

CARE4 MODULE NAME: PCS

How to use navigate the status board, place orders, document in the discharge plan, and create a note?

Overview

This document provides instructions for clerks on how to navigate the PCS status board, how to place orders, creation of a note, and documenting on the Summary and Discharge Plan.

PCS Status Board for Clerks:

- Columns on the clerk status board from the left side:
 - Clicking in the open box in the left column under the file will open the chart.
 - T Loc will indicate if the patient has been temporarily located and to what location.
 - Patient Information - includes patient name, age, sex, room and bed # (Male=blue, Female=pink, Gender Neutral=wheat, same name=Yellow)
 - Patient Name, Attending Provider, and any special indicators
 - Admit Diagnosis
 - C – If the patient is a confidential patient (Y will occur)
 - F – If the patient is a falls risk (Y will occur)
 - R – If the patient has responsive behaviours (Y will occur)
 - Prec – any Infection Prevention and Control precautions will be identified
 - APPTS – Indicates there are out-of-hospital exams/procedures needing to be arranged or post-discharge follow-ups needed to be booked. Clicking here will open the chart and take you to the current orders screen. See workflow and instruction in section further in document.
 - New Results – Displays new results (yellow=abnormal, red=critical)
 - Ack – Indicates there are new orders.
 - Clicking in the box will open a screen for you to see the new orders.
 - Clerks are to remind assigned clinicians there are orders.
 - This will help in notifying clerks of orders they need to action.

New	There are new orders placed on the patient. Includes new orders from the past 24 hours. Once the new order is viewed, the indicator disappears.
Inc	Indicates there are incomplete orders (additional information is required for the order to be considered "Complete".) Ex.: Out-of-hospital appointments needing to be booked, urine culture requiring a specimen source (clean catch, catheter, etc.)

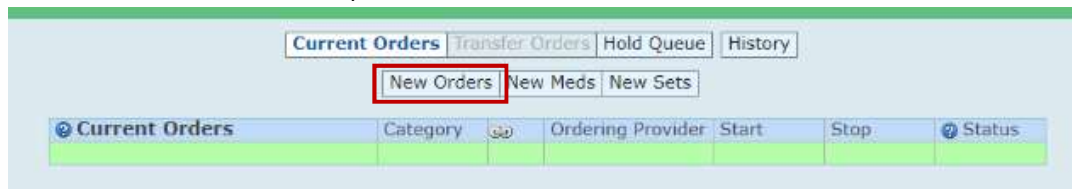
- HCC – Indicates the patient is presently or to being referred to Home Care

- UNC – Indicates there are specimens needing to be collected. Clicking in the box will open the chart and take you to the current orders screen.
- Diet – Shows the current diet and its start date and time. Clicking in the box will result in a pop up, you can select to go to orders or go to the worklist.
- TR/DC – indicates the patient has transfer orders needed to be processed by the nurse (TR) and if the patient's discharge is ready to be initiated (DC). Clicking in the box will open the chart and take you to the current orders screen

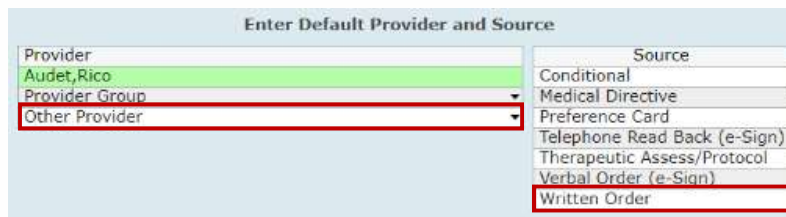
T Loc	Rm/Bed Age/Sex Adm Date	Name Attending MD Special Indicators	Admit Dx	C	F	R	Prec	APPTS	New Results	Ack	OP ORD	HCC	UNC	Diet	TR/DC
	MH.01-1 27 M 10/08/2021	Care4-Rvh,Morgan5 Mt,Meditech	MH Crisis												
	MH.01-2 3y 2m M 12/11/2020	OM,Comp1 Stanley-Smolka,Nadine	Testing Diet Interfa...	Y				OP F/U	Rpt-Gener...	Inc	OP OR...			02/03/2021 18:23 NPO Diet (V)	DC

How to place orders:

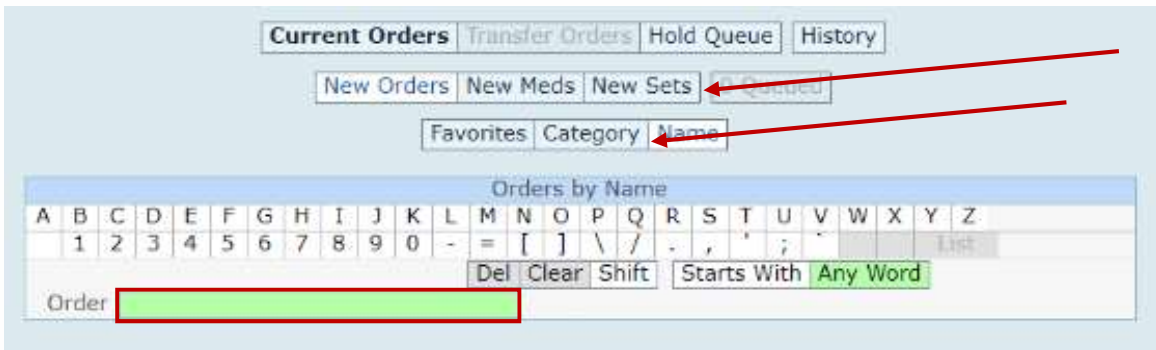
- Click on **Orders** on the right-hand column and then click **New Orders** (or all non-medication related orders)



- A pop-up screen **Enter Default Provider and Source** will come up. In the provider section the MRP will default. If they are not the ordering provider, click on the carrot in the **Other Provider** box. Type the name of the provider in the search field and click **enter**, then select the correct name.
- In the Source section select the source of the order (written, verbal, etc). Then click **OK**.



- In the box next to **Order**, type the name of the order you are looking for.



- Tips: You can select New Sets if you need to enter many orders from a set. You can also sort the orders by category by clicking on Category
- Click in the box next to the correct order. If there are more tests to order, click in the order box again, and type in the next order.



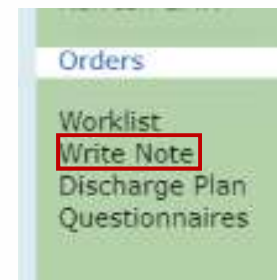
Note: there will be a number in the Queued box that matches the number of orders you have selected.

- Once all the orders you need are selected, click Next in the screen's footer. Ensure the priority/ frequency is correct, fill in any required or relevant information, and then click Submit. Enter your PIN and save.
- Current orders will then display the orders entered.

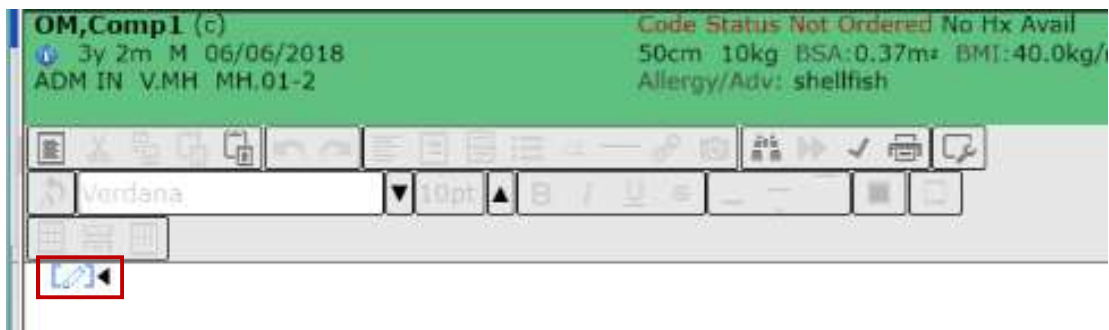


How to write a note:

- Click on **Write Note** on the right hand in the do section of the EMR



- If it is your first time creating a note, you can select a favourite to reduce the list of note options. Click the **Manage Favourites** button in the footer.
- Click in the box next to **Clerical** and click **Save**
- Click on **Clerical** to open a note.

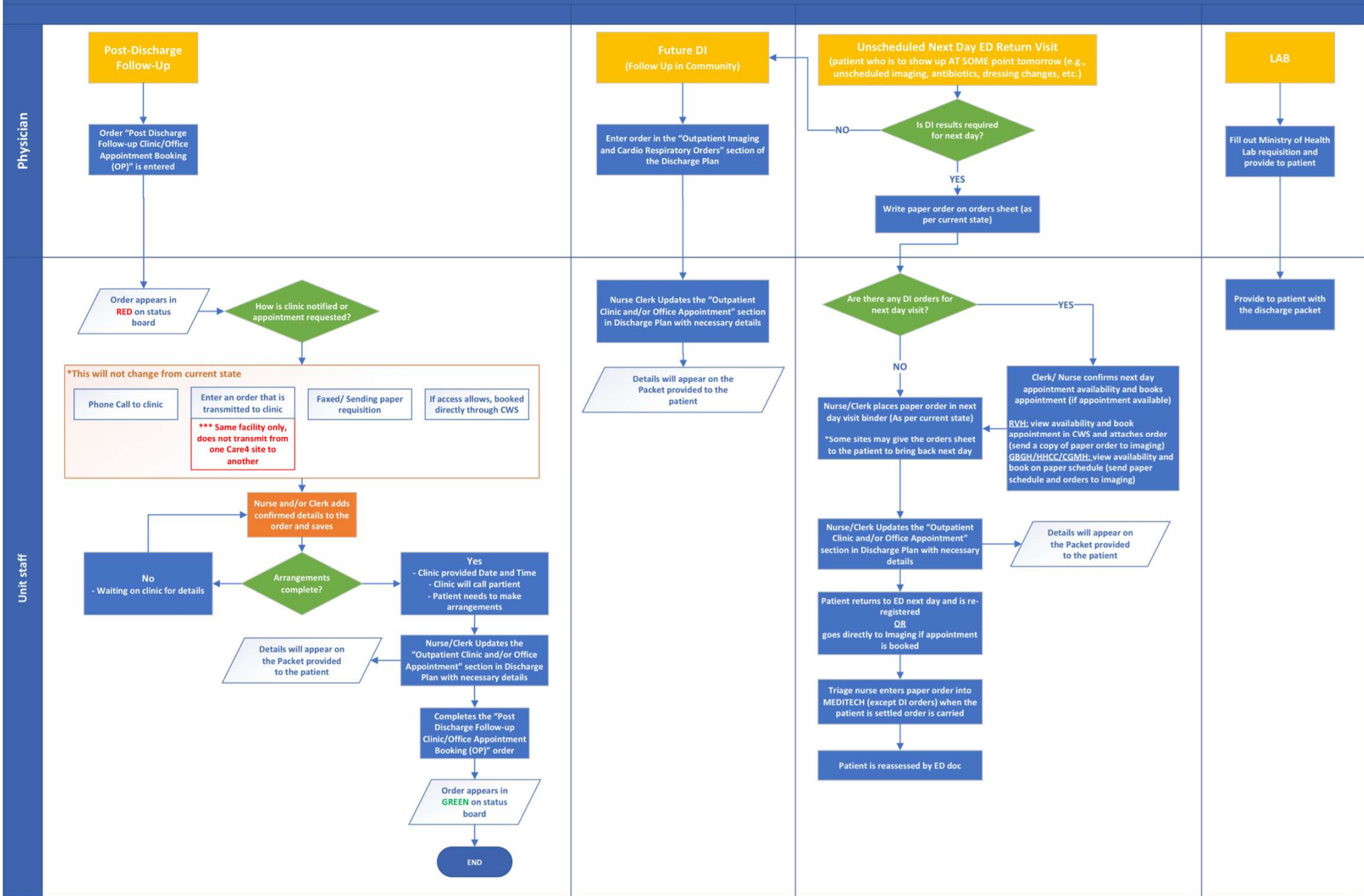


- Click in between the blue brackets with the pen and type the note that you wish to create. And then Click **OK**.

Organizing post discharge follow-up appointments and updating the Discharge Plan:

Here is an overview of the workflow, depending on the type of orders required.

Appointment to occur in an outpatient setting AFTER the patient is discharged

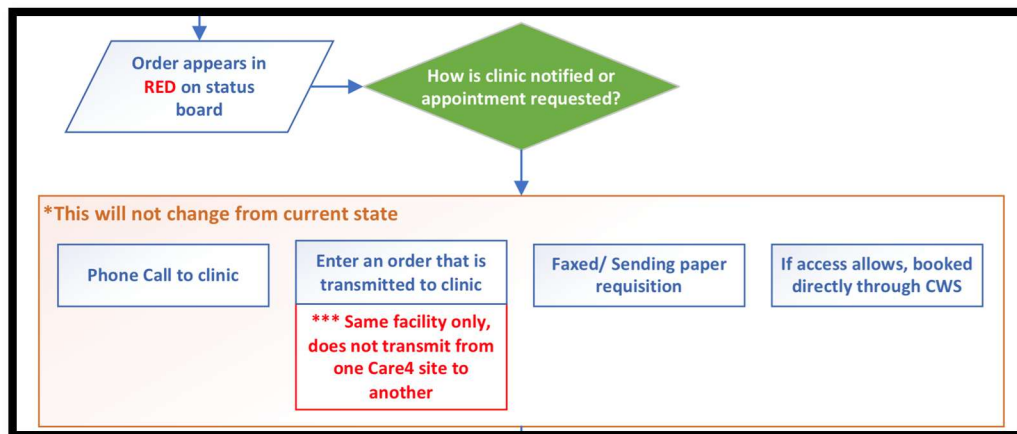


- **Clinic Appointments:**

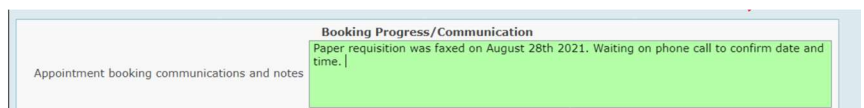
- If the physician orders a post-discharge follow-up, “OP F/U” will appear on the status board in **Red**.

Rm-Bed Age/Sex Adm Date	Patient Name Attending MD Special Indicators	C	F	R	Admit Dx	Surveillance	Prec	Ack	APPTS	New Results	UNC	Ne
ICUHALL-A 63 M 21/08/2021	Inpatient,Physdemo Audet,Rico Interpreter Needed				Test			Ack	OP F/U			
CAN.10-1 66 F 29/07/2021	PHA,SIX Ip,Terry				Testing Patient for PHA			Ack-M...				09:00 I 10:00 C 10:00 C 14:00 C 10:00 I 14:00 T
	Care4-Rvh,Melanie1											

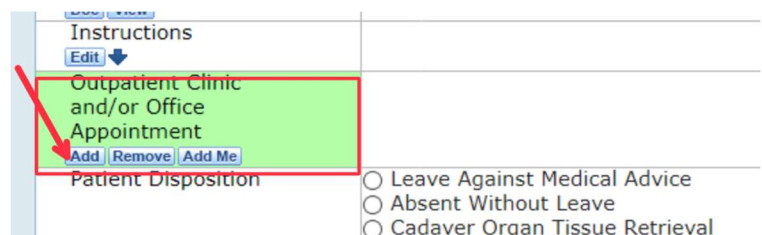
- The mechanism for booking the clinic appointment will vary depending of where the appointment will occur. This is based on current state.



- As the appointment booking process progresses, edit the order to add details and communication notes to track what is outstanding to book the appointment.



- Once appointment is confirmed, update the **Outpatient Clinic and/or Office Appointment section** in the **Discharge Plan** by clicking Add and then enter the necessary details.



- You will then select **provider, service, or outside** to select the correct individual or agency the patient is referred to and then click **OK**.

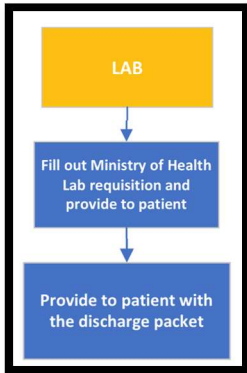
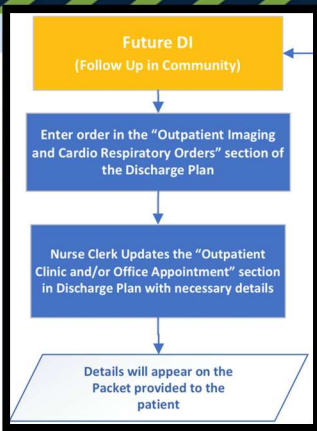
- To add an appointment date and time or to edit the details, click on the icon in the discharge plan.

- Click **save** in the footer of the **Discharge Plan**.
- The next step is completing the order. Click on the order status and select "Stop"

Surgical Pathology [F/M] Urgent	Full	Audet, Rico, MD	06/09/2021 12:10	Ordered
Post Discharge/Outpatient Appt				Stop
Post Discharge Follow-up Clinic/...	Appts	Audet, Rico, MD	06/09/2021 13:19	Ordered

- The indicator will then turn **Green** on the status board.

BUN-16 47 F 27/08/2021 MED 3N 240.4	Omtest, Order Sets One Audet, Rico IPAC C.difficile - Falls Risk ...	R TEST	Ack-M	OP F/U
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- **Diagnostic Imaging Appointments:**

- Physicians enter the order for the DI exam in the **Outpatient Imaging and Cardio Respiratory Orders** section of the **Discharge Plan**. It is visible from the Discharge plan, but this section **DOES NOT** appear on the discharge packet.
- The Nurse or Clerk will update the **Discharge Plan** with the details which will appear on the discharge packet that is printed and given to the patient.

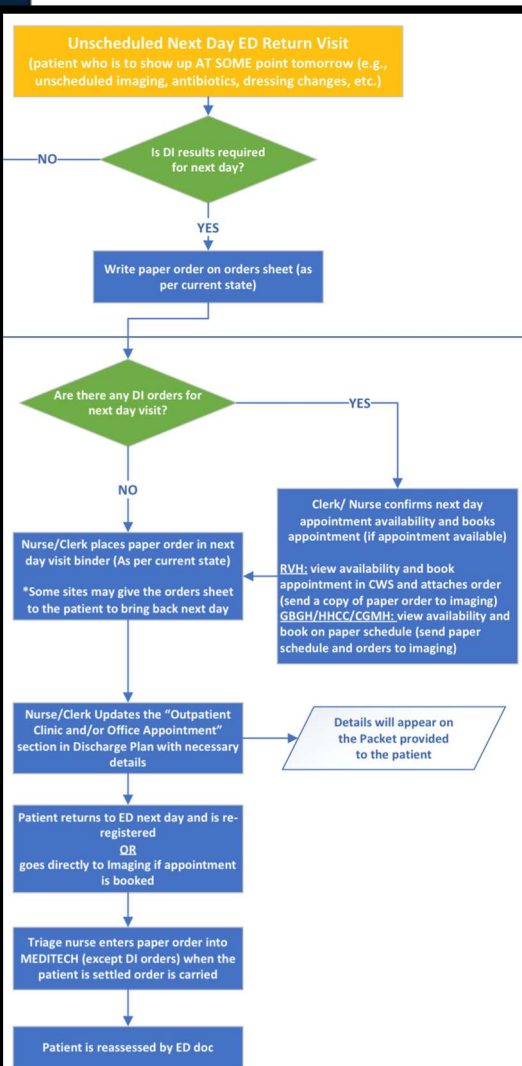
- **Post-Discharge Laboratory Testing:**

- Requisition will be completed by the physician and be given to the patient with the discharge packet.

0 of 1 requirements met		
Last Printed: 31/08/2021 08:05 by Maria Ma		
Discharge		
Reason For Visit	TEST	
Admit Date/Time	27/08/2021 14:10	
Admit Provider	Audet, Rico	
Outpatient Imaging and Cardio Respiratory Orders	CT Abdomen Biopsy (Routine) Location: Determined by Patient	Ordered By Rico Audet
Prescriptions	No Action	

- **ED Next Day Return Visit**

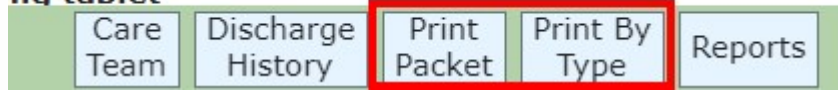
- For Next Day Orders
 - Physician writes paper order on orders sheet for a patient who is to show up AT SOME point tomorrow (e.g., unscheduled imaging, antibiotics, dressing changes, etc.)
 - Nurse or Clerk places paper order in next day visit binder/ folder (Some sites may give the patient the orders sheet to bring back next day)
 - Patient returns to ED next day and is re-registered
 - Triage nurse enters paper order into MEDITECH when the patient is settled order is carried out
- For Next Day Return Visits **That Include Diagnostic Imaging**
 - Clerk or Nurse determine if an appointment time can be given (RVH: Look on CWS, GBGH/HHCC/CGMH: look on paper to confirm availability)
 - Note: RVH books appointment and appointment has order attached to the appointment, Clerk places paper order in next day visit folder (a copy of these are brought to imaging)
 - Note: GBGH/HHCC/CGMH have no order tied to appointment; a paper schedule with orders is sent to imaging
 - Clerk slots the patient in for appointment and
- Future Imaging Orders (NOT the next day; Follow Up Family Doctor)
 - Follow the Future DI Appointment process using the **Outpatient Imaging and Cardio Respiratory Orders** section of the **Discharge Plan**.



- **To print the discharge packet**

- Select Print Packet to print the whole packet

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- Select Print by Type to print a specific section of the packet

✓	Reports	Last Printed Date/Time
<input type="checkbox"/>	Instructions	
<input type="checkbox"/>	Stand Alone Forms	
<input type="checkbox"/>	Rx for Treatment & Equipment	31/08/2021 08:21
<input type="checkbox"/>	Visit Report	31/08/2021 08:05
<input type="checkbox"/>	Customer Designed Reports	
<input type="checkbox"/>	Discharge Bloodbank Transfusion Letter	31/08/2021 08:05
<input type="checkbox"/>	Home Medications Report	
<input type="checkbox"/>	Prescriptions	
<input type="checkbox"/>	Monographs	
<input type="checkbox"/>	Patient Health Summary	
<input type="checkbox"/>	Discharge Patient Reports	
<input type="checkbox"/>	Discharge Report	31/08/2021 08:05

- NOTE: The prescriptions can only be printed by physicians and they need to sign them.