

Vanderbilt University Medical Center

Icon Key

Clinical Systems – Nurse Residents

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| --- | --- |
| **Icon** | **Definition** |
|  | **Develop Conceptual Knowledge** |
|  | **Activate Prior Knowledge** |
|  | **Training Resources** |
|  | **Video** |
|  | **Emphasis** |
|  | **Transitional Statement** |
|  | **Individual Activity** |
|  | **Group Activity** |
|  | **Quick Questions** |
|  | **PowerPoint companion** |
|  | **Break** |
|  | **Alert** |
|  | **Knowledge Check** |
|  | **Survey and Assessment** |

### Documents and Resources:

***Video Overview for:***

1. Overview of StarBrowser, StarPanel
2. Overview of HED
3. Overview Medication Administration
4. Overview of HEO/Wiz

***Training Resources:*** *Distribute before class begins*

1. Configuring and Assigning Patients in Care Organizer
2. What to Chart and When to Chart it
3. RX Tips
4. Scanner Reset Process
5. Matched Medication

**PowerPoint Companion Guide**

**STEPS TO PLAY BACK ORDERS FOR RN class**

1. Sign on with **TRAIAKO;** the password is winter14 (if this password does not work, see V:Training>Training Setup and Logistics>Training ID Info> MD-TRAINING IDs2013 to see current password)
2. **Enter Orders…** If orders in Left Window-**click D/C button** at bottom
3. Click **Patient’s Name in Upper Left Window**
4. Click **“Manage Personal Orders”**; click **NEO RN**
5. **Click Playback…** orders load… click  **Done**
6. Say NO to RASS, Admit order (defer), DVT –Reason “I’m not a Physician”
7. Accept orders

### Introduction

1. **Introduce** trainers and preceptors.
2. **Inform** participants that the goal of this training class is to introduce them to the different clinical systems that nurses will use in patient care. Explain this is a 4 hour class and moves quickly. It does so as we recognize the tech savvy, motivated personality of the typical nurse resident and ask they follow along with us as we click and move through content.
3. **Familiarize** participants regarding timing for breaks (times may vary slightly based on class size. Explain where they can locate food.)
4. **PLEASE** shut off and put away ALL technology and cell phones as breaks will be provided to check for messages. Please do not be tempted to log on to your work or personal e-mail during instruction time as we ask for your complete attention.
5. **Inform** participants about the location of bathrooms.
6. **Explain** that questions are encouraged and should be asked at any time.
7. **Discuss** CAPS role and Help Desk.
8. **Explain** that the trainer responsibilities include delivering content, sharing process expertise, and evaluating comprehension. The preceptor’s responsibilities include monitoring individual practice providing technical support and answering questions.
9. **Read the Welcome PowerPoint slide.**

## StarBrowser/StarPanel

**Lesson 1 Introduction to StarBrowser/StarPanel**

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| Length | \_\_ Minutes |
| Overview | In this lesson the learner is introduced to the StarBrowser and StarPanel interface including the purpose of primary menus and icons. |
| Learning Objectives | Locate and define the purpose of primary menus and icons in StarBrowser/StarPanel  Define the purpose of the StarBrowser/StarPanel systems |
| Preparation | On screen projection of StarBrowser/StarPanel |
| Materials | Facilitator Guide, Video, PowerPoint Companion |
| Lesson Type | Introduction |

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|  | **Show PowerPoint companion, slide 1.0 with learning objectives (toggle between this guide and the companion using ‘Alt + Tab’)** |

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| **Introduce and Show** Video “Overview of StarBrowser, StarPanel”. |

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|  | **Build Conceptual Knowledge:**  StarBrowser is a view of the StarPanel Electronic Medical Record (EMR) application that was developed for a specific group of users. Today we will focus on the version designed specifically to make navigation easier for the Inpatient Nursing Staff.  StarBrowser includes a complete version of the Inpatient Whiteboard with full patient names. The screensaver version of the Whiteboard includes only patient initials. StarBrowser also includes Action Menus for easy access to most features you will routinely use.  StarPanel is the full Electronic Medical Record application. It includes information about individual patients and groups of patients and menus to navigate to different parts of the Electronic Medical Record. |

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|  | **Transition Statement:** to Logging Onto the System Lesson |

### 1.1 Logging Onto the System

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

**Key Discussion Points**

1. **Explain** that the Inpatient Whiteboard (screen saver) is HIPAA compliant and that colors are triggered by complete or incomplete documentation (ex. green is complete, yellow is due, red is overdue).
2. **Explain** the login procedure and VCWS. Users should have access and can set up VCWS.
   1. Allows a user to maintain the same documentation session from multiple workstations
   2. Allows a user to re-open their last charting session where they left off, regardless of their location
   3. Users can open each program at the beginning of the shift and leave open
3. **Demonstrate and Explain** the clinical desktop will display when logging in the first time and the user will click on the StarBrowser icon.
4. **Explain how to restart VCWS session.  
   Refer to the Super User’s Guide for Setting up VCWS for RN’s and CP’s and Password Tips.**
5. **Demonstrate how to return to the training region using the inpt census under patient lists.**
6. **Show** that if an update has been made to StarPanel, a window will appear on startup informing you of the change. A check box will display that will allow you the option to “do not show this message again”.
7. **Explain** that system-wide notifications (i.e., technical issues with a clinical system) will appear in StarPanel in a **red box** in the lower right-hand corner.

 *StarPanel has no training environment, just training patients*  
**7. Show** the red sign off button on the bottom left of the screen

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|  | **Transition Statement:** to Defining StarBrowser Icons Lesson. |

1.2 Defining StarBrowser Icons

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  There are important icons found within StarBrowser. Scrolling over the icons displays a description or title of the icon’s related link. |

**Key Discussion Points**

1. **List and explain** icons.

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|  | ***Emphasize only*** *Print, Go to Desktop, Sign Off, Launch HEO/Wiz Order, Launch HED, Kronos, Email and Launch Help Desk.* |

1. **Point out** StarBrowser tab at bottom of screen that allows you to toggle back as necessary
2. **Explain** that other necessary icons for StarBrowser will be explained and accessed later when working on the unit

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|  | **Transition Statement:** to Defining StarPanel Menus Lesson. |

### 1.3 Defining StarPanel Menus

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  The black menu bar located on the left of StarPanel hosts important navigational links that will be introduced in this section. |

**Key Discussion Points**

1. **List and explain** icons.

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|  | ***Emphasize only*** *Print, Go to Desktop, Sign Off, Launch HEO/Wiz Order, Launch HED, Kronos, Email and Launch Help Desk.* |

1. **Point out** StarBrowser tab at bottom of screen that allows you to toggle back as necessary
2. **Instruct** learners if they click on the X at top right corner, StarBrowser will close and will need to be reopened from the Clinical Desktop.
3. **Explain** that other necessary icons for StarBrowser will be explained and accessed later when working on the unit
4. **Demonstrate and explain** how and why to logout completely.  
   **Demonstrate and explain** how to search for a patient if necessary using the search box.

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|  | *Explain why searching for a patient by using medical record number, Social Security number or last name is best. Provide a relevant story to reinforce this search method.* |

1. **Explain** what the Help menu is used for.

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|  | *Provide examples: updates, submitting a help desk ticket, etc.* |

1. **Explain** that main menu items appear in **red**.

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|  | **Transition Statement:**  to Defining StarPanel Tabbed Menu, Secondary Menu and Table. |

### 1.4 Defining StarPanel Tabbed Menu, Secondary Menu and Table

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  There are yellow and white tabbed menu items at the top of the screen |

**Key Discussion Points**

1. **Explain** the tabbed menu items at the top of screen and the significance of the yellow and white tabs. Patient chart has to be open to use yellow tabs. The only three tabs used on the Inpatient side are Pt Chart, Forms, and Pt List. All others are used on the outpatient/clinic side of the organization.
2. **Explain** that other menu items not mentioned with be discussed at a later time.
3. **Explain** the patient list column headers
4. **Show** sorting column headers in the patient list.

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|  | **Transition Statement:** to Defining StarPanel Colors and indicators. |

### 1.5 Defining StarPanel Colors and Indicators

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Activate Prior Knowledge** We just talked about the tabbed menus at the top of the StarPanel screen. One of those tabbed menus is the Patient List that displays the Inpatient Whiteboard. |

**Key Discussion Points**

1. **Show** Inpatient Whiteboard.
2. **Explain** that orders have two colors **blue** and **red**. **Blue** is for **pending orders** and **red** is for **STAT orders** or orders that are needed immediately. **Show** LIVE unit to demonstrate how to acknowledge new orders.
3. **Explain** that colors and indicators for Labs, Falls, and Ventilator vary by unit and preceptors will take time to explain their unit specific information. Note, indicators are based on preferences chosen by Nursing leadership for each unit and driven by the locations of the CWS. Therefore, indicators will look different on each unit and several of them are shown here for demonstration.
4. **Show** hover information box and color indicators to display more information.
5. **Explain** that hover information boxes are displayed by placing your mouse over a button or link to display additional information.

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|  | **Transition Statement:** to the Knowledge Check. |

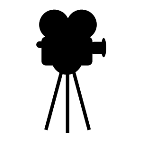
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## Actions Menu

**Lesson 2 Introduction to the Actions Menu**

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| Length | \_\_ Minutes |
| Overview | In Lesson 2 the learner has an in-depth introduction to the Actions Menu including its purpose and connective capabilities. |
| Learning Objectives | Define the purpose of the Actions Menu and identified links within the Actions Menu  Define the purpose of the OPC and demonstrate the ability to successfully navigate and print the required components within the Actions Menu |
| Preparation | On screen projection of the Actions Menu |
| Materials | Facilitator Guide, Video, PowerPoint Companion |
| Lesson Type | Introduction |

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|  | **Show PowerPoint companion, slide 1.0 with learning objectives.** |

**  
Introduce and Show** Video “Overview of Actions Menu”

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|  | **Reinforce conceptual knowledge for learners by explaining that:**  The Actions Menu has links within StarPanel that allow you to navigate to different sections of the EMR. The Actions Menu is a shortcut to access specific parts of the patient chart or to open forms for documentation. One example of a link found within the Actions Menu is the Admission History Form.  As the video demonstrated the Actions Menu is accessed from StarPanel by clicking the word link “actions” next to the patient name on the Inpatient Whiteboard. When a link within the Actions Menu is clicked a panel is opened. Remember, to eliminate multiple panels from opening, only use the “actions” word link that is next to the patient name. |

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|  | **Transition Statement:** to Functionality of the Actions Menu lesson. |

### 2.1 Functionality of the Actions Menu

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

**Key Discussion Points**

1. **Demonstrate** the correct way to access and view the Actions Menu.

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|  | *Emphasis: the benefits of using the “actions” link after a patient’s name.* |

1. **Demonstrate** the steps necessary to change the default setting so that the default view is “Inpatient Nurses” and **have** the learners set their default view
2. **Demonstrate and explain** how frames are opened, expanded, and resized by click the Actions OPC menu link.

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|  | *After 4 frames are opened the only way to eliminate frames is to make another selection and this will overwrite what is in the frame.* |

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|  | **Transition Statement:** to the Overview of Patient Care (OPC). |

### 2.2 Overview of Patient Care (OPC)

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  The first component of the Actions Menu that we will discuss is the Overview of Patient Care (OPC) which provides a snapshot of a patient's care record containing information pulled from multiple systems, used to provide an overview.  The OPC is used as a handover tool between nurses at shift change.  Printing the Overview of Patient Care (OPC) is used for shift changeover; nurses brief the new nurse coming onto the shift using the document. |

**Key Discussion Points**

1. **Demonstrate** the steps necessary to open the OPC.
2. **Demonstrate** expanding the panels to correctly view the OPC.

**Refer learners to OPC handout** in laminated packet

1. **Explain** that each section is divided by section headers using the SBAR format or “Situation, Background, Assessment, Recommendations”.
2. **Emphasize** the following in the Situation section:
   1. Team Text Page can be found
   2. Blue text is a link to the document
   3. Contact information appears from Admission History
   4. Present on Admission information
   5. Clinical Alerts appear: Code, Allergies, Isolation, Fall, Braden, Advance Directives
3. **Emphasize** the following in the Background section:
   1. Past medical/surgical history
4. **Emphasize** the following in the Assessment Section:
   1. Plan of Care (Pathway)
   2. Nursing Summary/Priority Problems from HED (off going nurse documents a nursing summary and the priority plans for the next shift)
   3. Last available weight
   4. 9 sets of V/S, Pain scores from HED
   5. 24hr temperature ranges from HED
   6. I&O from HED
   7. 24hr labs (bumps out yesterday’s result if there is new results)
5. **Emphasize** the following in the Recommendations section:
   1. Current orders from HEO/Wiz
   2. When the admission comes from the ED the documentations of tests/procedures done in the ED display
6. **Explain** the location of the print feature at the top of the OPC. DON’T PRINT!
7. **Instruct** learners on how to print front and back of the OPC.

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|  | **Transition Statement:** to Printing the All Documents lesson. |

### 2.3 All Documents

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  All Documents is a record of any document that pertains to a patient’s medical history at Vanderbilt University Medical Center. |

**Key Discussion Points**

1. **Show the** steps that are necessary to access the All Documents menu item on the Actions Menu.

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|  | *The Actions Menu is accessed from StarPanel by clicking on the word link “actions” next to the patient name on the Inpatient Whiteboard.* |

1. **Explain** how to search for a document, using progress notes.
2. **Show,** using the Radiology tab as an example, clicking the tab so the appropriate document titled “progress note” appears.

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|  | **Transition Statement:** to the Fast Labs Lesson. |

### 2.4 Fast Labs

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  Fast Labs is used as an overview of lab results from a patient’s hospital stay. Hovering over links will display additional information. |

**Key Discussion Points**

1. **Show** how to access Fast Labs from the Actions Menu.
2. **Demonstrate** (moving from left to right) hovering over links to view information boxes.
3. **Click** on PCV 33 lab result. Explain at Vanderbilt, a PCV may be more commonly known as a Hematocrit. **Show** clicking on any lab value will open a new window and display trending activity over the length of stay. **Red** will indicate out of range labs. **Blue** indicates comments by lab result.
4. **Show** clicking the “Graph Info” link for PCV to display a graph with additional lab value information.
5. **Show** clicking CBC will show all CBCs collected on this patient, also useful for trending data.

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|  | **Transition Statement:** to the Medication Administration Record (MAR) lesson. |

### 2.5 Medication Administrations Record (MAR)

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  MAR is used as a quick reference method to display what medications and what dosages have been administered to a specific patient including the time the medication was administered. |

**Key Discussion Points**

1. **Demonstrate** the steps to access MAR.
2. **Explain** thatMAR is displayed as a chart.
3. **Explain** that the view “all days” is default in the training environment and that in the real environment “1” or “2” days should be selected.
4. **Show** hover over solid black box, hollow box and yellow box to display details of these administrations. Explain instructions for reading the MAR will always be found at the top of the screen.
5. **Explain** that text with medication name and dosage information is displayed on the right side of the panel
6. **Show** clicking on the name of the medication to show all administration times for a single medication, show closing of the box by single click within the box.
7. **Show** using the “Ctrl” key and discuss the information that can be obtained by clicking on the **blue** medication name link.
8. **Explain** the solid **red line** denotes a downtime in the AdminRx system. Hovering over the red line will tell you the date and times of the downtime.
9. **Explain** the **blue** trending lines to indicate active current orders.
10. **Show** hovering over the black, yellow and hollow boxes and explain what they mean.
11. **Explain** that NOT ALL medications are currently captured in the MAR.

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|  | **Alert:**  ***Example:*** *If a patient is admitted in the ED and put on pain medication it may not show up in the MAR.* |

1. **Explain** how the default view can be changed to show a range of medication administration dates for length-of-stay.

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|  | **Transition Statement:** to the E-Docs Pathway lesson. |

### 2.6 E-Docs Pathway

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  E-Docs Pathway allows you to assign a pathway or a look at an existing pathway. A pathway is a roadmap used for the standardization of care processes. Pathways reduce variability in clinical practices and have been proven to improve outcomes. |

**Key Discussion Points**

1. **Show** the location of the E-Docs Pathway link on the Actions Menu.
2. **Demonstrate** how to view a pathway
3. **Demonstrate and explain** the steps to add the Medicine Admission Pathway **(for PEDS – Pneumonia > 2 months)**.
4. **Explain** how you can print or view as PDF.
5. **Show** how to verify the record was created**. View** in All Documents**.**
6. **Explain** that after a pathway is assigned the pathway name will appear in the OPC**.**

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|  | **Transition Statement:** Knowledge Check |

### **Knowledge Check**

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|  | Actions Menu  Activity: Quiz Show  Time:  Materials and prep: 2 buzzers, flip chart or white board.  Display Knowledge Check slides on PowerPoint companion.  Divide the class into two teams on opposite sides of room. Provide each team with a buzzer.  One trainer asks questions while another keeps score using flip chart or white board.  The first team to buzz in is allowed one chance to answer the question. If the question is answered incorrectly, the other team is allowed a chance. Teams may not buzz in until the trainer has finished reading the entire question.  Answers must be the name of the Actions Menu links.  In the event of a tie, use the tie breaker question.  Each correct answer earns 5 point. The team earning the most points wins a prize. (Candy, etc.) |

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| **Question #** | **Answer Key** |
|  | All Documents |
|  | MAR |
|  | E-Docs Pathway |
|  | OPC |
| **5.** | Fast Labs |

## Charting a New Patient’s Admission History

**Lesson 3 Admission History**

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| Length | \_\_ Minutes |
| Learning Objectives | Locate required sections of the chart and define the completion deadlines for those sections.  Demonstrate the ability to complete a patient admission history. |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint   Training Resource: What to Chart and When to Chart It |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  The Admission History section of a patient's chart is completed in StarPanel.  The form has completion deadlines associated with specific sections. The form is completed when the patient is stable and admitted to a hospital unit for the first time in this occurrence. If the patient is not stable, the staff member needs to check the box for “unable to obtain this information during the required time frame.”  The form is hospital-specific (i.e. PEDS, VPH, etc.) and is completed at the patient’s bedside. A nurse will ask the patient or patient family member the questions listed in the Admission History form. If the patient is already in the system, the nurse will verify the pre-populated information is correct and then complete the rest of the information.  We will be demonstrating the completion of the following sections of the Admission History form: Allergy, Immunization, MLT, and Nutrition. |

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|  | **Training Resources –**  What to Chart and When to Chart It. |

**Key Discussion Points**

1. **Using the Training Resource What to Chart and When to Chart It, explain** the different components of the patient chart and the time requirements associated.
3. **Show the steps** to access the Adult Nursing Admission History form associated with a training patient (give an example of a unit that uses a form that is located elsewhere. **(Use Peds form for Peds class)**
4. **Show** and **explain** expanding the panel that displays the Admission History form.
5. **Show** entering some examples of “Admission History Data” up to the section entitled “Pre Admission Medication list”.  
   Facilitator=patient role and Driver=nurse role for demonstration purposes.
6. **Explain** that the demographics section is commonly pre-populated in the live environment.
7. **Explain** that we will now be discussing the remaining individual sections of the form in detail.

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|  | **Transition Statement:** to the MLT (Med List Tool). |

### 3.1 MLT (Med List Tool)

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  MLT is the list of medications that a patient was taking prior to admission. MLT can be updated throughout the patient’s stay. It is important to collect a thorough medication history including creams, herbal supplements, and over the counter medications. Recognize many patients may not think of over the counter medications as part of their drug regiment history.  Providers reconcile MLT at the patient’s admission and at the time of discharge. |

**Key Discussion Points  
  
Demonstrate and explain** the location of the MLT section and the hyperlink in the Admission History form that opens MLT.

1. **Demonstrate** how to open MLT by clicking on Edit.
2. **Explain** that patients with a medication history will have medication that appears in the Patient Summary.
3. **Show** that medications listed in MLT as Patient Summary Medication may be edited or deleted.
4. **Using Clindamycin, demonstrate** how to enter a new medication using the Add Medication search function.
5. **Explain** the list of options for selecting the desired medication type.
6. **Explain** how to indicate the patient has no home medication or, you were unable to obtain information about home medications.
7. **Demonstrate** clicking “Submit for Review” when you have completed MLT.

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|  | **Transition Statement:** to the Allergy Section of Admission History lesson. |

### 3.2 Allergy Section of Admission History

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  Allergy Section in the Admissions History form is a table that allows you to view existing allergies or to enter new allergies. |

**Key Discussion Points**

**REMIND STUDENTS TO FOLLOW ALONG AGAIN**

1. **Show** the steps to view existing allergies.
2. **Show** Expand and collapse feature.
3. **Show** clicking the column header to sort and the **blue “?” Icon** to read more.
4. **Show** clickingthe **blue “I” Icon** on the far right to view detailed allergy information.
5. **Show** entering new allergies using morphine or bee sting.
6. **Show** saving an updated record.

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|  | **Transition Statement:** to the Immunization Section of Admission History lesson. |

### 3.3 Immunization Section of Admission History

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

**Begin** by describing the fields required for charting between the Allergy section and the Immunization section of Admission History.

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|  | **Develop Conceptual Knowledge:**  The Immunization Screening section of the Admission History form allows you to view a patient’s past immunization records and allows you to enter new immunization information. **(DON’T GO FURTHER WITH PEDS)**  All fields of immunization screening are required. When enough information has been entered a red Stop message will appear.  Depending on the information entered in the Immunization and nutritional screening, ancillary departments will be notified and orders submitted for the patient to receive and the nurse to administer. |

**Key Discussion Points**

1. **Show** filling in all required fields using radial buttons.
2. **Explain** that the flu screening questions will only appear during flu season.
3. **Show** steps to generate Pneumovax vaccine.
4. **Show** STOP by selecting “yes” at already received Pneumovax vaccine.

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|  | **Transition Statement:** to the Nutrition Screening Section of Admission History lesson. |

### 3.4 Ancillary Screening of Admission History

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  **Begin** by describing the required fields between the Immunization Screening and the Nutrition Screening on the patient chart.  Any item selected in the nutrition screening will result in a consult directly to nutrition for follow-up.  Other consults generated are case management, social work, chaplain, interpreter services, and child life services. |

**Key Discussion Points**

1. **Show and explain** checking the boxes appropriate to the patient’s condition or check “No problems identified at this time.
2. **Briefly** point out the remaining fields of the Admission History form.

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|  | **Transition Statement:** to the Saving the Admission History Form lesson. |

### 3.5 Saving the Admission History Form

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  You can save as *draft* if the Admission History form can’t be completed. If you save the Admissions History form as complete, you cannot change the information. You have to amend in the notes, any specific changes to be made. |

**Key Discussion Points**

1. **Show and explain** the purpose of “I Verify.”
2. **Explain and Demonstrate** saving as *draft* when it is not completed.
3. **Explain** that after saving the draft or, final save, a red alert will be displayed stating that the order was sent.
4. **Show** reopening a saved draft.
5. **Show and Explain** how to save as complete and then add amendments through “All Docs” to the saved Admission History form.

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|  | **Transition Statement:** to Charting in HED lesson. |

## Charting HED

**Lesson 4 Introduction Horizon Expert Documentation (HED)**

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| Length | \_\_ Minutes |
| Overview | In Lesson 3 the learner has an in-depth introduction to HED, its purpose and the method for assigning patients in Care Organizer. |
| Learning Objectives | Define the purpose of the HED system  Demonstrate the method for assigning patients in Care Organizer  Locate and define the purpose of primary menus in HED |
| Preparation | On screen projection |
| Materials | Video overview |
| Lesson Type | Introduction |

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|  | **Show PowerPoint companion, slide 1.0 with learning objectives.** |
|  | **Introduce and Show** Video “Overview of Horizon Expert Documentation (HED)” |

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|  | **Reinforce conceptual knowledge:**  Horizon Expert Documentation or HED is a clinical system for nursing documentation and it is separate from StarPanel and StarBrowser. It hosts sections of the chart, such as Admin Rx which is used for medication administration and Assessment and Intervention, used for the nursing physical assessment. It is accessed from the HED Train or HED icon located on the Desktop.  Care Organizer is a window that displays when you enter HED or HED Train.   Care Organizer is a way to assign patients to a specific nurse and view medication schedules. |

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|  | **Transition Statement:** to Launching Care Organizer/HED . |

### 4.2 Navigational Overview of Care Organizer

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| --- | --- |
| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint  [add image of navigation to ppt] |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  Care Organizer has three rows of navigation. |

**Key Discussion Points**

1. **Show accessing** Care Organizer using the training environment.
2. **Show** the menu bar at the top of the screen with navigation options such as File, View, Patient, Report, Chart, Review, Profile, Links and Help.
3. **Explain** that the menu bar is a row of navigational buttons that includes all patients, chart complete, census, patient select, encounters, create assignment, IV manage, HED and EXIT.
4. **Show** the row of radial buttons with navigation options such as “Overdues”, “To Do”, “Active”, “Current Shift”, and “Time Range.”
5. **Show** selecting a patient from the bottom table.
6. **Show** “this patient/all patient” feature.

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|  | **Transition Statement:** the Configuring and Assigning Patients in Care Organizer. |

### 4.3 Configuring and Assigning Patients in Care Organizer

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint  Training Resource for: Configuration (Completed One Time and Saved)  Assigning a Patient in Care Organizer |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Training Resources** Configuring and Assigning Patients in Care Organizer |

**Key Discussion Points**

Walk learners through one time configuration in training environment:  
  
**Configuring Patients**

1. **Click** view from Care Organizer and select configure
2. **Select** primary nurse as default care relationship
3. **Select** PHM, hold CTRL, select RES
4. **Click** add to excluded groups and click OK
5. **Click** view and confirm only medications and IVs are checked
6. **Click** create assignment
7. In the dropdown, choose provider type “RN”

* Enter Care Relation, “Primary Nurse”
* Shift window opens; select “DAYS” or “NIGHTS” and click “OK”
* Enter this end time: “1930” for days, “0730” for nights (this accounts for overlap and crossover of shifts)
* In Patient Dept. dropdown select a unit

1. **Click** File and “Save Configuration”
2. **Click** Exit and then click Refresh in Care Organizer to confirm assignment.

**Assigning Patients in Care Organizer  
  
Click** create assignment

1. **Under** Filter Staff, click “Search”
2. **Enter** your training ID name “**Training, \_\_\_\_\_\_\_**” located in the bottom left corner of your screen
3. **Click** “Find”
4. **Click** your training name – highlight appears
5. **Click** “OK”

**Select** patient from laminated sheet

1. **Press** and hold the Control key
2. **Select** an additional patient above or below
3. **Click** “Assign” (box will pop up that says Assignment Succeeded)
4. **Click OK**

**Click** Exit

1. **Click** “Refresh” in Care Organizer to verify assignment.

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|  | **Transition Statement:** to the Navigational Overview of HED. |

### 5.1 Confirming a Medication Order

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| Length | \_\_ Minutes |
| Preparation |  |
| Materials | Checklist for individual activity |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  Medications are confirmed by toggling between the Care Organizer window of HED and Starbrowser.  **Can anyone tell me why medication orders need to be confirmed?**  We confirm medications for patient safety. The nurse is the last safety check before the medication is administered. You want to confirm that the drug is appropriate for your patient. You also confirm that the pharmacist processed the order as the physician ordered it and placed it on the correct schedule.  Medications that need to be confirmed appear in yellow. All medications should be confirmed within the active view of Care Organizer. |

**Key Discussion Points**

1. **Reminder – use patient from the laminated sheet.**
2. **Show and explain** the steps for selecting and confirming a patient’s medication in Care Organizer.

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|  | *Make sure you are in Active view when confirming medication otherwise only a certain time period will be confirmed.*   * **Select** patient from patient list in the lower frame of Care Organizer. * **Confirm** Haldol using the confirm button in the top right hand corner. * **Toggling** back and forth between StarBrowser and Care Organizer**,** verify the right medication, right dose, right route, administration schedule is present, PCM number and physician order number match. * **Click** confirm. |

1. **Show and explain** that multiple orders can be confirmed for the same patient.

* **Using** the view confirm/unconfirmed menu confirm the remaining medications.
* **Explain** thepopupwindow that opens for other medications that need to be confirmed.

1. **Show and explain** that clicking “Send Rx a Message” is the best method of communicating with the pharmacy

* **Demonstrate** that the confirm button now displays history.

1. **Show and explain** using the refresh button becauseno screens self-refresh in Care Organizer or HED.

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|  | **Transition Statement:** to the Administering Medication lesson. |

### 4.4 Navigational Overview of HED

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Activate Prior Knowledge:**  At the beginning of this section we introduced HED in the Video. HED is a clinical system used for nursing documentation. |

**Key Discussion Points**

1. **Show** that the new nurse’s name should appear on the browser window
2. **Explain** brieflythe top menu bar items and their function.
3. **Show** opening and closing the patient census.
4. **Explain** the function of the“Relationship” tab and **demonstrate** displaying the assignment by clicking the “Relationship” tab.
5. **Show locating** allergy information.
6. **Explain** the function of the refresh button and the down arrow next to Monitored VS.
7. **Show** the location of the patient demographics.
8. **Demonstrate** viewing all tabs by clicking on drop down arrow on far right of screen.
9. **Explain and demonstrate** the function of the down arrow located on the far right of tabs and how to move up and down the drop down menu using the arrow keys on the keyboard.
10. **Explain** how the live HED screen will be different than the HED Train screens.
11. **Explain** that HED always opens to the tab for Vitals/I&O

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|  | **Quick Question:**  Who can define the purpose of HED? |

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|  | **Transition Statement:** to the Charting Navigation and Processes lesson. |

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|  | BREAK TIME – Lock Screen  Instruct learners to return in 15 minutes. |

#### 4.4.1 Charting Navigation and Processes

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| Length | \_\_ Minutes |
| Learning Objectives | Demonstrate the ability to enter vitals in a patient chart.  Locate the tab for line management (IV) and **identify** the line management completion deadlines.  Based on provided patient conditions **define** the completion guidelines and demonstrate documenting the appropriate Plan of Care. |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint  Scenario Group Activity |
| Lesson Type | Introduction |

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|  | **Show PowerPoint companion, slide 1.0 with learning objectives. When finished navigate to StarBrowser.** |

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|  | **Activate Prior Knowledge**  Sections of the patient’s chart are located in both StarPanel and HED. The Admission History form is located in StarPanel while vitals and the nursing assessment is charted in HED. |

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|  | **Transition Statement:** to Charting a New Patient’s Vitals lesson. |

#### 4.4.2 Charting a New Patient’s Vitals in HED

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| --- | --- |
| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint  Laminated patient sheet |
| Lesson Type | Demonstrate and let me try activity. |

**Explain laminated sheet.**

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|  | **Develop Conceptual Knowledge:**  The charting of all patient information is required by your unit. Vitals must be charted at least once per shift and requirements may vary between units. |

**Key Discussion Points**

1. **Show and explain** selecting a patient in Care Organizer and clicking the HED button which opens the “Vitals IO” tab as a default.
2. **Show** clicking “Show All” from left column to expand all of the available charting options of the vitals section of the patient chart.
3. **Show** clicking “Show All” in the charting field to show all the components of the vital signs I/O fields.
4. **Explain** that at times using the Chart button may be necessary but not usually.
5. **Explain** that time can be adjusted back to time charted but not forward.
6. **Show and explain** moving across fields using the tab button on the keypad.
7. **Show** entering the following examples of information in the vital signs section:

* Change time to 30 minutes ago.
* Enter temp of 101.4 Oral.  
  ***Explain*** *what the* ***red color*** *exclamation means*
* Click exclamation point to make significant finding.
* Enter heart rate/DAS of 112 apical.
* Enter this annotation “prior to digoxin”  
  ***Annotation capabilities*** *and functionality include a change in color to indicate a comment has been entered.* *There is a* ***240*** *character limit.*
* Enter O2 Sats of 93% on Oxygen
* Enter O2 Liter Flow of 2L, Nasal Canula

1. **Explain** thatsome fields are fee text and some are dropdown.
2. **Explain** that clicking on the left hand column allows you to “jump to” different sections of the chart.
3. **Explain** that if the information is unsaved, a **yellow** check mark will appear on the vitals tab.
4. **Explain** that each HED tab charted on must be saved individually.
5. **Show** clicking “Save and Confirm” after vitals have been entered.

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|  | *If vitals are entered after they were originally taken the time can be adjusted by clicking the up and down arrows next to the time at the top of the chart.* |

1. **Explain and Demonstrate** how to modify entered information after “Save and Confirm”.

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|  | **Transition Statement:** to the Charting the Physical Assessment lesson. |

#### 4.4.3 Charting the Physical Assessment in HED

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Activate Prior Knowledge:** Ask learners to recall the features and functions in the Vitals section of the Patient Chart. The same features and functionality are available when charting the Physical Assessment. |

**Key Discussion Points**

**Key Discussion Points**

1. **Explain** that different hospitals, like VPH, have their own assessment tabs and choices.
2. **Demonstrate and explain** navigating to HED and the ICU/SD Asmt/Interventn tab.

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|  | *Required charting documentation is displayed in UPPER CASE and are required each shift or when the patients level or location of care changes.* |

1. **Reinforce** that clicking “Show All” displays available fields to chart a patient’s physical assessment. “Show All” must be clicked for every section of the chart.

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|  | *It is recommended that clicking “Show All” be done at least twice per shift so that documentation is not missed.* |

**Explain** Vanderbilt charts to standards. Required charting in Upper Case has been mentioned. Mixed case items are assessed when appropriate to the patient’s condition. Some UPPER CASE items are abbreviations and are not required unless applicable to the patient’s condition. Preceptors will provide unit specific charting requirements at a later time. A Care Plan is started at admission and charted through discharge**.** This plan outlines a set of nursing actions to be delivered to resolve the patient’s condition. VUMC uses identification of priority problems in our care planning.

Priority problems and goals are set for each patient throughout each shift. They are the focus of patient care and improvement. 2 to 3 priority problems should be identified per patient in a 12-24 hour period.

The priority problems can be continued from one nurse to the next on a shift as upgraded, downgraded, stabilized or eliminated. Problems should be ended as goals are achieved.

1. **Demonstrate** entering the following examples of the patient’s physical assessment results in the Pulmonary section:

* Click on PULMONARY in the left bar then click on SHOW ALL in the charting area
* To document an abnormality, select Respiratory ASMT (Problems), and select Gas Exchange.

1. **Demonstrate and explain** the “Start Priority Problem” hyperlink in the Care Plan tab andthe stepsfor entering a priority problem.
2. **Demonstrate** starting a new problem using the following information:

* Pulmonary – Gas exchange
  + May be related to - Secretions
  + Expected Outcome – Improve
  + Start Time “T”
  + Save

1. **Demonstrate** documenting the short term shift goal:

* Maintain O2 Sats >94% on O2
* Save and Confirm
* **Demonstrate** the functionality of the magnifying glass icon which allows you to see more information or open an existing problem.
* **Demonstrate** charting abnormal Breath Sounds using the following selections:
* Click Chart then SHOW ALL
* Click RLL and fine crackles
* Click LLL and select fine crackles
* Click cough
* Click productive
* Make up nasty secretions
* Incentive Spirometer: 600X5
* Scroll to Respiratory intervention: D B and Cough and Suction
* **Demonstrate** charting a Baseline assessment
  + Click on Activity/Musculoskeletal
  + Click on Activity Assessment Problems
  + Select Baseline
  + Annotate “contracture left hand”

1. Explain completing a Braden skin assessment screening tool
   * Braden is an automated skin assessment documented within 8 hours of admission and every shift. It assesses the patient’s likelihood of developing pressure ulcers and gives us the chance to document existing pressure ulcers.
   * **Demonstrate** how to document a new incision
   * **Demonstrate** accessing the skin integrity resources as part of documenting a new wound
   * **Demonstrate** when to use skin integrity under Links
2. **Explain c**ompleting a falls risk assessment.
   * Make it a low fall risk
   * Demonstrate Safety Risk Assessment
   * Select WNL
3. **Demonstrate** “Save and Confirm”.

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|  | *NOTE: If the data is* ***unsaved,*** *a yellow checkmark will be displayed on the top of the tab.* |

1. **Reinforce** where charted information is displayed include the hover functionality that displays more details.

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|  | **Transition Statement:** to Beginning and Discontinuing a Line in HED |

#### 4.4.4 Beginning and Discontinuing a Line in HED

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  Beginning a new line can be charted at the same time that the physical assessment is completed. |

**Key Discussion Points**

1. **Show** beginning a new line in the CVC section of the chart and how to chart the following information :

* Line type: Central line
* Site: Internal Jugular
* Side: Right
* Number of Lumens: Double
* Lumen Description: Proximal, Distal
* Dressing: Chlorhex Drsg, Transparent
* Secured with: Suture
* Type “T” in date and time
* Inserted by: Dr. Golightly
* Location: VUMC ED *Emphasize that proper documentation of patient location at insertion of a line can significantly impact reimbursement.*
* Response: c/o pain on insertion, site comfortable after procedure.

1. **Explain** that hovering over the magnifying glass icon will provide more information on the location and site of the line.
2. **Show** documenting an assessment of an existing line.
3. **Show and explain** thatmaintaining, updating or discontinuing an existing line is accomplished by clicking the magnifying glass next to the line location. Typing the letter “T” in line removal will automatically enter the current date and time.
4. **Show** ending an existing line.
5. **Show** clicking Save.
6. **Explain and show** that when line removal information is entered and saved the line shows \*Ended\* next to each piece of charted information.

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|  | **Transition Statement:** to the Charting Plan of Care and Priority Problems lesson. |

#### 4.4.5 Charting Plan of Care and Priority Problems

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| --- | --- |
| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity. |

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| --- | --- |
|  | **Develop Conceptual Knowledge:**  A Plan of Care is started at admission and charted through discharge**.** This plan outlines a set of nursing actions to be delivered to resolve the patient’s condition.  Priority problems and goals are set for each patient throughout each shift. They are the focus of patient care and improvement. 2 to 3 priority problems should be identified per patient in a 12-24 hour period.  The priority problems can be continued from one nurse to the next on a shift as upgraded, downgraded, stabilized or eliminated. Problems should be ended as goals are achieved. |

**Key Discussion Points**

1. **Demonstrate** navigating to the Care Plan tab.
2. **Demonstrate** reviewing the Problem List
3. **Reinforce** clicking chart and the “Show All”.
4. **Explain** that phase, nursing summary, plan priorities and addressing goals occurs toward the end of the shift.
5. **Demonstrate** entering the phase in the Care Plan. This can be assessed by reviewing the goals on the patients pathway, which was assigned and placed in the patient’s chart through StarPanel. Remind them that they can view the goals of the pathway there.
6. **Demonstrate** locating the nursing summary in the Care Plan.
7. **Demonstrate** entering the following free text in the Nursing Summary and plan priority fields:

* Temp 102.4 with Tylenol Q4h. 02 Sats 94% with 2L.

1. **Demonstrate creating Plan Priorities statement:**

* Continue to wean O2 as ordered, draw vancomycin trough after 1800 dose, encourage PO intake and ambulation in room.

1. **Demonstrate** addressing end of shift goals:

* Short Term Goal Status: Met
* Save and Confirm

1. **Demonstrate** ending goals as they are completed.
2. **Demonstrate** saving the Nursing Summary.
3. **Demonstrate** that hovering over the yellow note in the middle column will display text that has been entered.
4. **Reinforce** clicking “Show All” to find the “Discharge Plan” section of the tab.
5. **Explain** that not all fields of the Discharge Plan are required for every unit and that the Discharge Plan must be evaluated every 24 hours.
6. **Reinforce** timing of pathway process by showing slide “workflow of charting”

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|  | **Transition Statement:** to the Charting Patient Education lesson. |

**4.4.6 Charting Patient Education**

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| Length | \_\_ Minutes |
| Preparation | On screen projector |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity.  Group Activity |

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|  | **Develop Conceptual Knowledge:**  Patients require education prior to discharge. The functionality here is the same as charting in any part of HED. Psych has its own patient education tab and it is located on the right drop down menu under “VPH Education.”  One important piece of information that is charted in HED is the care contact. This information can be updated throughout the patient stay. The care contact flows from HED dynamically to the OPC so that the most current information is always available. |

**Key Discussion Points**

1. **Demonstrate** locating the “Education Record” tab in HED.
2. **Demonstrate** documenting one care contact. Reiterate information flows to the OPC.
3. **Demonstrate** clicking “Show All” to find the “Pulmonary Education”.
4. **Demonstrate** filling in the following information:

* Pulmonary->pulmonary care education-> teachback/verbalize understanding->patient and care contact #1

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|  | **Transition Statement:** to Medication Administration lesson. |
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## Medication Administration

**Lesson 5 Overview of Medication Administration**

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| Length | \_\_ Minutes |
| Overview | In this lesson the learner is introduced to confirming medication administration in StarBrowser and Care Organizer. The step-by-step process for administering medication in Admin Rx including the use of a barcode scanner and the 5 Rights is also introduced. The process for Match Medication and cosigning high alert medications will also be covered. |
| Learning Objectives | Demonstrate confirming a medication order in StarBrowser and Care Organizer  Demonstrate the use of a barcode scanner and explain the 5 Rights  Demonstrate administering a matched medication.  Demonstrate the cosigning of a high alert medication |
| Preparation | On screen projection of StarBrowser / Care Organizer |
| Materials | PowerPoint companion |
| Lesson Type | Introduction |

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|  | **Show PowerPoint companion, slide 1.0 with learning objectives** |

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|  | **Transition Statement:**  To the Confirming a Medication Order lesson. |

### 5.2 Administering Medication

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| Length | \_\_ Minutes |
| Preparation |  |
| Materials | Bar code scanner, laminated medication sheets, functional task list in PowerPoint  Training Resources: Rx Tips, Medication Administration When Scanner is Down |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  Once medications are confirmed in Care Organizer the administration can be charted in the Admin Rx tab of HED.  We use the “To Do” view in Care Organizer to identify the medication administration times. We use the “Overdue” view as an alert to show medications that were not given at their scheduled time.  Warnings will interrupt the process of administering medication and **should not** be ignored. For example, warnings will occur when an incorrect dose is selected or the medication is administered too late, too early or when no medication order is found. |

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|  | **Training Resources** Rx Tips Scanner Reset Process |

**Key Discussion Points**

1. **Explain and list** the 5 Rights:

* The Right Patient
* The Right Medication
* The Right Dose
* The Right Route
* The Right Time

1. **Using the Rx Tips Training Resource, review** the steps for administering medication.
2. **Show** identifying medications that are due using the “To Do” view of Care Organizer.

* **Click** “Show Worklist” so that a timeline displays.
* **Explain and Show** the radial buttons “Overdues, Changes, To-Do” and column headers.
* **Show** the location of comments about medications.

1. **Show** administering **Hydralazine:**

* **Scan** medication and address warnings.
* **Scan** the patient armband and address any warnings **if necessary**.
* **Explain** that the medication should be administered before confirming.
* **Save and Confirm.**

1. **Explain** the remaining information contained in the Rx Tips Training Resource.
2. **Show** the location of IV manage for continuous medication drips. Demonstrate how to begin a bottle and end a bottle.
3. **Explain** that Admin Rx is for scheduled medication doses.
4. **Using the Scanner Reset Process Training Resource, explain** the process for resetting the scanner when the barcode does not scan.

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|  | **Transition Statement:** to the Matched Medication lesson. |

### 5.3 Matched Medication

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| Length | \_\_ Minutes |
| Preparation |  |
| Materials | Functional task list in PowerPoint  Training Resource: Match Medication |
| Lesson Type | Demonstrate and let me try activity.  Group Activity |

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|  | **Develop Conceptual Knowledge:**  When a medication is scanned that has more than one order a Matched Medications popup window will display. Admin Rx is unable to identify which medication order to document against and the nurse will need to select the appropriate order.  High Alert medications require cosigning and include IV potassium drip, IV digoxin drip, Heparin, Insulin, and Chemotherapy |

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|  | **Training Resources** Matched Medication |

**Key Discussion Points**

1. **Explain** Match Medication occurs when there are 2 different orders for the same medication. This can occur with, for example, insulin scheduled dose + sliding scale *OR* a scheduled dose of a medication and additional PRN dose.
2. **Demonstrate** scanning insulin tad pole first and choosing which dose of insulin you are charting first by using the highlight function in the matched medication box.
3. **Demonstrate** scanning and administering the sliding scale dose by using the manufacturer bar code on the insulin bottle and completing the steps through the matched medication box. Complete the administration up to the Save and Confirm screen.
4. **Using the Matched Medication Training Resource demonstrate** the extra steps required for administering Matched Medications.

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|  | *High Alert medications require cosigning.* |

1. **Explain** that there are two different methods for cosigning.
2. **Explain** that not all Matched Medications are high alert. (you may have a scheduled pain medication q8 hrs and then a smaller PRN dose for breakthrough pain-this will trigger matched medication but is not high alert and will not need co-signature)

### **Knowledge Check-Skip if Short on Time!**

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|  | Medication Administration  Activity: Hit or Myth  Time:  Materials and prep: Coin, flip chart or white board  Display Knowledge Check slides on PowerPoint companion.  Divide the class into two teams on opposite sides of room.  One trainer asks questions while another keeps score using flip chart or white board.  Toss a coin to see which team goes first. The team that goes first gets one chance to identify whether the statement on the slide is a hit (correct) or a myth (incorrect).  Each correct answer is worth 5 points. If a team gets an answer incorrect the other team gets the next question.  Answers must be “Hit” or “Myth”.  In the event of a tie use the tie breaker question.  Each correct answer earns 5 point. The team earning the most points wins a prize. (Candy, etc.) |

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| **Question #** | **Answer Key** |
|  | Myth – Clicking “Send Rx a message” is the best method for communicating with the pharmacy. |
|  | Hit |
|  | Hit |
|  | Myth – Warnings from the system will occur when an incorrect dose is selected, medication is administered too late or too early, or when no medication order is found. |
|  | Hit |
|  | Myth - The five Rights are: The right dose; The right medication; The right patient; The right route; The right time. |
|  | Tie Breaker – Myth – To confirm medications you do have to be in Active View in Care Organizer. |

## Order Entry - HEO/Wiz

**Lesson 6 Overview of HEO/Wiz**

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| --- | --- |
| Length | \_\_ Minutes |
| Overview | In this lesson the learner is introduced the third clinical system HEO/Wiz used in patient care. |
| Learning Objectives | Define the purpose of the HEO/Wiz system  Demonstrate searching for and locating active orders  Demonstrate entering orders  Demonstrate preforming the Braden skin assessment |
| Preparation | On screen projection of the desktop and the HEO/Wiz icon |
| Materials | PowerPoint companion |
| Lesson Type | Introduction |

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|  | **Show PowerPoint companion, slide 1.0 with learning objectives.** |

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|  | **Introduce and Show** Video “Overview of Horizon Expert Order or HEO/Wiz”. |

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|  | **Develop Conceptual Knowledge:**  Vanderbilt University Medical Center Horizon Expert Order or HEO/Wiz is the third clinical system used in patient care. HEO/Wiz is used by clinicians for entering new patient orders and editing existing patient orders.  Wiz was developed at Vanderbilt and sold to McKesson and renamed HEO. You will hear it called both names. |
|  | **Transition Statement:** to the Navigating HEO/Wiz lesson. |

### 6.1 Navigating HEO/Wiz

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| --- | --- |
| Length | \_\_ Minutes |
| Preparation |  |
| Materials | Checklist for individual activity |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  HEO/Wiz is accessed through the clinical desktop by clicking on the icon with the blue wizard hat entitled WIZ through StarBrowser.  For the purposes of training we will be using the green wizard hat entitled Wiz Train from the desktop. |

**Key Discussion Points**

1. **Explain** the interface layout displaying the patient census information on the left side of the screen.
2. **Explain** the meaning of colors, icons and letters that may appear next to a patient’s name in the patient census list.
3. **Identify and explain** the “Stations”, “Services” and “Attending” columns.
4. **Explain and demonstrate** the Patient name search box and its function.
5. **Show** the functionality of the “Go to desktop” button.
6. **Explain** the “click to sign off” button and the button that links to StarPanel.

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|  | **Transition Statement:** to the Locating Active Orders lesson. |

### 6.2 Locating Active Orders

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| Length | \_\_ Minutes |
| Preparation |  |
| Materials | Checklist for individual activity |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge::**  Looking up orders is a way to verify active orders. When looking up orders, new orders can’t be entered and existing orders can’t be modified.  The orders that are displayed include patient information such as alerts, activity, diet, treatments, labs, medications and IV fluids. |

**Key Discussion Points**

1. **Direct** learners to use the patient name on the **PATIENT CARD.**
2. **Show** selecting a patient and looking up an active order for guiac stools.
3. **Show** clicking “Done” to exit the lookup screen.

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|  | **Transition Statement:** to the Entering Orders lesson. |

### 6.3 Entering Orders

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| Length | \_\_ Minutes |
| Preparation |  |
| Materials | Checklist for individual activity |
| Lesson Type | Demonstrate and let me try activity. |

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|  | **Develop Conceptual Knowledge:**  There are five primary order types: verbal, telephone, written, protocol, and nurse-to-nurse. |

**Key Discussion Points**

1. **Demonstrate and explain** the steps necessary to enter the following telephone order, pointing out that orders are entered on the right side, active orders are displayed on the left and order prompts are displayed top right:

* PCV in am 0500
* Comment – do not draw from left arm
* Click done and complete the order by confirming.

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|  | **Transition Statement: Requesting a Blood Product** |

### 6.5 Requesting a Blood Product

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| Length | \_\_ Minutes |
| Preparation |  |
| Materials | Functional task list in PowerPoint |
| Lesson Type | Demonstrate and let me try activity.  Group Activity |

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|  | **Develop Conceptual Knowledge:**  Blood products are requested from the Blood Bank at the time the product is ready to be infused. HEO/Wiz is the system used to request the blood product.  Blood products are sent via tube station once the request is received |

**Key Discussion Points**

1. **Show and explain** requesting a blood product for a training patient.

* Select your patients
* Select protocol order
* Select test, physician
* Click on the active order for transfuse 2U PRBCs
* Click “request blood product from Blood Bank”
* Click Send
* Click done and Accept Orders

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|  | **Transition Statement:** to the Order Entry Group Activity, Jeopardy. |

# **Knowledge Check**

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|  | Comprehensive  Activity: Jeopardy Game- MUST BE OPENED FROM AN AWS!!!  Time: 30 minutes  Jeopardy Setup Instructions  *Do not delete any items in PowerPoint. Before you edit the PowerPoint content read the directions and warnings contained within the PowerPoint game.*  Designate a facilitator who will be responsible for introducing the game, reading the categories at the start of the round. The facilitator is final authority on the correctness of the answer given.  Designate a game operator who is responsible for running the PowerPoint game.  Provide card or paper and pencil to each team captain (for “Final Challenge” answer only.)    Divide the class into two teams instructing them to select a team captain and choose a team name. The captain will be that team’s spokesperson and will answer the questions for each team (alternatively you can call on individual students within each team to answer questions).  At launch you will click “Start” button at bottom left of screen. Select team order from dropdown menu (First team is chosen randomly).  Select timer duration from the dropdown menu (60 Seconds).  Click “Submit.”  Click “START” – If you receive the message to “enable content”, do so.  Popup “How many teams will be playing?” Enter 2.  Popup “Name of team 1.” Enter “*team name*”  Click “OK”  Popup “Name of team 2.” Enter “*team name*”  Click “OK”  Popup displays which team starts.  Click “OK”  Game Play Directions  The starting team selects the category and point value. (Timer starts when point value is clicked)  Beginning team confers with team members and decides on an answer. When the team captain provides the answer the Game Operator clicks continue. (Game Operator clicks correct or incorrect).  If a team gets the question right they score the number of points allotted for that question.  If a team gets the question wrong the point value is deducted from their score.    Game continues alternating between teams until all questions have been answered.  Teams with positive scores compete in the "Final Challenge".    When “Final Challenge” is clicked the popup box asks for each teams wager.  Teams can wager any or all of their points. Teams have one minute to confer and decide on an answer. Each team writes their answer on a piece of paper and gives it to the facilitator.  Game Operator clicks “Yes” or “No” when popup asks if each team got the answer correct.  Computer adjusts scores based on wagers and winning team is posted. Ties are possible.  Congratulate Winners! Game Over. |

# **Survey and Assessment**

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|  | Review any outstanding items; ask if there are any questions.  Guide learners to the Clinical Systems Evaluation found on the System Support web site. Allow time for thoughtful completion.  Thank learners for their time and attendance.  Dismiss Class! |

**Duties after Class**

1. Update Amanita
2. Log on with Traiako ID to discontinue orders
3. Discontinue all orders for 7N training patients.
   1. Type @911
   2. Select U for Utopia mode
   3. Click on the D/C orders button
   4. Select Discontinue Orders
   5. Select All, then Discontinue
   6. Click done and follow prompts.