т	F	s
l 			25	26	27	28	29	30	31
AMB,SEVEN Physio Joint Treatment		•	1	2	3	4	5	6	7
			8	9	10	11	12	13	14
			15	16	17	18	19	20	21
<available> <block exists=""></block></available>			22	23	24	25	26	27	28
<other locations=""></other>			29	30	31	1	2	3	4
					ſ	Today			
<available> <block exists=""></block></available>			_	<	Block Ex Other Lo	ists>	, ,	_	_

Then click on the date located at the top in the middle of the screen under the black tool bar, and find the date you would like to book the follow up for.

60

63

Physio Jan Abbott

Physio Jan Abbott

Select that date. The scheduling grid for that date will open with available appointment times, blocked off in the blue dotted lines.



E A E U	Chart Document Orders
C Appt List Waitlist	Physiotherapists on 4 Tue 31 Aug
	Resource Now
Jan Abbott	
<available> <other groups=""> &lt;<u>Cther Locations&gt;</u> 30</other></available>	<available> Slock Exists&gt; Cother Location:</available>
<available> <block exists=""> _<other locations=""></other></block></available>	Paste s>
AMB,SEVEN Physio Joint Treatment	
10:00	

You then want to Right click on the time slot you want to select. (it is hard to see but the time slot is highlighted in grey) and then you are going to paste.

That same appointment type will be added to the time slot selected.

If there are any changes that need to be made to that appointment type you then have to click (left click) on the appointment and choose "Edit Visit Record".

	£	i		
	AMB,SEVEN Physio Joint Treatment	AMB,SEVEN Ann DOB/Birth Sex: 02/02/1986	35/F [M00000065] ▲ PCP: ♥	-
	<available> <block exists=""> <other locations=""></other></block></available>	Physio Joint Treatment Booked Mccartney,Kerry 24/08/2021 09:41 RT THA ADDRESS	TELEPHONE (999)999-9999 Cell Phone PRIMARY INSURANCE Self Pay	
	<available> <block exists=""> <qther locations=""></qther></block></available>	201 Georgian Drive Barrie, ON L4M 6K2 Check In Check Out Chrg Entry	Edit Visit Record Change Status	1
11:00				11

You will notice that check in is not available, as the appointment is set in the future.

Edit Visit Record         AMB,SEVEN Ann 35 F 02/02/1986       Allergy/Adv: Penicillins, strawberry, [work]       (More * )									
					Save Pre				
Appt Detail	∽ Appt Detail								
Demographic	Facility	Collingwood General Hosp AMB	Appt Date	31/08/2021 10:00					
Insurance	Account	MB0000522/21	New Appt Date		-				
Contact	*Appointment	Physio Joint Treatment	*Appt Duration	Search 15					
Guarantor	*Location	Bundled Joint QBP	Comments						
Accident	*Visit Provider (Appt)	Abbott,Jan 🔻	Edit Reason						
	*Visit Reason	RT THA	]	Waitlist					
	Do Not Use	<b>•</b>	1						
	*Referring Provider								
	Primary Care	· · · · · · · · · · · · · · · · · · ·							
	,								
	> Manage Events (Char	nge Reg Type							
	> Domographic								

From this layover, you are able to edit things like, the appointment type, i.e., going from an initial appointment, now to a treatment appointment. You are also able to change the provider, if someone else is going to see the patient that day for whatever reason, you may also change the appointment time, and duration if that patient requires more time or less time than what auto populates for that appointment type.

When you are finished changing the details of the appointment you can hit "Save" in the top right corner of the visit record box.

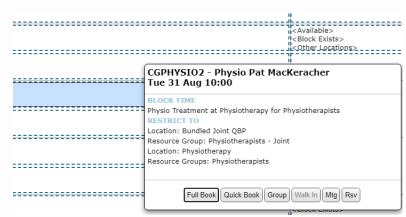


You have now successfully booked another appointment for your patient. To see more details about the appointment from the scheduling grid you may click on the double grey arrows located in the right bottom corner of the appointment block.

AMB,SEVEN Physio Joint Treatment	
AMB,SEVEN Physio Joint Treatment RT THA 35 F 02/02/1986 (999)999-9999 Abbott,Jan Bundled Joint QBP Booked	This will expand the box. And when you are done click it again to shrink it back.

If you would like to book several appointments, you will need to copy and then paste each one, you cannot paste several times, only once per copy.

## **Booking a New Appointment**



Follow the same instructions to get to the scheduling grid and find the resource group you want to book under. Then select the date that you want to book for. This time you are going to choose your time slot and go to full book or quick book.

The Patient Search by Best Match overlay displays

							101 0701
Patient Search	n by Best Matcl	h					
✓ Best Match	Search				Name	DOB & Birth Sex	Address & PCP
LAST NAME		10		Amb,Alec Stewart		м	196 Hilltop Drive
AMB FIRST NAME							
MIDDLE NAME		10		AMB,TWO		17/05/1985 F	205 GEORGIAN DRIVE
BIRTHDATE		10		AMB,Bestie		30/08/1984 M	123 Donkey St
AGE BIRTH SEX		10		Amb,Bev		F	201 Georgian Dr
BIRTH SEX							
HC NUMBER		10		AMB,EIGHT		03/02/1991 F	201 Georgian Drive
PHONE		10		amb,eight		F	
POLICY NUM							
EMAIL				Aash Elaura		AA /AA /AAAF AA	
<1			Best Match R	esults 🕡 🛛 🛛 🛛 🕢	rch EMPI Clear Search		

You then can search for your patient by any of the means listed. Health card number is probably the most accurate way to verify the correct patient.



Enterprise MPI	Search	
✓ EMPI Criteria	Search	
LAST NAME		
AMB		
FIRST NAME		
SEVEN	No results to display	
MIDDLE NAME		
Ann		
BIRTHDATE		
02/02/1986		
AGE		
35		
BIRTH SEX		
F		
ADDRESS 1		
201 Georgian Drive		
ADDRESS 2		
CITY		
Barrie		
PROVINCE		
ON	<ul> <li>Continue with Patient Selected from</li> </ul>	local MPI
POSTAL CODE		
L4M 6K2	-	
	Referred To Specialty	

You then click continue with patient selected from local MPI, and it takes you into the booking screen.

The difference between quick book and full book is the amount of information that is available to put in while booking the appointment. Quick book is the minimum amount of info needed to book the appointment, but when in quick book there is always the option to go into full book from that screen if required.

Quick Book		Cancel Save D
AMB,SEVEN Ann DOB/Birth Sex: 02/02/1986 35/F		[ <b>M000000065]</b> 🛕 PCP: 🤤
APPOINTMENT	TELEPHONE (999)999-9999 Cell Phone	
ADDRESS 201 Georgian Drive Barrie, ON L4M 6K2	PRIMARY INSURANCE Self Pay	
*Facility	Collingwood General Hosp AMB	<b>•</b>
Account	<new></new>	•
*Appointment	1	-
Location		•
*Visit Provider		-
Visit Reason		-
Date/Time	31/08/2021 10:30	•



## Click the arrows to search for required information. Anything with an \* is a required field and you cannot book without filling in these fields.

# NOTE: The Referring Provider should be entered as it's required when the patient is being registered

Return To 🛛 Home 🛛 🔫	Sch Grid 🛛 🔻 🛛 Pt Sum 🛛 👻 Clin Chart 🔍	Workload	Cash Drawer	Worklist	Sch Meeting	Statistics	Phone Bo	ok Manage Portal	c
AMB,SEVEN A								PCP:	
Full Book					Cancel B	ook Pre	Book Sch	]	
✓ Appointment								<ul> <li>Comments</li> </ul>	s Edit
Appointment	Series Pending								Dec 2020 8:16 am EST e giver to be prese
*Facility	Collingwood General Hosp AMB	<b>v</b> D	ate/Time	31/08/202	21 10:30		•	✓ Special Inc	dicators Edit
Account	<new></new>	-		Search				Interpreter Nee Substance Use	
*Appointment		- C	omments		ment related o		s will	Falls Risk	
	Details	PR	OVIDERS	only ap	pear with this	appointment		Hearing and/or IPAC Suspect C	'Vision Assist CJD (CRUZ-JACOB)
Location		<b>▼</b>	isit				•	IPAC ESBL	
Duration		А	bsent						il
*Reg Type		▼ 5	upervising				•		
Visit Reason		▼ R	eferring				•	> Demograp	hic Edit
✓ Insurance Eligibility	у							ADDRESS 201 Georgian D Barrie	Irive
Self Pay for this visit								ON Browinco	

As mentioned, you have the ability to add more information to the visit when you book in full book than in quick book, but all the mandatory information remains the same. The comment box in the appointment booking section is for comments that are relevant to that appointment only. You can see these comments when you click on the green  $\bigcirc$  comment bubble on the home screen.

The comment section in the reference section (right column), stay on the patient's registration record and will appear every time an appointment is booked and when the patient gets registered for an appointment.

The Reg type should auto populate based on the appointment that you choose. You will have to type in at least 2 letters of the provider's name before the search function will work.

When you are done putting in all the information you can click save or book sch in the top right corner of the overlay screen. And if you notice during the booking process that you have the wrong patient, then beside that save or book sch button is a cancel button, so you can always cancel and start over again.

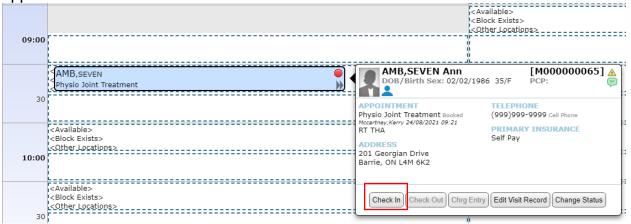
NOTE: If changing the appointment duration you have to ensure that the duration is also changed within the Details (See above Details button is located above the Location field). If the duration doesn't match you will get a warning.



### Checking in your patient for their appointment

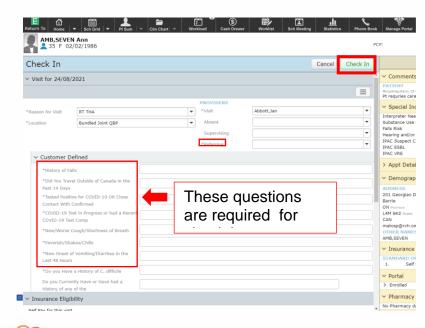
To check a patient in for their appointment you are going to follow all the same steps described above to get to the scheduling grid. Once on the scheduling grid you are going to select the appointment that you wish to register (Check In).

In the example below you will notice a red dot on the visit, this means that the patient has not yet registered and the appointment start time has passed, this dot will turn green when the patient is registered. The dot remains if the patient No Shows to their appointment.



Right Click the appointment you want to Check In. Select the "Check In" box. A screen listing special indicators will appear, review and click close to continue.

	AMB, SEVEN Ann 35 F 02/02/1986	Allergy/Adv: Penicillins, strawberry, [work]		(More 🔻 )	Close
	Special Indicators	✓ Special Indicators			
		Indicator	Last Edited By	Last Edit Date/Time	
тн		Interpreter Needed	Mccartney,Kerry	02/09/2020 09:59	
		Substance Use Disorder	Mccartney,Kerry	03/09/2020 09:21	



CARE

The check in screen displays, like the booking screen, there is an \* by everything that is required before you are able to complete the check in process.

When you are done click on the "Check In" box on the top right. If you have missed any mandatory information a warning will appear for you to complete.

Absent Supervising *Referring	22Tamplate AmbDoctor Choice Validate Health Care Number?  Ves No	Once everything is filled in, a pop up to validate health care number will come up. You will have to then validate the Health Card Number.
	AMB,SEVEN Physio Joint Treatment	

Now that the patient is checked in the dot on the patients booked appointment has turned to green.

Check in is complete, and the patient will show in an Arrived status on the home screen.

## Accessing the Chart from the Schedulling Grid

Navigating to select a document or opening the chart from the scheduling grid is also possible. You will notice that the black navigation bar is still there, with the options of, chart, document, and orders. Click on the patient you wish to document on or open chart, then go to the black navigation bar and click on documtent or chart, ignore the visit information that will pop up.

	fan Ein De Herrie	Chart Document Orders
C Appt	List Waitlist	Physiotherapists an Tue 24 Aug 2021
₽,	Jan Abbott	
08:00		Conter unops Cotter Locationss CAvailables
30		<pre>cAvailable&gt; &lt; CAvailable&gt; &lt; CAvailable&gt; &lt; CAbck Exists&gt; &lt; CAtter Locations&gt; </pre>
09:00		<available> <block exists=""> <other locations=""></other></block></available>
30	AMB,SEVEN Physio Joint Treatment	AMB,SEVEN Ann DOB/Birth Sex: 02/02/1986 35/F PCP: APODINTMENT Physio Joint Treatment Arrived (999)999-9999 Call Phone
10:00	<available> <block exists=""> <qtber locations=""></qtber></block></available>	Noticities     PRIMARY INSURANCE       AT THA     PRIMARY INSURANCE       ADDRESS     Self Pay       Earrie, OI L4M 6K2     Earrie
30	<pre>    </pre> <pre>/ Collock Exists&gt; </pre>	Check Im Check Out Chrg Entry Edit Visit Record Change Status
	/ ////////////////////////////////////	0 0 2∠Augilablas



Clicking on Chart or Document launches you into the patient's visit record, in the example below Document was selected which launched the user into the "Select Document" screen.

E Char Document Croins	الله Sign	3 ☑ : Compose More	
Select Document		C	0
MY ALL	<u>م</u>	35, F · 0 HCN# 123	VEN Ann 12/02/1986 4567897-AA
You have no open documents for this visit		Arrived	REG AMB, M.BNDJNT
Add New Document Show All Q Search New Documents		Visit Date: 24/08/20	21
Advanced Practice Physio 🔶 Chargeable Items - CGMH 🔶 General Surgery Clinic Note 🔶 General Surgery Clinic Material Surgery	Gynecology Clinic Visit 🔶	No H Search Chart	Not Addressed  x Avail
Hand Clinic Report 🖕 MSK RAC Clinic Report 🖕 Nursing Progress Note 🖕 Orthopaedic Clinic Report 🖕 Orthopaedic Clinic Visit Note 🖕	Orthopedic/Cast Tech Note 👍	v Special Indic	ators

From there you can continue to select all, then choose which document or note type you would like. And to return to the Scheduling grid use the "Return To" in the top left corner of the black navigation bar to either close the chart and return or just return and leave this chart open.

SEVEN Ann AMB - Patient Chart	×							
Scheduling Grid - Physiotherapists	×				MY		ALL	
Clinical Home Screen Fac: Collingwood General Hosp AMB	×					,		
EIGHT AMB - Patient Chart	×			You h	ave no ope	n doci	iments for this	visit Show All
Main Menu: ** TEST ** Care4 (ROV TEST - TEST) Job: Z.BUILDTEAM ProviderType: Registered Nurse	×	eable Items - CGMH	*	General Surg	ery Clinic Note	*	General Surgery C Report	
Office Staff Home Fac: Collingwood General Hosp	×							
Workload User: Mccartney,Kerry Fac: Collingwood General Hosp AMB	×	AC Clinic Report	*	Nursing Prog	ress note	*	Orthopaedic Clinic	Report 7
Close All		tric Clinic Report	<u> </u>	Paade Aethm	a Clinic Report		Pharmacy Note	4

### **Entering charges**

In Ambulatory chargeable items will be documented using the Chargeable Items document. Once the document is "Completed" the charges drop to finance and a report can be printed and provided to the patient to take to the payment office within your facility.

NOTE: It's Extremely Important to Review the Document before clicking the "Completed" button. Entry errors will require you to submit a retraction request to finance. Please see the Chargeable Retraction of a Charge tip sheet.



#### **Documentation**

In the Document tab locate the document "Chargeable Items"

MY	ALL	
	Q, chi	
Adult Diabetes 🕁 Clinic Nota	Adult Diabets Cha	rgeable Items - RVH

Document appropriate items within the document.

✓ Chargeable Items (RVH) Add Content	
V Splints Add	
Add Chargeable Items	
Item 1     (Item 2)     (Item 3)     (Item 4)     (Item 5)     (Item 6)     (Item 7)     (Item 8)     (Item 9)     (Item 10)	)
✓ Chargeable Items (RVH) Add Content	View Pre
✓ Splints Add	
✓ Item 1	
Anti Ulner       =       CMC With Neoprene Strap       =       Cupuytren       =       Elbow       =       Elbow       Including	Hand =
Hand Resting     =     MKO Lacer     =     Prefab Comp Flexion     =     Prefab Digital Flexion     =     Thumb Cool Control	nfort =
Thumb D-Ring = Thumb Otto Bock = Thumb Spica Forearm = Thumb Spica Hand = Thumb Spica Han	opica Long
Thumb Spica Radial = Thumb Spica Short = Ulnar Gutter = Wrist Action = Working =	
Working Benik = Wrist Otto Bock = Wrist Widget =	
✓ Splints - Custom Add	
✓ Item 2	
Splints Custom	
Custom \$10         Custom \$20         Custom \$25         Custom \$30         Custom \$40         Custom \$50	

Once you have completed your documentation click "Complete" or "Sign" depending on your access.



#### Print the report

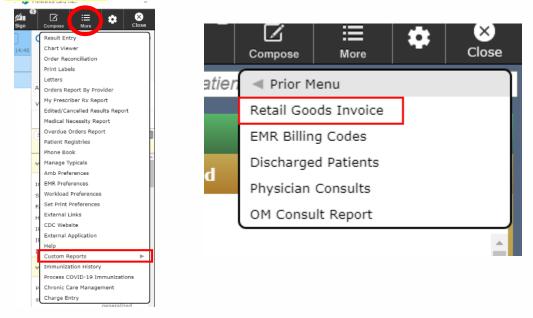
≡	Chargeable Items	- CGMH				
Contributor: Kerry Mccartney, RN						
*	View Document					
✓ Vi	<ul> <li>View Document</li> </ul>					
Care4	1-Cgmh,Maverick1	Male DOB: 01/01/195	5 MedRec# M00000	2425		
	13/09/2021 12:04 - Chargeables by Kerry Mccartney, RN Act Num: MB000056-647, DOD: 01/01/1055, Deliver Acts 15					
		Сору	Ctrl+C			
Chargeable Items Copy link to highlight						
Cast	- Air	Search Google for "MB0	000565/21"			
Item B	Boot Adult Fility Miscellaneous	Print	Ctrl+P			
Mobil Item		Inspect				
С	rutches					
** Electronically signed by Kerry Mccartney, RN on 13/09/2021 12:06 ** Initialized on 13/09/2021 12:04 - END OF NOTE						



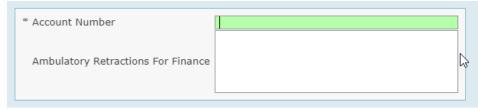
Click on the *i* icon in the right corner or the reference region to open the patient information overlay and copy the account number from there.

				IN	C
Iad Rac Num M00000065	Health ( Ctrl+C	are Num: 1234	4567897-AA	EMR Num:	E000
opy link to highlight arch Google for "MB0000560/21"					
int	Ctrl+P	erred Phone			
	ppy py link to highlight arch Google for "MB0000560/21"	ppy Ctrl+C ppy link to highlight arch Google for "MB0000560/21" int Ctrl+P	ppy link to highlight arch Google for "MB0000560/21" int Ctrl+P erred Phone )999-9999	ppy link to highlight arch Google for "M80000560/21" int Ctrl+P rred Phone ()999-9999	ppy link to highlight arch Google for "MB0000560/21" int Ctrl+P pred Phone pige9-gegg

After you copy the account Number you then go to the "More" menu on the top right in the black navigation bar. You then click on "Custom Reports", and then click on "Retail Goods Invoice"



You then paste the account number into the account number field. The "Ambulatory Retractions For Finance" field is left blank, it's only used to indicate any retractions – see the Chargeable Retraction of a Charge tip sheet for details.





Once the account number is entered, click "Print" located at the bottom of the "Retail Goods Invoice" screen



Select the printer to send the invoice to and click "ok", ensure that it is given to the patient prior to leaving their appointment.

Print Des	tination				×
					Preview
	* Printer List * Printer Copies	All GBGH Printers M-TEST-P01 1			Print Download My Drive Mail Archive
					Archive Preferences Refresh
			Cancel	ок	? ∆

The Invoice will look similar to this, with a spot for the patient's signature on the bottom.



If required by your facility, you can print off two copies of the invoice and have the patient sign both copies, one for the patient to keep and one for Medical Records.



#### <u>Alternative method of printing the "Retail Goods Invoice", you will need to follow</u> <u>these steps.</u>

Copy the account number, go "Return To" Cick on the "Main Menu". this will take you back to where you

Return To Home V	started. Then follow the p	, this will take you back to where you back to where you bathway in green.
Clinical Home Screen Fac: Collingwood General Hosp X AMB Scheduling Grid - Urgent Stress Clinic X	Clinical Administrative Ancillary Financial	Billing Clerk
Main Menu: ** TEST ** Care4 (ROV TEST - TEST) Job: Z.BUILDTEAM ProviderType: Registered Nurse	Ambulatory Info Systems Message/Task System CGMH Reports	OV Results     CGMH I       Co-Signer Assignment     GBGH I       Reports     HHCC I
Workload	GBGH Reports HHCC Reports RVH Reports Change Your User's PIN Enter/Edit Temporary Location	Custom Reports       RVH         Dictionaries       Manage Pregnancies         Clinical Home Screen       Clinical Home Screen

#### Input the account number and what is to be retracted.

\* Account Number Ambulatory Retractions For Finance

