

# PatientTouch<sup>®</sup> Clinical Manager User Guide for Administrators v4.7

November 2019

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PatientTouch System – v4.7

November 2019

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## **The Clinical Manager for Administrators**

### **Overview**

The PatientTouch Clinical Manager runs in the pharmacy and on designated workstations in various care areas throughout the hospital where clinicians are using the system. Users can perform many activities, depending upon their individual roles and privileges within the system.

The PatientTouch Clinical Manager is used by various hospital personnel to perform the following tasks:

- Pharmacists have access to update the hospital formulary, maintain other pharmacyrelated configurations and view patient information.
- Caregivers can chart medication administrations on the online MAR.
- Caregivers can view, edit, and print MARs.
- Management can run statistical reports and see system configurations.
- IT personnel can configure settings, prompts and interventions for all modules in the PatientTouch System.
- Lab personnel can collect lab orders and print specimen labels.
- Blood Bank Technicians assist laboratory and blood bank personnel in accurate matching of blood samples with correct blood products, and assist nurses in transfusing blood products to the correct patient.
- Caregivers can collect and label human milk from mothers to ensure that the correct human milk is matched and administered for feeding.
- Hospital staff can call or text one another using the fully integrated communications tool with or without VoIP capabilities.



## **Migrating to the Enterprise Manager**

Some of the functionality in the PatientTouch Clinical Manager (System Manager) is migrating to the Enterprise Manager. The table below outlines the application in which you will find each feature.

Feature	Clinical Manager (System Manager)	Enterprise Manager
Patients	Х	х
Order Verification	Х	
Patient Assignment	Х	Х
Reports	Х	
Pharmacy	Х	
Laboratory	Х	
Intervention/Prompt Setup	Х	
Flowsheet Setup	Х	
mView	Х	
Users (Caregivers in Enterprise Manager)		х
Default Printer	Х	
Roles	Х	х
Configuration:		
Settings		
Hospital Address		х
Global Settings	Х	
Notification Settings (System)	Х	
Notification Settings (Text and VoIP)	Х	Х
User Security		Х
Respiratory Therapy	Х	
Nursing Units	Х	Х
Alerts and Reasons	Х	
Destinations	Х	
Label Printers	Х	
Devices		х
Coding Systems	Х	
Communications		х

## **PatientTouch System Components**

Because each facility has unique clinical workflows and procedures, a PatientSafe Solutions project team works with the hospital to implement the PatientTouch System in each hospital environment. The team works with the hospital's clinical, pharmacy, laboratory, respiratory therapy, and

information systems staff to ensure the necessary training, configurations, policies, and procedures are all in place.

### **System Requirements**

The PatientTouch Positive Patient Identification (PPID) Platform is required for all PPID modules and Vitals and consists of the following components:

- Clinical Manager (Optional with the installation of any clinical module)
- Enterprise Manager (Required for all 4.x Environments. Also a necessity for PatientTouch Communication applications)
- PatientTouch Handheld
- Interface Engine
- Clinical Manager Reporting Services
- PatientTouch Analytics

### PatientTouch Clinical Manager

The PatientTouch Clinical Manager runs in the pharmacy and on designated workstations in various care areas throughout the hospital where clinicians are using the system. Users can perform many activities, depending upon their individual roles and privileges within the system. The Clinical Manager is optional for those sites interested in installing any of the following clinical modules:

- Medication Administration
- Care Interventions
- Specimen Collection
- Infant Care
- Blood Product Administration
- Clinical Communications

The PatientTouch Clinical Manager is used by various hospital personnel to perform some of the following tasks:

- Pharmacists have access to update the hospital formulary, maintain other pharmacy-related configurations and view patient information.
- Caregivers can assign patients, run reports or chart medication administrations on the online MAR.
- Caregivers can view, edit, and print MARs.
- Management can run statistical reports, view patient information and see system configurations.
- IT personnel can configure settings, prompts and interventions for all modules in the PatientTouch System.
- Lab personnel can collect lab orders and print specimen labels.
- Blood Bank Technicians assist laboratory and blood bank personnel in accurate matching of blood samples with correct blood products, and assist nurses in transfusing blood products to the correct patient.
- Caregivers can collect and label human milk from mothers to ensure that the correct human milk is



matched and administered for feeding.

 Hospital staff can call or text one another using the fully integrated communications tool with or without VoIP capabilities.

### **Platform**

The PatientTouch Platform is required for use on any of the system modules. The platform contains the PatientTouch Clinical Manager for centralized management of all clinical rules and content, management of core system configurations, and reporting services. The PatientTouch Platform contains both inbound and outbound interface engines.

### **Enterprise Manager**

The Enterprise Manager is a required application for all 4.x environments. It is a tool that provides greater flexibility in assigning caregivers and patients. You will use the Enterprise Manager to manage the relationship between the hospital, care role, and the patient.

The Enterprise Manager also allows you to:

- 1. Create and manage user information/permissions and contacts
- 2. Manage user extensions
- 3. Configure the organization structure, including organization types (i.e. unit) and organization units (i.e. 3rd Floor) across multiple facilities
- 4. Configure the clinical attributes, including care roles and clinical profiles
- 5. Manage settings for system security, messaging and voice
- 6. Manage devices
- 7. View patient information
- 8. Add multi-facility configuration

### PatientTouch Handheld

PatientTouch includes an Apple iPod touch<sup>®</sup> (16GB/32GB) or an iPhone. Please refer to the iOS Compatibility Matrix located on the client portal for recommended PatientTouch iOS devices.

#### Softscan

PatientSafe Solutions is recommending our Softscan technology that enables the camera to scan badges and medications.

#### **Handheld Workflow**

The PatientTouch System requires the caregiver to scan a unique user ID barcode (typically found on the caregiver's name badge) to log into the system, complete the med pass and/or other workflows for each patient, and document and "sign" the information, providing enhanced security and accountability for the process.



By scanning barcodes on patient wristbands, medications and caregiver badges, caregivers can quickly and easily check medication accuracy at the bedside; lab personnel can accurately scan specimens and document collection; caregivers can match infant formulas to the correct baby and more.

Caregivers can also document pertinent information, such as vital signs, IV rate flow, and reasons for alert overrides. The handheld wirelessly links to the PatientTouch server for real-time updates and charting.

### PatientTouch Application Uses

Depending on how the hospital sets up the PatientTouch System, it can streamline a variety of reporting and communication needs. For example, the PatientTouch application can:

- Initiate and document workflows
- Initiate vital readings and record vital patient data
- Document override reasons for deviations on a med pass
- Document injection sites
- Send messages to the pharmacy
- Print MARs or other reports for physicians and caregivers
- Assist phlebotomists with correct labeling of specimen collection tubes at the bedside
- Assist laboratory personnel in accurate matching of blood samples with correct blood products
- Caregivers can perform patient care activities such as vitals, I/O, nursing hourly rounds, skin assessments, evaluating fall risk, capturing pain information, and more

## PatientTouch System Modules

#### **Medication Administration Module**

Using an interface with the hospital information systems, the PatientTouch System receives patient medication orders, admitting data, and allergy information for example. The system is designed to help caregivers ensure the Seven Rights of medication administration at the point of care. To help ensure patient safety, the system also performs drug interaction, allergy checking and duplicative drug-therapy checking for medications administered when there is no order found in the system. An online medication orders list on the PatientTouch application allows the clinician to see STAT, late, due, scheduled, and PRN medications.

Clinical prompts can be associated with formulary items to allow the collection of patient data, such as temperature, blood pressure, blood glucose, and so on, at the time of administration. The alerting capabilities give clinicians visual indicators of potentially harmful events at the time of medication administration.

The Medication Administration module also includes a real-time reminder system to make the clinician aware of due administrations, late administrations, data collection follow-up, order status changes, and new orders.

Medication administration is documented on both hardcopy and online versions of a MAR, which can be viewed by all care team members. Additionally, the PatientTouch System provides interfaces with other vendors' MARs.

### **Vitals Module**

The Vitals module delivers user-definable interventions to the bedside for real-time documentation of patient's clinical status. Caregivers leverage the module to capture and document vitals signs, Input/Output (I/O)/dietary status, and other clinical observations at the point of care. All observations are documented in real time and may be presented to the care team via mView, Flowsheets, and as clinical decision values throughout clinical workflows, if configured to do so. Observations can also be sent via an outbound interface to other clinical systems.

Users can author Interventions using Clinical Manager, which can contain clinical prompts and other Interventions. All Interventions guide the caregiver through the collection process.

### **Care Interventions Module**

The Care Interventions module provides point-of-care workflows and clinical data entry support for performing patient care activities such as vitals, I/O, nursing hourly rounds, skin assessments, evaluating fall risk, capturing pain information, and more. Interventions can be configured to suit your facility's point-of-care workflows, including clinical data collection, assessments, safety best practices, patient status, and care team clinical and activity documentation.

Care intervention orders can be scheduled and executed via the PatientTouch Clinical Manager and PatientTouch. They can be ordered and discontinued based on assigned roles and privileges.

Intervention results are seamlessly documented in real-time and can be made available for review in the mView display on caregiver handhelds, and/or in the patient's flowsheet(s) in the PatientTouch Clinical Manager.

Additionally, data captured using Care Interventions supports HL7 and Web Service-based integration with other hospital information systems.

### **Specimen Collection Module**

PatientTouch Specimen Collection workflows increase the safety, accuracy, and efficiency of lab order processing and fulfillment by combining the PatientTouch System with mobile label printing at the point-of-care.

PPID-based workflows coupled with the PatientTouch Mobile Orchestration Platform enable frontline caregivers to enforce patient identification and care verification, document in real time, and optimize care team workflows through order recruitment and escalation.

### **Blood Product Administration Module**

The PatientTouch Blood Product Administration (BPA) module is a point-of-care Transfusion Safety Management System intended to assist in positive patient identification for the transfusion of blood products.

In conjunction with the PatientTouch Specimen Collection module, which assists phlebotomists with correct labeling of specimen collection tubes at the bedside, BPA assists laboratory personnel in accurate matching of blood samples with correct blood products, and assists nurses in transfusing blood products to the correct patient.

### **Infant Care Module**

PatientTouch Infant Care helps ensure safe, high-quality infant care. PPID-based workflows support accurate mother and baby matching, accurate labeling of collected breast milk and safety of breast milk feedings.

### **Clinical Communications Module**

PatientTouch Clinical Communications is a fully integrated communications tool that improves care collaboration, safety, and patient satisfaction by allowing caregivers to stay connected with each other and the patient care process. The PatientTouch Platform eliminates the inefficiencies of carrying multiple devices and using disconnected applications by providing a single, mobile application for all communications and clinical workflow needs. This product is currently in Limited Commercial Release (LCR).

## Additional PatientTouch Services

### **Professional Services Support**

PatientSafe Solutions assists hospitals by supporting the full integration of the PatientTouch System with your EHR and other health information systems. Included in this is the ability to support nursing documentation and custom interventions and assessment workflows, as well as to support your organization's Meaningful Use Activities. This includes specific interoperability functionality to support Clinical Quality Measure (CQM) data capture and reporting. The Clinical Manager provides specific code fields to identify the element vocabulary (SNOMED-CT<sup>®</sup>, RxNorm, LOINC<sup>®</sup>, etc.) code, short description, and description for the following clinical information:

- 1. Interventions and Assessments
- 2. Formulary Items
- 3. Routes of Administration

Documentation performed at the bedside using PatientTouch will contain these codes, and may be optionally exported via the HL7 interface.

Please contact PatientSafe Solutions for further information on the services we can provide to support the set up and implementation of this functionality.

### **Campus Support**

The PatientTouch System now optionally offers Campus Support features. Licensed facilities of Campus Support will now have the option to manage and access multiple hospital facilities from a single PatientTouch Server. This feature set simplifies management of the PatientTouch System across multiple hospitals that have standard formularies and configurations. Additionally, Campus Support can enable or restrict user access to one or more facilities within a campus, and therefore support users that may float between multiple facilities, while restricting other users to a single hospital within a campus of facilities. When applicable and configured, this user guide provides instructions for Campus Support.



If you are interested in learning more about Campus Support, please contact your PatientSafe account manager for more information about obtaining any necessary licensing and services to access this new platform.

## **Logging In and Out**

An icon on the hospital workstation allows you to quickly access the PatientTouch Clinical Manager. Some facilities may provide a link on the intranet network from which users can access the application.

The system administrator sets your login name and you create your own unique password. You use the same password for the Clinical Manager, Enterprise Manager, and PatientTouch.

You may have access to one or more Hospitals through the optional feature: Campus support. When applicable you'll be offered the ability to choose a specific hospital at login, or "All" hospitals. The "All" hospital option will allow you to perform certain functionality that will apply to all hospitals within a campus.

### Logging In

To log in, perform the following steps.

1. Double-click the **PatientTouch Clinical Manager** icon to launch the application. Or, select the link from the intranet.



- 2. Enter your login name and password and click **OK**. (Please note that the login name and password are case sensitive).
- If your hospital is configured for Campus Support, select the facility for which you want to log in. Or, select <All>. Note for Campus Support: If your hospital is *not* configured for Campus Support, you will not be provided with the hospital selection field.
- 4. Click **Options** to change the domain name of the server to which the PatientTouch System is pointing.
- 5. Click **Exit** to quit the Patient Touch Clinical Manager.

PatientTouch Clinical Manager - PatientSafe Mira Mesa	
Blue- M	Ailstein
patient touch *	Login Name: jcartwright Password: •••••• OK
Exit Options Change Password Version 4.5	5.0 (0700-SNAPSHOT), Copyright © 2011-2017 PatientSafe Solutions, Inc.

### **Logging Out**

To log out of the PatientTouch Clinical Manager and return to the login screen, select **Logout** from the **Manager** menu.

**Note for Campus Support**: If your hospital is configured for Campus Support, and you want to change views to a different hospital, you must log out and log back in and select that hospital.

<u>M</u> anager	<u>V</u> iew	<u>H</u> elp
Logou	t	
Chang	e <u>P</u> assw	ord
Exit		

- To close the application, select **Exit** from the **Manager** menu.
- The system may also log you out automatically after a period of inactivity that is defined for your hospital to comply with hospital policies and HIPAA guidelines.

### **Clinical Manager Navigation**

Use the menu structured list of folders in the left pane of the main screen to open windows in the right pane of the main screen in which you can view and enter information.



The name of your hospital displays in the upper left-hand side of the screen. Some servers may host more than one facility.



The name on the Enterprise Manager is the name of the Organizational Services system. For example, the name might be PatientSafe Hospital and you may have facilities called PatientSafe Mira Mesa and PatientSafe Hospital.



System time is displayed in the upper right corner of all Clinical Manager screens. The Clinical Manager uses the time zone of the server.

lanager <u>V</u> iew <u>H</u> elp C		02/05/2019 11:08 PS
PatientSafe Mira Mesa  PatientSafe Mira Mesa  Order Verification  Patient Assignment  Reports  Pharmacy  Blood Administration  Infant Care  Intervention/Prompt Setup  Flowsheet Setup  Roles  Configuration  Settings  Alerts and Reasons  Destinations  Label Printers  Devices  Coding Systems	Settings         Hospital Address       Global Settings       Notification Setting         Lead and Lag Times for RT Orders	minder Delay (%): 75 Throughout the Clinical Manager, yellow fields are required; white fields are optional.

The system displays only the options available to you. This is based on the role and privileges you are assigned. The menus and options you see may be different from those illustrated in this guide.

For example, caregivers with the Nurse Manager role may see options that allow them to view and edit the online MAR, run reports, open patient charts, and assign patients. Pharmacists will have options that allow them to view the master drug file or to edit SIG codes.

- Click the Refresh icon or select **Refresh** from the View menu to update the information window with changes.
- To expand the information screen to the entire work area, click the left arrow between the

two panes. To return to a dual-pane window, click the right arrow  $\clubsuit$  .

Double-click folders to expand them and view or navigate to the options within.

#### **Searching the Database**

The PatientTouch Clinical Manager database is searchable. The list of patients, medications, SIG codes, and additional information can be searched by entering a few characters of the item's name in the Search field. The Clinical Manager searches all columns for characters that appear in the same sequence.

**Note for Campus Support:** If your hospital is configured for Campus Support, the search will only look for patients in the selected hospital.

PatientTouch Clinical Manager - B	lue- Milstein - Us	er, Admin						×
Manager View Help								
G							02/05/2019 1	1:13 PST
PatientSafe Mira Mesa	Patients							
Patients Order Verification		(	My Patients	Active Patie	nts C Advanc	ed Search		
- Patient Assignment			Search	fr				
	Last Name	First Name	DOB	MRN	Visit ID	Nursing Unit	Location	
- Caboratory	Burns	Frank	09/28/1956	M100006	V100006	3RDFLOOR	121 2	<b>-</b>
Blood Administration								
B-								
E- Carlowsheet Setup								
🗄 🗀 mView								
Users								
Configuration								
								•
			View	MAR Vie	ew Flowsheet	View Transfusions	Patient D	etail
· · · · · · · · · · · · · · · · · · ·								

## Configuration

### **Settings**

The Settings tab allows you to enter setup information for:

- Hospital Address
- Global Settings
- Notification Settings
- User Security
- Respiratory Therapists (optional)

This section explains how to configure these settings. Initially, your PatientSafe Solutions representative will help define these settings. However, the hospital's system administrator can edit these options and will do so after the initial setup in order to keep the configuration current.

### Hospital Address Tab

The Hospital Address and Time Zone are configured under the Organization Unit in the Enterprise Manager. They display here for your reference.

M PatientTouch Clinical Manager - E	Blue- Milstein - U	User, Adı	min				
Manager View Help							
C						(	02/05/2019 11:15 PST
PatientSafe Mira Mesa	Settings						
Patients     Order Verification     Patient Assignment     Patient Assignment     Patient Assignment     Patient Assignment     Patient Assignment     Patient Assignment     Patient Care     Intervention/Prompt Setup     Intervention/Prompt Setup     Powsheet Setup     Pows	Address: City: State:	92121 PatientS 5380 Mi San Die CA	Safe Mira Mesa ira Sorrento Pla	n Settings		Respiratory Therapy	
Coding Systems				 Savi	e		

#### **Global Settings Tab**

Global Settings configure basic options such as the shift start time and duration. To set up these options in the Clinical Manager, perform the steps below:

- 1. Select **Configuration > Settings**.
- 2. Click the **Global Settings** tab.

PatientTouch Clinical Manager -	Blue- Milstein - User, Admin	- • • ×
Manager View Help		
C	02/05/	2019 11:16 PST
PatientSafe Mira Mesa     PatientS     Order Verification     Patient Assignment     Reports     Pharmacy     Pharmacy     Blood Administration     Infant Care     Intervention/Prompt Setup     Intervention Scheduling     Flowsheet Setup     Users     Users     Roles     Configuration	02/05/ Settings Hospital Address Global Settings Notification Settings User Security Respiratory Therapy Hospital Settings Hospital Code: -1 Mail Server Label: Shift Start Time: 07:01 Shift Duration: 12 Hours ▼ Faable Patient Specific Medication Order Matching F Enable Same Name Patient Matching Due and Late Reminders Snooze Interval: 15 Minutes Reset Reminders	2019 11:16 PST
Settings           Settings           Nursing Units           Alerts and Reasons           Destinations           Label Printers           Devices           Coding Systems	Task Settings         Image: Construction of the set	

3. Select the following global settings.

Hospital Settings: Hospital Code	Set for you by PatientSafe Solutions and cannot be changed.
Mail Server Label	The IP address of the hospital's e-mail server. It is used if you want e-mails to be sent through the hospital's mail server (recommended). If left blank, e-mails will be sent using a PatientSafe Solutions mail server.
Shift Start Time	Sets the start time for the first shift column displayed on the printed and online MARs.
Shift Duration	Determines whether the MAR shifts display as three 8-hour columns or two 12-hour columns.
Enable Patient-Specific Medication Order Matching	Select this checkbox if you want to reduce the number of patient-specific medications that must be re- labeled by the pharmacy when certain changes are made to an order but the medication and dose remain the same. If this feature is active and the pharmacy makes a change to an existing order such that it requires a new order and new patient-specific barcode label, the clinician can still scan the ori- ginal patient-specific barcode on the medication until the pharmacy is able to provide the new label. This feature only works if the medication and dose match the new order for 24 hours after the original order is discontinued.
Enable Same-NamePatient Matching	Select this checkbox to display an icon next to the names of patients who have identical names. The icon only appears next to the names of patients who share both first and last names.
Due and Late Reminders:	Depending on how the system is configured, users can receive pop-up reminders about the items on the To Do tab: due and/or late medication doses, uncollected lab orders, due or late interventions, or number of unverified orders on the handheld. The reminder pop-up will display periodically until the task is complete. The Snooze Interval setting defines the length of time between the reminder pop-ups if the user selects Snooze. The Snooze Interval can be set to last from 5—60 minutes in 5-minute



	increments. In certain situations, you may want to reset reminders being sent to users about various activities (e.g. due and late medications). For example, the system may be down for a long period of time and backup procedures put in place. Once the system is back up, you do not want to remind users of activities for which they may have already addressed during the down time. Therefore, you can select "Reset Reminders" and specify the unit(s) for which the system will only remind users about activities from that point forward.
Task Settings	The Enable Task Monitoring, Reminders and Escalation setting determines whether or not users will receive reminder pop-ups and an incremental badge count for the To Do tab on the handheld. Additionally, if the Specimen Collection module is installed, this setting determines if the user will receive lab escalation messages. By default, this box is checked. However, during setup, the PatientSafe Solutions field team may uncheck this box so the new system easily loads without extraneous reminders and tasks. When you are ready to use the system, this checkbox must be selected for reminders and the To Do tab badge count to work. The Upcoming Tasks Lead Time defines the window of time for which to display upcoming orders in the Upcoming section of the caregiver's To Do list. For example, if this setting is defined for 12 hours, the system will show any "upcoming" orders within the next 12 hours.
Label Printer Settings	These settings are enabled with the installation of Specimen Collection or Infant Care Modules. A descrip- tion of how to set this option is included in this user guide.

4. Click **Save** to record your changes. Note that the **Save** button is only available if you have made changes in the tab settings.

#### **Notification Settings Tab**

The Notification Settings tab in the Clinical Manager allows you to enable notifications and configure the behavior of System Messages.

Notification settings for text messages, notification messages, clinical due and late reminders and voice calls are all configured in the Enterprise Manager.

- 1. Select Configuration>Settings.
- 2. Click the **Notification Settings** tab.

Use the descriptions below the screen image to complete the fields.

📶 PatientTouch Clinical Manager - B	lue- Milstein - User, Admin	
Manager View Help		
C	02/	05/2019 11:17 PST
C	525 Settings Hospital Address Global Settings Notification Settings User Security Respiratory Therapy System Message Notification Behavior I™ Enable Notifications Sensory Visual To manager other Notification Behavior settings, Please click: Go to Enterprise Manager System Message Priority Settings Stat Orders: High ▼ Urgent/ASAP Orders: High ▼ Routine Orders: High ▼ Timed Orders: High ▼	05/2019 11:17 PST
	• m Save	,

System Message Notification Behavior	Click this checkbox to enable system notifications.
System Message Priority Settings	Set the message priority (High, Medium, or Low) for <b>Stat, Urgent, Routine</b> and <b>Timed</b> medication administration and specimen collection orders. Priority level determines the category of the message in the Inbox and the notification behavior initiated when order messages are received.

After defining the desired notification settings, click **Save** to record your changes. Note that the **Save** button is only available if you have made changes in the tab settings.

### **User Security Tab**

The User Security settings are now configured in the Enterprise Manager and a link is provided for your reference.

However, two settings remain specific to the Clinical Manager and need to be defined here. Auto Logout (min): This defines the amount of idle time before the user is automatically logged out of the Clinical Manager.

Login Failed Lockout Message: This is a custom message displayed to a user when they attempt to log into the Clinical Manager but have failed three times.

🗾 PatientTouch Clinical Manager - Blue- Milstein - User, Admin	. D 🗙
Manager View Help	
C 02/05/2	2019 11:18 PST
C       02/05/2         PatientSafe Mira Mesa       Settings         PatientS       Order Verification         Patient Assignment       Reports         Reports       Auto Logout (min):         Laboratory       Elsoratory         Elsoratory       Login Failed Lockout Message:         Plater Assignment       System Manager         Reports       Auto Logout (min):         Laboratory       Login Failed Lockout Message:         Plater Assignment Care       Plater Care         Infant Care       Plater Setup         Infant Care       Niew         Users       Noles         Configuration       Settings         Destinations       Label Printers         Devices       Coding Systems	019 11:18 PST
Save	

### **Respiratory Therapy Tab (Optional)**

For hospitals that have enabled the optional Respiratory Therapy (RT) module, these settings determine how the PatientTouch System manages orders designated as RT orders. To configure these options in the Clinical Manager:

- 1. Select **Configuration > Settings**.
- 2. Click the **Respiratory Therapy** tab.

PatientTouch Clinical Manager - I	Blue- Milstein - User, Admin 💿 🔍
Manager View Help	
C	02/05/2019 11:19 PST
PatientSafe Mira Mesa         Order Verification         Patient Assignment         Reports         Pharmacy         Blood Administration         Infant Care         Infant Care         Intervention/Prompt Setup         Intervention Scheduling         Flowsheet Setup         Nitervention         Configuration         Settings         Nursing Units         Destinations         Destinations         Devices         Coding Systems	Settings         Hospital Address       Global Settings       Notification Settings       User Security       Respiratory Therapy         Lead and Lag Times       01:00       Lag Times       01:00       Reminder Delay (%): 75         Respiratory Therapist Settings for RT Orders       Image: Notify of New/Updated Stat Orders       Image: Notify of New/Updated Routine Orders         Image: Notify of Discontinued Stat Orders       Image: Notify of Discontinued Stat Orders         Image: Notify of Discontinued Stat Orders       Image: Notify of New/Updated Routine Orders         Image: Notify of New/Updated Routine Orders       Image: Notify of New/Updated Routine Orders         Image: Notify of New/Updated Routine Orders       Image: Notify of New/Updated Routine Orders         Image: Notify of New/Updated Routine Orders       Image: Notify of Discontinued Stat Orders         Image: Notify of New/Updated Routine Orders       Image: Notify of Discontinued Routine Orders         Image: Notify of Discontinued Routine Orders       Image: Notify of Discontinued Routine Orders         Image: Notify of Discontinued Routine Orders       Image: Notify of Discontinued Routine Orders         Image: Notify of Discontinued Routine Orders       Image: Notify of Display Due Orders Image: Nurses Due List         Note: Assigned Nurses Always Receive Late RT Order Reminders       Save

3. Select the Lead and Lag Times for RT Orders, as follows:

Lead Time Lag Time	The times you set here determine the lead time and lag time (RT orders only) when there is no lead or lag time set in the SIG Code. SIG Code lead or lag times always take precedence over these settings. These settings drive if/when an RT medication is considered to be early (too soon before the scheduled dose due time) or late (too long after the scheduled dose due time).
Reminder Delay (%)	This number is a percentage of the lag time before a "Dose Due" reminder for an RT medication displays on the handheld. For example: If the lag time is set by the hospital to 1 hour (01:00), enter:
	25% to display a reminder 15 minutes after the RT med due time
	50% to display a reminder 30 minutes after the RT med due time
	75% to display a reminder 45 minutes after the RT order due time
	100% to display a reminder only after the lag time (1 hour) elapses

#### 4. Define the Respiratory Therapist Settings for RT Orders:

Notify of New/Updated Stat and Routine Orders	Select this option to notify RTs about new/updated and/or discontinued RT orders for assigned patients. You can choose one or both of these options.
Notify of Discontinued Stat and Routine Orders	If the hospital is utilizing the Order Verification features, be aware that users will receive this noti- fication in their Inbox and a task in their To Do list to verify the order.

5. Define the Nurse Settings for RT Orders:



Notify of New/Updated Stat and Routine RT Orders	Select this option to notify nurses about new/updated and/or discontinued RT orders for patients assigned to them. You can choose one or both of these options.
Notify of Discontinued Stat and Routine RT Orders	If the hospital is utilizing the Order Verification features, be aware that users will receive this noti- fication in their Inbox and a task in their To Do list to verify the order.
Display Order Verification Icon on Handheld	If your hospital has enabled order verification, the verification status is displayed on the hand- held.
Remind Nurse of Due Orders	Select this option to alert nurses when RT-specific orders are due, based on the reminder delay defined above.
	<b>Note</b> : Regardless of the settings you select, nurses always receive reminders of late RT orders for patients assigned to them.
Display Due Orders in Nurses Med Due List	Select this option to display RT-specific orders in the list of "Meds Due" after a nurse scans a patient.

6. Click **Save** to record your changes. Note that the **Save** button is only available if you have made changes in the tab settings.

### **Nursing Units**

The PatientTouch System automatically creates nursing units, rooms and bed numbers based upon information received from the hospital's ADT (Admissions, Discharges and Transfers) system. Additionally, nursing unit information comes over from the Enterprise Manager>Organization Units.



#### Nursing Units are made inactive via the Enterprise Manager.

Use the Clinical Manager to view and edit the following nursing unit information:



### **Edit a Nursing Unit**

anager <u>V</u> iew <u>H</u> elp		
3		02/05/2019 11:21 P
PatientSafe Mira Mesa	Nursing Units	
Patients     Order Verification	Search	
Patient Assignment     Reports	Nursing Unit	
Pharmacy	2-West	-
Laboratory	2.N 2E	
Blood Administration	2E 2E (B)	
- 🗀 Infant Care	2N (Inactive)	
Intervention/Prompt Setup	2N (B)	
Intervention Scheduling	2S (Inactive)	
Flowsheet Setup	2S (B)	
- 🗀 mView	2W	=
- Users	2W (B)	
Roles	3 East 3 North	
Configuration	3 North 3 South	
Settings	3 West	
Nursing Units	3-North	
- Alerts and Reasons	3-North	
- Destinations	3-South	
Label Printers	3.N (Inactive)	
Devices	3E	
Coding Systems	3E (B)	
	3N 3N (B)	
	3RDFLOOR	
	35	
	3S (B)	•
		Edit

To edit a nursing unit, perform the following steps.

- 1. Select a unit and click **Edit**, or simply double-click the highlighted unit.
- 2. In the **Unit** tab, enter or change information as follows:

1	Nursing Ur	nit: 3 South	23	J
	Unit S	ettings Clinical Checks Lab Settings		
	Name:	3 South		
		Non-Profile Unit		
		🗌 Infant Care Unit		
	Rooms:	330 1		
		331 1		L
		332 1		l
		333 1		
		334 1		ľ
		335 1		l
				L
				L
		OK Cancel	Apply	

- The Name field automatically populates according to what is sent from the hospital's ADT system or from the Enterprise Manager. You cannot edit this field. If it does not match the name from the ADT system, information will be incorrect and/or lost.
- Non-Profile Unit: Select this check box for areas such as emergency rooms or other units where caregivers administer medications that are not routinely entered in the Pharmacy system. When this option is selected, users in these areas will still receive an Order Not Found in System alert when scanning medications. However, they will not have to provide an override reason and no order matching takes place.
- Infant Care Unit: Select this check box if the unit is an Infant Care nursing unit
- **Rooms** Numbers automatically populate according to what is sent from the hospital's ADT system or from the Enterprise Manager. Rooms are made active or inactive via the Enterprise Manager.
- Click Apply to save nursing unit settings and remain in the Nursing Unit window to perform more edits. Or click OK to save changes and close the Nursing Unit window.
- 4. In the Settings tab, enter or change information as follows:

N	Iursing Unit: 3 South
	Unit Settings Clinical Checks Lab Settings
	Lead Time: 00:00 Lag Time: 00:00
	Reminder Delay (%): 50
	✓ Notify Nurse of New/Updated Stat Orders
	✓ Notify Nurse of New/Updated Routine Orders
	✓ Notify Nurse of Discontinued Stat Orders
	Notify Nurse of Discontinued Routine Orders
	OK Cancel Apply

- Enter a Lead Time and Lag Time for the unit in hours:minutes format. (This option is not available for non-profile units.) The time you set here determines the lead time and lag time for medication administration only when there is no lead or lag time set in the SIG code or formulary item. The formulary and SIG code lead or lag times always take precedence. Example: you would enter 1:00 and 1:00 for one hour each for lead and lag time.
- Enter the Reminder Delay %. (This is not available for non-profile units.) This number is a percentage of the lag time before a med due reminder displays on the handheld. For example, if the lag time is set to 1 hour, then enter:
- 25% to display a reminder 15 minutes after the med due time
- $\circ$   $\,$  50% to display a reminder 30 minutes after the med due time
- 75% to display a reminder 45 minutes after the med due time
- 100% to display a reminder only after the lag time (1 hour) elapses



If the hospital is utilizing the Order Verification features, be aware that users will receive the notifications below in their Inbox and a task in their To Do list to verify the order.

- Click Notify Nurse of New/Updated Stat Orders to notify caregivers on the nursing unit specifically about new and updated STAT orders for their assigned patients. (This option is not available for non-profile units.)
- Click Notify Nurse of New/Updated Routine Orders to notify caregivers on the nursing unit specifically about new and updated routine (non-STAT) orders for their assigned patients. (This option is not available for non-profile units.)
- Click Notify Nurse of Discontinued Stat Orders to notify caregivers on the nursing unit about discontinued STAT orders for their assigned patients.



- Click Notify Nurse on Discontinued Routine Orders to notify caregivers on the nursing unit about discontinued routine (non-STAT) orders for their assigned patients.
- 5. In the **Clinical Checks** tab, select options as follows:

1	Nursing Unit: 3 South
	Unit Settings Clinical Checks Lab Settings
	Disable Allergy Checking
	Disable Drug Interaction Checking
	Disable Duplicate Therapy Checking
	Disable Max Single Dose Checking
	T Disable Acetaminophen Cumulative Dose Checking
	OK Cancel Apply

- Select **Disable Allergy Checking** to prevent this check from occurring.
- Select **Disable Drug Interaction Checking** to prevent this check from occurring.
- Select Disable Duplicate Therapy Checking to prevent this check from occurring for any patient in this nursing unit. This setting is only active when the Enable Duplicate Therapy Checking setting is selected.
- Select Disable Max Single Dose Checking to prevent this check from occurring.
- Select Disable Acetaminophen Cumulative Dose Checking to prevent this check from occurring.



#### The options you set here will be valid for the selected nursing unit only.

6. In the Lab Settings tab, enter the lead/lag times for each priority type (Pooled Routine, Timed and

Scheduled, STAT and Urgent).

- 7. The Interventions tab displays if you do not have the Intervention Scheduling Module enabled.
  - Click Add Intervention to add a Care Intervention to the nursing unit.
  - Click **Remove** to remove a Care Intervention from the nursing unit.

Unit S	ettings Clinical Checks	Lab Settings	Interventions	
Interve	ntions			_
	Name	Display Nam	e	
	Respiratory Evaluation	Respiratory E	val. 🔺	· ]
			-	-1
	Add Intervention	Re	emove	

### **Alerts and Reasons**

A fundamental design principle of the PatientTouch System is to give hospitals latitude in managing clinical process exceptions and to allow caregivers to exercise independent clinical judgment. And so, while the system may offer alerts concerning allergies, late dosing, wrong dosing, etc., caregivers always have the ability to do what they think is right in any situation. An example would be to override an alert saying a medication dose is early (in which case a reason for doing so is required).

The **Override Reasons** tab contains the master list of possible override reasons for all situations. This list serves as the "library" from which to choose what reasons are made available to the caregiver on the handheld. This "library" of reasons is customized to the hospital's preferences and policies. For example, reasons for a medication given late might include 'Patient occupied', 'Pending IV start', 'Clarifying physician order', etc.

The **Alert Reason Lists** tab contains the system-generated alert types requiring users to provide an override reason. For each alert type, you can build a logical list of appropriate override reasons using the reasons from the Override Reasons "library". The handheld displays a list of these approved override reasons for the specific alert that the caregiver has received. For example, the handheld might display an alert when it detects that a patient may have an allergy to an un-ordered medication. The clinician can override this alert and continue to administer the medication after they select a reason why they are choosing to continue the medication administration.

Given the required privileges (Manage Override Reasons), you can review and edit the override reasons library and the reasons for each alert type from **Alerts and Reasons** under the **Configuration** folder.

### Add an Override Reason

To add a reason to the Override Reasons list, follow the steps below.

1. Select **Configuration > Alerts and Reasons**.



PatientTouch Clinical Manager - B	lue- Milstein - User, Admin	
Manager View Help		
C		02/05/2019 11:24 PST
PatientSafe Mira Mesa	Alerts and Reasons	
PatientSafe Mira Mesa  Patients Order Verification Patient Assignment Reports Caboratory Caboratory Dation Administration Caboratory Caboratory Dation Scheduling Differention Scheduling Differention Scheduling Differention Scheduling Differention Scheduling Differention Differention Differention Differentiation Diffe	Override Reasons         Alert Reason Lists           Search	
	DECIDED NOT TO GIVE NOW Delete	Edit New

- 2. Click New.
- 3. Enter a name for the new override reason in the Display Text field.

New Override Reason:	×	
Display Text Annotation Allowed Code	Patient Condition	
	OK Cancel Apply	)



Maintain abbreviated entries when possible. Text that is too long will not display properly on the handheld. When entering text, remain brief but clinically accurate for documentation.

4. Select **Annotation Allowed** to display an icon on the handheld that allows free text entry when this override reason is selected. The annotation information displays on the patient's MAR,



Flowsheets, and mView.

- 5. Code (Optional): Enter a code in the Code field.
- 6. Click **OK** to save the new reason and close the window.

#### **Delete an Override Reason**

- 1. To delete an override reason, select the reason from the list and click **Delete**.
- 2. Click **OK** to confirm the deletion.

ſ	Confirma	tion
	?	Are you sure you want to delete this Override Reason?
		Yes No

#### **Edit an Override Reason**

- 1. To edit an override reason, select the reason from the list and click **Edit** or simply double-click the highlighted reason.
- 2. Edit the Display Text field and click **OK** to save the changes.

#### Alert Reasons Lists

The Alert Reasons Lists can be viewed and edited by clicking the **Alert Reason Lists** tab. When the user receives one of these alert types on the handheld, the list of defined reasons for that particular alert is available for the user to select from when they decide to override. The list of alert types is not configurable. Only the override reasons for each alert from which the clinician can select can be configured.

#### Edit Alert Reason List

1. Double-click an Alert Reason List to modify.



Manager View Help	
C	02/05/2019 11:26 PST
PatientSafe Mira Mesa       Alerts and Reasons         PatientSafe Mira Mesa       Override Reasons         Order Verification       Patient Assignment         Reports       Marce Manager         Blood Administration       Blood Administration         Infant Care       Blood Unit Already Transfused Override Reasons         Intervention/Prompt Setup       Blood Unit Already Transfused Override Reasons         Intervention Scheduling       Cancel de Override Reasons         Phowsheet Setup       Clinical Prompt Override Reasons         Delayed Lab Order Override Reasons       Delayed Dose Override Reasons         Duplicate Therapy Override Reasons       Duplicate Therapy Override Reasons         Duplicate Therapy Override Reasons       Early Lab Order Override Reasons         Duplicate Therapy Override Reasons       Given Before Order Start Time Override Reasons         Given Before Order Start Time Override Reasons       Early Lab Order Override Reasons         Devices       Coding Systems       Manager Created Override Reasons         No Doses Available Override Reasons       Manager Created Override Reasons         No Doses Available Override Reasons       Manager Created Override Reasons         No Gride Not Found in System Override Reasons       No Doses Available Override Reasons         No Doses Available Override Reasons       Manager Crea	E

2. Click **Add Override Reasons** to add a new reason to the list, or select an existing reason in the list and click **Remove** to delete it. The reasons are displayed to the user in the order they are shown on this screen. You may change the display order by moving the reason up or down in the list.

A	lert: Allergy Override	Reasons	<b>×</b>	
	Response Type:	Allergy Override Reasons		
	Override Reasons:	Name		
ł		CLARIFIED W/MD CLARIFIED W/PT.	-	
		CLARIFIED W/RPH		
		SEE ADDED MAR DOCUMENTATION		
			<u> </u>	
		Add Override Reasons Remove	Remove All	
			OK Cancel Apply	

3. Click **OK** to save your changes and close the window.

### **Destinations**

You can configure the PatientTouch System to use printers and other associated destinations available on your hospital network. PatientSafe Solutions recommends that you add at least one printer/destination per nursing unit and one printer for each area of the pharmacy.



# Printers used with the Clinical Manager must be laser printers in order to print barcodes properly.

To add a printer in the Clinical Manager, follow the steps below:

1. Select **Configuration > Destinations**.

anager <u>V</u> iew <u>H</u> elp			
3		02/05	/2019 11:28
atientSafe Mira Mesa Destina	tions		
Patients	Search		
Order Verification			
Patient Assignment	dly Name	Device Name	
Reports	t Printer	3 West Printer	
Pharmacy Blood	Bank - Bag Tags	Blood Bank - Bag Tags	_
Laboratory Lab R	eports	Lab Reports	
	's Email	c-lbonomo@patientsafesolutions.com	
lnfant Care Pharm	n Printer	Pharm Printer	
Intervention/Prompt Setup			
Intervention Scheduling			
Flowsheet Setup			
mView			
Users			
Roles			
Configuration			
- Settings			
Sectings     Nursing Units			
Alerts and Reasons			
- Destinations			
- D Label Printers			
- Devices			
Coding Systems			_

2. Click New.

New Destination: ICU Pr	inter X
Destination Setup	
Friendly Name	ICU Printer
• Printer	
Device Name:	
C Email Address -	
Email Address:	
O Network Share	
Host:	
Path:	
Username:	
Password:	
Advanced	
	OK Cancel Apply

- 3. Enter the **Friendly Name** that will be displayed when users select a printer/destination for reports. For example, "ICU Printer" or "ICU Director Email", etc.. Be sure to enter a name that adequately indicates the location of the printer.
- 4. Click the **Printer** radio button and enter the Device Name of the printer. (This must be identical to the name assigned in the Common Unix Printing System [CUPS]) For more information on configuring CUPS, see Configure Printers in CUPS.

-or-

Click **Email Address** and enter the e-mail address where you want the information directed. For example, enter the Pharmacy e-mail address to send quarantined orders there.

-or-

Click **Network Share** and enter the following details.

- Host The host name of the workstation where the network share is located.
- Path The full pathname to the network share.
- Username The username for accessing the network share (if required).
- Password The user's password (if required for the username).



5. Click **Advanced** to change the file type(s) accepted by this printer destination. By default, output types PDF and Text are selected.

Advanced Settings	
This Destination Supports the following Output Types	
I Text	
ОК	

When you have the **Email Address** radio button selected, the Advanced Settings change and you have two choices under the Text option:

- Send Text as the Email Body.
- Send Email Text as an Attachment.

It is recommended that you send the email text as an attachment, especially if it is a CSV report.

Advanced Settings
This Destination Supports the following Output Types
TIFF
<ul> <li>Text</li> <li>Send Text as the Email Body</li> <li>Send Email Text as an Attachment</li> </ul>
ОК

 Select the file types accepted by this destination. For example, if you clear the checkbox for PDF and, instead, select TIFF, the Clinical Manager will automatically convert the report and send a TIFF file when the report is printed/created.



You must select PDF or TIFF if you want the destination to accept formatted reports like the MAR. If you select Text, the destination will accept only the statistical CSV and text reports, and will reject other reports. (The Quarantine Order and Pharmacy Order Change Request are available in text.)

- 8. Click **OK** to close the *Advanced Settings* window.
- 9. In the New Destination window, click **OK** to save the printer information. This printer is now



available to all Clinical Manager Users.

#### **Change or Delete a Printer**

To edit a printer's configuration, select it from the Printers list and click **Edit**. After you change the options as described above, click **OK** to close the *Edit Printer* window.

To delete a printer, select the target printer and click **Delete**. Click **Yes** to confirm the deletion.

#### **Configure Printers in CUPS**

Printers configured in the Clinical Manager application must also be configured in CUPS (Common UNIX Printing System).

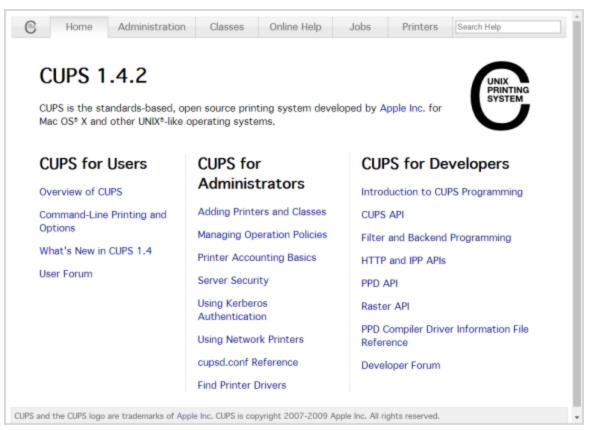
To configure a printer in CUPS:

1. Enter the following URL into a web browser: https://IPAddress:631

where "IPAddress" is the IP address of the PatientTouch server.

For example: https://172.17.10.51:631

The CUPS 1.4.2 main screen displays.



2. Under CUPS for Administrators, click Adding Printers and Classes.



You may be prompted to enter a username and password. Enter "cupsadmin" (without



Home	Administration	Classes	Online Help	Jobs	Printers	Search Help	
Printers			Server				
Add Printer Manage Printer	Find New Printers		Edit Configuration Fil View Page Log	View Acc	ess Log View	Error Log	
Classes			Server Settings:				
Add Class Manage Classes			Advanced • Show printers shared by other systems Share printers connected to this system Allow printing from the Internet				
Manage Jobs			<ul> <li>Allow remote administration</li> <li>Use Kerberos authentication (FAQ)</li> <li>Allow users to cancel any job (not just their own)</li> <li>Save debugging information for troubleshooting</li> </ul>				
			Change Settings				
RSS Sub	scriptions						
Add RSS Subs	cription						

3. Click Add Printer.

Add Prir	nter					
		<ul> <li>SCSI Prin</li> <li>Serial Poi</li> <li>Serial Poi</li> <li>LPT #1</li> </ul>	rt #1			
Discovered	Network Printers:					
Other		<ul> <li>LPD/LPR</li> <li>Internet</li> <li>Internet</li> <li>Internet</li> </ul>	et/HP JetDirect Host or Printer Printing Protoco Printing Protoco Printing Protoco Error Handler	ol (https) ol (ipp)	1	



- 4. Click LPD/LPR Host or Printer and click Continue.
- 5. Enter lpd:/IPAddress/default in the Connection field, where "IPAddress" is the IP address of the printer. Example - lpd:/172.17.10.51:9100/default.
- 6. Click Continue.

2	Home	Administration	Classes	Online Help	Jobs	Printers	Search Help
A	dd Prin	ter					
Со	nnection:	lpd:/172.17.10.51	:9100/defaul	lt			
		Examples:					
		http://hostno http://hostno					
		ipp://hostnar ipp://hostnar		:1			
		lpd://hostnar	ne/queue				
	socket://hostname socket://hostname:9100						
		See "Network Print	ters" for th	e correct URI to	use with	n your printe	ər.

- 7. Complete the following fields:
  - Name: The name of the printer. This name must match the Device Name designated in the Clinical Manager. For example, "1st\_Floor\_Printer". You cannot use spaces between words.
  - Description: An optional field that can be used to describe the printer in more detail. For example, you might enter the IP address or location of the printer, so you can have this when you need to edit or modify printer information.
  - **Location**: An optional field that describes the physical location of the printer such as "1st floor".
  - **Sharing:** Select if you are going to share this printer.
- 8. Click Continue.



Name:	1st_Floor_Printer	table characte				
Decoription	(May contain any print		rs except "/", "#"	, and space	3)	
Description	1st_Floor_Printer (Human-readable desc		s "HP I seer let wit	h Dupleyer	<b>~</b> )	
Location	1st_Floor_Printer	anp don auch a	a in caselset wit	in poplexer	/	
Location.	(Human-readable loca	tion such as "	Lab 1")			
Connection:	lpd:/172.17.10.51		· · · · · · · · · · · · · · · · · · ·			
	Share This Prin					
onung.	Continue					
	Continue					

9. Select the printer manufacturer (HP in this example) from the list and click **Continue**.

6	Home	Administration	Classes	Online Help	Jobs	Printers	Search Help
Δ.	dd Prin	tor					
A		ter					
		Name: 1st_Floo	pr Printer				
	De						
		scription: 1st_Floo					
		Location: 1st_Floo					
	Co	nnection: lpd:/172	2.17.10.51:	9100/default			
		Sharing: Share Th	nis Printer				
		Make: Gestetner	*				
		Heidelberg Hitachi					
		HP					
		IBM					
		Imagen Imagistics					
		InfoPrint					
		Infotec					
		Intellitech	•				
		Continue					
Or	Provide a	PPD File: Choose F	ile No file cho	sen			
		Add Print	er				

10. Select the Model of printer from the list (for example, the HP Business Inkjet 2280 Foomatic/Postscript) and click **Add Printer**.

Add Printer	Home Admini	stration C	lasses	Online Help	Jobs	Printers	Search Help
Name: 1st_Floor_Printer Description: 1st_Floor_Printer Location: 1st_Floor_Printer Connection: lpd:/172.17.10.51:9100/default Sharing: Share This Printer Make: HP Select Another Make/Manufacturer Model: HP 2000C Foomatic/pcl3 (en) HP 2500C Foomatic/pcl3 (en) HP 2500C Foomatic/Postscript (en) HP 2503 Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2250 Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2000 Foomatic/Postscript (en) HP Busines							
Name: 1st_Floor_Printer Description: 1st_Floor_Printer Location: 1st_Floor_Printer Connection: lpd:/172.17.10.51:9100/default Sharing: Share This Printer Make: HP Select Another Make/Manufacturer Model: HP 2000C Foomatic/pcl3 (en) HP 2500C Foomatic/pcl3 (en) HP 2500C Foomatic/Postscript (en) HP 2503 Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2250 Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2000 Foomatic/Postscript (en) HP Busines							
Description: 1st_Floor_Printer Location: 1st_Floor_Printer Connection: lpd:/172.17.10.51:9100/default Sharing: Share This Printer Make: HP Select Another Make/Manufacturer Model: HP 2000C Foomatic/pcl3 (en) HP 2500C Foomatic/Postscript (en) HP 2500CM Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2300 Foomatic/Postscript (en) HP Business Inkjet 2300 Foomatic/Postscript (en) HP Business Inkjet 2000 Foomatic/Postscript (en) HP Business	Add Printer						
Description: 1st_Floor_Printer Location: 1st_Floor_Printer Connection: lpd:/172.17.10.51:9100/default Sharing: Share This Printer Make: HP Select Another Make/Manufacturer Model: HP 2000C Foomatic/pcl3 (en) HP 2500C Foomatic/Postscript (en) HP 2500CM Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2300 Foomatic/Postscript (en) HP Business Inkjet 2300 Foomatic/Postscript (en) HP Business Inkjet 2000 Foomatic/Postscript (en) HP Business							
Location: 1st_Floor_Printer Connection: lpd:/172.17.10.51:9100/default Sharing: Share This Printer Make: HP Select Another Make/Manufacturer Model: HP 2000C Foomatic/pcl3 (en) HP 2500C Foomatic/Pcl3 (en) HP 2500CM Foomatic/Postscript (en) HP 2563 Foomatic/Ip2563 (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2000 Foomatic/Postscript (en) HP Business Inkjet 2	Name	: 1st_Floor_I	Printer				
Location: 1st_Floor_Printer Connection: lpd:/172.17.10.51:9100/default Sharing: Share This Printer Make: HP Select Another Make/Manufacturer Model: HP 2000C Foomatic/pcl3 (en) HP 2500C Foomatic/Pcl3 (en) HP 2500CM Foomatic/Postscript (en) HP 2563 Foomatic/Ip2563 (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2000 Foomatic/Postscript (en) HP Business Inkjet 2	Description	: 1st_Floor_F	Printer				
Connection: lpd:/172.17.10.51:9100/default Sharing: Share This Printer Make: HP Select Another Make/Manufacturer Model: HP 2000C Foomatic/pcl3 (en) HP 2500C Foomatic/Pcl3 (en) HP 2500C Foomatic/Pcl3 (en) HP 2563 Foomatic/Ip2563 (en) HP Business Inkjet 2200 Foomatic/Chp2200 (en) HP Business Inkjet 2250 Foomatic/Postscript (en) HP Business Inkjet 2250TN Foomatic/Postscript (en) HP Business Inkjet 2260 Foomatic/Postscript (en) HP Business Inkjet 2600 Foomatic/Postscript (en	Location	:1st Floor	Printer				
Sharing: Share This Printer Make: HP Select Another Make/Manufacturer Model: HP 2000C Foomatic/pcl3 (en) HP 2500C Foomatic/Postscript (en) HP 2500C M Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2250 Foomatic/Postscript (en) HP Business Inkjet 2250 Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2200 Foomatic/Postscript (en) HP Business Inkjet 2000 Foomatic/Postscript (en) HP Business Inkj				9100/default			
Make: HP       Select Another Make/Manufacturer         Model:       HP 2000C Foomatic/pcl3 (en)         HP 2500C Foomatic/pcl3 (en)       HP 2500C Foomatic/pcl3 (en)         HP 2503 Foomatic/lp2563 (en)       HP 2503 Foomatic/lp2563 (en)         HP Business Inkjet 2200 Foomatic/Postscript (en)       HP Business Inkjet 2200 Foomatic/Postscript (en)         HP Business Inkjet 2250 Foomatic/Postscript (en)       HP Business Inkjet 2250 Foomatic/Postscript (en)         HP Business Inkjet 2200 Foomatic/Postscript (en)       HP Business Inkjet 2200 Foomatic/Postscript (en)         HP Business Inkjet 2200 Foomatic/Postscript (en)       HP Business Inkjet 2200 Foomatic/Postscript (en)         HP Business Inkjet 2200 Foomatic/Postscript (en)       HP Business Inkjet 2600 Foomatic/Postscript (en)         HP Business Inkjet 2600 Foomatic/Postscript (en)       HP Business Inkjet 2600 Foomatic/Postscript (en)         HP Business Inkjet 2600 Foomatic/Postscript (en)       Implement Postscript (en)         HP Business Inkjet 2600 Foomatic/Postscript (en)       Implement Postscript (en)         HP Business Inkjet 2600 Foomatic/Postscript (en)       Implement Postscript (en)         HP Business Inkjet 2600 Foomatic/Postscript (en)       Implement Postscript (en)         HP Business Inkjet 2600 Foomatic/Postscript (en)       Implement Postscript (en)         HP Business Inkjet 2600 Foomatic/Postscript (en)       Implement Postscript (en)         HP		-		or oor derduit			
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Or Provide a PPD File: Choose File No file chosen Add Printer							
Or Provide a PPD File: Choose File No file chosen Add Printer						*	
Add Printer	Or Provide a PPD File		,		()		
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11. Select the options for the printer or click Set Default Options.



B Home	Administration	Classes	Online Help	Jobs	Printers	Search Help
Set Def	ault Options	for 1st	Floor Pri	nter		
Jet Den	aure options	101 131		itter		
Query Printer f	or Default Options					
General	Banners Po	licies				
			General			
			oonora			
		Page	Size: US Letter	•		
		Media So	ource: Default	•		
	Doub	le-Sided Pri	nting: Off	•	1	
		Resol	ution: 600 DPI	•		
		S	et Default Options			

12. The printer has been added successfully.

Set Default Options for 1st_Floor_Printer Printer 1st_Floor_Printer default options have been set successfully.	e	Home	Administration	Classes	Online Help	Jobs	Printers	Search Help	
Printer 1st_Floor_Printer default options have been set successfully.									
	Se	et Defa	ult Options	for 1st	_Floor_Pri	nter			
	Prir	nter 1st_F	loor_Printer defau	lt options h	ave been set su	ccessfully	y.		
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## **Label Printers**

Label Printers are only available if you have purchased the Specimen Collection or Infant Care Modules. To learn how to configure Label Printers, refer to the <u>Configure Label Printer Selection</u> Setting in the Specimen Collection Configuration section.

### **Devices**

Devices is now configured in the Enterprise Manager. A link is provided for your reference.

lanager <u>V</u> iew <u>H</u> elp		
3		02/05/2019 11:32 P
atientSafe Mira Mesa	Devices	
Patients Order Verification Patient Assignment Reports Pharmacy Pharmacy Pharmacy Intervention/Prompt Setup Phowsheet Setup Nitew Users Roles Configuration Settings Nursing Units Alerts and Reasons Destinations Label Printers Coding Systems Coding Systems	To View/Edit this information please click here : <u>Go to Enterprise Manager</u>	

## **Coding Systems**

Coding Systems is a feature in the Clinical Manager that allows hospitals to enter vocabulary items, such as RxNorm, SNOMED-CT<sup>®</sup>, LOINC<sup>®</sup> and other vocabulary standards. These vocabularies can then be associated with interventions, formulary items, and routes of administration. Documentation performed at the bedside using PatientTouch will contain the codes for these items and may be optionally exported via the HL7 interface. Associating vocabulary items with interventions, formulary items, and routes of administration supports Interoperability, and assists in the process of Clinical Quality Measure Reporting.



PatientTouch Clinical Manager - I	Blue- Milstein - User, Admin	
<u>Manager View H</u> elp		
G		02/05/2019 11:33 PST
PatientSafe Mira Mesa	Coding Systems	
Patients	Search	
Patient Assignment     Reports	Name FALL RISK	•
Pharmacy     Laboratory     Bood Administration	CFID MEDID RvNorm	
Infant Care     Infant Care     Intervention/Prompt Setup     Intervention Scheduling		
Flowsheet Setup     Towsheet Setup     Towsheet Setup     Towsheet Setup		
Settings		
Alerts and Reasons     Destinations		
Label Printers     Devices     Coding Systems		•
	Delete	Edit New

1. To enter a Coding System, click **New**.

Ne	w Coding System: LOINC
	Name LOINC
_	OK Cancel Apply

2. Enter the name and click **OK**.



PatientTouch Clinical Manager - B	lue- Milstein - User, Admin	
Manager View Help		
C		02/05/2019 11:34 PST
PatientSafe Mira Mesa	Coding Systems	
Patients Order Verification	Search	
Patient Assignment     Reports	Name FALL RISK	*
Pharmacy     Laboratory     Bood Administration	CFID	
Bood Administration     Bood Administration     Difant Care     Difant Care     Difant Care	MEDID RafNorm	
Generation Prompt Setup     Generation Scheduling     Generation Scheduling		
mView     Users		
Settings		
Alerts and Reasons     Destinations		
Label Printers     Devices		-
Coding Systems	Delete	Edit New
(°		·

The new vocabulary item displays in the list.



Once you have defined a Coding System, you can associate it to interventions using Response Lists and Clinical Types. You can also associate a Coding System to formulary items.

- 1. To edit a Coding System, select the item and click Edit.
- 2. To delete a Coding System, select the item and click Delete.

ſ	Confirma	tion
	?	Are you sure you want to delete this Coding System?
		Yes No

3. Click Yes on the confirmation window.

# **Roles and Privileges**

The Clinical Manager comes with a predefined set of privileges you can combine, as needed, to create roles that align with hospital policies. For example, you might create a Staff Nurse role with privileges to view and edit patient information, while a Pharmacist role would have privileges to edit the formulary and view the patient information, but not edit the MAR.

A description of all privileges is provided below.

# **Description of Privileges**

Privilege	Description
View Formulary	View formulary, no editing allowed.
Manage Formulary	View and edit formulary.
Manage Clinical Prompts and Flowsheets	View and edit certain information within the following sections (if installed): Blood Administration, Infant Care, Intervention/Prompt Setup, Intervention Scheduling, Flowsheet Setup, mView. Additionally, this privilege allows the user to manage the clinical prompts associated to medication formulary items.
Manage Users	View and edit user information. However, to ensure security in the system, users with this privilege can only assign roles that have equal or lesser privileges than his or her assigned role.
Access to All Patients	Provides access to view all patients and all related information. Warning: Assign this privilege with care and limit user access to patient information in accordance with your hospital's security and confidentiality policies.
View Patient Info	View patient information, no editing allowed with this privilege.
Manage Patient Info	View patient information and edit the date and/or time of admission/discharge. Note that this is not connected to hospital's ADT system.
Document/Edit Patient MAR	View, edit, and add documentation to the online MAR in Clinical Manager. Without this privilege, users can only view the online MAR information. User must also have at least the View Patient Info privilege for this privilege to have any affect.
Edit All Documentation	Edit any user's documentation. Use caution when assigning this privilege. Most caregivers should only be able to edit their own documentation.
Manage Nursing Units	View and edit nursing unit information and settings.
Manage Hospital Configuration	View and edit Hospital configuration (address, global settings, user security, RT settings, printers, etc.).
Manage User Roles	View and edit privileges assigned to user roles.
Manage SIG Codes	View and edit SIG codes.
View SIG Codes	View SIG codes; no editing allowed.
Manage Handheld Devices	View and reset devices.
View Override Reasons	View Override Reasons; no editing allowed.
Manage Override Reasons	View and edit Override Reasons.
Manage Reports	View and edit Scheduled Reports.
View Patient Assignment	View current Patient assignments. Automatically granted to users who have
(Managed in Enterprise Manager permissions)	the Manage Patient Assignment, Manage RT Assignment or Manage Pharmacist Assignment privileges.
Manage Patient Assignment	View and perform patient assignment in Clinical Manager and/or the
(Managed in Enterprise Manager permissions)	PatientTouch application.



Privilege	Description
Manage RT Assignment	This privilege is used to check availability of Assign/Unassign button for a user on Clinical Manager.
Manage Clinical Checks	Edit Allergy and Drug Interaction settings, and modify Max Single Dose Checking and Acetaminophen Cumulative Dose Checking settings.
Verify Orders	Verify nursing medication orders using the Clinical Manager and, if Order Verification settings permit, using the PatientTouch application. (To verify orders, you must also have the Administer Meds privilege.)
Quarantine Orders	Quarantine nursing medication orders using the Clinical Manager and, if Order Verification settings permit, using the PatientTouch application.
Un-quarantine Orders	Un-quarantine an order in the Clinical Manager.
Reset Dose Reminders	Ability to reset medication dose due reminders for specific or all nursing units.
Administer Meds	Administer medications with the PatientTouch application, including RT orders, if applicable.
Respiratory Therapy	Administer only medications designated as RT medications (as determined by the SIG code of the order).
Collect Observations	Collect patient vital signs, patient care activities, etc., via interventions.
Breast Milk Collection and Administration	Collect breast milk and deliver infant feedings.
Blood Bank	Assign, check out, etc., blood bags and configure Blood Admin settings.
Transfuse Blood	Administer blood products at the bedside.
Document/Edit Patient TAR	Allows users to document and edit the patient TAR for their entries only. This is similar to the Document/Edit Patient MAR privilege that already exists. This privilege should be given to any role that will need to document and/or edit the patient TAR.
Witness	Ability to witness the preparation or administration of medications or other process such as blood product administration.
Verify Respiratory Therapy Orders	Perform order verification for orders designated as 'RT' based upon the SIG code.
Quarantine Respiratory Ther- apy Orders	Quarantine orders designated 'RT'.
Manage Laboratory Configuration	Configure Laboratory settings. This privilege is required to edit the Unable to Complete Transfusion Reason.
Manage Phlebotomy Assign- ment	Assign collection privileges to users from the Lab Dashboard (for users with Phlebotomist privilege).
Manage Lab Orders	View, edit and omit lab orders using Clinical Manager.
Phlebotomist	View and collect specimens for lab orders of this collector type.
Collect Nurse Lab Orders	View and collect specimens for lab orders of all (P, N, R) collector types.
Collect RT Lab Orders	View and collect specimens for lab orders of this collector type.
Laboratory	Perform Laboratory functions such as Receive/Reject Specimens, Add On Tests, and Print Aliquot Labels.

Privilege	Description
Publish Notices	Send a "text message" to all Handhelds currently in use/logged in.
Mother-Infant Matching	Verify correct infant link to inpatient mother or visitor, and link with crib.
Pharmacist	User with the Pharmacist privilege can be assigned as "pharmacist for a location". An assigned pharmacist will appear on the care team list of the patient located in that location. Only one pharmacist can be assigned to a location at a time.
Manage Pharmacist Assign- ment	Ability for User to manage assignment via the PatientTouch application or the Clinical Manager.
Unit Secretary	Allows the user to order and discontinue, but not execute, scheduled interventions.

### **Recommended Roles and Privileges**

The following roles and associated privileges are recommended for the most common roles in a hospital environment. These default privileges and roles are part of the PatientTouch System's original configuration. You can use this list as a starting point and adapt the roles to fit any unique job descriptions. There is no limit to the number of roles you can define, and each one can have a unique set of privileges.

#### **Roles and Privileges**

Click a link below to learn about the privileges typically assigned to each role:

- Nurses
- Pharmacists
- Lab
- System Administration

#### **Nurses**

The following roles and privileges are recommended for nurses and nurse staff.

Privilege	House Super- visor	Nurse Man- ager	Nurse Pre- ceptor	Staff Nurse	Nurse Tech/CNA	Unit Sec- retary	RT Man- ager	Respiratory Therapist
View Formulary	Х	Х	Х				х	
Manage Clinical Prompts and Flowsheets							х	
Manage Users	х	х					х	
Access to All Patients	Х							
View Patient Info	Х	х	х	Х	х	х	х	Х
Manage Patient Info	х	х	х				х	
Document/Edit Patient MAR	х	х	х	х			х	х
Edit All Documentation	х	х					х	
Manage Hospital Con- figuration	х							



Privilege	House Super- visor	Nurse Man- ager	Nurse Pre- ceptor	Staff Nurse	Nurse Tech/CNA	Unit Sec- retary	RT Man- ager	Respiratory Therapist
View SIG Codes	Х	Х					х	
Manage Handheld Devices	х							
View Override Reasons	Х	Х						
Manage Reports	Х	х					х	
Manage RT Assignment							Х	Х
Verify Orders	Х	Х	Х	Х				
Quarantine Orders	Х	Х	Х	Х				
Reset Dose Due Remind- ers	х							
Administer Meds	Х	Х	Х	Х				
Respiratory Therapy	х	х	х	Х			х	Х
Collect Observations	х	х	х	Х	х		х	Х
Breast Milk Collection and Administration	х	х	х	х	х			
Transfuse Blood	х	х	х	Х				
Document/Edit Patient TAR		х		х				
Witness	х	х	х	Х				
Verify Respiratory Ther- apy Orders	х	х	х	х			х	Х
Quarantine Respiratory Therapy Orders	х	х	х	х			х	Х
Collect Nurse Lab Orders	х	х	х	Х				
Collect RT Lab Orders							х	Х
Publish Notices	х							
Mother Infant Matching	х	х	Х	Х	х			
Unit Secretary						х		

#### **Pharmacists**

The following roles and privileges are recommended for the pharmacy.

Privilege	Pharmacy Manager	Pharmacist	Pharmacy Inventory Tech	Pharmacy Tech
View Formulary	х	х	Х	х
Manage Formulary	х	Х	Х	
Manage Clinical Prompts and Flowsheets	х			
Manage Users	х			
Access to All Patients	х	Х		
View Patient Info	Х	Х	Х	х



Privilege	Pharmacy Manager	Pharmacist	Pharmacy Inventory Tech	Pharmacy Tech
Manage SIG Codes	х	Х		
View SIG Codes	х	Х	х	х
View Override Reasons	х	Х		
Manage Reports	х			
Manage Clinical Checks	х	Х		
Verify Orders	х	Х		
Quarantine Orders	х	Х		
Un-quarantine Orders	х	Х		
Verify Respiratory Therapy Orders	х	Х		
Quarantine Respiratory Therapy Orders	х	Х		
Pharmacist	х	Х		
Manage Pharmacist Assignment	х	Х		

#### Lab

The following roles and privileges are recommended for the laboratory.

Privilege	Lab Manager	Lab Tech	Phlebotomist	Blood Bank Technologist
Manage Users	х			
View Patient Info	х	х	х	Х
Manage Reports	х			
Blood Bank				Х
Manage Laboratory Configuration	х			
Manage Phlebotomy Assignment	х	х	х	
Manage Lab Orders	х			
Phlebotomist			Х	
Laboratory	х	х		

#### Administration

The following roles and privileges are recommended for system administrators and IT personnel.

Privilege	System Administrators	IT Personell
View Formulary	Х	
Manage Formulary	Х	
Manage Clinical Prompts and Flowsheets	Х	
Manage Users	Х	х
Access to All Patients	Х	
View Patient Info	Х	
Manage Patient Info	Х	
Document/Edit Patient MAR	Х	



Privilege	System Administrators	IT Personell
Edit All Documentation	Х	
Manage Nursing Units	Х	
Manage Hospital Configuration	Х	
Manage Users Roles	Х	
View SIG Codes	Х	
Manage Handheld Devices	Х	х
View Override Reasons	Х	
Manage Override Reasons	Х	
Manage Reports	Х	
Manage RT Assignment	Х	
Verify Orders	Х	
Quarantine Orders	Х	
Reset Dose Due Reminders	Х	
Administer Meds	Х	
Respiratory Therapy	Х	
Collect Observations	Х	
Breast Milk Collection and Administration	Х	
Transfuse Blood	Х	
Witness	Х	
Verify Respiratory Therapy Orders	Х	
Quarantine Respiratory Therapy Orders	Х	
Manage Laboratory Configuration	Х	
Collect Nurse Lab Orders	Х	
Publish Notices	Х	х
Mother Infant Matching	Х	Х

### **Creating Roles**

Roles must be defined before adding users.

You can define as many roles as necessary to reflect your staff titles and positions.

When you select a privilege that represents a "super" set of privileges, such as Manage Formulary, the system automatically selects the lesser privilege(s) as well, such as View Formulary.

To define roles, follow the steps below.

1. Click **Roles** from the Clinical Manager menu tree.



PatientTouch Clinical Manager - E	lue- Milstein - User, Admin	
Manager View Help		
C		02/05/2019 11:37 PST
PatientSafe Mira Mesa	Roles	
Patients Order Verification	Search	
Patient Assignment     Reports     P-     Pharmacy	Name All Privileges	
Laboratory     Bood Administration	Blood Bank House Supervisor IT	
Infant Care     Infant Care     Infervention/Prompt Setup	Lab Tech Location Pharmacist	
Intervention Scheduling     Flowsheet Setup     Mview	Location Pharmacist Manager Nurse Lab Collector Nurse Manager	
Users	Nurse Preceptor Nurse Tech/CNA	
- Configuration	Pharmacist Pharmacy Inventory Tech Pharmacy Manager	
	Pharmacy Tech Phlebotomist Physician	
	Respiratory Therapist Respiratory Therapist Manager	
	RT RT Lab Collector Staff Nurse	
	System Manager Unit Secretary	•
	Delete	Edit New
	To manage Care Roles for Assignment, please click here: Go to Enterprise Manager	

2. Click **New** to display the *New Role* window.

New Role:	×
Role Name:	
Privileges:	Name
	Access to All Patients
	Administer Meds
	🗖 Blood Bank
	Breast Milk Collection and Administration
	Collect Nurse Lab Orders
	Collect Observations
	Collect RT Lab Orders
	Document/Edit Patient MAR
	Document/Edit Patient TAR
	Edit All Documentation
	Manage Clinical Checks
	Manage Clinical Prompts and Flowsheets Manage Formulary
	Manage Handheld Devices
	Manage Hospital Configuration
	Manage Lab Orders
	OK Cancel Apply

- 3. Enter a name in the Role Name field.
- 4. In the Privileges list, select the check boxes that correspond to privileges to associate with the role. The different privileges correspond to specific options in the Clinical Manager as described in the section above. Once the privileges are assigned, users in the system see only those options associated with the privileges assigned to their respective roles.
- 5. Click **OK** to save your changes.

### **Editing a Role**

To edit a role:

- 1. Select it from the list and click Edit (or simply double-click the highlighted role).
- 2. Modify the Role Name, if desired.
- 3. After you finish editing the privileges, click **OK** to save your changes.

Role: Staff Nurse		x
Role Name:	Staff Nurse	
Privileges:	Name         Access to All Patients         Administer Meds         Blood Bank         Breast Milk Collection and Administration         Collect Nurse Lab Orders         Collect Observations         Collect RT Lab Orders         Document/Edit Patient MAR         Document/Edit Patient TAR         Edit All Documentation         Laboratory         Manage Clinical Checks         Manage Clinical Prompts and Flowsheets	
	Manage Formulary Manage Handheld Devices Manage Hospital Configuration Manage Lab Orders	• ply

## **Deleting a Role**

To delete a role:

Select the role in the *Roles* window and click **Delete**. Click **Yes** to confirm deletion of the role.

Warning! This action cannot be undone.

Confirma	tion
?	Are you sure you want to delete this Role? Yes No

# Users

Creating new users is now done via the Enterprise Manager. A link is provided for your reference at the bottom of the Clinical Manager>Users screen. However, you can still modify user roles and the default printer using the Clinical Manager.

# **Modify User Role or Default Printer**

To modify a user, follow the steps below.

1. Select **Users** from the Clinical Manager menu tree.

anager View Help						
,					02/05/2019 1	1:41 P
atientSafe Mira Mesa	Users					
Patients Order Verification			Search		Display Users with Logi	n only
Patient Assignment Reports	Last Name	First Name	Title	Login Name	Barcode/Badge Id	_
Pharmacy	Aardema	Peter		paardema	1127	
	Aardvarck	Sherry	Case Manager	saardvarch	1125	
	Aaron	Selly	ED Nurse	saaron	1126	
	Ababa	Darlene	Pediatrician	dababa	1129	
Infant Care	Abaca	Rodney	Neurologist	rabaca	1130	
Intervention/Prompt Setup	Abba	Mary	Registered Nurse	mabba	1128	
Intervention Scheduling	Abbey	Daniel	Anesthesiologist	dabbey	1131	
C Flowsheet Setup	Abel	David	Transporter	dabel	1124	
B- MView 	Abercrombie	Rodriguez	Physician	rabercrombie	1133	
	Aberdeen	Shelly	Registered Nurse	saberdeen	1114	
	Abernathy	Linda	Registered Nurse	labernathy	1113	
	Abindale	Mike	Cardiologist	mabindale	1115	
Configuration	Abirnith	Keith	Physician	kabimith	1110	
	Able	Paul	Surgeon	pable	1123	
	Abney	Steve	Surgeon	sabney	1132	
	Abundy	Malcolm	Phlebotomist	mabundy	1116	
	AD	Zohreh		zad	zad	
	Adirondack	Mitch	IT Director	madirondack	1117	
	Affernuff	Robert	Physical Therapist	raffemuth	1121	
	Afirth	Joe	Janitor	jafirth	1120	
	Airbus	Kelly	Respiratory Ther	kairbus	1122	
	Albert	Stephen	MD	74		
	Alexander, MD	Joseph	Urology	ajl	ajl	
	Amber	Karen	Unit Secretary	kadonerson	1119	
	AMiON User	New	MD	38		
	amionint			amionint		
	1					

2. Double-click the specific user name.



User: Aardema, Peter	r (paardema)		×
	: Aardema : Floating Nurse : paardema	First Name: Initials: Badge ID/Barcode:	pa
Handheld Ext			
Roles	<ul> <li>Name</li> <li>All Privileges</li> <li>Blood Bank</li> <li>House Supervisor</li> <li>IT</li> <li>Lab Tech</li> <li>Location Pharmacist</li> <li>Location Pharmacist Manage</li> <li>Nurse Lab Collector</li> <li>Nurse Manager</li> <li>Nurse Preceptor</li> <li>Nurse Tech/CNA</li> </ul>	ler	E
B L	Mesa West Printer Iood Bank - Bag Tags ab Reports inda's Email harm Printer		
		0	K Cancel Apply

3. Add a role.



Roles that are not grayed out are unmapped and applicable to the Clinical Manager only. They are available for selection. The roles that are grayed out are mapped to the Enterprise Manager and cannot be removed. To manage them, refer to the Enterprise Manager application.

The table below lists several Clinical Profiles from the Enterprise Manager that are associated to Roles in the Clinical Manager. However, this may be configured for your facility and may be different than seen here.

Enterprise Manager Clinical Profiles	Clinical Manager Roles
Primary Nurse	Staff Nurse
Nurse Tech/CNA	Nurse Tech/CNA
Head Nurse	House Supervisor, Nurse Manager, Staff Nurse, Nurse Tech, CNA
Respiratory Therapist	Respiratory Therapist, RT
RT Lab Collector	RT Lab Collector
Technicians	Pharmacy Inventory Tech
Pharmacy Manager	Pharmacy Manager
Phlebotomist	Phlebotomist
Pharmacist	Pharmacist
Physician	Physician

- 4. Select a default printer for this user from the **Default Printer** drop down list. This printer will be automatically selected when the user prints reports from the Clinical Manager or the PatientTouch application. However, the user can choose a different destination at the time of printing, as needed.
- 5. **Nursing Units** are read-only in the Clinical Manager. They are selected for each caregiver using the Enterprise Manager.
- 6. Click **Apply** to save the new user and remain in the *New User* window. Or, click **OK** to save the new user and close the *New User* window.

#### **Search for a User**

1. Filter the list of users so only the users with login names appear by selecting the **Display Users** with Login only checkbox. This is the default view when you first launch the Clinical Manager.



anager Yiew Help					
7					02/05/2019 11:4
atientSafe Mira Mesa	Users				
Patients Order Verification			Search		Display Users with Login or
Patient Assignment Reports	Last Name	First Name	Title	Login Name	Barcode/Badge Id
Pharmacy	Aardema	Peter		paardema	1127
Laboratory	Aardvarck	Sherry	Case Manager	saardvarch	1125
	Aaron	Selly	ED Nurse	saaron	1126
Blood Administration	Abeba	Darlene	Pediatrician	dababa	1129
Infant Care	Abaca	Rodney	Neurologist	rabaca	1130
Intervention/Prompt Setup	Abba	Mary	Registered Nurse	mabba	1128
Intervention Scheduling	Abbey	Daniel	Anesthesiologist	dabbey	1131
Flowsheet Setup	Abel	David	Transporter	dabel	1124
mView	Abercrombie	Rodriguez	Physician	rabercrombie	1133
Users	Aberdeen	Shelly	Registered Nurse	saberdeen	1114
Roles	Abernathy	Linda	Registered Nurse		1113
	Abindale	Mike		mabindale	1115
Configuration	Abimith	Keith	Physician	kabimith	1110
	Able	Paul	Surgeon	pable	1123
	Abney	Steve	Surgeon	sabney	1132
	Abundy	Malcolm	Phlebotomist	mabundy	1116
	AD	Zohreh		zad	zad
	Adirondack	Mitch	IT Director	madirondack	1117
	Affernuff	Robert	Physical Therapist		1121
	Afirth	Joe		jafirth	1120
	Airbus	Kelly	Respiratory Ther		1122
	Albert	Stephen		74	
	Alexander, MD	Joseph	Urology	ajl	ajl
	Amber	Karen		kadonerson	1119
	AMiON User	New	MD	38	
	amionint			amionint	
	14.1	***	- · · · · · · · ·		

- 2. Search for a specific user by entering the first few characters of the person's first or last name.
- 3. The list of filtered users displays in the Search panel.

Manager View Help					
C					02/05/2019 11:44 P
PatientSafe Mira Mesa	Users				
Patients Order Verification			Search jud		Display Users with Login only
Patient Assignment     Reports	Last Name	First Name	Title	Login Name	Barcode/Badge Id
Pharmacy	Cartwright	Judy	RN	jcartwright	12345
Intervention/Prompt Setup     Intervention Scheduling     Provention Scheduling     Provention     View     View     Notes     Configuration	To Add/Remove users,	please click here: Go to Ente	sprise Manager		

# Intervention/Prompt Setup

Interventions and clinical prompts can be associated with formulary items, used in clinical documentation, and used in vitals-type interventions.

Interventions provides caregivers with intervention execution guidance and allows them to collect patient vital signs, conduct assessments, and document patient care activity at the bedside with enhanced safety and efficiency. Data is documented in a configurable Flowsheet and is available for interfacing with outside systems.

Clinical prompts associated with formulary items are displayed during workflows in the PatientTouch application and during charting using the Online MAR in the Clinical Manager. The pharmacy team typically works with nursing staff to set up the required prompts and link them to specific formulary items. Clinical prompts used in clinical documentation and vitals interventions are collected when the intervention is executed within the PatientTouch application.

When setting up Interventions and Prompts, it is best to work from the bottom up on the Clinical Manager menu tree (start with Response Lists and finish with Interventions).

- De Intervention/Prompt Setup
Interventions
Intervention Lists
Clinical Prompts
Clinical Types
Response Lists

The following items are available for configuration (listed in order of set up). Click a link below or from the Contents tab on the left to learn more.

- Response Lists This feature allows creation of custom descriptive answer lists. You can create as many lists as necessary to allow caregivers to provide answers to interventions and clinical prompts that are approved by your hospital policy. For example you might setup a response list for injection sites, temperature sites, pain descriptions, etc.
- Clinical Types This feature is used to define clinical observation characteristics. Clinical types allow users to customize how information is interpreted by the system. For example, if it is important to distinguish a temperature value from more generic, "floating point" types of values, you may want to create a Temperature clinical type.
- Clinical Prompts This feature allows selection of a clinical type to be collected by using the prompt, and can be configured to appear during medication preparation, at the bedside, or as follow-up reminders to appear at specific intervals after a med pass or other workflows. A prompt may be either informational only or may require the caregiver to enter clinical data.
- Intervention Lists Individual interventions and clinical prompts are grouped together in an easy-to-use list so caregivers receive a seamless flow of procedural guidance and documentation opportunities rather than having to select individual prompts.
- Interventions This feature allows for grouping individual clinical prompts together in a clinically meaningful way. Caregivers receive procedural guidance in the PatientTouch application, with seamless documentation of compliance. Caregivers can quickly and easily document patient status and assessments (such as hourly rounds and vital signs). Additionally, interventions can be configured to make calculations based on collected data, e.g. falls risk score, accumulated fluid intake and output, and so on. Interventions can be a grouping of multiple clinical prompts and other interventions.

The procedures in this section will guide you through creating and configuring the various types of prompts and interventions and associating them with patients and/or nursing units.

#### **Response Lists**

To add or edit a response list:

1. Select Intervention/Prompt Setup > Response Lists.

PatientTouch Clinical Manager -	Blue- Milstein - User, Admin	
Manager View Help		
C		02/05/2019 11:55 PST
PatientSafe Mira Mesa	Response Lists	
Patients Order Verification Patient Assignment Reports Pharmacy God Administration Infant Care Intervention/Prompt Setup Intervention Lists Clinical Types Response Lots God Administration Intervention Scheduling Followsheet Setup	Search           Name           Ambulatory aids           Blood Pressure Position           Blood pressure Sites           Body position           Breath Sounds           Capillary Refill           Cardiac Edema           Cardiac Edema Location           Cardiac Heart Rynthm           Cardiac Heart Sounds           Cardiac Neck Vein Distention           Cough           Diet Type	<b>▲</b>
Moles     Configuration	Education Fall injury Fall type Feeding Route Gait Gait / Transferring History of falling Is It Hot? IV/Saline Lock Delete	▼] Edit New

- 2. Do one of the following:
  - To create a new response list, click **New**.
  - To edit an existing response list, select the response and click **Edit**.
- 3. In the Name field, add or change the name of the response list.

Name: Cough		
Code:		•
Code:		
Responses		
Name	Label	
None	None	•
Weak	Weak	
Strong	Strong	
Non-productive	Non-productive	_
Productive	Productive	
Congested	Congested	
Loose	Loose	
Moist	Moist	- 1
14/~+	Mat	· _
Add Remov	e Edit	

4. Coding System (Plus Sign): You must have Coding Systems defined in the Clinical Manager to populate this field. To add a code to the response list or to a specific response on the list, click the plus sign .

Code Association(s	I	
Coding System	Code Short	Description
Add R	emove Edit	-

5. Click Add.



	×
Coding System:	
Code:	_FALL_RISK CFID
Short Description:	
Description:	MEDID RxNorm
	OK Cancel

6. Select a **Coding System** from the drop down menu.

		×	
	Coding System:	LOINC	
	Code:		
	Short Description:		
	Description:	<u> </u>	
		•	
_			
	(	OK Cancel	

- 7. Enter the Code, Short Description, and Description. Click **OK**.
- 8. Click **OK** on the *Code Association* window.
- 9. To add a new response to the response list, click Add.

Response:
Clinical Component Info
Name:
Label:
Text Response Allowed
C Annotation Allowed
Code:
Clinical State: Normal
OK Cancel

- 10. Enter information for the desired response:
  - Name enter a name for the response
  - Label –The label is how the response will appear in the PatientTouch application AND in documentation. For an example of the character length of the field, you should be able to enter "Calm and Cooperative" in both the Name and Label fields.
  - Text Response Allowed If the option is checked, the user can use the PatientTouch application to optionally include 500+ characters of additional free text information along with the pre-defined response. This may be useful if the user has more to describe than the selected response.
  - **Annotation Allowed** Similar to a text response, if this option is checked, the user will be given the option to include an annotation (note) along with the pre-defined response.
  - Coding System (Plus Sign): You must have Coding Systems set up in the Clinical Manager

to populate this field. To add a code, click the plus sign 🔛, click **Add** on the *Coding Association* window and select a Coding System from the drop down list. Enter the Code, Description and Short Description.

- Clinical State Each response can be identified as either "Normal", "Abnormal", or "Critical". For example, in a "Wound Description" response list, a response of "No redness/ooze" would have a "Normal" clinical state. On the other hand, a response of "Red & oozing" is likely considered "Abnormal". Both abnormal and critical settings will display in red font in the Flowsheet and mView.
- 11. Click **OK** once the desired text and settings are defined.
- 12. When finished adding all desired responses, click **OK** to save the new response list. The list is displayed in the Response Lists directory.

#### **Clinical Types**

To add or edit a clinical type:

1. Select Intervention/Prompt Setup > Clinical Types.

inager View Help				
1				02/05/2019 11:56
stientSafe Mira Mesa	Clinical Types			
Patients     Order Verification		Search		
Patient Assignment     Reports	Name	Code	Display Name	
	Administration Site		Admin Site	
Pharmacy	Apical Pulse		Apical Pulse	
Laboratory	Blood Glucose		Blood Glucose	
Blood Administration	Blood Pressure		Blood Pressure	E
🗀 Infant Care	Blood Pressure Position		BP Position	
Intervention/Prompt Setup	Blood Pressure Site		BP Site	
- Interventions	Breath Sounds		Breath Sounds	
Intervention Lists	Cardiac Capillary Refill		Capillary Refill	
Clinical Prompts	Cardiac Edema		Edema	
Clinical Types	Cardiac Heart Rhythm		Heart Rhythm	
	Cardiac Heart Sounds		Heart Sounds	
Response Lists	Cardiac Neck Vein Distention		Neck Vein Distention	
Intervention Scheduling	Cough		Cough	
Flowsheet Setup	Creat Clearance		Creat. Clearance	
mView	Creatinine Level		Creatinine Level	
Users	Digoxin Level	DLCT	Digoxin Level	
Roles	Education		Education	
Configuration	Expiration Date		Expiration Date	
Comgaration	Feeding Route		Feeding Route	
	FiO2		FiO2	
	Infusion Start Time		Infusion Start	
	Infusion Stop Time		Infusion Stop	
	INR		Record INR	

- 2. Do one of the following:
  - To create a new clinical type, click **New**.
  - To edit an existing clinical type, select the type and click **Edit**.

Clinical Type: Blood	Pressure			×
Clinical Type Ir	fo			
	Blood Press	1176		
Display Name:	Blood Press	sure		
Code:				+
	🗌 Display a	s Parent/Child		
Clinical Type C	mpoporte			
	omponents			-
Name		Label		
Blood Pressure		Blood Pressure	-	1
			-	]
Add	Remove	Edit	]	
		ОК	Cancel	Apply

- 3. In the Name field, add the name of the clinical type. When editing, you cannot change the Name field once it has been set.
- 4. In the Display Name field, add or change the name that will appear on the PatientTouch application *Care Interventions* screen.
- Coding System (Plus Sign): You must have Coding Systems set up in the Clinical Manager to populate this field. To add a code, click the plus sign .



Coding System	Code	Short Description	
			-
			-

6. Click Add.

	×
Coding System: Code: Short Description: Description:	LOINC
	OK Cancel

- 7. Select a **Coding System** from the drop down list.
- 8. Enter the Code, Short Description, and Description. Click **OK**.
- 9. Click **OK** on the *Code Association* window.
- 10. Select **Display as Parent-Child** to display the clinical type as a parent-child prompt. A parentchild prompt simply means there is a "relation" that links the clinical type components together. For example, you may create a Blood Pressure clinical type where Blood Pressure is the parent component and Blood Pressure Site is the child component. You would not want to prompt a user for just the Blood Pressure Site, so you make it a "child" of Blood Pressure.
- **11**. To add components to the clinical type, click **Add**.



Clinical Type Componen	t:	x
Clinical Component	Info	_
Name:		
	Always Display Label	
Label:		
Code:		<del>.</del>
Units/Suffix:		
	Allow Annotation	
Response Configura	ntion	_
Data Type:	<none></none>	-
	OK Cancel	

- In the Name field, enter the name of the component.
- Select Always Display Label, and enter the name that should be displayed in the Label field. This is the label that will display on any flowsheets.
- Coding System (Plus Sign): You must have Coding Systems set up in the Clinical Manager

to populate this field. To add a code, click the plus sign , click **Add** on the *Code Association* window and select a Coding System from the drop down list. Enter the Code, Short Description, and Description.

- Enter Unit/Suffix information. Based on the selected Data Type, enter any desired unit of measure/suffix (examples: pounds, kilograms, F, C, inches, mL/Hr, etc.).
- Select Allow Annotation to allow users access to a post-it note icon that opens a keyboard to enter free text to add additional notations when capturing this data.
- Under Response Configuration, select the appropriate Data Type for the component. Data types tell the system what kind of information is being captured by the component. The



data type options include:

- **Alpha-numeric** (letter/number combination): Use for data that contains both letters and numbers. Example: medication lot numbe
- Integer: Use for data that is in whole numbers. Example: Blood Glucose.
- Floating point: Use for data that may contain a decimal value. Example: INR.
- **Height**: Use for clinical types/prompts that ask for height values. In order for the system to calculate BMI based on user-input data, this data type must be used for height.
- Weight: Use for clinical types/prompts that ask for weight values. In order for the system to calculate BMI based on user-input data, this data type must be used for weight.
- **Response list**: Use for data that requires descriptive answers. Example: Pain Scale Type.
- Blood pressure: Use for blood pressure clinical types.
- **Date**: Use for data that needs a date. Example: Expiration Date.
- Date/time: Use for data that needs both a date and a time. Example: IV Stop Time.



When you create a clinical prompt with a clinical type that has a data type of Date/Time, a Specifies Time of Occurrence checkbox displays. If selected, this feature captures the date/time the action was taken, not the time the badge was scanned to document the action.

- **Non-response**: Use for clinical types/prompts that do not require the user to input any data; it is a "reminder-only" clinical type/prompt. Example: Give with food.
- Witness barcode. Use for clinical types/prompts that require the user to scan a witness barcode. Example: Witness Required.
- Based upon the selected **Data Type**, fill in the required fields (in yellow) and any other desired response configuration fields, described below:
- Min Value: The minimum value field defines the lowest value that will be accepted to progress through the workflow. If users enter a value lower than what is defined here, they will be alerted and asked to enter a value within the defined range. This value is recommended but not required.
- Normal Min: The normal min field defines the lowest normal value for the clinical type (ex: normal min. value for potassium level). If users enter a value lower than what is defined here, they will be alerted. They will then have the option to edit the value or proceed with their originally entered value.
- Default Value: The default value field defines the first value that appears on the PatientTouch application without entering or changing the value. For example, when asking for a blood pressure value, the application will present two spin dials to the users. If you want each dial to have a starting point, such as 130 and 80, you would define them here as default values. This value is optional.
- Normal Max: The normal max field defines the highest normal value for the specific clinical type (ex: normal max. value for potassium level). If users enter a value greater than what is defined here, they will be alerted. They will then have the option to edit the value or proceed with their originally entered value.
- Max Value: The max value field defines the highest value that will be accepted to progress through the workflow. If users enter a value higher than what is defined here, they will be alerted and asked to enter a value within the defined range. This value is recommended but not required.
- Min Characters: The min characters field defines the minimum amount of characters the user must enter for an alpha-numeric response. This helps to prevent the user from accidentally entering incomplete data. For example, if a lot number always has a minimum amount of characters, you define that here to ensure the minimum length is met when the user enters the information using



the PatientTouch application.

- Max Characters: The max characters field defines the maximum amount of characters the user must enter for an alpha-numeric response. This helps to prevent the user from accidentally entering inaccurate data. For example, if a lot number always has a maximum amount of characters, you define that here to ensure the user does not enter more than the maximum number of characters.
- Precision: The precision field defines how precise you want the entered value to be (how many numbers past the decimal point the value can go). For example, a potassium level value only has one decimal value (3.5) whereas a weight value may need to be more specific, like 9.25 kg. In the weight example, the precision value would be "2", to allow two values after the decimal point.
- 12. Click **OK**.
- 13. When finished, click **OK** on the *Clinical Type* window to save the new clinical type. The clinical type is displayed in the Clinical Types list.

### **Clinical Prompts**

To add or edit a clinical prompt:

1. Select Intervention/Prompt Setup > Clinical Prompts.

nager <u>V</u> iew <u>H</u> elp				
			02/0	5/2019 11:58
tientSafe Mira Mesa	Clinical Prompts			
Patients		Search		
Order Verification		Scarch		
Patient Assignment	Name	Screen Display	MAR Label	_
Reports	Administration Site	Admin Site	Admin Site	
Pharmacy	Apical Pulse	Apical Pulse	Apical Pulse	
Laboratory	Blood Glucose	Blood Glucose	Blood Glucose	
Blood Administration	Blood Pressure	Blood Pressure	Blood Pressure	
linfant Care	Blood Pressure Position	BP Position	BP Position	
Intervention/Prompt Setup	Blood Pressure Site	BP Site	BP Site	-
- Interventions	Breath Sounds	Breath Sounds	Breath Sounds	
Intervention Lists	Cardiac Capillary Refill	Capillary Refill		
- Clinical Prompts	Cardiac Edema	Cardiac Edema		
	Cardiac Heart Rhytm	Heart Rhytm		
Clinical Types	Cardiac Heart Sounds	Heart Sounds		
Response Lists	Cardiac Neck Vein Distention	Neck Vein Distention		
Intervention Scheduling	Cough	Cough	Cough	
Flowsheet Setup	Creatinine Clearance	Creat. Clearance	Creat. Clearance	
mView	Creatinine Level	Creatinine Level	Creatinine Level	
Users	Digoxin Level	Digaxin Level	Digoxin Level	
Roles	Education	Education	Education	
Configuration	Expiration Date	Expiration Date	Expiration Date	
	Feeding Route	Feeding Route		
	FiO2	FiO2	FiO2	
	Infusion Start Time	Infusion Start	Infusion Start	
	Infusion Stop Time	Infusion Stop	Infusion Stop	
	INR	Record INR	INR	•

- 2. Do one of the following:
  - To create a new clinical prompt, click **New**.
  - To edit an existing clinical prompt, select the prompt and click **Edit** or just double-click it.



On the New Clinical Prompt screen, in the **Prompt** tab use the information below to complete the fields.

Prompt Formulary Assoc	ations			
linical Prompt Info				
Name:		Prompt Code:		
Screen Display:			Display on MAR	
Short Display:		MAR Label:		
Clinical Type:	Select		Disable System Wide	
Data Type:	<none></none>		Display as Parent/Child	
Name				
Add Remove	Edit			*

- 3. Name: add or change the name of the clinical prompt.
- 4. Screen Display: add or change the prompt name that will appear on the PatientTouch application *Care Interventions* screen.
- 5. Short Display: add or change the name that will appear on the data entry panel on the PatientTouch application when the users enter their response.
- 6. To the right of the Clinical Type field, click **Select**.



Name	Code	Display Name	
Administration Site	couc	Admin Site	
Apical Pulse		Apical Pulse	
Blood Glucose		Blood Glucose	8
Blood Pressure		Blood Pressure	U
Blood Pressure Position		BP Position	
Blood Pressure Site		BP Site	
Breath Sounds		Breath Sounds	
Cardiac Capillary Refill		Capillary Refill	
Cardiac Edema		Edema	
Cardiac Heart Rhythm		Heart Rhythm	
Cardiac Heart Sounds		Heart Sounds	
Cardiac Neck Vein Diste		Neck Vein Distention	
Cough		Cough	
Creat Clearance		Creat. Clearance	
Creatinine Level		Creatinine Level	
- · · ·	DL OT	a:	_

- 7. Select a Clinical Type from the list and click **OK**. In general, the clinical type corresponds to the clinical prompt name. For example, if you're creating a clinical prompt for blood pressure, the Clinical Prompt Name will be something like Blood Pressure and the Clinical Type will also be Blood Pressure.
- 8. If the desired Clinical Type does not display in the list, you can create a new clinical type by clicking **New**.



🔬 New Clinical Ty	/pe: Pain Location
Clinical Type In	nfo
	Pain Location
Display Name:	Pain Location
Code:	
	Display as Parent/Child
Clinical Type C	omponents
Name	Label
Name	
	<b>_</b>
	•
Add	Remove Edit
	OK Cancel Apply

- 9. Name: Enter the name of the clinical type.
- 10. Display Name: Enter the name that will display on the PatientTouch application.
- 11. Click Add to add a clinical type component.



Clinical Type Componen	t: Pain Location	x
Clinical Component	Info	_
Name:	Pain Location	
	Always Display Label	
Label:	Pain Location	
Code:		<b>-</b>
Units/Suffix:		
	Allow Annotation	
Response Configura	ation	_
Data Type:	Response List	-
Response List:	Select	
	C Single Response	
	Multi Response	
	OK Cancel	
	ok Cancer	

- 12. Name: Enter the name of the clinical component.
- 13. Label: Enter the name that will display on the PatientTouch application.
- 14. Select **Allow Annotation** to display a post-it note icon to add a text message when collecting prompt information.
- 15. Add a **Data Type**. In this example, we chose a response list data type.
- 16. Click **Select** to add the response list.



Search			
Name			
Ambulatory aids			•
Blood Pressure Position			
Blood pressure site			
Blood Pressure Sites			E
Body position			
Breath Sounds			
Capillary Refill			
Cardiac Edema			
Cardiac Edema Location			
Cardiac Heart Rhythm			
Cardiac Heart Sounds			
Cardiac Neck Vein Distention			
Cough			
Diet Type			
Education			-
Delete		Edit	New

17. The *Response List* window displays. If the desired response list does not appear, click **New**.



New Re	sponse List: Pain Lo	cation	×
Respor	ses List		
Name:	Pain Location		
Code:			+,
Respor	ses		
Name		Label	
			<u> </u>
			-
			•
Ad	d Remove	Edit	
		OK Cancel	Apply

- 18. Enter the name of the new response list.
- 19. Click Add to start adding the responses to the response list.

Response: Head	<b>X</b>
Clinical Comp	onent Info
Name:	Head
Label:	Head
	Text Response Allowed
	Annotation Allowed
Code:	<b>+</b> _
Clinical State:	Normal
	OK Cancel

20. Click OK. Continue adding response list items until your list is complete.

🍰 Respon	se List: Pain Locatio	n	×
Respon	ises List		
Name:	Pain Location		
Code:			
Respon	ises		
Name	1	Label	
Head		Head	▲
Neck		Neck	
	ler-Right	Shoulder-Right	
Should	ler-Left	Shoulder-Left	
Ad	ld Remove	Edit	•
		OK Cancel	Apply

21. Click **OK** on the *New Response List* window.



Search	
Name	
IV/Saline Lock	-
Level of Consciousness	
Mental status	
Motor reaction	
Oxygen Mode - RT	
Pain description	
Pain Location	
Pain Scale Used	
Patch Placement Sites/Documentation	E
Patient Care Daily Care	
Patient Care Procedures	
Position	
Pulse Site	
Rounding Position	
Rounding Safety	
a no anna a na	-
Delete	Edit New

22. Select the response list and click **OK**.



Clinical Type Componen	at: Pain Location
Clinical Component	Info
Name:	Pain Location
	🗌 Always Display Label
Label:	Pain Location
Code:	<b>+</b>
Units/Suffix:	
	Allow Annotation
Response Configura	ation
	Response List
Response List:	Pain Location Select
	C Single Response
	• Multi Response
	OK Cancel

- 23. Click Multi Reponse when your list has more than one response.
- 24. Click **OK**.
- 25. Click **OK** on the *Clinical Type* window.



S	earch		
Name	Code	Display Name	
Output Ileostomy		Ileostomy	
Output Indwelling Cath		Indwelling Catheter Output	
Output Nephrostomy		Nephrostomy Output	
Output Urine		Urine Output	
Output Urostomy		Urostomy	
Oxygen Flow		Oxygen Flow	
Oxygen Saturation		O2 Saturation	
Pain Location		Pain Location	
Pain Scale		Pain Scale	=
Pain Scale Used		Pain Scale Used	
Patch Placement Site		Patch Site	
Patch Removal		Patch Removal	
Patient Care Daily Care		Daily Care	
Patient Care Procedures		Procedures	
Peak Flow Post		Peak Flow Post	
Deals Flow Dro		Dask Elaw Dra	-
Delete		Edit	ew

26. Select the clinical type from the list and click **OK**.

lew Clinical Prompt: Pain Loc	Formulary Associations         inical Prompt Info         Name:       Pain Location         Screen Display:       Pain Location         Short Display:       Pain Location         Clinical Type:       Pain Location         Data Type:       Response List					
Prompt Formulary Associ	iations					
Clinical Prompt Info						
Name:	Pain Location		Promp	ot Code:		
Screen Display:	Pain Location				Display on MAR	
Short Display:	Pain Location		MA	R Label:	Pain Location	
Clinical Type:	Pain Location	Select			Disable System Wide	
Data Type:	Response List	Ŧ			Display as Parent/Child	
Clinical Prompt Configurat	ion					
Question Text:			Response List:	Pain Loo	cation	~
Units/Suffix:			] (	C Single	e Response	
	Allow Annotation			Multi	Response	
Description:		-	1			
(Limit: 500 characters)		-				
					OK Cancel A	pply
	Prompt Formulary Associ Clinical Prompt Info Name: Screen Display: Short Display: Clinical Type: Data Type: Clinical Prompt Configurat Question Text: Units/Suffix:	Clinical Prompt Info Name: Pain Location Screen Display: Pain Location Short Display: Pain Location Clinical Type: Pain Location Data Type: Response List Clinical Prompt Configuration Question Text: Units/Suffix: EXAllow Annotation Description:	Prompt       Formulary Associations         Clinical Prompt Info       Name:         Name:       Pain Location         Screen Display:       Pain Location         Short Display:       Pain Location         Clinical Type:       Pain Location         Data Type:       Response List         Question Text:	Prompt       Formulary Associations         Clinical Prompt Info       Pain Location         Name:       Pain Location         Screen Display:       Pain Location         Short Display:       Pain Location         MA       Clinical Type:         Data Type:       Response List         Question Text:	Prompt       Formulary Associations         Clinical Prompt Info       Prompt Code:         Name:       Pain Location         Screen Display:       Pain Location         Short Display:       Pain Location         MAR Label:       Clinical Type:         Clinical Type:       Pain Location         Data Type:       Response List         Question Text:	Prompt       Formulary Associations         Clinical Prompt Info       Prompt Code:         Screen Display:       Pain Location         Short Display:       Pain Location         MAR Label:       Pain Location         Clinical Type:       Pain Location         Clinical Type:       Pain Location         Clinical Type:       Response List         Data Type:       Response List         Question Text:       Response List         Units/Suffix:       C Single Response         Image: Allow Annotation       Multi Response         Description:       Image: Allow Annotation



The new Clinical Type, Data Type, and Response List display.

#### When you select a Clinical Type:



a. The Data Type field is automatically populatedb. Some of the fields under the Clinical Prompt Configuration area may change

- 27. To display the clinical prompt on the online MAR and printed MAR reports, select **Display onMAR**, and enter the name that should be displayed in the MAR Label field.
- 28. Enter a Prompt Code if the information collected from this prompt will also be sent to your EHR. Hospitals that use this option work with their IT department and the PatientSafe Solutions System Engineer to obtain the prompt code values.
- 29. Select **Disable System Wide** if you want to proactively create a prompt but don't want it seen by users. This is most frequently used when testing a new prompt and then wanting to educate staff prior to it displaying in their workflows.
- **30**. Under the Clinical Prompt Configuration area, certain fields will be auto-populated from the configurations of the selected Clinical Type. Other fields can be configured here and include:
  - Allow Annotation: While this setting is determined by the configuration of the selected Clinical Type, you can change it here by either selecting or deselecting the checkbox.
  - Require Password: When the Data Type is set to Witness Barcode, this checkbox becomes enabled. When selected, users will have to enter a Witness password after scanning a Witness badge.
  - Description: If you think it will be helpful for users to access additional information about what this prompt is asking them, you can include a more detailed description in this field. For example, you may prompt the user to enter a sedation scale score. In order to help the user better determine what value to enter, you can include a description of the sedation scale values in this field. On the application, the user will be able to select an icon with a caduceus symbol to display this information.
- 31. If you want to see which formulary items currently have this prompt associated, click on the **Formulary Associations** tab. This table helps you determine if there are medications that still need to be associated or medications that no longer need to prompt for this information.



nical Prompt: Pain Location			<u> </u>
Prompt Formulary Associations			
Generic Name	Reference Brand Name	Hospital ID	
Morphine Sulfate		1506	-
Acetaminophen	TYLENOL	2262	
			-
		OK Cancel	Apply

- 32. When you are finished defining the clinical prompt settings, click **OK** to save the new clinical prompt. The prompt is displayed in the Clinical Prompts list.
- 33. If you try to delete a prompt, and it is associated with formulary items and/or interventions, you will receive a message asking if you are sure you want to delete.

Confirma	tion
?	The Prompt you are about to delete is associated with - 2 Medications Are you sure you want to delete this Clinical Prompt? Yes No

# **Intervention Lists**

To add or edit an Intervention List:

1. Select Intervention/Prompt Setup > Intervention Lists.



PatientTouch Clinical Manager - E	llue- Milstein - User, Admin	
Manager View Help		
Patient touch clinical manager - blue- missient - Oser, Admin		
PatientSafe Mira Mesa	Intervention Lists	
<ul> <li>Order Verification</li> <li>Patient Assignment</li> <li>Reports</li> <li>Pharmacy</li> <li>Laboratory</li> <li>Blood Administration</li> <li>Infant Care</li> <li>Intervention/Prompt Setup</li> <li>Intervention Lists</li> <li>Clinical Prompts</li> <li>Clinical Types</li> <li>Response Lists</li> <li>Flowsheet Setup</li> <li>Wriew</li> <li>Users</li> </ul>	Name Clinical Documentation Heparin Drip Infusion Start Time/Rate Insulin Drip	
_	Delete	

- 2. Do one of the following:
  - To create a new intervention list, click **New**.
  - To edit an existing intervention list, select the list and click **Edit** or double-click it.

🗌 Disable Syste	em Wide		
Components		_	
Name	Туре		
Administration Site	Clinical Prompt	<b>^</b>	
Apical Pulse	Clinical Prompt	=	
Blood Glucose	Clinical Prompt		
Blood Pressure	Clinical Prompt		_
End of Shift Document	ation Intervention		× .
Education	Clinical Prompt		
Infusion Start Time	Clinical Prompt		
Infusion Stop Time	Clinical Prompt	- 1	
n/ Data	Clinical Bromat	•	
Add Remo	ove Edit		



- 3. In the Name field, add or change the name of the intervention.
- 4. To add components to the intervention, click **Add**, and then click **Select**.

nterventio	n Component:	X	3
Сотро	nent		
Name:		Select	
Type:			
Workfl	ow Options		
	Bedside Only (patient	scan required)	
	Display last values for	activity only	
	Pre-Answer		
Collect	ion Options		
	<ul> <li>Must collect, no overri</li> </ul>	de allowed	
	C Must collect, allow over	erride with reason	
	C Skippable, don't ask in	'Collect All'	
	C Skippable, ask in 'Colle	ect All'	
	ОК	Cancel	
// Select C	Component		3
	Search		
Name		Туре	
Administ	ration Site	Clinical Prompt	•
Apical Pu	lse	Clinical Prompt	
Blood Glu		Clinical Prompt	1
Blood Pre		Clinical Prompt	
	essure Position	Clinical Prompt	
	essure Site	Clinical Prompt	
	essure UlcerAssessment	Intervention	
Breath So		Clinical Prompt	
	ssessment	Intervention	
	apillary Refill	Clinical Prompt	
Cardiac E		Clinical Prompt	
	leart Rhytm	Clinical Prompt	
Cardiac H	leart Sounds	Clinical Prompt	

OK

Clinical Prompt

Cancel

-

Cardiac Neck Vein Distention

5. Select the desired component, and click **OK**.

Intervention Component:				
Сотро	nent	_		
Name:	Blood Pressure Select			
Type:	Clinical Prompt			
Workfl	ow Options	-		
	Bedside Only (patient scan required)			
	Display last values for activity only			
	Pre-Answer			
Collect	ion Options	_		
	<ul> <li>Must collect, no override allowed</li> </ul>			
	C Must collect, allow override with reason			
	C Skippable, don't ask in 'Collect All'			
	C Skippable, ask in 'Collect All'			
	OK Cancel			

6. Select the desired Workflow and Collection Options for this component:

Workflow Options:

- Bedside Only Bedside only indicates that the prompt can only be documented after the patient is scanned. For example, you may want to set Administration Site to be Bedside Only to ensure the user does not document a site of administration until the point of administering the medication which requires that information.
- Display last values for activity only The system will display the last entered value at the time the user is prompted to enter a new value. If you want the last value to be only from this activity as opposed to pulling the last value for the same prompt from a different activity, check this option.
- Pre-Answer When selected, the user will not have to re-enter the same information for the same prompt that may be associated with multiple items throughout a single workflow. For example, during a medication administration workflow, the user may be giving multiple blood pressure medications requiring a blood pressure value. With this option checked the user will only be prompted for the value with the first medication and the system will automatically use the same value for any subsequent medications withinthe same workflow.

**Collection Options:** 



- Must collect, no override allowed The user must collect a value and cannot continue without doing so. An example of this might be prompting for a witness to a medication amount. If you want to require the user to capture this information prior to moving forward in the workflow, select this collection option.
- Must collect, allow override with reason The user can override and bypass entering a value but must provide an override reason which will be documented. For example, if the user is prompted for a lab value which may not be available, you may consider selecting this option for that prompt so the user can either enter the value or provide a hospital-approved reason for overriding.
- Skippable, don't ask in 'Collect All' If this option is selected, the prompt will not display as part of the list of prompts when the user "Begin Collection" to step through the list of prompts. No override reason is required.
- Skippable, ask in 'Collect All' If this option is selected, the prompt will display as part of the list of prompts when the user "Begin Collection" to step through the list of prompts. However, the user can skip it and no override reason is required.
- 7. Once you have defined all the options, click **OK**.
- 8. Repeat these steps to add components, as necessary.
- 9. When finished adding components, click **OK** to save the new intervention list. The list is displayed in the Intervention Lists list.

# Interventions

To add or edit an intervention:

1. Select Intervention/Prompt Setup > Interventions.

🖉 PatientTouch Clinical Manager - Blue- Milstein - User, Admin				
Manager View Help				
G		02/05/2019 12:01 PST		
PatientSafe Mira Mesa	Interventions			
Patients     Order Verification     Patient Assignment	Search			
	Name BradenPressure Ulcer Assessment BradenPressure UlcerAssessment	<u>_</u>		
Caboratory     Blood Administration	BradenPressure UlcerAssessment -eh Cardiac Assessment			
Infant Care     Infant Care     Intervention/Prompt Setup     Interventions	e_BradenPressure UlcerAssessment e_Glasgow Coma Scale e_MEWS_Scored_Intervention			
Intervention Lists     Clinical Prompts	e_Morse Fall Risk Assessment End of Shift Documentation	E		
Clinical Types Response Lists	Hourly Rounding Intake Intake/Output			
Intervention Scheduling     Flowsheet Setup	Intake/Output     MEWS. Scored Intervention			
B- Direw	Output Patient Care Post Tx w/FiO2			
- Roles - Configuration	Post 1x w/FIO2 Post Tx w/Liter Flow	<u> </u>		
	Delete	Edit New		



- 2. Do one of the following:
  - To create a new intervention, click **New**.

Interventions are created based on the clinical data types and prompts you have set up in Intervention/Prompt Setup>Clinical Prompts/Clinical Types.

• To edit an existing intervention, select the intervention and click **Edit** or double-click it.

Name:	Respiratory Evaluation			
Screen Display:	Respiratory Ev	/al.		
Short Display:	Evaluation			
Code:				
Hospital ID:				
	Display on	MAR		
MAR Label:	Respiratory Ev	/al.		
	Allow Addi	ition from Master List		
	Disable Sys	tem Wide		
	o autore sys			
Components –				
			_	
Name		Туре		
Name Pulse Rate		Type Clinical Prompt	•	
	e		•	
Pulse Rate		Clinical Prompt Clinical Prompt Clinical Prompt	•	
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	•	
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT Oxygen Flow		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	-	
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT Oxygen Flow FiO2		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	-	
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT Oxygen Flow FiO2 Breath Sounds		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	-	• •
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT Oxygen Flow FiO2 Breath Sounds Cough		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	•	
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT Oxygen Flow FiO2 Breath Sounds Cough Secretions		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	*	
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT Oxygen Flow FiO2 Breath Sounds Cough Secretions Position		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	*	
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT Oxygen Flow FiO2 Breath Sounds Cough Secretions		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	•	
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT Oxygen Flow FiO2 Breath Sounds Cough Secretions Position		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	* *	
Pulse Rate Respiratory Rat Oxygen Saturat O2 Mode - RT Oxygen Flow FiO2 Breath Sounds Cough Secretions Position		Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt Clinical Prompt	•	

- 2. In the Name field, add or change the name of the intervention.
- 3. In the Screen Display field, add or change the intervention name that will appear on the PatientTouch application Interventions screen.
- 4. In the Short Display field, add or change the intervention name that will appear where summary information is used.

- 5. Add the Hospital ID (optional)
- 6. Click **Display on MAR** to have the intervention display in the online MAR and printed MAR documents.
- 7. Enter the MAR Label, which will be the name of the intervention that displays in the online MAR.
- 8. Click **Allow Addition from Master List** to allow the user to add additional pieces of information from a "master list" of prompts accessible in the PatientTouch application.
- 9. Click **Disable System Wide** to prevent the intervention from displaying to the users in the PatientTouch application until the point in time you are ready for them to be prompted for, or use, the information.
- 10. To add components to the intervention, click Add, and then click Select.

Intervention Component:	Select Component		x
Component	Search		
Name:	Name	Туре	
	Administration Site	Clinical Prompt	<b></b>
Туре:	Apical Pulse	Clinical Prompt	
Workflow Options	Blood Glucose	Clinical Prompt	
	Blood Pressure	Clinical Prompt	
Bedside Only (patient scan required)	Blood Pressure Position	Clinical Prompt	
	Blood Pressure Site	Clinical Prompt	
Display last values for activity only	BradenPressure UlcerAssessment	Intervention	
Pre-Answer	Breath Sounds	Clinical Prompt	
Pre-Answer	Cardiac Assessment	Intervention	
	Cardiac Capillary Refill	Clinical Prompt	
Collection Options	Cardiac Edema	Clinical Prompt	
Must collect, no override allowed	Cardiac Heart Rhytm	Clinical Prompt	
	Cardiac Heart Sounds	Clinical Prompt	
Must collect, allow override with reason	Cardiac Neck Vein Distention	Clinical Prompt	-
C Skippable, don't ask in 'Collect All'	OK	Cancel	_
C Skippable, ask in 'Collect All'			
OK Cancel			

- **11**. Select the desired component and click **OK**.
- 12. Select the desired Workflow and Collection Options for this component and click **OK**. Refer to the Intervention Lists section for more detailed information on how to setup Workflow and Collection Options.
- 13. Repeat these steps to add components, as necessary.
- 14. When finished adding components, click **OK** to save the new intervention. The intervention is displayed in the Interventions list.

# **Intervention Scheduling**

Intervention Scheduling is only available if you have purchased the Intervention Scheduling Module. The following sections explain the Intervention Scheduling tab of the PatientTouch Clinical Manager. This user guide describes each of the tabs under the Intervention Scheduling folder. Click a link below or from the Contents tab on the left to learn more.

- Notification Settings
- Standing Orders
- Orderable Interventions
- Schedules

# **Notification Settings**

Notification Settings allows caregivers to select CNA, RT, and Nurse intervention order notification settings.

1. Select Intervention Scheduling>Notification Settings.

🖉 PatientTouch Clinical Manager - Blue- Milstein - User, Admin				
Manager View Help				
C	02	2/05/2019 12:03 PST		
PatientSafe Mira Mesa  PatientS  Patients  Patient Assignment  Pat	Notification Settings CNA Intervention Order Settings Iv Notify CNA of New/Updated Intervention Orders Iv Notify CNA of Discontinued Intervention Orders Iv Notify Nurse of New/Updated CNA Intervention Orders Iv Notify Nurse of Discontinued Intervention Orders Iv Notify Nurse of Due CNA Intervention Orders Iv Remind Nurse of Late CNA Intervention Orders Rt Intervention Order Settings Iv Notify RT of New/Updated Intervention Orders Iv Notify RT of Discontinued Intervention Orders	/05/2019 12:03 PST		
MView     Users     Roles     Configuration	<ul> <li>Notify Nurse of New/Updated RT Intervention Orders</li> <li>Notify Nurse of Discontinued RT Intervention Orders</li> <li>Remind Nurse of Due RT Intervention Orders</li> <li>Remind Nurse of Late RT Intervention Orders</li> <li>Nurse Intervention Order Settings</li> <li>Notify Nurse of New/Updated Nurse Intervention Orders</li> <li>Notify Nurse of New/Updated Nurse Intervention Orders</li> <li>Notify Nurse of Discontinued Nurse Intervention Orders</li> </ul>			

2. Select the options for this screen based on the following field definitions:

# **CNA Intervention Order Settings**

- Notify CNA of New/Updated Intervention Orders: Notify the CNA of any new or updated intervention orders.
- Notify CNA of Discontinued Intervention Orders: Notify the CNA of any discontinued intervention orders.
- Notify Nurse of New/Updated CNA Intervention Orders: Notify the nurse of any new or updated CNA intervention orders.
- Notify Nurse of Discontinued Intervention Orders: Notify the nurse of any discontinued intervention orders.
- Remind Nurse of Due CNA Intervention Orders: Remind the nurse of any CNA intervention orders that are due.
- Remind Nurse of Late CNA Intervention Orders: Remind the nurse of any CNA intervention orders that are late.

# **RT Intervention Order Settings**

- Notify RT of New/Updated Intervention Orders: Notify the RT of any new or updated intervention orders.
- Notify RT of Discontinued Intervention Orders: Notify the RT of any discontinued intervention orders.
- Notify Nurse of New/Updated RT Intervention Orders: Notify the nurse of any new or updated RT intervention orders.
- Notify Nurse of Discontinued RT Intervention Orders: Notify the nurse of any discontinued RT intervention orders.
- Remind Nurse of Due RT Intervention Orders: Remind the nurse of any RT intervention orders that are due.
- Remind Nurse of Late RT Intervention Orders: Remind the nurse of any RT intervention orders that are late.

## **Nurse Intervention Order Settings**

- Notify Nurse of New/Updated Nurse Intervention Orders: Notify the nurse of any new or updated nurse intervention orders.
- Notify Nurse of Discontinued Nurse Intervention Orders: Notify the nurse of any discontinued nurse intervention orders.
- 3. Click **Save** when you are done.

# **Standing Orders**

Interventions that are created as Standing Orders, are assigned to specific nursing units. They are available immediately for patients assigned to those nursing units.

1. To configure a new Standing Order, select Intervention Scheduling>Standing Orders from the left.

PatientTouch Clinical Manager - B	lue- Milstein - User, Admin		
Manager View Help			
C			02/05/2019 12:05 PST
PatientSafe Mira Mesa	Standing Orders		
Patients     Order Verification		Search	
Patient Assignment	Intervention	Schedule	Nursing Unit(s)
Reports     Pharmacy     Laboratory     Laboratory     Infant Care     Infant Care     Intervention/Prompt Setup     Intervention Scheduling     Standing Orders     Schedules     Schedules     Flowsheet Setup     Users     Roles     Configuration	End of Shift Documentation Post Tx w/FiO2 Post Tx w/Liter Flow Vital Signs Respiratory Evaluation	One Time Available Available Daily One Time	LE, IN, IS, IW 15, 3RDFLOOR 1W, 3RDFLOOR 3N, 3RDFLOOR 3RDFLOOR Constraints Co

- 2. Click New.
- 3. Click **Select** next to the Intervention field to display a list of interventions.

New Standing Orde	er. X
Intervention:	Select
Schedule:	Select
	No catch up
Nursing Units:	Add
	Remove
	OK Cancel Apply

4. Select an intervention from the list.

	// Select Intervention				
	Search				
	Name				
	BradenPressure UlcerAssessment				
	Cardiac Assessment				
	End of Shift Documentation				
1	Hourly Rounding				
1	Intake				
	Intake/Output				
	Morse Fall Risk Assessment				
	Patient Care				
	Post Tx w/FiO2				
	Post Tx w/Liter Flow				
	Respiratory Evaluation				
1	Vital Signs				
	• •				
	OK Cancel				

- 5. Click OK.
- 6. Click **Select** next to the Schedule field to select a schedule for the Intervention.

New Standing Ord	er. X
Intervention:	
Schedule:	Select
	🗆 No catch up
Nursing Units:	Add
	Remove
	OK Cancel Apply

📶 Select Schedu	e	×
Sear	ch	
Name		
Available		•
Daily		
Every Other Hou	ır Nurse	
One Time		
Q 4 Hour		
Q 8 Hour		
]		<b>–</b>
	OK Cancel	

- 7. Click OK.
- 8. The **No catch up** check box is used for interventions that are scheduled to repeat: When checked, missed interventions would be removed from the To do List and Care tab at the earliest of:
  - The end of the missed intervention lag time
  - The beginning of the next intervention lead time
  - The mid point between the missed intervention due time and the next due time.
- 9. Click **Add** to the right of the Nursing Units field on the *New Standing Order* window to display a list of Nursing Units.
- 10. Select nursing unit(s) as required.

// Select N	ursing Un	it(s)	×
	Search		
Name			
10106			<b>▲</b>
10108			
10151			E
1E			
1E (B)			
1N			
1N (B)			
1S			
1S (B)			
1W			
1W (B)			
2 West			
2-South			
2-West			-
		OK Cancel	

- 11. Click OK.
- 12. The *New Standing Order* window will display the selected configuration for this order.
- 13. Click **OK** to accept the configuration.

New Standing Ord	er:	X
Intervention:	Vital Signs	Select
Schedule:	Q 4 Hour	Select
	🔲 No catch up	
Nursing Units:	2-South 2-West	Add
	3RDFLOOR	▼ Remove
		OK Cancel Apply

# **Orderable Interventions**

Select **Orderable Interventions** to configure which care roles (CNA, Nurse, RT) can execute interventions (document the intervention), and which user roles can order and discontinue



interventions. In order to schedule an intervention for a specific patient or assign an intervention to a specific nursing unit, all interventions must be listed under the **Orderable Interventions** tab.

- 1. Select Intervention Scheduling> Orderable Interventions.
- 2. Click New.

PatientTouch Clinical Manager - B	Blue- Milstein - User, Admin	
Manager View Help		
C	02/	/05/2019 12:06 PST
PatientSafe Mira Mesa	Orderable Interventions	
Patients     Order Verification	Search	
Patient Assignment     Reports	Name	
Pharmacy     Laboratory	Braden UlcerAssessment -eh Cardiac Assessment e_Adult Glasgow Coma Scale	
Blood Administration     Infant Care	e_Braden UlcerAssessment e_MEWS Scored Intervention	
Intervention/Prompt Setup     Intervention Scheduling	e_Morse Risk of Falling Assessment End of Shift Doc. Hourly Rounding	
Notification Settings     Standing Orders	Intake Intake/Output	
Orderable Interventions     Schedules	MEWS Scored Intervention Morse Risk of Falling Assessment	
B- C Flowsheet Setup B- C MView	Patient Care Post Tx w/FiO2	
	Post Tx w/L Flow Respiratory Eval.	
Configuration	Vital Signs	
		-
	Delete	New

The New Orderable Intervention window will appear.



Care Roles for Executing Intervention Or	rder:	Add Remove
Roles for Ordering Intervention		Roles for Discontinuing Intervention
Name All Privileges	•	All Privileges
Blood Bank	-	Blood Bank
House Supervisor		House Supervisor
П		
Lab Tech		Lab Tech
Location Pharmacist		Location Pharmacist
Location Pharmacist Manager	=	Location Pharmacist Manager
Nurse Lab Collector		Nurse Lab Collector
Nurse Manager		Nurse Manager
Nurse Preceptor		Nurse Preceptor
Nurse Tech/CNA		Nurse Tech/CNA
Pharmacist		Pharmacist
Pharmacy Inventory Tech		Pharmacy Inventory Tech
Pharmacy Manager		Pharmacy Manager
Pharmacy Tech		Pharmacy Tech
Phlebotomist		Phlebotomist
Physician	-	Physician
		OK Cancel Apply

3. Click **Select** to select an intervention to configure.

selected roles.

// Select Intervention	n	×
Search		
Name		
Output		<b>^</b>
Post Tx w/Room Air	r	
Pre Tx Assessment		
		•

- 4. Select an item from the list and click **OK**.
- 5. Click **Add** under Care Roles for Executing Intervention Order. A popup will appear listing the available care roles. Select the roles and click **OK**. The selected roles will appear in the *Care Roles for Executing Intervention Order* window.

Select CareRole(s)		×
Search		
Name		
Certified Nursing Ass	istant	-
Nurse		
Respiratory Therapist	1	
		•
	OK Cancel	

- 6. Select the user roles that can order this intervention.
- 7. Select the user roles that can discontinue this intervention.



8. Click **OK** to accept the input.

v Orderable Intervention:		
Intervention: Pre Tx Assessment		Select
Care Roles for Executing Intervention Ord	ler:	
Certified Nursing Assistant		
Nurse		
		Add Remove
Roles for Ordering Intervention		Roles for Discontinuing Intervention
Name		Name
Nurse Lab Collector	•	All Privileges
Vurse Manager	_	Blood Bank
Nurse Preceptor		House Supervisor
Nurse Tech/CNA		Π
Pharmacist		Lab Tech
Pharmacy Inventory Tech	-	Location Pharmacist
Pharmacy Manager		Location Pharmacist Manager
Pharmacy Tech		Nurse Lab Collector
Phlebotomist		✓ Nurse Manager
Physician		Nurse Preceptor
Respiratory Therapist	=	Nurse Tech/CNA
Respiratory Therapist Manager		Pharmacist
		Pharmacy Inventory Tech
RT Lab Collector		Pharmacy Manager
Staff Nurse		Pharmacy Tech
System Manager		Phlebotomist
Unit Secretary	•	Physician

# **Schedules**

Schedules provide the ability to configure interventions based on:

- Discrete times
- Intervals
- One Time
- PRN

Interventions can be ordered from within Clinical Manager, in the PatientTouch application, from an external system, or as Standing Orders.



- 1. To begin the intervention scheduling configuration, click **Schedules** from the left.
- 2. Then, click **New** to create a new intervention schedule.

inager <u>V</u> iew <u>H</u> elp		02/05/20	19 12:07
stientSafe Mira Mesa Schedules			
Patients     Order Verification	iearch		
Patient Assignment Reports Name	Display Text	Туре	
Pharmacy     Available	Available	Available	
Daily	Daily	Discrete	
Every Other Hour Nuise	Every Other Hour Nurse	Interval	
NOW	NOW	One Time	
Infant Care One Time	One Time	One Time	
Intervention/Prompt Setup Q 4 Hour	Every 4 Hours	Interval	
Intervention Scheduling Q 8 Hour	Every 8 Hours	Interval	
Notification Settings			
- Standing Orders			
Orderable Interventions			
Schedules			
Flowsheet Setup			
mView			
Users			
Roles			
Configuration			
			_

# **Intervention Types**

Four schedule type options are available (**Discrete, Interval, One Time**, or **Available**). Each option offers a unique set of fields.



New Schedule:	×
Schedule Info	
Name:	
Display Text:	
Type:	Invalid
Description -	Discrete
Invalid Sched	
	Available
Cattings	
Settings	
	OK Cancel Apply

#### Discrete

A **Discrete** intervention is scheduled to occur at a specific time(s). In this example, the intervention will occur at 9:00 each morning.

- 1. Add a name for the schedule.
- 2. Add a label (Display Text) to appear on the PatientTouch application.
- 3. Enter the Discrete Settings.
- 4. Click **Edit** to enter information in the Discrete Times field.
- 5. Enter Lead and Lag times if desired.
- 6. Click **OK** to accept the entries and return to the Schedules screen.



New Schedule: Daily	x
Schedule Info	_
Name: Daily	
Display Text: Daily	
Type: Discrete	
Description	_
Give at 06:00 every day	
Discrete Settings	-
Every 1 Day(s)	
O Specific days of the week	
🗆 Sun 🗖 Mon 🗖 Tue 🗖 Wed 🗖 Thu 🗖 Fri 🗖 Sa	st
Discrete Times 06:00 Edit	וור
Lead time: 01:00 Lag time: 01:00	-
Lead time: 01:00 Lag time: 01:00	
OK Cancel Apply	

#### Interval

An **Interval** intervention is scheduled to occur at designated time intervals. In this example, the intervention will occur every 4 hours, starting at 8:00 each morning.

- 1. Add a name for the schedule.
- 2. Add a label (Display Text) to appear on the PatientTouch application.
- 3. Enter the Interval Settings.
- 4. Enter Lead and Lag times if desired.
- 5. Click **OK** to accept the entries and return to the *Schedules* screen.



New Schedule: Q4H
Schedule Info Name: Q4H Display Text: Q4H Type: Interval
Description Give every 4 hours beginning at 06:00
Interval Settings Every 4 Hour Base Time: 06:00
Lead time: 01:00 Lag time: 01:00
OK Cancel Apply

#### One Time

A **One Time** intervention is scheduled to occur once.

- 1. Add a name for the schedule.
- 2. Add a label (Display Text) to appear on the PatientTouch application.
- 3. Select **One Time** from the **Type** drop down list.
- 4. Enter Lead and Lag times if desired.
- 5. Click **OK** to accept the entries and return to the *Schedules* screen.



New Schedule: Or	ne Time	x
Schedule Info	)	
	One Time	
Display Text:	One Time	
Type:	One Time 💌	
Description -		
Give once		
One Time Set	tings	—
Lead time:	01:00 Lag time: 01:00	
	OK Cancel App	olv

#### Available (PRN)

An **Available** intervention can be scheduled as needed.

- 1. Add a name for the schedule.
- 2. Add a label (Display Text) to appear on the PatientTouch application.
- 3. Select Available from the Type drop down list.
- 4. Click **OK** to accept the entries and return to the *Schedules* screen.



New Schedule: PR	N	×
Schedule Info		
Name:	PRN	
Display Text:	PRN	
Type:	Available 💌	
Description -		
Give as neede	d	

# Configuring the Medication Administration Module

# **General Settings**

The Pharmacy tab of the PatientTouch Clinical Manager is used to configure basic settings for the Medication Administration Module. We begin with an overview of the Pharmacy Settings.

# **Overview of Pharmacy Settings**

Working with a PatientSafe Solutions representative, the hospital pharmacy performs initial setup for the Clinical Manager to import the pharmacy information system's hospital formulary list into the Clinical Manager. After the initial formulary items are in the system, the configuration process includes:

- Entering/uploading the NDC and barcodes present in pharmacy inventory and associating them with the corresponding formulary item.
- Selecting options for clinical checks—including drug interaction and allergy checking,

maximum single dose checking, and acetaminophen cumulative dose checking—to trigger the PatientTouch application to perform the necessary checks at the point of administration.

- Associating clinical prompts with formulary items.
- Entering/uploading SIG codes that correspond to those used in the pharmacy information system.
- Enabling Computerized Physician Order Entry (CPOE) settings, if CPOE is in use at the hospital.



# CPOE functionality must be activated by PatientSafe Solutions technical support prior to configuring the pharmacy settings.

Physician medication orders are reviewed by the pharmacist and entered into the pharmacy information system. These medication orders are then sent to the PatientTouch Clinical Manager via an interface. Formulary and SIG codes must be custom configured for the hospital so the orders can be interpreted correctly by the PatientTouch Clinical Manager.

Because the iPhone device is designed to scan barcodes on medications at the patient bedside, the hospital pharmacy department is responsible for insuring that a barcode will be present on every item to be, both during system setup and as an ongoing process, and that these barcodes are in the Clinical Manager formulary.

Because several brands may satisfy a single formulary medication, multiple barcodes can be added to each formulary item.

Click the links below to learn more about the General Settings tab:

- Pharmacy Setup
- Order Verification
- Satellite Pharmacies
- Message to Rx
- Quarantine Order Requests

## **Pharmacy Setup Tab**

The Pharmacy Setup options allow you to configure system preferences for your pharmacy, such as designating a default Pharmacy destination, specifying alert expiration times, specifying barcode packager settings, and configuring CPOE options.

To get started configuring pharmacy system preferences, select **Pharmacy>General Settings>Pharmacy Setup**.

### **Pharmacy Destinations**

**Pharmacy Destinations** is used to specify the default destination for messages sent from caregivers (for example, Quarantined Order Notifications Message to Rx). The Pharmacy Destination is defined in the Clinical Manager>Destinations as a physical printer, an email address or a shared drive. If your facility has more than one destination configured, click inside the Destination area to select one from the list.

If your hospital is configured for Campus Support and you have selected <All> hospitals at login, you will see the various hospitals display in the Pharmacy Destinations field. The hospitals that display have been associated to a printer in the Destinations folder. Click the drop down menu under the Destination column to select a specific printer for each hospital.

### Set Alert Expiration Times

Alert expiration times can be configured to support your hospital's polices on how long caregivers will continue to receive notifications of an order's status when they scan a medication that has been discontinued, fulfilled, or stopped.

To select or change the alert expiration times:

In the Alert Expiration Times area, use the drop-down lists to select expiration times for discontinued, fulfilled, and stopped orders.

Alert Expiration Times		
Order Discontinued:	4 Hours	
Order Fulfilled:	4 Hours	
Order Stopped:	4 Hours	
	After the selected time has passed, the user will automatically enter the Order Not Found in System workflow.	

Alerts can be overridden in the PatientTouch application, but require an override reason be entered. Overriding alerts invokes the *Order Not Found in System* workflow. After the Alert Expiration Times have been reached, the PatientTouch application invokes the *Order Not Found in the System* workflow without displaying notification of order status.

## Order Accessibility on Handheld

This option allows you to define the amount of time for which you want inactive orders to remain available on the handheld. In doing so, users are able to add additional MAR documentation (e.g. clinical documentation) against these orders from the handheld device.

### Order Not Found in System

Use the configurable Order Not Found in System alert to set the workflow to a hard stop or warn and proceed.

#### **Order Not Found Alert Type**

Order Not Found in System		
Order Not Found Alert Type:	Stop Administration 💌	
Number of components that	Stop Administration Warn Only	

#### **Stop Administration**

Select **Stop Administration** when you want to stop the administration of a medication. When you enter the Order Not Found in System workflow using the PatientTouch application, you will receive a *Stop Administration* alert and only have the option to cancel the workflow.

#### Warn Only

Select **Warn Only** so when you encounter the *Order Not Found in System* workflow, you will only receive the warning and you will be able to tap **Continue** and complete the workflow as necessary.

### Allow New Order Option

Users have the ability to configure the *New Order* workflow, which allows caregivers to administer a new order for the medication, different from the scheduled dose. The setting is on by default. When the setting is selected, or checked, users can enter the *New Order* workflow and will see the **New Order** option on the **Options** menu of the PatientTouch application. Deselect the **Allow New Order** 

**Option** checkbox to disable the *New Order* workflow. If the *Order Not Found in System* alert is configured to be a hard stop (Stop Administration), the **New Order** option is automatically disabled.

## Allow Now Dose Option

Users have the ability to configure the *Now Dose* workflow, which allows caregivers to administer a medication now, as opposed to the regularly scheduled dose. The setting is on by default. When the setting is selected, users can enter the *Now Dose* workflow using the PatientTouch application. Deselect the **Allow Now Dose Option** checkbox to disable the *Now Dose* workflow.

When users do not want to use the **Now Dose** option, the following workflows will change:

- Order Not Started The alert screen will only show the first scheduled dose and the user will need to provide a reason for giving the medication before the order start time.
- *Early* The alert screen will only show the early dose as the option and user will have to provide a reason for giving the dose early.

## Limit Order Not Found by Access Groups

If your facility has the ability to define Access Groups in the EHR, you will be able to configure certain PatientTouch features in the Clinical Manager based on the same Access Groups.

💹 PatientTouch Clinical Manager - I	Dlue- Hilstein - User, Admin	_ O ×
Manager View Help		
C		08/15/2019 18:18 PDT
	General Settings	
Patients     Order Verification	Pharmacy Setup Order Verification Satellite Pharmacies Message to Rx Quarantine Order Requests	
Patient Assignment		<u> </u>
Reports	Hed Preparation	
B Pharmacy	F Hide Med Prep	
General Settings     Ginical Settings	Number of components that may be prepped together: 3	
Master Drug File	Patient Specific Med Barcode Settings	
Generic Equivalency Grou     SIG Codes	Use Patient-specific, multi-dose medication	
Allergy Mapping		
B C Laboratory	Barcode Eprmet:	
Blood Administration     Difference	Select barcode format	
Intervention/Prompt Setup	Barcode Packager Settings	
B D Intervention Scheduling	🖓 Use Drug Packager Barcode Format Mask	
🖲 🛄 Flowsheet Setup	Barcode Format:	
H- C IVew	DOXX	
Roles	O = Include this character in the Barcode String	
- Configuration	X = Exclude this character from the Barcode String	
	MMYY = Expiration Date Month and Year	
	Valid strings can include any number of Xs and Os in any position	
	MMYY is optional and may appear anywhere in the string	
	Order Settings	
	Display Components In Order Received	
	Display Order Number on Handheld	
	Tisable Clinical Documentation Option In Order Details	
	Require VIS documentation during administration of vaccines	
	Tisable Delay/Delay All Actions	
	Disable Message To Pharmacy	
	Stop Administration of medication if order is in a Rejected state	
	Minutes before start time an order can be administered:	
	Minutes after stop time an order can be administered:	<u>.</u>
	Save	

Access Groups can be configured for ONFS and CPOE orders.

## **Med Preparation**

#### **Hide Med Prep**

For customers that do not need the med prep workflow, PatientSafe Solutions provides the option to disable this feature.

When enabled, caregivers will not see the Med Prep or Med Admin buttons on the handheld.

#### Set the Number of Components that Can Be Prepped Together

Depending on a hospital's pharmacy service coverage and policies, the caregiver may need to prepare (compound or admix) a medication prior to taking the final preparation to the point of administration. This process is completed in the Med Prep workflow. To allow compliance with laws and policies, the PatientTouch System allows the facility to specify the total number of medication components that can be prepared by the caregiver using the Med Prep process. For IV admixtures, this number includes the base solution and additives. The number of components permitted is entered in the Number of components that may be prepped together field.

To select or change the number of components that can be prepped together:

In the Order Not Found in System area, enter the number of components that can be prepped together in the field provided.

## Patient-Specific Med Barcode Settings

**Use Patient-Specific, Multi-Dose Medication** – Select to enable the patient-specific, multi-dose medication barcode format. This barcode will identify the medication being specific to a patient, similar to order-specific barcodes. However, the difference this barcode provides is the ability to be reused even if the order changes. The pharmacy will need to be able to generate a barcode with the information defined here (patient visit number and/or MRN number plus the hospital ID/PKV).



# If the "Patient-Specific, Multi-Dose Medication" option is enabled, this barcode information is required.

Delimiter: Select from one of the special characters listed on the screen.

Add Barcode format		
Format barcode		
Delimiter:		
Only Special characters '-, _, , !, \$, %, ^, *, +' are allowed in Delimiter field. Patient specific barcode format Values		
Barcode Format	Select	
Hospital PKV		
Visit Number		
MRN		
OK Cancel Apply		

**MRN, Visit Number, Hospital PKV:** Select the MRN and/or Visit Number option, which will be used in conjunction with the Hospital PKV to define the barcode format. Use the up/down arrow to place each item in the sequence desired. Click **OK**.

## Define the Drug Packager Barcode Format Mask

The Barcode Packager Settings is applicable when using a pharmacy-based packaging system that allows you to embed the expiration date in the barcode. By defining a global Barcode Format Mask, it is then possible to embed an expiration date in certain pharmacy-packaged barcodes as well as to ignore certain unneeded characters within the barcode. If the Barcode Format Mask is used with the position of MMYY specified, and if the barcode is flagged in the Clinical Manager formulary as using the mask format, the expiration date in the barcode will be checked when the medication is scanned prior to administration. Doses will be considered expired after the last day of the month specified by MMYY.

To define the Drug Packager Format Mask, perform the following steps:

1. In the Barcode Packager Settings area, select Use Drug Packager Barcode Format Mask.



Barcode Packager Settings				
✓ Use Drug Packager Barcode Format Mask				
Barcode Format:				
	O = Include this character in the Barcode String			
	X = Exclude this character from the Barcode String			
	MMYY = Expiration Date Month and Year			
	Valid strings can include any number of Xs and Os in any position			
	MMYY is optional and may appear anywhere in the string			

- 2. Use Os, Xs, and MMYY to define the purpose of the characters within the barcode. Note in the example that the Barcode Format establishes the first 10 digits to be the product identifier, the next 8 characters to be ignored, and the last 4 characters as the month and year.
- 3. In the **Master Drug File** folder, choose a formulary item, click **Add Brand** and select the **Packager Generated Barcode Format** checkbox for barcodes in the formulary for which you want the Barcode Format Mask to be applied. Do not include the excluded characters or the MMYY characters in the barcode field.

Add Formulary	Brand
Brand Name:	Luride
Barcode:	0126612587
Code:	
NDC:	Packager Generated Barcode Format 0126     -0006     -21     NDC Search OK     Cancel

#### **Order Settings**

**Display Components in Order Received:** When selected, the MAR and PatientTouch application will display multi-component orders in the order received from the HL7 interface.

**Display Order Number on Handheld:** When selected, the PatientTouch application will display the order number.

**Disable Clinical Documentation Option in Order Details:** When selected, clinical documentation from the **Options** menu in the Order Details view will be suppressed. When the **Disable Clinical Documentation Option in Order Details** is selected, the **Observation** button on the patient's online MAR will be disabled.



**Require VIS documentation during administration of vaccines:** When selected, caregivers will need to print the Vaccine Information Sheet (VIS) for the patient before documenting the administration. The VIS shows up on eMar and printed MAR.

**Disable Delay/Delay All Actions:** The Delay and Delay All functions in PatientTouch are designed to suppress dose reminders longer than the global reminder setting. Due to some customers not wanting to utilize these functions and/or EHR systems not supporting them, the PatientTouch System now includes the option to disable them from the clinical application.

**Disable Message to Pharmacy:** Provides the option to remove Message to Rx from the Options menu of the handheld.

**Stop Administration of Medication if Order is in a Rejected State:** When selected, caregivers will not be able to administer medication orders that have been rejected by Pharmacy and thus placed in a rejected state. For example, pharmacists may need to investigate an order to determine the appropriateness of care for a patient. The pharmacist may then choose to reject a medication order in the Host EHR Pharmacy system to indicate the investigation in ongoing.

#### **Documentation Boundaries for Order Start and Stop Times**

These two optional settings allow you to further define when a user can document against an order before the start and/or after the order stop time. For example, you may want to limit the acceptable documentation time for doses being given prior to the order start time. Or, if there is a dose scheduled at the same time as the order stop time, customers may want the users to have up to a defined amount of time after that point to administer this last dose.

Minutes before start time an order can be administered: 60

Minutes after stop time an order can be administered: 10

6	00000
ľ	
L	

These settings will take precedence over the defined lead and/or lag time set at the Formulary Item/Sig Code/Nursing Unit level. If you want those times to still be honored for order start and order stop times, make sure to set these new times to an equal or greater amount of time.

To define the allowed amount of time for documentation before the order start and after the order stop time, perform the following steps:

- 1. In the Minutes before start time an order can be administered, define the number of minutes prior to order start time doses are able to be administered/documented.
- 2. In the Minutes after stop time an order can be administered, define the number of minutes after order stop time doses are able to be administered/documented.



The recommendation is to set these times to equal or longer than the greatest defined lead/lag times. For example, if the longest lead and/or lag time setting at any level (med, sig code or nursing unit) is 60 minutes, set these times to at least 60 minutes.



🔏 PatientTouch Clinical Hanager - Blue- Hilstein - User, Admin 📃 📃 🗶					
Manager View Help					
C		0000-00-00 00:00.000			
	General Settings         Pharmacy Setup       Order Verification       Satellite Pharmacles       Message to Rx       Quarantine Order Requests         Prompt Based On Ordered Med       CPOE Settings       CPOE Settings       CPOE Settings         Image: Prompt Based Order Override Notification to Pharmacy Printer       Display CPOE orders prior to Rx Verification         Image: Prompt Based Order Override Notification       Name       Name         Image: Philosophian Set Setting Should apply.       Name       Name         Image: Philosophian Set Setting Should apply.       Satellite Pharmacy Setting Should apply.				
<b>I</b>	Save				

#### **Prompt Settings**

**Prompt Based on Ordered Med:** Please contact your account manager for further information on this feature.

#### **CPOE Settings**

If your hospital has the CPOE order matching feature enabled, the CPOE Settings options appear in the Pharmacy Setup tab.

To define the CPOE options, perform the following steps:

- 1. Select **Enable Alternate CPOE Med ID** to allow medications to be mapped to medication IDs in another formulary.
- 2. Select **Auto-Print Rx Unverified Order Override Notification to Pharmacy Printer** to send a notification to the Pharmacy printer that a CPOE order which pharmacy has not yet approved has been administered.
- 3. **Display CPOE orders prior to Rx Verification:** When this setting is enabled, the caregiver will be able to see the CPOE order in the PatientTouch System prior to pharmacy verification and prior to any administration. If the setting remains off, the caregiver will not see the CPOE order until either pharmacy has verified it or a dose has been documented in the PatientTouch System.

**Restrict ability to administer medications prior to Rx verification**: When enabled, caregivers who are within the selected access group(s) will be able to administer CPOE medications prior to pharmacy verification. However, users who are not within the selected access group try to



administer a CPOE medication before pharmacy verifies, will receive an alert. If they choose, they may continue with an override reason.



Remember to click the Save button after making changes to each tab under Pharmacy, General Settings.

# **Order Verification Tab**

If Order Verification is enabled, caregivers are expected to verify orders entered by the pharmacy before administering the ordered medication. Orders may be verified via the PatientTouch application or at the Clinical Manager. If you choose to verify new orders (recommended), you may also indicate whether discontinued or updated orders will require verification and whether re-verification of orders following patient transfer will be required.

A caregiver who believes there is an issue with an order can choose to Quarantine the order at the Clinical Manager or using the PatientTouch application. While quarantined, the order is still displayed on the application and the caregiver can administer the medication but must provide a reason for bypassing the quarantine alert. The application will then enter the *Order Not Found in System* workflow.

If Notify Pharmacy of Quarantined Orders is selected, the pharmacy receives notification of quarantined orders to the configured Pharmacy Default Printer, Pharmacy Satellite printer if applicable, or, if needed, another specified destination. The report includes the patient information, order details, and the reason the caregiver quarantined the order.

# **Configure Order Verification Options**

If Order Verification is enabled, only those users with the Verify Orders privilege can perform this task. The status of verified and unverified orders is visible to all users in the *Patient* window and on the PatientTouch application.

To change the Order Verification options, perform the following steps:

1. Select Pharmacy>General Settings>Order Verification.

lanager <u>V</u> iew <u>H</u> elp C	04/22/2019 12:06 PD
PatientSafe Mira Mesa  Patients  Order Verification  Patient Assignment  Reports  Pharmacy  General Settings  Clinical Settings  Clinical Settings  Allergy Mapping  Laboratory  Blood Administration  Infant Care  Intervention Scheduling  Flowsheet Setup  Mirew Users Roles  Configuration	General Settings         Pharmacy Setup       Order Verification         Image: Require Order Verification       Require Verification of Discontinued Orders         Image: Require Verification of Order Updates       Require Verification of Orders on Patient         Image: Require Re-Verification of Orders via Handheld       Motify Pharmacy of Quarantined Orders         Image: Require Verification before Medication Admi       Require Verification via the Handheld         Image: Allow Verification of Allow Verification has bee       Allow Verification after a Medication has bee

- 2. Select, as needed, the following verification options:
  - **Require Order Verification**—Select to require order verification for all new orders.
  - Require Verification of Discontinued Orders—Select to require verification for all discontinued orders.
  - **Require Verification of Order Updates**—Select to require verification of all order updates.
  - Require Re-Verification of Orders on Patient Transfer—Select to require re-verification of active orders when a patient is transferred from one nursing unit to another. This helps hospitals to comply with Joint Commission requirements related to medication reconciliation.
  - Allow Quarantine of Orders via Handheld—Select to allow users with the Quarantine Orders privilege to quarantine an order using the PatientTouch application.



# If Allow Quarantine via the Handheld is enabled, the default reasons must be configured in the Clinical Manager under the Quarantine Order Requests tab.

- Notify Pharmacy of Quarantined Orders—Select to automatically notify the pharmacy when an order is quarantined. These notifications will be automatically sent to the default Pharmacy Printer or Satellite Pharmacy Printer as defined for the involved unit.
- Allow Order Verification via Handheld—Select to allow users to complete Order Verification using the PatientTouch application.
- 3. Click **Save** to record your changes.

# **Satellite Pharmacies Tab**

The hospital's Pharmacy Department often includes one or more satellite pharmacies to provide pharmacy services to various areas of the hospital. Hospitals that use satellite pharmacies can configure the Clinical Manager to route pharmacy reports to these pharmacy satellites based on a predefined schedule.

For example, if the NICU is serviced by a satellite pharmacy from 8PM to 7AM Monday through Friday, the Clinical Manager can send pharmacy reports and quarantined orders from the NICU to this satellite rather than the main pharmacy during those hours. The Clinical Manager can recognize holidays when defining satellite hours.

# Set Up Satellite Pharmacies

To set up a Satellite Pharmacy in the Clinical Manager:

PatientTouch Clinical Manager - E	llue- Milstein - User, Admin	x				
Manager View Help						
C 02/05/2019 12:27 PST						
PatientSafe Mira Mesa	General Settings					
Patients     Order Verification     Patient Assignment	Pharmacy Setup Order Verification Satellite Pharmacies Message to Rx Quarantine Order Requests Satellite Pharmacies: Add					
Reports     Pharmacy     General Settings     Clinical Settings	Edit Remove					
Clinical Settings  Master Drug File  Generic Equivalency Grou  Sli6 Codes	Holidays: Add Remove					
Allergy Mapping     Laboratory     Blood Administration     Infant Care						
Intervention/Prompt Setup     Intervention Scheduling						
Flowsheet Setup     MView     Users						
Roles     Configuration						
<	Save					

1. Select Pharmacy>General Settings>Satellite Pharmacies.

- 2. Click Add (directly to the right of the Satellite Pharmacies text box).
- 3. Enter a name for the satellite pharmacy.
- 4. Select a printer from the **Printer** drop-down list to which reports will be sent.
- 5. Click **Add** below the Nursing Units text box to add the nursing units that will use this Satellite Pharmacy when it is open:
  - Select each nursing unit from the list or use the shift key to select a range of units.
  - Click **OK** to close the window.



• Repeat this process if necessary until all of the desired nursing units have been added.

Add Satellite Pharmacie	rs X
	1
Name:	
Printer:	<b>_</b>
NursingUnits:	
	Add Remove
Schedules:	
	Add Remove
	OK Cancel Apply
	OK Cancel Apply



#### Each nursing unit can only be assigned to one Satellite Pharmacy.

- 6. Define the days that reports from these nursing units will be routed to this pharmacy satellite.
  - Click Add below the Schedules text box.
  - Select the box next to each day to be included in the schedule.
  - Select Holiday if the Satellite Pharmacy is open on holidays.
  - Enter the operating hours of this pharmacy satellite (for example, 08:00-19:00). Before and after these times, reports will be routed to the default pharmacy printer.



You can create multiple schedules for each satellite. For example, the satellite may be open weekdays from 7 a.m. until 7 p.m. but on weekends and holidays from 7 a.m. to 3 p.m. Hours are in 24h format.

- 7. Click OK to save.
- 8. Click **OK** on the *Add Satellite Pharmacies* window.
- 9. Click Save to save your changes.

#### Set Holiday Dates for the Satellite Pharmacy

If a satellite pharmacy will be open on holidays, follow the steps below to specify the dates to be treated as holidays.



- 1. From the Satellite Pharmacies tab, click Add next to the Holidays text box.
- 2. Select the holiday date(s) from the window.
- 3. Click **OK** after selecting each holiday date.
- 4. Repeat steps to add more dates as needed.
- 5. Click OK.

### Message to Rx Tab

You can create pre-configured messages that the caregiver can send to the pharmacy when an order change or other order-specific message needs to be sent. Caregivers see these as choices under the Messages to Rx function of the PatientTouch application. These messages are configured in the **General Settings > Message to Rx** tab.

#### Set Up Message to Rx

To configure pharmacy order change requests, perform the following steps:

1. Select Pharmacy>General Settings>Message to Rx.

PatientTouch Clinical Manager - E	lue- Milstein - User, Admin
Manager View Help	
G	02/05/2019 12:28 PS1
PatientSafe Mira Mesa	General Settings
Patients Order Verification Patient Assignment	Pharmacy Setup Order Verification Satellite Pharmacies Message to Rx Quarantine Order Requests
	Search
General Settings     Clinical Settings     Master Drug File     Generic Equivalency Grou	Barcode Not Scanning Chg Time (Add Message) Compatibility Info Needed Dispense Cabinet Refill
SIG Codes  Allergy Mapping  Laboratory	Duplicate Order Free Text (Add Message) IV to PO
Blood Administration     Infant Care     Intervention/Prompt Setup	IV to Saline Lock Med Dose Missing Med Not Ordered Med Refil Needed
Intervention Scheduling     Intervention Scheduling     Flowsheet Setup     MView	Order Discontinued PO to IV
Users	Possible ADR RN Med Schedule RT Med Schedule
Configuration	Saline Lock to IV
	Delete Edit New
	Save

- 2. Do one of the following:
  - To create a new message, click **New**.
  - To edit an existing message, select the message and click Edit.



Message to F	Rx: Barcode Not Scanning
Name:	Barcode Not Scanning
Header:	Barcode Not Scanning
Message:	The medication barcode for this order is not scanning.
Cance	el << Previous Next >>

- 3. In the Name field, enter or edit the name of the message. This field is required.
- 4. In the Header field (optional), enter or edit the message's header (which will be printed at the top of the message.)
- 5. In the Message field, enter the message text you want to be sent to the pharmacy.
- 6. Click Next.

essage to Rx: Barcode Not Sca	anning				×
Hospital	Select Hospital(s) Destination		For	mat	<b></b>
✓ PatientSafe Mira Mesa	3 West Printer	<b>•</b>	• PDF	⊂ Text	
					-
Cancel		< < Pre	vious	Save	

- 7. Place a check mark next to your hospital. The Destination field becomes active.
- From the Destination drop-down list, select the printer to which the message should be sent. The printers displayed here have been configured in the Clinical Manager>Configuration>Destinations tab. This field is required once a hospital has been selected.
- 9. Select either **PDF** or **TEXT** format, depending on your pharmacy's preferences. This field is required once a hospital has been selected.
- 10. When finished, click **Save** to save the message and close the window.



# **Quarantine Order Requests Tab**

You can create a list of quarantine reasons in the **General Settings > Quarantine Order Requests** tab. If the option to quarantine orders on the PatientTouch application is enabled, the quarantine reasons set up in Clinical Manager will be available for selection.

### Set Up Quarantine Order Requests

To configure quarantine order request reasons, perform the following steps:

1. Select Pharmacy>General Settings>Quarantine Order Requests.

PatientTouch Clinical Manager - B	lue- Milstein - User, Admin
Manager View Help	
C	02/05/2019 12:30 PST
C PatientSafe Mira Mesa Patients Order Verification Patient Assignment Reports Clinical Settings Clini	General Settings  Pharmacy Setup Order Verification Satellite Pharmacies Message to Rx Quarantine Order Requests Search  Name  Add Additional Info.  Duplicate Order Epidural Out Medication on Hold Not Re-ordered on Transfer Not Re-ordered on Transfer Not Re-ordered Post Op Order Changed Order Needs a Stop Time RN Med Schedule RT Med Schedule Wrong Dose Wrong Dose Wrong Medication Wrong Patient Wrong Route Wrong Start Time
٠	Save

- 2. Do one of the following:
  - To create a new reason request, click **New**.
  - To edit an existing reason, select the quarantine order request reason and click **Edit**.



Quarantine C	order Request: Duplicate Order	x
Name:	Duplicate Order	
Header:	Duplicate order for this patient	
Message:	There are multiple orders entered for this medication for this patient.	▲ ▼
Cance	el C<< Previous Next	>>

- 3. In the Name field, enter or edit the message's name. This will appear in the application in the list from which the caregiver can select a reason for the quarantine. This field is required and cannot be left blank.
- 4. In the Header field, enter or edit the message's header (which will be printed at the top of the message.) This field is optional and can be left blank, if desired.
- 5. In the Message field, enter the message text you want to be sent to the pharmacy.
- 6. Click Next.

Q	uarantine Order Request: Dupl	licate Order		×
	Hospital I PatientSafe Mira Mesa	Select Hospital(s) Destination 3 West Printer	Format	⊂ Text
	Cancel		<< Previous	Save

- 7. Place a check mark next to your hospital. The Destination field becomes active.
- From the **Destination** drop-down menu, select the printer to which the quarantine order request reason should be sent. The printers displayed here have been configured in the Clinical Manager>Configuration>Destinations tab. This field is required once a hospital has been selected.
- 9. Select either PDF or TEXT format, depending on your pharmacy's preferences. This field is

required once a hospital has been selected.

10. When finished, click **Save** to save the quarantine order request reason and close the window.

# **Clinical Settings**

To set or change the settings for allergy and drug interaction checking, see the Clinical Check tab below.

To set or change drug interactions/side effects or first dose education, select one of the following links: <u>Drug Indications/Side Effects</u> <u>First Dose Education</u>

# **Clinical Checks Tab**

- 1. Select Pharmacy > Clinical Settings
- 2. Click the Clinical Checks tab

Before setting clinical checks options for specific formulary items, you can choose whether to globally enable clinical checks. Clinical checks require that the medication being scanned has a valid NDC code in the PatientTouch System formulary and occur when medications are scanned prior to administration using in certain workflows.

By default, all formulary items are included in the clinical checks enabled in **General Settings > Clinical Checks**. For more information on clinical check settings for specific formulary items, refer to the Formulary Settings and Nursing Units sections of this guide.

The following clinical checks are available to be enabled:

- Enable Allergy Checking—The PatientTouch System uses patient allergy information received from the hospital information system (typically either the ADT or PIS) and the NDC codes for medications in the formulary to check for potential allergies using the FDB database. If this setting is enabled, the allergy check is done anytime a medication is scanned for which there is no pharmacy-approved order present in the System. Patient allergies are matched to FDB allergy codes using the PatientTouch Allergy Mapping table. Also, if enabled the following additional allergy checking options become available:
- When New Allergy Received If active, when a new allergy is received via interface, and medication orders are already present in PatientTouch, the new allergy will be checked against existing orders. If a potential allergy is found, the assigned caregiver will receive an Inbox message and the pharmacy will be notified via the pharmacy printer settings.
- **On First Dose of New Med** Allergies will be checked when the first dose of a new medication order is scanned for administration. If a potential allergy is found, the assigned caregiver will receive an Inbox message and the pharmacy will be notified via the pharmacy printer settings.
- Enable Drug Interaction Checking If enabled, the PatientTouch System uses the scanned item's NDC code in conjunction with FDB to perform drug-drug interaction checks anytime a medication is scanned for which there is no pharmacy-approved order present in the System.

If you enabled drug interaction checking, select the severity options to deteremine what alerts caregivers see at the handheld, as follows:

- Select Severe to alert the caregiver of only those interactions with potentially life-threatening consequences.
- Select **Serious** to alert the caregiver of severe interactions plus interactions that may cause the patient's condition to deteriorate or require additional care.
- Select Moderate to alert the caregiver of Severe and Serious interaction plus those that are bothersome but not medically significant.
- Enable Duplicate Therapy Checking When selected, the PatientTouch System will check for duplicate drug therapy when a medication is scanned for which there is no order. The default setting is false.
- Enable Max Single Dose Checking If enabled, the PatientTouch System uses the scanned item's NDC code in conjunction with FDB to perform a check for recommended maximum single dose amount anytime a medication is scanned for which there is no pharmacy-approved order present in the System. Depending on the medication, the maximum dose amount based on patient height, weight, and age may vary for a Loading Dose, Single Dose, or Maintenance Dose.
- Enable Acetaminophen Cumulative Dose Checking—If enabled, the PatientTouch System will maintain a cumulative rolling 24-hour record of acetaminophen administered to each patient. When an acetaminophen-containing medication is scanned for a patient, the system sends a query to FDB to identify the amount of acetaminophen contained in the drug and verifies whether administering that amount will cause the patient to exceed the



recommended daily limit. See Unlike the other Clinical Checks, which are part of the No Order Found in System workflow, the Acetaminophen Cumulative Dose Check is done for ALL administrations of drugs containing Acetaminophen. Therefore, a nurse could receive this alert when administering an ordered and pharmacy-approved medication.

If the scanned amount of acetaminophen will exceed the hospital's established 24-hour dosing limits (see setup below), the caregiver will receive an alert. There are two globally-set **Alert Types** that can be selected from the drop-down list:

- Warn only—Caregivers will see an alert showing the 24-hour cumulative amount of acetaminophen (including the scanned dose) for the patient while indicating that the patient's daily acetaminophen limit will be exceeded if the scanned medication is administered. The caregiver can then choose to either cancel the administration or continue with the administration after providing a reason for overriding the alert.
- Stop Administration—Caregivers will see an alert showing the 24-hour cumulative amount of acetaminophen (including the scanned dose) for the patient while indicating that the medication should not be administered because the 24-hour acetaminophen limit for this patient will be exceeded. The administration can only be canceled, and the caregiver provides a reason for cancellation.
- If you enabled acetaminophen cumulative dose checking, fill in the associated table with your hospital's acetaminophen dosing guidelines. Alerts occur when either the mg/kg/24hr or the Not To Exceed 24hr limit is reached based on patient age.

Age(Months)		Enter one or both for each age range			
From	То	mg/kg Dose per 24-Hr	24-Hr Dose Not to Ex		
216	1440	50	4000 🔺		
144	216	75	3000		
24	144	15	750		
3	24	15	600		
1	3	8	400		
0	1	8	75 👻		
•			•		
Remo	ve Row	Edit Row	Add Row		



The "From" setting is interpreted as > or =, and the "To" setting is interpreted as < the number of months entered.

3. Click Save to save your changes.

# **Drug Indications / Side Effects Tab**

The PatientTouch Handheld can provide access to a limited number of key indications and side effects for ordered medications to be freely referenced by the caregiver. The availability of this information depends on the presence of a valid NDC in the PatientTouch formulary for the ordered drug.



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<u>M</u> anager <u>V</u> iew <u>H</u> elp	
C	02/05/2019 12:37 PST
	Clinical Settings
Order Verification	Clinical Checks Drug Indications/Side Effects First Dose Education
Patient Assignment	Enable Drug Information Access on Handheld
🖯 🦳 Pharmacy	✓ Drug Indications
General Settings	I▼ Side Effects
Master Drug File	Number of most frequent side effects to display: 2
···· 🔄 Generic Equivalency Grou ···· 🗋 SIG Codes	Number of severe side effects to display: 2
Allergy Mapping	
Laboratory     Blood Administration	
🖲 - 🦳 Infant Care	
Intervention/Prompt Setup     Intervention Scheduling	
B- Flowsheet Setup	
⊕- 🛄 mView	
Users	
- Configuration	
<b>▲</b>	Save

- Enable Drug Information Access on Handheld If enabled, PatientTouch will display a Drug Information screen for the selected medication when a valid NDC for that medication is available.
- **Drug Indications** If enabled, the indications for the medication will be displayed on the *Drug Information* screen as retrieved from FDB.
- Side Effects If enabled, side effects for the medication will be displayed on the Drug Information screen as retrieved from FDB.
  - Number of most frequent side effects to display This setting determines the number of most frequent side effects (per FDB) that will be displayed.
  - Number of severe side effects to display This setting determines the number of severe side effects (per FDB) that will be displayed.
- Click **Save** to save your changes.

# **First Dose Education Tab**

You can configure whether Drug Indications and Side Effects will automatically display the first time a formulary item is administered by using the settings on the **First Dose Education** tab. This feature is designed to help improve the hospital's HCAHPS scores and therefore its use is recommended.

M PatientTouch Clinical Manager - Bl	lue- Milstein - User, Admin		
Manager View Help			
C			02/05/2019 12:41 PST
PatientSafe Mira Mesa	Clinical Settings		
PatientSafe Mira Mesa PatientS Order Verification Patient Assignment Reports Pharmacy General Settings Clinical Settings Generic Equivalency Grou SIG Codes Allergy Mapping Clinical Settings Blood Administration SiG Codes Infant Care Sin Scodes Infant Care Sin Scodes Sin Scode	Clinical Checks Drug Indications/Side Effects F Enable First Dose Education - caregiver will Provide first dose education upon: First administered dose of ge	be prompted to provide patient education eneric drug (do not re-prompt upon cha eneric drug + route (re-prompt upon cha be prompted to provide patient education	nge in route) ange in route) Add Remove
• • •		Save	

The following settings are available:

- Enable First Dose Education This setting globally enables the First Dose Education feature. If enabled, one of the following options must be chosen based on the hospital's patient education practices:
- First administered dose of generic drug If this setting is chosen, drug indications and side effects for the scanned drug will be presented to the caregiver during the administration workflow only the first time that a generic drug entity is scanned for administration to the patient. For example, the drug indications and side effects screen will appear for the caregiver when furosemide injection is first administered, and will not again be presented when a later dose of furosemide oral is scanned.
- First administered dose of generic drug + route If this setting is chosen, indications and side effects for the scanned drug will be presented to the caregiver during the administration workflow the first time that a generic drug is scanned for administration to the patient by a specific route. For example, the drug indications and side effects screen will appear for the caregiver when furosemide injection is first administered, and will again be presented when a later dose of furosemide oral is scanned.
  - If First Dose Education cannot be completed due to patient's condition or other factors present at the time of the first dose, the caregiver can delay First Dose Education to the next dose. See Education attempt repeated below.
- Exclude in Select Units This setting allows you to designate units in which First Dose Education is not required. Examples may be NICU and Pediatrics.



- Exclude Unordered Admins If enabled, this setting indicates that the system will not display first dose education drug information to the caregiver when a dose is scanned prior to pharmacy approval of the order. Consult your hospital's First Dose Education policy on whether to enable this setting.
- Education Attempt Repeated If enabled, this setting allows you to define the number of First Dose Education repeat attempts before the education is automatically and permanently considered incomplete.
- Education Responses This allows you to define the acceptable caregiver responses when First Dose Education is presented during the medication administration workflow. These responses should comply with your hospital's First Dose Education policies.
- **Add** Allows you to add a new response and designate whether it should spawn a repeat attempt at education when the next dose occurs. Example responses are:
  - Yes
  - No: Patient takes at home
  - No: Patient refused the information
  - No: Try again at next dose [Repeat]
- Edit Allows you to edit an existing response.
- **Remove** Allows you to delete an existing response.
- Save your changes.

# **Master Drug File**

The PatientTouch System **Master Drug File** should mirror the Pharmacy Information System Formulary. It is also where barcodes, NDCs, clinical prompts assignments, and numerous functional and clinical settings are defined at the formulary item level.

# Search for Formulary/Master Drug Items

You can quickly locate an item in the **Master Drug File** list by entering the first few characters of the item's generic name, brand name, or identifier code (Hospital ID) into the search field. As you continue to type, the list on the *Master Drug File* screen is narrowed.

# Add/Edit Formulary Item

1. Select Pharmacy > Master Drug File.



anager <u>V</u> iew <u>H</u> elp										
3								02/05/2019	9 12:	4
atientSafe Mira Mesa	Master Drug File									
Patients Order Verification		Search				P	Display inactive	items		
Patient Assignment Reports	Generic Name	Reference Brand Name	Hospital ID	Strength	Strength	Volume	Dispensing	Charge C		Ī
Pharmacy	Acarbose	PRECOSE	3145		50 mg		50 mg	3145	U	
	Acebutolol		1978		200 mg		1 Capsule	1978	U	
General Settings	Acetaminophen		2254		325 mg		325 mg	2254	U	
<ul> <li>Clinical Settings</li> </ul>	Acetaminophen	TYLENOL EXTRA STREN	2256		500 mg		500 mg	2256	U	
- Master Drug File	Acetaminophen	'S	2259		80 mg		80 mg	2259	U	
- Generic Equivalency Grou	Acetaminophen		2260		120 mg		120 mg	2260	U	
- SIG Codes	Acetaminophen	TYLENOL	2262		160 mg	5 mL	5 mL	2262	U	
Allergy Mapping	Acetaminophen	ACEPHEN	2267		650 mg		650 mg	2267	U	
Laboratory	Acetaminophen	TYLENOL ARTHRITIS	3677		650 mg		650 mg	3677	U	
	Acetaminophen		3748		160 mg	5 mL	5 mL	3748	Ŭ	
Blood Administration	Acetaminophen	TYLENOL	TSTTYLE32		325 mg		325 mg	2263	U.	
infant Care	Acetaminophen	TYLENOL	TSTTYLEB0		80 mg	0.8 ml	15 mL	2264	Ŭ	
Dintervention/Prompt Setup	Acetaminophen-Butalbi.		3257				1 Capsule	3257	Ū.	
Intervention Scheduling		TYLENOL w/CODEINE #4			60 mg		60 mg	2249	Ū.	
Elowsheet Setup	Acetaminophen-Codei		2251		12 mg	5 mL	480 ml	2251	Ŭ	
mView	Acetaminophen-Codei	There in cobeine	2253		12 mg	5 mL	5 mL	2253	ŭ	
Users	Acetaminophen-Codei		2255		15 mg	21112	15 mg	2255	ŭ	
	Acetaminophen-Codei		2257		30 mg		30 mg	2257	ŭ	
Roles		TYLENOL EX STRENGT	3673		500 mg		500 mg	3673	ŭ	
Configuration	Acetaminophen-Hydro	There is an an and the	1379		75 mg		7.5 mg	1379	ŭ	
	Acetaminophen-Trama	UI TRACET	4087		37.5 mg		37.5 mg	4087	ŭ	
	AcetaZOLAMIDE	DIAMOX	3229	CR	500 mg		1 Capsule CR	3229	ŭ	
	AcetaZOLAMIDE	DIAMOX	772		250 mg		250 mg	772	ŭ	
	AcetaZOLAMIDE Sodium	200mlWA	773		500 mg	5 mL	5 mL	773	ŭ	
	Acetic Acid	VINEGAR	2358		Job my	2.002	120 mL	2358	ŭ	
	Acetic Acid	THE OWN	2536				15 mL	2518	ŭ	
	Acetic Acid		3638	0.25%			1000 mL	3638	ŭ	
	Acetic Acid-Hydrocortis.	ACETASOL HC	2517	0.2.3 %			10 mL	2517	ŭ	
	Acetylcholine Chloride	MIOCHOL-E	2517				2 mL	2517	ŭ	
	Acetylcysteine	MUCHULIE	1523		400 mg	2 mL	2 mL 4 mL	1523	ŭ	
		MUCOSIL	1523		400 mg 200 mg	2 mL 1 mL	4 mL 30 mL	1525	U	
	Acetylcysteine	ACETADOTE IV	4189			1 mL	30 mL	4189	-	
	Acetylcysteine	ACETADOTEW	4189		200 mg	1 mL	30 mL	4189	U	
	La rueleure		7404		410 ma		t t america	2400		ľ

- 2. Do one of the following:
  - New Click to add a new formulary item
  - Edit Click after selecting a formulary item to edit that item.
  - Delete Click after selecting a formulary item to delete that item. (Caution: Deleting a formulary item that has been ordered and/or administered in the past is not recommended.)



ormulary Item: Acetylcysteine	magnet 8	Surger In	-	Seegil 1	×
General Settings Clinical	Values Clinical Checks				
Medication Info					
Hospital ID:	1523				CMS
Generic Name:	Acetylcysteine				
Reference Brand Name:					
Code:					+,
Charge Code:	1523				□ Billable
Strength Descriptor:					
Strength:	400		mg		
Volume:	2		mL		
Dispensing Size:	4		mL		
Dosage Form:	Solution				
Available Dosing Amount:	800				
Dosing Unit:	mg				Class:
Lead Time:	: Lag time: :		Allow d	ose entry on orders without dose	
Medication Status: Brand Info					
Brand Name	Barcode	NDC		NDC Check	
	0110305177604257 T1523 1523	0517-7604	-25	000	•
Remove Brand	Edit Brand Add Brand	]		OK Cancel	Apply

# **Formulary Setup Guidelines**

We recommend that you adhere to the following general requirements when configuring formulary items in the PatientTouch **Master Drug File**.

- Never end a field with a period.
- Enter generic and brand names in specific letter case. Lower case is recommended for generic name and upper case for brand name. Use Tall-Man lettering where applicable (see http://www.ismp.org/Tools/tallmanletters.pdf)
- Remember that the letter case entered here appears throughout the system.

### **General Tab**

**Hospital ID field** - The Hospital ID is the hospital-specific code by which the item is ordered in the Pharmacy Information System.





#### This is a required field, alphanumeric, with a maximum length of 16 characters.

**Generic Name** - This field should contain only the generic or non-proprietary name of the product. If the item is not known by a generic or non-proprietary name, the brand name may be entered here instead and the Reference Brand Name field left blank. The generic name field should *not* contain strength, concentration, dosage form or any other information. This is a required field; entries must be-alphanumeric, with a maximum length of 60 characters.

Correct	Incorrect
Ibuprofen	Motrin
Hydrocortisone	Hydrocortisone 10%
Amoxicillin	Amoxicillin Susp
Furosemide	Furosemide 40mg/2mL
Mineral Oil	Mineral Oil 30ml

**Reference Brand Name** - This field should contain the one brand or proprietary name that is *most commonly* used at your hospital when this item is prescribed. If the item does not have a brand name (only known by generic name), this field may be left blank. This field should *not* contain strength, concentration, dosage form or any other information.

Optional: Alphanumeric and maximum length of 40 characters.

Correct	Incorrect
MOTRIN	MOTRIN, ADVIL
<blank> (brand name never used)</blank>	Hydrocortisone
LAROTID	LAROTID Susp
LASIX	LASIX 40mg/2mL

**Coding System (Plus Sign)**: You must have Coding Systems (e.g. RxNorm) defined in the Clinical Manager to populate this field. To add a vocabulary item for this formulary item, click the plus sign

click **Add** on the *Code Association* window and select a Coding System from the drop down menu. Enter the Code, Short Description, and Description.



# The RxNorm code and associated information is automatically updated as necessary when the FDB updates are run for formulary items.

**Charge Code** - This field should contain the code by which the item is billed by the hospital billing system. The Charge Code can be the same or different from the Hospital ID. Required if Billable Flag is checked. Alphanumeric characters and maximum length of 20 characters.

**Billable Flag** - This checkbox indicates whether the item is eligible to be billed when administered <u>if an</u> <u>outbound billing interface is configured</u>. When selected, the Charge Code and Available Dosing Amount fields change to become required.



For proper billing when a PatientTouch outbound billing interface is used, this box is typically not selected for:

- Multi-dose items (inhalers, ophthalmic drops, topicals, etc.)
- Items billed up front by pharmacy when compounded or mixed
- Items billed on dispense by another automated system

**Strength Descriptor** - This field should contain information that describes the strength or concentration of a product but does not fit appropriately in the Strength and Strength Unit fields (see below). It is used where strength or concentration is expressed as %, ratio (1:1000), or a combination of multiple ingredient strengths (25-250). For some items such as transdermal patches, the Strength Descriptor is a unit of dosing over a period of time (e.g. mg/Day). This field should not contain generic name, brand name, dosage form or any other information.

Placing this type of strength information in the Strength Descriptor field rather than in both the generic and brand name fields eliminates redundant entry.

Correct	Incorrect
5%	5mg
1:1000	1mEq/ml
25-250*	Tab
0.1mg/hr (5cm2)	Patch
SR	

Optional: Alphanumeric and maximum length of 80 characters.

\*Example uses a dash in descriptions like 25-250 rather than 25/250 because ISMP recommends that / be avoided.

**Strength** - This field should contain the numeric strength of the product expressed in conjunction with Strength Unit as a weight or other non-volumetric unit of measure (mg, G, mEq, Units, and so on).

This field is required if Strength Unit is used. It should be numeric, whole numbers with up to 6 digits before and 4 digits after the decimal point.

**Strength Unit** - This field should contain the properly abbreviated unit by which the Strength is expressed. This field is required if the Strength field is used. It should be alphanumeric and a maximum length of 12 characters.

Correct	Incorrect
mg	5mg
G	Puffs
Units	cm2
mEq	Tabs
	mg/hr



**Volume** - This field should contain the numeric volume of the product that associates with the strength information to create a concentration (e.g. mg/mL). It should be expressed in conjunction with Volume Unit as a volumetric measure (most often mL). Entry in this field is required when Volume Unit is used. The entry should be numeric, whole numbers with up to 6 digits before and 4 digits after the decimal point.

**Volume Unit** - This field should contain the properly abbreviated unit by which the Volume field is expressed. This field is required when the Volume field is used. The entry should be alphanumeric and a maximum length of 12 characters.

Correct	Incorrect
mL	MI
Ounces	mg
Liters	Tabs
	cm2
	mg/Day

**Dispensing Size** - This field should contain the numeric value used in conjunction with the Dispensing Unit to indicate the total size or volume of the package that the pharmacy dispenses. In many cases, this is different from the original package size.

**Dispensing Size and Dispensing Unit** are used by the handheld and report medication displays for descriptive purposes, such as when verifying pharmacy inventory items or scanning and documenting non-ordered items during administration. The Dispensing Size and Unit are not used to determine whether multiple units of the medication are needed to deliver a prescribed dose (see Available Dosing Amount).

The Dispensing Size is required if the Dispensing Unit is used. The type should be numeric, whole numbers with up to 6 digits before and 4 digits after the decimal point.

**Dispensing Unit** - This field should contain the properly abbreviated unit by which the Dispensing Size is expressed. Dispensing Unit may or may not be the same as the Strength Unit or Volume Unit.

This field is required if the Dispensing Size field is used. The entry should be alphanumeric with a maximum length 12 characters.

Correct	Incorrect
mL	SL
G	Drops
mg	Sprays
Tab (tablet with no strength)	

**Dosage Form** - This field should contain the properly abbreviated or full-length dosage form for the item if applicable. Spaces are permitted. The exact case entered here displays throughout the system. This field is optional; if entered, the entry should be alphanumeric and a maximum length of 20 characters.



Correct	Incorrect
Sublingual or Subl Tab	Puffs
Ointment or Oint	10 Gram
Inhaler or Inh or Inhal	
Tablet or Tab	CR (CR, XL, other part of generic and brand)
IV Bag or Bag	
Ophth Drops	Drops (more specific - Ophth Drops, Otic Drops, Oral Drops, or Nose Drops, is better)
Nasal Spray	Spray (more specific - Nasal Spray is better)
Injection or Inj or Vial or Ampule	
Irrigation or Irrig	
Liquid or Liq	
Oral Soln	
Suspension or Susp	
Vaginal Crm or Vag Cream	VCRM
Vaginal Supp	VSUPP

Available Dosing Amount - This field is used by the Clinical Manager to check the ordered dose against the amount of drug in the scanned product to determine whether to prompt the user to scan multiple units, or in some cases to determine whether only a partial dose of the scanned medication should be administered. For example, if the ordered dose is 650 mg and the Available Dosing Amount/Unit of a tablet is 325 mg, the handheld prompts the caregiver to scan a second tablet to achieve the ordered dose. Therefore, where applicable, this numeric field should contain the total amount of drug in the scanned item as measured in terms of the Dosing Unit. In essence, this field defines the maximum dose that can be obtained from one unit or package of this item. If the Available Dosing Amount field is blank, the dose versus amount check is bypassed during administration.

This field is required if the **Billable Flag** checkbox is selected or if you want to use the dose versus amount check. The entry should be numeric, whole numbers with up to 6 digits before and 4 digits after the decimal point.

**Dosing Unit** - This field must be the same unit of measure used in the Pharmacy Information System when entering a prescribed dose amount for this item. It also indicates the unit of measure to use when prompting the caregiver to enter the dose being administered. In most cases, the Dosing Unit will be the same as the Strength Unit, Volume Unit, or Dosage Form. However, in some cases, the Dosing Unit will be a completely different unit of measure (for example, with puffs, drops, or sprays).

If the Available Dosing Unit is blank, the dose versus amount check is bypassed during administration and the handheld does not prompt for the specific dose to be given (applicable to an ointment, cream, or similar item where dose amount is not recorded).

This field is optional, but required in order to prompt for dose. The entry should be alphanumeric and a maximum length of 12 characters.



Correct	Incorrect
Tabs (if tablet has no strength)	Tabs (if tablet has a strength)
mg	mL (if item has a strength)
mL (for example, oral liquid)	Teaspoonfuls
Puffs	17 G
Drops	Ophth Drops
Sprays	Nasal Spray
G	Bottle
mcg	Vial
mEq	Can

**Lead and Lag Time** - This field determines the acceptable times before and after the scheduled time of the drug that the administration of a dose is considered to be "on time."

Lead and Lag Times set at the formulary item level take precedence over lead/lag times set in the SIG code or nursing unit settings.

**Medication Status** - Select **Active/Inactive** to indicate the status of the medication. To see all inactive medications, click the **Display Inactive Items** from the top left of the Master Drug File screen. Users must have the Manage Formulary privilege to inactivate a medication.

Allow dose entry on orders without dose - In some cases, the PatientTouch System will receive a medication order with a dose amount of "0". In order to accommodate these order types, formulary items in the PatientTouch System can now be configured to allow the user to specify the dose amount.

**CMS** - This setting allows you to flag certain medication as CMS medications for reporting purposes.

Class – This setting allows you to indicate the control class (U, I, II, III, IV, V) for reporting purposes.

# **Enter Barcodes and NDC Numbers**

Each product received by the pharmacy must be checked to ensure that its barcode is in the **Master Drug File**. Perform this step using the *Verify Item* workflow.

- Any formulary items received without barcodes printed on them must be packaged or labeled with a barcode. Medications without barcodes cannot be scanned for safe use at the bedside.
- If a Medication is scanned but has a barcode that is not known to the system, the user can follow the Add Barcode routine on the handheld to search for the medication in the formulary and match it.

The NDC numbers and barcodes for formulary items are not imported from the pharmacy information system. These elements of information must be entered manually or by using a scanner connected directly to the hospital workstation running the PatientTouch Clinical Manager. For more information on this, refer to Adding Barcodes to Master Drug File.

patienttouch

# Maintain the Master Drug File

After the initial download of the formulary database, pharmacists maintain the **Master Drug File** by adding new formulary medications and adding new barcodes and corresponding NDCs.

#### Associate Barcodes with Formulary Items

The recommended way to associate barcodes with formulary items is to capture the barcodes by scanning them into the Clinical Manager. A USB scanner connected directly to the Clinical Manager will serve this purpose. You can also type in the barcodes, but this is not recommended, as it is not as efficient or accurate as scanning.

To associate a brand barcode with a currently listed formulary item, perform the following steps:

1. Beneath the Brand Info list, click Add Brand to open the Add Formulary Brand window.

Add Formulary	Brand
Brand Name:	
Barcode:	
Code:	<b>+</b>
NDC:	Packager Generated Barcode Format
	OK Cancel

- 2. The cursor defaults to focus in the Barcode field. Scan the medication barcode to populate the Barcode field with the barcode value.
- 3. **Coding System (Plus Sign)**: You must have Coding Systems (e.g. RxNorm) defined in the Clinical Manager to populate this field. To add a vocabulary item for this formulary item, click the plus

sign 🔛 , click **Add** on the *Code Association* window and select a **Coding System** from the drop down list. Enter the Code, Short Description, and Description.

- 4. Enter the product brand name in the Brand Name field. In many cases, the brand name for the barcode you are adding is a generic name. (This brand name is only seen by pharmacy when using the Lookup function. Its entry is optional and, if blank, the generic name will be displayed in its place during Lookup.)
- 5. Either enter the NDC number manually or click **NDC Search** to locate it. If you click **NDC Search**, the following window opens so you can enter the Medication name or enter the NDC number from the FDB database list:



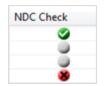
📕 Search for I	Product by Medication Name or	NDC					x
Medica	ation Name:		NDC:			Search	
NDC	Product Name	Strength	Dosage Form	Size	Pack Qty	Pack Type	-
* NDC not c	onverted	Select	Cancel				•

- 6. Click **Select** to choose the NDC number.
- 7. Click **OK** to accept the NDC number and return to the *Formulary Item* window.
- 8. Click **OK** to save the new entry and close the window or click **Apply** to save the newly entered information in the formulary and continue editing the item (repeat steps above).

#### NDC Check

If you enter the NDC code manually, the system cross-references the number with the FDB database and indicates the results in the NDC Check field:

• A green circle with checkmark indicates the NDC is valid.



- A red circle with an "x" indicates the NDC is invalid (not in the current version of FDB). However, the NDC may still be the correct NDC for the product barcode that you are adding.
- A gray circle indicates that no NDC was entered for the brand and barcode.



Only one valid NDC is required for each parent formulary item for drug interaction and allergy checking to take place. The NDC check column only appears if allergy and/or drug interaction checking is enabled at the system and formulary item level.



MEDID(s) and CFID(s) from the FDB have been added to each formulary item based upon



the NDC associated to the formulary item. Each valid NDC in the Brand Info that is associated with the formulary item is associated with one MEDID and one CFID. All NDCs within the same formulary item should have the same MEDID; they may or may not have the same CFID.

#### Settings tab

Use the descriptions below to complete the fields on this tab.

Formulary Item: Acetylcysteine		×
General Settings Clinical Values Clinical C	Checks	
General Settings		
Disable dose-due reminders		
□ IV Base Solution		
RT May Administer Without an RT Order		
Prompt for Route		
Approved Routes:	Click Search to select Approved Routes based on a valid NDC present for the Enter or edit as comma separated in order of display.	Route Search
	e.g., INTRAMUSCULAR, INTRAVENOUS, SUBCUTANEOUS	
Non-Medication Item		
Display Custom Generic Name		
Patient-specific, multi-dose medication		
Allow scan of manufacturer barcode		
Select Alert Type:	•	
CPOE Settings		
Rx Unverified OK		
Alternate CPOE Med ID:		
Reports Display		
Generic and Brand	Acetylcysteine [400 mg per 2 mL Solution] 4 mL	
	OK Can	cel Apply

**Disable dose-due reminders** - Select if you do not want the assigned caregiver to be reminded when this medication is due.

**IV Base Solution** – Select if, when the caregiver scans this item, you want to document the dose as "Infusion Started" on the PatientTouch MAR. In addition, only the rate designated in the order from the pharmacy will display on the MAR-related documents and on the handheld, and the dose will not be shown.



**Prompt for Route** - Select when you want the nurse to record the route of administration which will be used for administration when no pharmacy-approved order exists.

For medications being prepared or administered as a multi-component dose via the "Order Not Found in System" workflow that have common (matching) Approved Routes in the PatientTouch formulary:

- If the involved medications have more than one common Approved Route, the handheld will present the caregiver with only the common route choices.
- If the involved medications have only one common Approved Route, that route will automatically be documented and the caregiver will not be prompted to select a route.

For medications being prepared or administered as multi-component doses via the "Order Not Found in System" workflow that do NOT have common (matching) Approved Routes in the PatientTouch formulary:

- The handheld will present the caregiver with route choices for the first medication scanned.
- If the first medication has only one Approved Route, that route will automatically be documented and the caregiver will not be prompted to select a route.

Recommendation to Pharmacy: Ensure that formulary medications that may potentially be administered together in a multi-component dose via the "Order Not Found in System" workflow have common and appropriate Approved Routes.



When you select Prompt for Route, the text field changes to a required field. Click Route Search to select the appropriate route. The latest entry supersedes the previous entry.

Prompt for Route		
Approved Routes:		Route Search
	Click Search to select Approved Routes based on a valid NDC present for t	he formulary item.
	Enter or edit as comma separated in order of display.	
	e.g., INTRAMUSCULAR, INTRAVENOUS, SUBCUTANEOUS	

Non-Medication Item – Select to remove the item from statistical and MU reports.

**Display Custom Generic Name** – Select to display the custom generic name entered into the order comment field of the Pharmacy order. This is applicable for formulary items like Non-Formulary Medication and Patient's Own Medication.

Pharmacy can now identify medications as being patient-specific, multi-dose items to provide an additional layer of safety for medications that should not be shared between patients (ex: insulin pens). Additionally, to alleviate re-printing order barcodes when a dose amount changes for these items, pharmacy can configure a custom order barcode. See **Pharmacy>General Settings>Patient-Specific Med Barcode Settings** for more information on creating custom barcodes.





# Formulary items flagged as patient-specific, multi-dose medication cannot be added to Generic Equivalency Groups.

**Patient-Specific, Multi-Dose Medication** – When selected, enables the identification of the patient-specific, multi-dose medication function.

Allow Scan of Manufacturer Barcode – When selected, enables the caregiver to still have the option of scanning the manufacturer barcode. When this setting is off or disabled, it provides you with the following options:

- A "soft stop" alert will display the following message on the handheld to the user, "Per hospital policy, this medication requires you to scan the pt. specific barcode. Please provide a reason for not scanning that barcode." The user can cancel or proceed. If the user proceeds, he or she must provide an override reason.
- A "hard stop" alert which will display the following message on the handheld to the user, "Per hospital policy, this medication requires you to scan the pt. specific barcode. If there is no pt. specific barcode on the item, please contact pharmacy." The user will only have the option to cancel out of the workflow.

#### **CPOE Settings**:

**Rx Unverified OK** - Select to allow the medication to match a CPOE order before it has been verified by Pharmacy. The caregiver will be alerted and prompted to enter a reason for administering the medication before Pharmacy verification.

Alternate CPOE Med IDs - This field allows for more than one CPOE Alternate Med ID to be saved on each formulary item.

**Reports Display** - From the drop-down list select **Generic Only**, **Brand Only**, or **Generic and Brand**, depending on which medication name information you want to display on reports. Default is **Generic and Brand**.

Click **OK** to save your changes and exit the window, or click **Apply** to save these changes and continue to edit other settings.

#### **Clinical Values tab**

The **Clinical Values** tab provides a means to assign PatientTouch Clinical Prompts or Clinical Decision Values such as incoming lab values to the formulary item to be available during the administration process for the item.



Formulary Item: Acetylcysteine	×
General Settings Clinical Values Clinical Checks	
Clinical Prompts	
	•
Add Prompt Remove Prompt Edit Prompt Clinical Decision Values	
	•
Add Decision Value Remove Decision Value	
OK Cancel	Apply

# **Clinical Prompts**

- 1. In the Clinical Prompts section, click **Add Prompt.** The *Prompt Settings and Restriction* window appears.
- 2. Enter information into the following fields:

Prompt Setting & Restriction	X				
Prompt Settings Prompt Restrictions					
Prompt					
Name: Select Prompt					
Workflow Options					
Bedside Only (patient scan required)					
Display last values for this medication only					
Pre-Answer					
Collection Options					
Must collect, no override allowed					
C Must collect, allow override with reason					
C Skippable, don't ask in 'Collect All'					
C Skippable, ask in 'Collect All'					
Schedule Options					
During med administration only - no follow up					
C Follow up only					
C During med administration and follow up					
Follow-up Schedule					
Fixed Interval times, repeat every :					
O Variable Interval Edit					
Prompt Lead : Prompt Lag : Collapse Time :					
Follow Up even if order discontinued					
OK Cancel					

Name – required field. Click **Select Prompt** and select a prompt from the list that displays.

Select Workflow Options:

- Bedside Only when selected, the prompt will not occur during the Prep Med process.
- **Display last values for this medication only** when selected, the handheld prompt screen will display the last value collected (if any) for all subsequent administrations of the same

medication.

 Pre-Answer – when selected, the caregiver will only need to enter this specific prompt information once during a med pass session even if required by multiple medications within that session.

Select the Collection Options:

- Must Collect, no override allowed The caregiver cannot proceed with the handheld workflow until the required data is entered.
- Must collect, allow override with reason The caregiver may bypass the prompt but must provide a reason for doing so. This setting applies when administering a medication on the handheld and also when charting a dose using the Clinical Manager.
- Skippable, don't ask in 'Collect All' The caregiver may bypass the prompt without specifying a reason.
- Skippable, ask in 'Collect All' The caregiver may bypass the prompt but the data will be collected later.

Select Schedule Options as follows:

- During med administration only no follow up The caregiver will be prompted for this data only during the administration process.
- Follow up only The caregiver will not be prompted for this data during the administration process but instead will be prompted when follow up is due.
- During med administration and follow up The caregiver will be prompted for this data during the administration process and at the time of follow up.

If applicable, indicate Follow Up Schedule options as follows:

- **Fixed Interval and Repeat Times** Indicates the time interval between administration and follow up, and if desired, additional follow ups at the same time interval.
- Variable Interval Allows the definition of varying time intervals for follow ups.
- Prompt Lead Defines the time period before a follow up is due during which the follow up may be fulfilled.
- **Prompt Lag** Defines the time period after a follow up is due during which the follow up may be fulfilled.
- Collapse Time Defines the time period within which multiple follow ups for the same clinical data may be collapsed into one follow up event.
- Follow Up even if order discontinued Allows you to indicate that follow ups due after the last dose of an order is given should continue to be due even if the order is subsequently discontinued.

Repeat these steps for each Clinical Prompt you want to add.

3. Click the **Prompt Restrictions** tab.



Prompt restrictions are included with follow up prompts.

	Add
	Remove
	Inchiove.
By Hospital	Add
	Remove
By Nursing Unit	
	Add
	Remove
By Route	
	Add
	Remove
By Patient Age	
Minimum Age (months):	
Maximum Age (months):	
By First Dose	
Prompt only with first dose	
By Last Documented Time	
by Last Documented Time	

Configure prompt restrictions by:

- By SIG Code Only prompt when an order for this medication contains specific SIG code(s)
- By Hospital Only prompt when an order for this medication is to be given within the selected hospital. The list displays in alphabetical order. Select one or more facilities. Please note that the prompt will only display if the following conditions are met:
  - The prompt has been assigned to the medication being scanned or documented at the Clinical Manager.
  - The transaction is taking place for a patient located in a hospital that is defined in the "By Hospital" table in prompt restriction setup.

- By Nursing Unit Only prompt when an order for this medication is for a patient in a specific unit(s).
- By Route Only prompt when an order for this medication is for specific route(s) of administration.
- By Patient Age Only prompt if the patient age is between the min and max age in months specified.
- By First Dose Only prompt on first dose of this medication.
- By Last Documented Time Don't prompt if documented within last "X" minutes. There may be times when caregivers do not need to document the same clinical information that has recently been documented. For example, you may generally require that a pain assessment be documented as part of a medication administration. However, if a pain assessment has been documented within the past 30 minutes, you may want to alleviate the caregiver from having to re-document it. This setting allows you to define a time parameter to determine if the caregiver is required to document the information at the time of the administration.
- 4. Click OK.

#### **Clinical Decision Values**

- The patient's lab values come to PatientTouch via an HL7 message from the Laboratory Information System. In order to display values, your hospital staff should work with PatientSafe Solutions Technical Support to establish this interface and verify that these messages are being passed from the LIS to the PatientTouch System.
- For medications to display these Clinical Decision Values during the administration workflow, the Clinical Decision Values must be assigned to the formulary line item.

To add clinical decision values:

- 1. In the Clinical Decision Values section, click **Add Decision Value** and select the decision values to associate with this formulary item.
- 2. Click **OK** to save your changes and exit the window, or click **Apply** to save these changes and continue to edit other settings.

#### **Clinical Checks tab**

1. Select the Clinical Checks tab.



Formulary Item: Acetylcys	teine				trange 1	×
General Settings Clin	nical Values C	linical Checks				
Exclude allergy chec	k					
Exclude drug interac						
Exclude duplicate th						
Exclude first dose ed	lucation					
□ Vaccine						
Contains Acetaming	ophen					
Check Max Dose Am	nount if Order N	Not Pharmacy Approv	red			
Alert Type:		<u> </u>				
Max Dose Referen						
Acetylcysteine 4	00 mg/2 mL So	olution 4 mL				
Dose Type	Low Age	High Age	Route	Max Single Dose	Max Daily Dose	
MAINTENANCE	0 Days	364 Days	INHALATION	0	0	-
MAINTENANCE		110	INHALATION	0	0	-
SINGLE	0 Days	364 Days	INHALATION	0	0	
SINGLE	1	110	INHALATION	0	0	
LOADING	30 Days	364 Days	ORAL		154 milligram per kilogram	
LOADING	1	64	OPAL	154 millioram per kiloora	154 millioram ner kilooram	-
Direct Patient Adminis	stration Settin	gs				
Available for Direct	Administration	in All Units				
C Not Available for Dir	rect Administra	tion				
C Not for Direct Admi	nistration in Sel	ect Units:				
		A	id bi	Remove		
				0	K Cancel Ap	pply

**Exclude allergy check** – Select to exclude this formulary item from allergy checking.

**Exclude drug interaction check** – Select to exclude this formulary item from drug interaction checking.

**Exclude duplicate therapy check** - When selected, the formulary item will be excluded from duplicate therapy checking. This setting is only active when the **Enable Duplicate Therapy Checking** setting is selected in **Clinical Settings**.

**Exclude first dose education** – Select to exclude educating the patient at the time of the first dose.

**Vaccine** – Medications that have a valid NDC and have been identified by FDB as a vaccine will display a grayed out checkbox.

**Contains Acetaminophen** – Note that any medication containing acetaminophen will be automatically identified by FDB, as shown in the grayed out section of the screen shot above.

**Check Max Single Dose Amount if Dose Not Pharmacy Approved** – Select to specify that the max single dose amount of this item based on patient parameters should be checked when being administered without a pharmacy approved order.

If the Check Max Single Dose options is selected, from the **Alert Type** drop-down list, select **Warn Only** if caregivers can continue medication administration after selecting an override reason, or select **Stop Administration** if caregivers must cancel the administration and document the reason.

Direct Patient Administration Settings:

**Available for Direct Administration in All Units** – Indicates that this medication is approved for direct administration to a patient (e.g. without dilution) in all units of the hospital. [Default]

**Not Available for Direct Administration** - – Indicates that this medication is NOT approved for direct administration to a patient (e.g. without dilution) ANYWHERE in the hospital.

**Not for Direct Administration in Select Units** – Indicates that this medication is NOT approved for direct administration to a patient (e.g. without dilution) in SPECIFIED UNITS of the hospital (E.G. Heparin 10,000 Unit/mL in NICU).

# **Formulary Item Examples**

Refer to the following illustrations for an example of how to configure the most common formulary item types.

Formulary Item	Example					
Oral Solid - No Strength	Formulary Item: PRENATAL RX	100	-	al and		×
	General Settings Clinical V	alues Clinical Checks				
	Medication Info					
	Hospital ID: 2	2608				T CMS
	Generic Name: 4	Prenatal Vitamin				
	Reference Brand Name: 4	PRENATAL RX				
	Code:					+.
	Charge Code: 2	2608				Billable
	Strength Descriptor:					
	Strength:					
	Volume:					
	Dispensing Size: 1	1		Tablet		
	Dosage Formi	Tablet				
	Available Dosing Amount: 1	1				
	Dasing Unit:	Tablet				Class: U 💌
	Lead Time:	: Lag time: :				
	Brand Info					
	Brand Name	Barcode	NDC	ND	C Check	
	Darbus Tati Dir	2608	CR17 7346 44			-
	PRENATAL RX PRENATAL RX	358177216114	5817-7216-11			- 1



Oral S	olid -	With	Strength
--------	--------	------	----------

16 etaminophen LENOL EXTRA STRENGTH				IT EMS
etaminophen				II CMS
LENOL EXTRA STRENGTH				
				+.
i6				Billable
)		mg		
)		mg		
blet				
)				
				Class: U
Barroda	NDC		NDC Churk	
2256	nos		HUC CHECK	
T2256				
	blet blet : Lag time: : Barcode 2256	blet Earcode NDC 2256 T2256	0 mg 0 mg 0 mg 1 mg	blet Barcode NDC NDC Check 2256 172256

#### Oral Solid - 2 Tab Packet

Formulary Item: TYLENOL EXT	RA STRENGTH			-		×
General Settings Clinical	Values Clinica	al Checks				
Medication Info						
Hospital ID:	2256					IT CMS
Generic Name:	Acetaminophi	en .				
Reference Brand Name:	TYLENOL EXT	RA STRENGTH				
Code						
Charge Code:	2256					E Billable
Strength Descriptor:	ES					
Strength:	500			mg		
Volume:						
Dispensing Size:	2			Tablet		
Dosage Form:	Tablet					
Available Dosing Amount:	500					
Dasing Unit:	mg					Class: U 💌
Lead Time:	: La	g time: :				
Brand Info						
Brand Name		Barcode	NDC		NDC Check	
TYLENOL EXTRA STRENGT		2256				-
TYLENOL EXTRA STRENGT		T2256 0110350580451035	11917-04918			- 1
Remove Brand	Edit Brand	Add Brand				
				ОК	Cancel	Apply



Sustained Release Tab (LA, CR, XL)

Tab (LA, CR, XL) Formulary	Item: WELLBUTRIN SR		_			X
Genera	Settings Clinical Values	Clinical Checks				
Medica	tion Info					
	Hospital ID: 4300				E	CMS
	Generic Name: BuPROP	lion				
Refe	rence Brand Name: WELLBU	ITRIN SR				
	Coder					]
	Charge Code: 4100					Billable
	itrength Descriptor: SR					
	Strength: 150			mg		
	Volume:					
	Dispensing Size: 1			Tablet		
	Dosage Form: Tablet					
Availa	le Dosing Amount: 150					
	Dosing Unit: mg				Ch	
	Lead Time: :	Lag time: :				
Brand I	nfo					
Brand	Name	Barcode	NDC	NDC	Check	
WELL	UTRIN	4100 00173094755	0173-0947-55		3	-
	IUTRIN	T4100	6473-6477-22		- Ŭ	-
Ren	sove Brand Edit Bran	d Add Brand		ОК		

Injectable - Single Dose

General Settings Clinical Values Clinical Checks Medication Info Hospital ID 4301 C Check Generic Name Zponsidene Mesylate Reference Brand Name: GEODON Code Code Charge Code: 4301 C Billa Strength Descriptor Strength: 20 mg Volume: 1 0 mL Dispensing Size 1 0 mL L D L Dispensing Size 1 0 mL L D L D L D L D L D L D L D L D L D L	_
Hospital ID: 4381 C CMC Generic Name Zponsidone Mexylate C Reference Brand Name GEODON Code Charge Code 4381 Bills Strength Descriptor Strength 29 mg Volume 1 mL Dispensing Size 1 mL Dosage Form Nu Available Dasing Amount 20	
Generic Name Ziposidone Mesylate Reference Brand Name GEODON Code Charge Code 4001 Charge Code 4001 Charge Strength 25 Strength 25 Volume 1 Dispensing Size 1 Dispensing Size 1 Dispensing Size 2 Available Dasing Amount 20	
Reference Brand Name:     GEODON       Code:     Image Code:       Charge Code:     4301       Strength:     20       Volume:     1       Dispensing Size:     1       Dosage Form:     Nui       Available Dasing Amount:     20	4
Code     Image Code       Charge Code     4001       Strength Descriptor     Image Code       Strength     20       Volume     1       Dispensing Size     1       Dosage Form:     NU       Available Dasing Amount:     20	
Charge Code: 4001 III Bills Strength Descripton Strength: 20 mg Volume: 1 mL Dispensing Size: 1 mL Dosage Form: NU Available Dasing Amount: 20	
Strength Descripton     mg       Strength     20     mg       Volume:     1     mL       Dispensing Size:     1     mL       Dosage Form:     NU        Available Desing Amount:     20	
Strength:     20     mg       Volume:     1     mL       Dispensing Size:     1     mL       Dosage Form:     NU       Available Dosing Amount:     20	ble
Volume 1 mL Dispensing Size 1 md Dosage Form NU Available Dosing Amount 20	
Dispensing Size 1 ml Dosage Form INU Available Dosing Amount: 20	
Dosage Form: INU Available Dosing Amount: 20	
Available Dosing Amount: 20	
Daving Unit: ma	
	U -
Lead Time: : Lag time: :	
Brand Info	
Brand Name Barcode NDC NDC Check	
4101 GECOON T4101	-
GECCON 0110300493920838 0049-3920-83	•
Remove Brand Edit Brand Add Brand	
	-
OK Cancel Aq	pply



Multi-Dose

# With Streng

Example

Multi-Dose Floor Stock Injectable	Formulary Item: XYLOCAINE	man in	-			88
With Strength	General Settings Clinica	I Values Clinical Checks				
With Sti Clight	Medication Info					
	Hospital ID	1340				IT CMS
		Lidocaine HCI				
	Reference Brand Name					
	Code					
	Charge Code					Billable
	Strength Descriptor					
	Strength	£				
	Volume					
	Dispensing Size	20		mL.		
	Dosage Form	INI INI				
	Available Dosing Amount	20				
	Dosing Unit					Class: U •
	Lead Time					
	Brand Info					
	Brand Name	Barcode	NDC		NDC Check	
	XYLOCAINE	1340 T1340			3	-
						-
Topical Cream/Ointment Billed on Dispense	Formulary Item: Hydrocortiso		and for some 1	transfer li		X
billed off Disperise	Medication Info					
	Hospital ID	1152				IT CMS
		Hydrocortisone (Topical)				
	Reference Brand Name					
	Code					•
	Charge Code					Billable
	Strength Descriptor	2.5%				
	Strength					
	Volume					
	Dispensing Size	: 30		Gm		
	Dosage Form	Cream				
	Available Dosing Amount	2				
	Dosing Unit	:				Class: U 💌
	Lead Time	: : Lag time: :				
	Brand Info					
		Barroda	NDC		NDC Check	
	Brand Name	Barcode 1152	NDC.			-
		301680080314 T1152	0168-0080-31			
	1	11152				-
	Remove Brand	Edit Brand Add Brand				



Inhaler -	Billed	on	Dispense
-----------	--------	----	----------

Medication Info					
Hospital ID:	1879				I CMS
Generic Name:	Albuterol Sulfate				
Reference Brand Name:	PROVENTIL.				
Code					*.
Charge Code:	1879				🗆 Billable
Strength Descripton					
Strength:	90		mcg		
Volume:	1		Act		
Dispensing Size:	17		Gm		
Dosage Form:	Inhaler				
Available Dosing Amount:					
Dasing Unit:	Puffs				Class: U
Lead Time:	: Lag time: :				
Brand Info					
Brand Name	Barcode	NDC		NDC Check	
	1879 T1879				
PROVENTIL				-	

Enema

	Values Clinic	cal Checks				
edication Info Hospital ID:	78.48					IT CMS
Generic Name:						) Chia
Reference Brand Name:	ROWASA					
Coder						*.
Charge Code:	2848					🗆 Billable
Strength Descriptor:						
Strength:	4			Gm		
Volume:	60			mL.		
Dispensing Size:	60			mL.		
Dosage Form:	Enema					
vailable Dosing Amount:	4					
Dasing Unit:	Gm					Class: U 💌
Lead Time:	: L	ag time: :				
and Info						
Brand Name		Barcode	NDC		NDC Check	_
ROWASA ROWASA		2848 345802098467 T2848	4580-2098-46		3	:
Remove Brand	Edit Brand	Add Brand				



#### Powder Packet

Example

General Settings Clinical						
Medication Info						
Hospital ID:	TSTMETAMUCI	L				I CMS
Generic Name:	Psyllium					
Reference Brand Name:	METAMUCIL SP	ORANGE				
Code						+.
Charge Code:	1485					E Billat
Strength Descriptor:						
Strength						
Volume						
Dispensing Size:	1			Packet		
Dosage Form	Packet					
Available Dosing Amount:						
	1					
Dasing Unit:						Class:
-	Packet	time: :				Class:
Dosing Unit: Lead Time: Brand Info	Packet					Class:
Dosing Unit: Lead Time:	Packet	Barcode	NDC		NDC Check	Class:
Dosing Unit: Lead Time: Brand Info Brand Name	Packet : Lag	Barcode 1485	NDC		NDC Check	Class: [
Dosing Unit: Lead Time: Brand Info	Packet : Lag	Barcode	NDC 3700-0741-08		NDC Check	Class:
Dosing Unit: Lead Time: Brand Info Brand Name METAMUCIL SF ORANGE METAMUCIL SF ORANGE	Packet : Lag	Barcode 1485 T1485			NDC Check	Class:
Dosing Unit: Lead Time: Brand Info Brand Name METAMUCIL SF ORANGE METAMUCIL SF ORANGE	Packat : Lag (B)	Barcode 1485 11485 037000741084			NDC Check	Class:
Dosing Unit: Lead Time: Brand Info Brand Name METAMUCIL SF ORANGE METAMUCIL SF ORANGE	Packat : Lag (B)	Barcode 1485 11485 037000741084			NDC Check	Class:
Dosing Unit: Lead Time: Brand Info Brand Name METAMUCIL SF ORANGE METAMUCIL SF ORANGE	Packat : Lag (B)	Barcode 1485 11485 037000741084			NDC Check	Classe
Dosing Unit: Lead Time: Brand Info Brand Name METAMUCIL SF ORANGE METAMUCIL SF ORANGE	Packat : Lag (B)	Barcode 1485 11485 037000741084			000	
Dosing Unit: Lead Time: Brand Info Brand Name METAMUCIL SF ORANGE METAMUCIL SF ORANGE	Packat : Lag (B)	Barcode 1485 11485 037000741084		OK	NDC Check	
Dosing Unit: Lead Time: Brand Info Brand Name METAMUCIL SF ORANGE METAMUCIL SF ORANGE	Packat : Lag (B)	Barcode 1485 11485 037000741084		OK	000	
Dosing Unit: Lead Time: Brand Info Brand Name METAMUCIL SF ORANGE METAMUCIL SF ORANGE	Packat : Lag (B)	Barcode 1485 11485 037000741084		OK	000	

#### Drops Billed on Dispense

nulary Item: TYLENOL	And a second second	and the second se	-	-	_ =
General Settings Clinical	Values Clinical Checks				
Aedication Info					
Hospital ID:	TSTTYLEBOLIQ				II CMS
Generic Name:	Acetaminophen				
Reference Brand Name:	TYLENOL				
Code					<b>.</b>
Charge Code:	2264				🗆 Billable
Strength Descripton					
Strength:	80		mg		
Volume:	0.8		mL		
Dispensing Size:	15		mL		
Dosage Form:	Liquid Drops				
Available Dosing Amount:	1,500				
Dasing Unit:	mg				Class: U 💌
Lead Time:	: Lag time: :				
Irand Info					
Brand Name	Barcode	NDC		NDC Check	
TYLENOL	2264 T2264				-
TYLENOL	0100350580144183	5058-0144-18		ŏ	
Remove Brand	Edit Brand Add Brand				
	Had drand				



#### Spray Billed on Dispense

Example

Hospital ID:	TSTNETROSP	RY				I CMS
Generic Name:	Nitroglycerin					
Reference Brand Name:	NITROLINGU	AL				
Codes						
Charge Code:	1639					E Billable
Strength Descripton	0.4 mg/Dose					
Strength:						
Volume:						
Dispensing Size:	12			Gm		
Dosage Form	Spray					
Available Dosing Amount:						
Dasing Unit:	Spray					Class: U
Lead Time:	_	ag time: :				-
Irand Info						
		Barcode	110.0		104.0	
Brand Name		Barcode 1639	NDC		NDC Check	
NETROLINGUAL		T1639				
NETROLINGUAL (B)		596300300204DUP	9630-0300-20		9	
	Edit Brand	Add Brand				
Remove Brand						
Remove Brand						
	Edit Brand	Add Brand				

#### LVP Solution

Use the generic name field only, to avoid long and redundant display names. Use abbreviations cautiously.

ormulary Item: LR				×
General Settings Clinical	Values Clinical Checks			
Medication Info				
Hospital ID:	1277			I CMS
Generic Name:	Lactated Ringers			
Reference Brand Name:	LR			
Code				*.
Charge Code:	1277			F Billable
Strength Descripton				
Strength:				
Volume:				
Dispensing Size:	1,000		mL.	
Dosage Form	TV Soln			
Available Dosing Amount:	1,000			
Dasing Unit:	mL			Class: U 💌
Lead Time:	: Lagtime: :			
Brand Info				
Brand Name	Barcode	NDC	NDC Check	
	T1277			-
Lactated Ringers	1277 0100304097953097	0409-7953-09		- 1
Remove Brand	Edit Brand Add Brand			
			OK Cancel	Apply



Premixed IV Piggyback

Example

Piggyback	Formulary Item: DIFLUCAN			-	88
	General Settings Clinical	Values Clinical Checks			
	Medication Info				
	Hospital ID:	3063			I CMS
	Generic Name:	Fluconazole (Diflucan) in NS			
	Reference Brand Name:	DIFLUCAN			
	Codes				<b>.</b>
	Charge Code:	3063			F Billable
	Strength Descripton	PMX			
	Strength:	200		mg	
	Volume:	100		mL	
	Dispensing Size:	100		mL	
	Dosage Form	Piggyback			
	Available Dosing Amount:	200			
	Dasing Unit:				Class: U 💌
	Lead Time:				
	Brand Info				
	Brand Name	Barcode	NDC	NDC Check	
	DIFLUCAN	3063 T3063			-
	DIFLUCAN	300540002855	0054-0002-85	3	-1
	Remove Brand	Edit Brand Add Brand			
	namove brand	Lost prano			
				OK Cancel	Apply
	[				

# **Generic Equivalency Groups**

Situations sometimes occur where a caregiver needs to fulfill the dose of an ordered medication with a different strength of the same medication. For example, an order for Furosemide 40mg Tablet might be fulfilled by scanning two Furosemide 20mg tablets.

However, when scanned, the barcode on the 20mg tablets is not recognized as a match for the 40mg tablet order, so the nurse is prompted with an "Order Not Found in System" alert. Similarly, this would occur if a Pilocarpine 1% eye drop was ordered as the 5mL size but the 2mL size was dispensed and scanned. Generic Equivalency Groups allow you to anticipate these situations.

To create a new Generic Equivalency Group:

1. From the Pharmacy folder, select Generic Equivalency Groups.



PatientTouch Clinical Manager - Bl	ue- Milstein - User, Admin	
Manager View Help		
C		02/05/2019 13:05 PST
PatientSafe Mira Mesa	Generic Equivalency Groups	
Patients     Order Verification	Search	]
Patient Assignment     Reports	Name	
Pharmacy     General Settings     Clinical Settings     Generic Equivalency Grot     SIG Codes     Allergy Mapping     Claboratory     Blood Administration     Infant Care     Intervention/Prompt Setup     Flowsheet Setup     Flowsheet Setup     Flowsheet Setup     Flowsheet Setup	Aspirin	<u>.</u>
		<b>-</b>
()	Qelete	Edit New

2. Click **New** to display the window for the new group.



eric Equivalen	cy Group: Aspirin						×
Name:	Aspirin						
Dosing Unit(s):	mg						
	□ Rx Unverified OK	Without an RT Order mount if Order Not Pharmac	y Approved				
ormulary Iten Hospital ID	Generic Name	Reference Brand Name	Strength	Volume	Dosage Form	Avail Dosing Amt	-
176	Aspirin		600 mg	Torunte	Suppository	6000 mg	
276	Aspirin EC		81 mg		Suppository	81 mg	
91	Aspirin		81 mg		Suppository	81 mg	
169	Aspirin		300 mg		Suppository	3000 mg	
		Add Formulary Item(s)	Remove	Formulary Iter			
					OK	Cancel App	ahr

- 3. Enter a Name for the group. For example, Furosemide Tablets.
- 4. Define the settings for the group:
  - Dosing Unit (e.g. mg) PatientTouch formulary dosing unit must be the same for all members of a group.
  - RT May Administer Without an RT Order Setting must be the same for all members of the group.
  - Check Max Single Dose Amount if Dose Not Pharmacy Approved The max single dose checking feature alerts the caregiver if he or she is going to exceed the recommended maximum dose amount for a single dose of the medication based on the patient's age, height and weight. The check will take place if the caregiver scans the medication prior to pharmacy entering/approving the order AND there is a valid NDC associated with the formulary item and the patient's demographics are available.
  - RX Unverified OK This CPOE-related setting must be the same for all members of the group.
- 5. Click Add Formulary Item(s).

		Search aspirin					
Hospital ID	Generic Name	Reference Brand Name	Strength	Volume	Dosage Form	Avail Dosing Amt	
3888	Dipyridamole-Aspirin	AGGRENOX			Capsule	1 Capsule	
169	Aspirin		300 mg		Suppository	3000 mg	Π
175	Aspirin		325 mg		Tablet EC	325 mg	
176	Aspirin		600 mg		Suppository	6000 mg	
191	Aspirin		81 mg		Suppository	81 mg	
TSTASA325MG	Aspirin		325 mg		Tablet	325 mg	
3276	Aspirin EC		81 mg		Suppository	81 mg	
178	Aspirin-Al Mag Hy	ASPIRIN w/ANTACID	325 mg		Tablet	325 mg	
3014	Aspirin-Butalbital				Tablet	1 Tablet	
996	Butalbital-Aspirin	BUTALBITAL/ASA/CAF			Capsule	1 Capsule	
2041	Carisoprodol-Aspirin				Tablet	1 Tablet	
1961	Methocarbamol-As	ROBAXISAL			Tablet	1 Tablet	
2040	Carisoprodol-Aspirin	SOMA COMPOUND			Tablet	1 Tablet	
							-

- 6. Select the formulary items to include in the group. To select multiple items at once, hold the Ctrl key down while selecting each item.
- 7. Click **OK** on the *Select Formulary Item* window.
- 8. Click **OK** again on the *New Generic Equivalency Group* window.

To edit an existing group:

- 1. Select the group from the list and click **Edit**.
- 2. Make the necessary changes.
- 3. Click **OK** on the *Generic Equivalency Group* window.

To delete a group:

- 1. Select the group from the list and click **Delete**.
- 2. Click **Yes** on the confirmation window that displays.

### **Generic Equivalency Group Warnings**

Three types of warnings may display when you create or edit a group

- If the selected items do not have a defined Dosing Unit (such as mg, mL, mEq) or do not have the same Dosing Unit (such as mg) in the formulary settings, the system displays an error message and returns you to the formulary item search window. A similar error message will occur if the RT May Administer Without an RT Order, Check Max Single Dose Amount if Dose Not Pharmacy Approved, or RX Unverified OK settings do not match.
- If the Generic Names of one or more of the selected items are not consistent, the system displays a confirmation/warning message. If you want to save the equivalency group as is, click OK. If you want to make corrections to the group first, click Cancel.
- 3. If the Dosage Form of one or more of the selected items is not consistent with other items in

the group (for example, Tablet LA versus Tablet), the system displays a confirmation/warning message. You can click **OK** to save the equivalency group as is or click **Cancel**.

# **SIG Codes**

The Clinical Manager allows you to set up a unique SIG code to correspond with each SIG code in the pharmacy information system. The name of each SIG code in the Clinical Manager must be an exact match (including case) with the codes in the pharmacy information system.

# **Create or Edit SIG Codes**

- 1. Select **SIG Codes** from the Clinical Manager menu tree.
- 2. Click **New** to create a new SIG code.
- 3. Click **Edit** to modify an existing SIG code.

anager <u>V</u> iew <u>H</u> elp				
3			02/05/201	l9 13:06 l
atientSafe Mira Mesa	SIG Codes			
- Patients	Search			
Order Verification	Search			
Patient Assignment	Name	Display Text	Type	_
Reports	BID	Twice Daily	Discrete	
- Dharmacy	CONT	CONTINUOUSLY	Continuous	-
General Settings	Daily	Daily	Discrete	
Clinical Settings	DCRT(UOST/Rpt)	DCRT(UOST/Rpt)	Invalid	
Master Drug File	DCRT(UST/Lg30/Rp)	DCRT(UST/Lg30/Rp)	Invalid	E
Generic Equivalency Grou	DCRT1DAYRPT	O 1 DAY UOST RPT	Discrete	-
- SIG Codes	DCRT1MTH	ONCE A MTH AT 00:00	Discrete	
	DCRT1MTHRPT	O 30 DAYs UOST RPT	Discrete	- U
- Allergy Mapping	DCRT1XDAY	1X DAY 0800sig Id/lg	Discrete	
- Laboratory	DCRT4XDAY	4X DAY DISCRETE	Discrete	
Blood Administration	DCRTJOUR2XRPT	Q SnTueThuSat @ 7.15	Discrete	
- 🛄 Infant Care	DCRTJOURDAY	O Sun Wed Fri UOST	Discrete	
- Intervention/Prompt Setup	DCRTJOURRPT	O SnTueWedFri USTRPT	Discrete	
Intervention Scheduling	DCRTQ10D	DCRTQ10D	Invalid	
- Flowsheet Setup	DCRTQ10DAY	Q 10 DAYS AT 10:00	Discrete	
- mView	DCRTQ10DAYUST	EVERY 10 DAY UOST	Discrete	
Users	DCRTQ3DAY	EVERY 3 DAYS 7 TIMES	Discrete	
- Roles	DCRTQ5DAY	EVERY 5 DAYS AT UOST	Discrete	
-	DCRTQ7DAY	EVERY WEEK AT 10:00	Discrete	
Configuration	DSC06,10,14,18,22	DSC06,10,14,18,22	Invalid	
	DSCT 06/12/Ld/Lg	DSCT 06/12/Ld/Lg	Invalid	
	Give Once	Give Once	One Time	
	INT(195msBse2345	INT(195msBse2345	Interval	
	NIT/S1 240-07201	TKIT/51 24Liz 07200	Interval	-
	Delete		Edit	New

Every SIG code includes a Name (such as "BID"), which must match the name in the pharmacy system and Display Text, which is what appears on the handheld and on the MAR.

G Code: BID			×
SIG Code Info			
Name:	BID	Require Dose Specification	
Display Text:	Twice Daily	Check Allergies on Initial Dose	
Туре	Discrete •	RT Prompt for Formulary Configured Ro	oute
Description -			
Give at 09:00	and 21:00 every day		
Discrete Setti	ngs		
Field Every 1	Day(s)		
C Specific d	rys of the week		
	🗆 Sun 🗖 Ma	on 🗆 Tue 🗆 Wed 🗖 Thu 🗖 Fri 🗖 Sat	
Discrete Time	s: 09:00, 21:00		Edit
Schedule	nitial Dose		
Required	Time Interval Before Fir	rst Routine Dose:	
Ignore Do	ses Before Order Start Ti	ime	
Lead time:	: Lag time:	1	
May Repe		1	
		OK Cancel	Apply

Selecting the **Type** of the SIG code determines what other options can be specified. The following types are available:

- Discrete for doses administered at specific times of the day
- Interval for SIG Codes with dose times at consistent time intervals
- One Time used for orders to be administered only once
- **PRN** for doses administered as needed
- **Continuous** for meds given routinely but without specific dose due times (for example, an IV infusion)

# RT

Check RT if you want users with the Respiratory Therapist privilege to see prompts and reminders for medication orders with this SIG code. If you check this option, the system also sends orders entered with this SIG code to the RT MAR Worksheet.

### **Require Dose Specification**

In some cases, the PatientTouch System will receive a medication order with a dose amount of "0" or with dosing units that do not match what is configured in the PatientTouch System. In order to accommodate these order types, sig codes in the PatientTouch System can now be configured to require the user to specify the dose amount.

## **Check Allergies on Initial Dose**

When this setting is enabled, allergy checks will occur on the initial dose of an order using this SIG code. The user will be informed/alerted only if there is an identified allergy. Note: This setting is subordinate to the global "Enable Allergy Checking" setting. If the global setting is off, this setting will not be functional.

## **Prompt for Formulary Configured Route**

When this setting is enabled, the user will be prompted for route using the formulary item's route settings, regardless of the route that is provided in the medication order. If the formulary item has only one route configured, the system will automatically use it and document against it. The route prompting will occur at admin details screens and the answer CAN trigger route based formulary prompting restrictions.

### Lead and Lag Times

Lead and lag times determine the window of time before and after a scheduled dose during which a dose can be administered and still be considered on time.

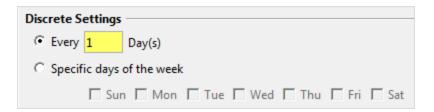
Setting lead and lag times for a SIG code is optional. If you do set a lead or lag time for a SIG code, these settings will take precedence over the times set for the nursing unit, but are superseded by the formulary lead and lag times.

#### **Discrete Dosing**

For SIG codes that have hospital standard administration times, use the **SIG Type Discrete**.

To enter Discrete Dosing Times for a SIG code:

- 1. Choose the SIG Type, Discrete.
- 2. Check **RT** if you want users with the Respiratory Therapist privilege to see prompts and reminders for medication orders with this SIG code. If you check this option, the system also sends orders entered with this SIG code to the RT MAR Worksheet.
- 3. Enter the day interval. For example, enter 1 for a dose that occurs daily, 2 for every other day, etc.



If dosing for this SIG will occur only on select days of the week, click **Specific days of the week** and choose the appropriate weekdays.

- 4. To select Discrete Dosing Times click **Edit** to enter the desired discrete times. Times can be indicated such as "0900, 1700" or just "9, 17". Separate each time by a comma.
- 5. Select Schedule Initial Dose and enter a required time interval (minutes or hours) to have



PatientTouch schedule an immediate dose if the length of time before the first scheduled dose will be due is longer than the time interval specified. For example, if discrete times for BID are 0900 and 2100 and an order is entered at 1300 for BID with Schedule Initial Dose enabled and time interval set at 6 hours, an initial dose will be scheduled. However, if the time interval were set at 9 hours, an initial dose would not be scheduled.

- 6. Enter Lead and Lag Times for doses on orders with this SIG code if desired.
- 7. If the order can be repeated, such as with HSMRx1i, select the **May Repeat** checkbox and enter the number of allowable repeat doses, and the required interval between each dose.
- 8. Click **OK** to save your changes.

### **Interval Dosing**

For SIG codes associated with scheduled time intervals in hours or minutes (such as Q6H), choose the **SIG Type Interval**.

To base the time of the first scheduled dose on the order start time, select the **Use Order Start Time** option. Otherwise, select the **Base Time** option, and enter a base time for calculating dosing times.

- Select Schedule Initial Dose and enter a required time interval (minutes or hours) to have PatientTouch schedule an immediate dose if the length of time before the first scheduled dose will be due is longer than the time interval specified. For example, if discrete times for BID are 0900 and 2100 and an order is entered at 1300 for BID with Schedule Initial Dose enabled and time interval set at 6 hours, and initial dose will be scheduled. However, if the time interval were set at 9 hours, an initial dose would not be scheduled
- Enter Lead and Lag Times for doses on orders with this SIG code if desired.



SIG Code Info			
Name:	Q24H	r	Require Dose Specification
Display Text:	Every 24 Hours	r	Check Allergies on Initial Dose
Type:	Interval 💌	E RT	Prompt for Formulary Configured Route
Description -			
Give every 24	hours beginning	at the order's star	t time
Interval Settin	igs		
Every 24	Hour 💌		
C Base Time			
Use Order	Start Time		
Schedule	Initial Dava		
	Time Interval Bef		Dose:
Ignore Do	ses Before Order S	tart Time	
		ne: :	
Lead time:	: Lag tim		
Lead time:		Q :	
		Q :	
		Q :	
		Q :	
		Q :	
		Q :	

### **One-Time Dosing**

The **One Time SIG Type** designates a single dosing time and is based on the order's start time.

To create a one-time SIG code:

- Select **One Time** from the **SIG Type** drop-down list.
- Select the Stat checkbox if SIG code will always be used for STAT orders. This will cause the
  order to appear in the STAT category on the patient's medication order screen on the
  handheld.
- Select the **RT** checkbox if this is a Respiratory Therapy SIG Code, if needed.
- Enter specific lead and/or lag times as needed.

#### As Needed Dosing

For SIG codes that may be given as needed, with or without an interval, select **PRN** as the **SIG Type** and, optionally, designate a PRN Setting interval in hours or minutes. To provide a "lead time" for PRN dosing when a dosing interval is desired, use an interval that is slightly less than the actual dosing interval. This allows the nurse to be slightly early for a PRN dose without receiving a warning that the dose being given is early. For example, for "every four hours PRN" (Q4HP), use a PRN Setting interval of 220 minutes rather than 4 hours (240 minutes) to allow a PRN lead time of 20 minutes.

Select the **RT** checkbox if this is a Respiratory Therapy SIG Code, if needed.

# **Continuous Dosing**

If a routine SIG code is intended, but specific dose due times are not applicable, use the Continuous SIG type. For example, you may want to use this type of SIG Code for IV infusions. Orders with a Continuous SIG type will be listed on MAR reports and shown on the handheld with Scheduled meds even though specific dose times are not applied.

Select the **RT** checkbox if this is a Respiratory Therapy SIG Code, if needed.

# **SIG Code Examples**

The following examples illustrate the settings for a variety of SIG codes.

# Twice Daily (BID)

A basic SIG code on a fixed schedule typically uses the hospital's standard discrete dosing times. In addition to providing a name and display text for the SIG code, this example sets the following options:

**Every 1 Day** indicates this is a daily SIG code.

Discrete Dosing Times is selected, and the default times are used. In this case, those times are 09:00 and 21:00.

SIG Code: BID
SIG Code Info
Name: BID Frequire Dose Specification
Display Text: Twice Daily Check Allergies on Initial Dose
Type: Discrete   RT Prompt for Formulary Configured Route
Description
Give at 09:00 and 21:00 every day
Discrete Settings
Every 1 Day(s)
C Specific days of the week □ Sun □ Mon □ Tue □ Wed □ Thu □ Fri □ Sat
I Sun I Mion I Tue I Wed I Thu I Ph I Sat
Discrete Times: 09:00, 21:00 Edit
Schedule Initial Dose
Required Time Interval Before First Routine Dose:
Ignore Doses Before Order Start Time
Lead time: : Lag time: :
May Repeat     times Q
OK Cancel Apply



# Every 4 Hours PRN (Q4HP)

In this case, to enter a PRN SIG Code for every 4 hours, select **PRN** from the **SIG Type** list and select the Every 4 Hours interval. This example uses the following options:

**PRN** is used, so Discrete Dosing Times are disabled.

**Every 4 Hour** is the minimum time interval in which the PRN dose may be repeated. (To allow a lead time for the PRN Setting, see As Needed Dosing.)

Click **Apply** to add the SIG code to the list.

Click **OK** to close the New SIG code screen.

Every	12	Hours	(Q12H)

A SIG code with a daily dosing interval may be set up as a Discrete SIG and assigned specific dosing times. For example, even though a SIG Code of Q12H could be based on a 12-hour interval, discrete dosing times help caregiver's better schedule the med pass and ensure that dosing times are always consistent.

In addition to providing a name and display text for the SIG code, this example sets the following options:

**Every 1 Day** indicates this is a daily SIG code.

Discrete (Dosing) Times is selected, and the default times are used. In this case, those times are 09:00 and 21:00.

SIG Code Info Name: C Display Text: E	
Display Text: E	24HP Require Dose Specification
	ivery 4 Hours As Needed Check Allergies on Initial Dose
Type:	PRN   RT Prompt for Formulary Configured Route
Description	
Give every 225	minutes beginning at the order's start time as needed
Every 225	Minute -
May Repeat	
	anner of the
	OK Cancel Apply
IG Code: Q12H	Success of
Name: k	
- annes M	Q12H Require Dose Specification
Display Text: E	
	Check Allergies on Initial Dose
Display Text:	Check Allergies on Initial Dose
Display Text: E	Check Allergies on Initial Dose
Display Text: E Type: Description	Image: Check Allergies on Initial Dose           Initial Dose           Initial Dose           Initial Dose
Display Text: E Type: Description	Check Allergies on Initial Dose
Display Text: E Type: Description Give at 09:00 ar	Discrete    Check Allergies on Initial Dose  Check Allergies on In
Display Text: Type: Description Give at 09:00 ar Discrete Setting	Image: Synthesis of Synthesynthesyntemetry of Synthesis of Synthesis of Synthesis of Synthes
Display Text: E Type: C Description Give at 09:00 ar Discrete Setting (* Every 1	Check Allergies on Initial Dose Check Allergies on Initial Dose Ciscrete  RT Prompt for Formulary Configured Route  d 21:00 every day Day(s)
Display Text: Type: Description Give at 09:00 ar Discrete Setting	Check Allergies on Initial Dose Check Allergies on Initial Dose Discrete  RT Prompt for Formulary Configured Route  d 21:00 every day  Day(s) s of the week
Display Text: E Type: C Description Give at 09:00 ar Discrete Setting (* Every 1	Check Allergies on Initial Dose Check Allergies on Initial Dose Ciscrete  RT Prompt for Formulary Configured Route  d 21:00 every day Day(s)
Display Text: E Type: C Description Give at 09:00 ar Discrete Setting (* Every 1	Check Allergies on Initial Dose Check Allergies on Initial Dose Discrete  RT Prompt for Formulary Configured Route  d 21:00 every day  Day(s) s of the week  Sun  Mon  Tue Wed Thu Fri Sat
Display Text: E Type: C Description Give at 09:00 ar Discrete Setting (* Every 1 C Specific day	Check Allergies on Initial Dose Check Allergies on Initial Dose Discrete  RT Prompt for Formulary Configured Route  d 21:00 every day  Day(s) s of the week  Sun  Mon  Tue Wed Thu Fri Sat
Display Text: E Type: E Description Give at 09:00 ar Discrete Setting (© Every 1 (© Specific day Discrete Times	Check Allergies on Initial Dose Discrete  Check Allergies on Initial Dose  Discrete  RT Prompt for Formulary Configured Route  d 21:00 every day  p Day(s) s of the week  Sun Mon Tue Wed Thu Fri Sat  Discrete Edit
Display Text: E Type: C Description Give at 09:00 ar Discrete Setting (* Every 1 C Specific day	Check Allergies on Initial Dose Discrete  Check Allergies on Initial Dose  Discrete  RT Prompt for Formulary Configured Route  d 21:00 every day  p Day(s) s of the week  Sun Mon Tue Wed Thu Fri Sat  Discrete Edit
Display Text: E Type: E Description Give at 09:00 ar Discrete Setting (* Every 1 C Specific day Discrete Times	Check Allergies on Initial Dose Discrete  Check Allergies on Initial Dose  Discrete  RT Prompt for Formulary Configured Route  d 21:00 every day  p Day(s) s of the week  Sun Mon Tue Wed Thu Fri Sat  Discrete Edit
Display Text: E Type: C Description Give at 09:00 ar Discrete Setting © Every 1 © Specific day Discrete Times C Schedule In Required T	Check Allergies on Initial Dose Discrete  Check Allergies on Initial Dose  RT Prompt for Formulary Configured Route  d 21:00 every day  Day(s) s of the week  Sun  Mon  Tue Wed Thu Fri Sat  dd d
Display Text: E Type: E Description Give at 09:00 ar Discrete Setting (* Every 1 C* Specific day Discrete Times Schedule In Required T Ignore Dose	Check Allergies on Initial Dose Discrete  Check Allergies on Initial Dose  RT Prompt for Formulary Configured Route  d 21:00 every dey  Day(s) s of the week  Sun Mon Tue Wed Thu Fri Sat  Dose  itial Dose  itial Dose  itial Dose  itial Dose  itial Pose  itial Dose  itia
Display Text: E Type: E Description Give at 09:00 ar Discrete Setting C Every 1 C Specific day Discrete Times C Schedule In Required T Elgnore Dose Lead time	Check Allergies on Initial Dose Discrete  Check Allergies on Initial Dose  RT Prompt for Formulary Configured Route  d 21:00 every dey  Day(s) s of the week  Sun  Mon  Tue Wed Thu Fri Sot  Check Allergies  Hour  Lag  Lag  Lag  Lag  Lag  Lag  Lag  La
Display Text: E Type: E Description Give at 09:00 ar Discrete Setting (* Every 1 C* Specific day Discrete Times Schedule In Required T Ignore Dose	Check Allergies on Initial Dose Discrete  Check Allergies on Initial Dose  RT Prompt for Formulary Configured Route  d 21:00 every dey  Day(s) s of the week  Sun  Mon  Tue Wed Thu Fri Sot  Check Allergies  Hour  Lag  Lag  Lag  Lag  Lag  Lag  Lag  La
Display Text: E Type: E Description Give at 09:00 ar Discrete Setting C Every 1 C Specific day Discrete Times C Schedule In Required T Elgnore Dose Lead time	Check Allergies on Initial Dose Discrete  Check Allergies on Initial Dose  RT Prompt for Formulary Configured Route  d 21:00 every dey  Day(s) s of the week  Sun  Mon  Tue Wed Thu Fri Sot  Check Allergies  Hour  Lag  Lag  Lag  Lag  Lag  Lag  Lag  La



# Every 3rd Day at Discrete Time (Q72H)

A Q72H SIG code would use the following options:

Discrete is the SIG Type.

**Discrete Times** indicates 09:00 as the designated dosing time.

**Every 3 Days** indicates the time interval.

# Every 5 Hours (Q5H)

If the dosing schedule is not divisible in a 24-hour period, set up the SIG code according to the following Q5H example:

**Interval** indicates this is a specified interval SIG code.

**Every 5 Hours** indicates the scheduled frequency.

**Use Order Start Time** indicates when to start the dosing schedule.

SIG Code Info					
Name:	Q72H		Require Dose Specific	ation	
	Every 3rd Day		Check Allergies on In		
	Discrete •		Prompt for Formular		
.77-					
Description -					
Give at 09:00	every 3 days				
Discrete Setti	ngs				
Every 3	Day(s)				
C Specific d	ays of the week				
	🗆 Sun 🗆 I	/lon □ Tue	□ Wed □ Thu □	Fri 🗖 Sat	
Discrete Time	s: 09:00				Edit
Schedule	nitial Doce				
	Time Interval Before F	int Routing D	ose: Hour	-1	
	ses Before Order Start		use: Hour		
Lead time:	: Lag time:				
May Repe					
I may kepe	times Q	1			
			OK	Cancel	Apply
Code Offi			ОК	Cancel	Apply
Code: Q5H	2		ОК	Cancel	Apply
SIG Code Info	2	040 144 - 1 47			Apply
Code: Q5H SIG Code Info Name:			Require Dose Specific	ation	Apply
SIG Code Info Name:	Q5H Every 5 Hours	-	Require Dose Specific Check Allergies on In	ation itial Dose	
SIG Code Info Name: Displøy Text:		-	Require Dose Specific	ation itial Dose	
SIG Code Info Name: Displøy Text:	Every 5 Hours	-	Require Dose Specific Check Allergies on In	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description —	Every 5 Hours	L. KIL	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description —	Every 5 Hours	L. KIL	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description Give every 5 H	Every 5 Hours	L. KIL	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description Give every 5 H	Every 5 Hours Interval	L. KIL	Require Dose Specific Check Allergies on In Prompt for Formular	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description Give every 5 H	Every 5 Hours Interval • nours beginning at the gs Hour •	F RTF	Require Dose Specific Check Allergies on In Prompt for Formular	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description Give every 5 f Interval Settin Every 5	Every 5 Hours Interval • hours beginning at the gs Hour • :	F RTF	Require Dose Specific Check Allergies on In Prompt for Formular	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description Give every 5 1 Interval Settin Every 5 C Base Time	Every 5 Hours Interval • nours beginning at the gs Hour • Start Time	F RTF	Require Dose Specific Check Allergies on In Prompt for Formular	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description Give every 5 1 Interval Settin Every 5 C Base Time © Use Order C Schedule	Every 5 Hours Interval  Tours beginning at the  Hour Start Time  Initial Dose	order's start t	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description Give every 5 I Interval Settin Every 5 © Base Time (* Use Order C Use Order Required	Every 5 Hours Interval • nours beginning at the gs Hour • Start Time	order's start t	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description — Give every 5 f Interval Settin Every 5 C Base Time © Use Order C Use Order Required F Ignore Do	Every 5 Hours Interval	order's start t	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description — Give every 5 f Interval Settin Every 5 C Base Time C Use Order C Use Order Required Required Lead time:	Every 5 Hours Interval  Tours beginning at the  G  G  G  G  G  G  G  G  G  G  G  G  G	order's start t	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description — Give every 5 f Interval Settin Every 5 C Base Time © Use Order C Use Order Required F Ignore Do	Every 5 Hours Interval  Tours beginning at the  gs Hour  Start Time Initial Dose Time Interval Before F ses Before Order Start  Log time: Log time:	order's start t	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description — Give every 5 f Interval Settin Every 5 C Base Time C Use Order C Use Order Required Required Lead time:	Every 5 Hours Interval  Tours beginning at the  G  G  G  G  G  G  G  G  G  G  G  G  G	order's start t	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description — Give every 5 f Interval Settin Every 5 C Base Time C Use Order C Use Order Required Required Lead time:	Every 5 Hours Interval  Tours beginning at the  G  G  G  G  G  G  G  G  G  G  G  G  G	order's start t	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	
SIG Code Info Name: Display Text: Type: Description — Give every 5 f Interval Settin Every 5 C Base Time C Use Order C Use Order Required Required Lead time:	Every 5 Hours Interval  Tours beginning at the  G  G  G  G  G  G  G  G  G  G  G  G  G	order's start t	Require Dose Specific Check Allergies on In Prompt for Formulary	ation itial Dose	



# **Every Hour (Q1H)**

If a particular interval SIG code has a short time interval setting, you should consider shorter lead and lag times for this SIG code. In this example, the SIG code dosing time interval of 1 hour is the same or less than the hospital's standard lead and lag time of 60 minutes. The SIG lead and lag times can set at 30 minutes each to avoid overlapping the lead and lag period for consecutive doses.

Use Order Start Time indicates that dose scheduling will begin at the Pharmacy order's start time.

# One Time Only (Once)

"Once" is an example of a one-time SIG Code. In this example, the dose time will be the particular order's start time and the lag time is set at 4 hours to allow the caregiver ample time in which to administer the dose.

A lead time and lag time can be designated for a One Time SIG code. However, if the SIG were only used for immediate One Time doses, only the lag time would apply.

G Code: Q1H	Terrer Terrer
-	Toronto de M
SIG Code Info Name:	Q1H Require Dose Specification
Display Text:	
	Interval   RT Prompt for Formulary Configured Route
Type	anterval
Description -	
-	ur beginning at 07:00
Interval Settin	95
Every 1	Hour -
Base Time	07:00
C Use Order	Start Time
Schedule ]	initial Dose
Required	Time Interval Before First Routine Dose: Hour
🗖 Ignore Do	ses Before Order Start Time
Lead time:	: Lag time: :
May Repe	
	OK Cancel Apply
3 Code: ONCE	Taxa (MD)
SIG Code Info	
SIG Code Info Name:	ONCE Require Dose Specification
Name	
Name: Display Text:	Once Check Allergies on Initial Dose
Name: Display Text:	
Name: Display Text: Type:	Once Check Allergies on Initial Dose
Name: Display Text: Type: Description —	Once Check Allergies on Initial Dose
Name: Display Text: Type:	Once Check Allergies on Initial Dose
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description —	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route
Name: Display Text: Type: Description — Give once	Once Check Allergies on Initial Dose One Time STAT RT Prompt for Formulary Configured Route



# Specific Days of Week (MWF)

It is common for some medications to be ordered for specific days of the week, as illustrated in the following MWF SIG Code. In this case, set the following options:

Discrete is the Type.

Discrete Times is specified as 09:00.

**Specific days of the week** is selected for Mon, Wed, and Fri.

### May Repeat (KCLIV)

Some orders, such as a Potassium Chloride IV protocol, use a **May Repeat** option, so the dose may be divided as clinically indicated among several intervals. For KCLIV, the options are:

Discrete is the SIG Type.

Discrete Times with the time set to 09:00.

**Every 1 Day** indicates this is a daily SIG code.

**May Repeat** 5 times Q 01:00 indicates the interval at which the dose may be repeated.

SIG Code: MWF		
	Tana bar a 10	1
SIG Code Info Name:	MWF Require Dose Specification	
Display Text:		
	Discrete	
type	Discrete I R II Prompt for Pormulary Computer Note	
Give at 09:00	on Mon, Wed, and Fri	
Discrete Setti	ngs	
C Every	Day(s)	
Specific di	ays of the week	
	🗆 Sun 🗟 Mon 🗆 Tue 🗟 Wed 🗆 Thu 🗟 Fri 🗖 Sat	
Discrete Time	99-00	Edit
	0.00	con
Schedule ]	Initial Dose	
	Time Interval Before First Routine Dose: Hour	
☐ Ignore Do	ses Before Order Start Time	
Lead time:	: Lag time: :	
May Repe	at times Q :	
	OK Cancel	Apply
SIG Code: KCLIV	Tana Sala Landa Landa M	×
SIG Code: KCLIV	Lauria a M	×
-	KCLIV Require Dose Specification	×
SIG Code Info Name:	KCLIV Require Dose Specification Potassium Protocol Check Allergies on Initial Dose	×
SIG Code Info Name: Display Text:		×
SIG Code Info Name: Display Text:	Potassium Protocol Check Allergies on Initial Dose	×
SIG Code Info Name: Display Text: Type: Description	Potassium Protocol Check Allergies on Initial Dose Discrete    RT Prompt for Formulary Configured Route	
SIG Code Info Name: Display Text: Type: Description	Potassium Protocol Check Allergies on Initial Dose	
SIG Code Info Name: Display Text: Type: Description Give at 09:00	Potassium Protocol Check Allergies on Initial Dose Discrete RT Prompt for Formulary Configured Route every day. May Repeat every hour up to 5 times	×
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Settin	Potassium Protocol Check Allergies on Initial Dose Discrete RT Prompt for Formulary Configured Route every day. May Repeat every hour up to 5 times	
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1	Potassium Protocol Check Allergies on Initial Dose Discrete RT Prompt for Formulary Configured Route every day. May Repeat every hour up to 5 times	
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1	Potassium Protocol Check Allergies on Initial Dose Discrete  RTI Prompt for Formulary Configured Route every day. May Repeat every hour up to 5 times Day(s)	
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1 C Specific da	Potassium Protocol       Check Allergies on Initial Dose         Discrete <ul> <li>RTI</li> <li>Prompt for Formulary Configured Route</li> </ul> every day.       May Repeat every hour up to 5 times         ngs <ul> <li>Day(s)</li> <li>ays of the week</li> <li>Sun</li> <li>Mon</li> <li>Tue</li> <li>Wed</li> <li>Thu</li> <li>Fri</li> <li>Sat</li> </ul>	
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1	Potassium Protocol       Check Allergies on Initial Dose         Discrete <ul> <li>RTI</li> <li>Prompt for Formulary Configured Route</li> </ul> every day.       May Repeat every hour up to 5 times         ngs <ul> <li>Day(s)</li> <li>ays of the week</li> <li>Sun</li> <li>Mon</li> <li>Tue</li> <li>Wed</li> <li>Thu</li> <li>Fri</li> <li>Sat</li> </ul>	Edit
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1 C Specific da	Potassium Protocol       Check Allergies on Initial Dose         Discrete <ul> <li>RTI</li> <li>Prompt for Formulary Configured Route</li> </ul> every day.       May Repeat every hour up to 5 times         ngs <ul> <li>Day(s)</li> <li>ays of the week</li> <li>Sun</li> <li>Mon</li> <li>Tue</li> <li>Wed</li> <li>Thu</li> <li>Fri</li> <li>Sat</li> </ul>	Edit
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1 C Specific da	Potassium Protocol       Check Allergies on Initial Dose         Discrete       Image: The Prompt for Formulary Configured Route         every day.       May Repeat every hour up to 5 times         ngs       Day(s)         ays of the week       Image: The Prompt For The Promote The	Edit
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1 © Specific di Discrete Time	Potassium Protocol       Check Allergies on Initial Dose         Discrete       Image: The Prompt for Formulary Configured Route         every day.       May Repeat every hour up to 5 times         ngs       Day(s)         ays of the week       Image: The Prompt For The Promote The	Edit
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1 © Specific di Discrete Time Discrete Time	Potassium Protocol       Check Allergies on Initial Dose         Discrete <ul> <li>RTI</li> <li>Prompt for Formulary Configured Route</li> </ul> every day.       May Repeat every hour up to 5 times         mgs       Day(s)         ays of the week       Sun         Sun       Mon         Tue       Wed         Thu       Fri         Sol       Sol	Edit
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1 © Specific di Discrete Time Discrete Time	Potassium Protocol       Check Allergies on Initial Dose         Discrete <ul> <li>RTI</li> <li>Prompt for Formulary Configured Route</li> </ul> every day.       May Repeat every hour up to 5 times         mgs       Day(s)         ays of the week       Sun         Sun       Mon         Tue       Wed         Initial Dose       Initial Before First Routine Dose:         Hour	Edit
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti © Every 1 © Specific di Discrete Time C Specific di Discrete Time	Potassium Protocol       Check Allergies on Initial Dose         Discrete <ul> <li>RTI</li> <li>Prompt for Formulary Configured Route</li> </ul> every day.       May Repeat every hour up to 5 times         mgs       Day(s)         ays of the week       Sun         Sun       Mon         Tue       Wed         Thu       Fri         Ses       09:00         Initial Dose       Hour         Time Interval Before First Routine Dose:       Hour         ses Before Order Start Time       1         Leg time       1	Edit
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti (° Every 1 C Specific di Discrete Time C Specific di Discrete Time Required C Ignore Do Lead time:	Potassium Protocol       Check Allergies on Initial Dose         Discrete <ul> <li>RTI</li> <li>Prompt for Formulary Configured Route</li> </ul> every day.       May Repeat every hour up to 5 times         mgs       Day(s)         ays of the week       Sun         Sun       Mon         True       Wed         Thu       Fri         Sate       09:00         Initial Dose       Hour         Time Interval Before First Routine Dose:       Hour         z       Leg time         z       Leg time	Edit
SIG Code Info Name: Display Text: Type: Description Give at 09:00 Discrete Setti (° Every 1 C Specific di Discrete Time C Specific di Discrete Time Required C Ignore Do Lead time:	Potassium Protocol       Check Allergies on Initial Dose         Discrete <ul> <li>RTI</li> <li>Prompt for Formulary Configured Route</li> </ul> every day.       May Repeat every hour up to 5 times         mgs       Day(s)         ays of the week       Sun         Sun       Mon         True       Wed         Thu       Fri         Sate       09:00         Initial Dose       Hour         Time Interval Before First Routine Dose:       Hour         z       Leg time         z       Leg time	Edit



# Continuous

Orders with this SIG Type appear in the scheduled medication section on the MAR Worksheet and MAR. There is no interval and no dose due times, so doses can be scanned and administered at any time. No alerts or warnings regarding dose times will occur. Select the **Continuous SIG Type**.

SIG Code: C		le construction de la constructi	x
SIG Code Info			
Name:	c	Require Dose Specification	
Display Text:	Continuous	Check Allergies on Initial Dose	
Туре	Continuous -	RT Prompt for Formulary Configured Route	
Description -			
Continuous			
Continuous Se	ttings		
		OK Cancel A	pply

# Allergy Mapping

When a patient has an allergy, the allergy information is entered into the hospital's EHR system. The Clinical Manager receives this information through its interface to the EHR. Every allergy name and corresponding allergy code received is stored in the Allergy Mapping table. The table allows the hospital's allergy codes to be matched to the allergy codes used by FDB.

When an allergy name is received for the first time, the Clinical Manager looks for an exact match in the FDB Allergy table. If one is found, the allergy name is Auto-Mapped. If an exact match is not found, the allergy status is Mapping Required as it awaits manual mapping to a similar FDB allergy by the pharmacist. Until <u>all</u> of a patient's allergies are mapped to FDB in the **Allergy Mapping** table, the patient's allergies cannot be screened by the handheld.

To map an allergy code to the corresponding code in FDB, select **Allergy Mapping** from the **Pharmacy** folder to open the *Allergy Mapping* screen.

ientSafe Mira Mesa	Allergy Mapping			
Patients	Allergy Mapping			
Order Verification		Search		
Patient Assignment Reports	Hospital Allergy Code	Hospital Allergy Name	Mapped Allergy Name	Status
Pharmacy	3673	Acetaminophen	acetaminophen	Auto
1	Acetaminophen	Acetaminophen	acetaminophen	Auto
General Settings	2625	Amoxicillin	amoxicillin	Auto
Clinical Settings	Ibuprofen	Ibuprofen	ibuprofen	Mapped
Master Drug File		Lipitor	Lipitor	Auto
Generic Equivalency Grou	Lipitor	Lipitor	Lipitor	Auto
SIG Codes	Lyrica	Lyrica	Lyrica	Mapped
Allergy Mapping	NKDA	NKDA		Mappi
Laboratory		Penicillin	Penicillins	Auto
Blood Administration	PENICILLIN	PENICILLIN	Penicillins	Auto
Infant Care	Tape	Tape		Mappi
Intervention/Prompt Setup				
Intervention Scheduling				
Flowsheet Setup				
mView				
Users				
Roles				
Configuration				

# Allergy Code: Mapping Required

Allergies from the EHR that have not been Auto-Mapped or mapped manually are displayed in the table with a Mapping Required status.

1. To map or exclude the hospital allergy name and code, select the allergy from the list and click **Edit** to open the *Allergy Mapping* window.

ergy Mapping: PENICILUI	N		23
Hospital Allergy Name:	PENICILLIN		
Hospital Allergy Code:	PENICILLIN		
☑ Include in Drug/Aller	gy checks		
Mapped Allergy Name:	Penicillins		Select
		OK Cancel	Apply

By default, the option to **Include in Drug/Allergy Checks** is selected for each code. To exclude this particular code from the checking process (e.g. not a drug allergy), deselect the checkbox.

- 2. Click **Select** to display the FDB allergy code list.
- 3. To sort through and narrow the list of FDB Allergy Names, enter the name (or first part of name)



of the allergy in the Search field.

4. When you find the appropriate FDB Allergy name, highlight the name and click **OK** to select it.



### The FDB Allergy name is displayed with the corresponding hospital allergy name and code.

5. Click **OK** to save the mapping and close the window. The hospital allergy is now displayed in the Allergy Mapping table with the associated FDB Allergy name and Mapped status.

# Map New Allergy Code

If an Allergy's name and code are not yet in the Hospital Allergy Code list, you can proactively add it from the *Allergy Mapping* window.

- 1. Select **Pharmacy > Allergy Mapping**.
- 2. Click New.
- 3. Enter the Hospital Allergy Name (required) and the Hospital Allergy Code (optional).
- 4. Retain the enabled **Include in Drug/Allergy checks** checkbox if you want the handheld to screen for this allergy.
- 5. Click **Select** and locate the corresponding FDB allergy.
- 6. Click **OK** to complete the entry and close the window.

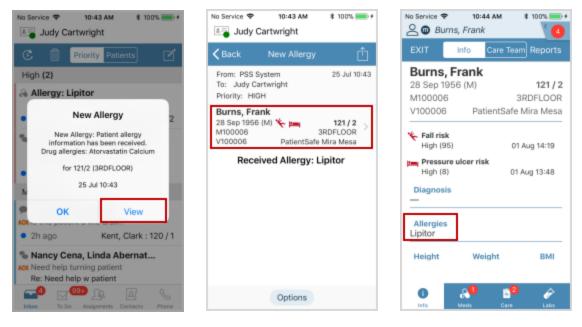
# **Exclude an Allergy**

If an allergy is listed in the Mapping table, but the **Include in Drug/Allergy Check** checkbox is not enabled, the status of that allergy will be Excluded and the specific allergy will NOT be included in the allergy checking process. There is no need to associate excluded allergies with a FDB allergy name.

# Perform Allergy Checks on Pre-Existing Orders

When a new allergy is received from the Hospital's Admissions system, PatientTouch can now check all active orders for potential allergies to this medication. If an allergy is found, the administering caregiver, assigned caregiver (if different from the administering) and pharmacy will be notified.

- The administering/assigned caregiver will be notified via a notification and an Inbox message.
- Pharmacy will be notified via printed bulletin sent to the Pharmacy default printer.



Allergy checks can also be done on the administration of the first dose of ordered medications. If an existing allergy is found, the administering caregiver, assigned nurse, and pharmacy will be notified. See Pharmacy/Clinical Checks for information on configuring this type of allergy check.

- The administering/assigned caregiver will receive a standard allergy alert during the workflow.
- Pharmacy will be notified via printed bulletin sent to the Pharmacy default printer.

# **Configuring the Specimen Collection Module**

The Laboratory folder is only available if you have purchased the Specimen Collection Module .

The following sections explain how to configure the PatientTouch Specimen Collection Module, including the Laboratory folder of the PatientTouch Clinical Manager. We begin with an overview of the necessary roles and users.

# **Setting Up User Roles and Privileges**

Caregivers who will collect specimens and technicians who will process specimens in the lab must have the appropriate collector laboratory privileges before they can perform the related tasks.

Privilege	Description
Phlebotomist	View orders and collect lab specimens designated for this collector type.
Collect Nurse Lab Orders	View orders and collect lab specimens for all collector types.
Orders	

View orders and collect lab specimens designated for this collector type.

The following system privileges are available in connection with specimen collector and lab users:

Collect RT Lab Orders



Privilege	Description			
Laboratory	Perform laboratory functions, such as receiving or rejecting specimens.			
Manage Laboratory Configuration	nfigure laboratory settings.			
Manage Phlebotomy Assignment	Assign phlebotomists to nursing units from the Lab Dashboard in Clinical Manager. User with this privilege is also able to do unit assignment on the handheld.			
Manage Lab Orders	Omit orders and change an order's collector type using the PatientTouch Clinical Manager.			

Refer to the Roles and Users section of this user guide for more information about defining roles and creating users.

# **Getting Started**

Before you can use the Specimen Collection module, you must have a tested and verified interface between your hospital's Laboratory Information System (LIS) and the PatientTouch System for laboratory orders.

You must also perform the following configuration tasks.

Click a link below to learn more:

- <u>Configure Laboratory Settings</u>
- <u>Configure Label Printer Selection Setting</u>
- Set Up Wireless Label Printers
- Designate Collector Types
- <u>Create Clinical Prompts (optional)</u>
- Configuring Tube and Test Types (optional)

# **Configure Laboratory Settings**

To configure the Laboratory settings:

1. From the main screen, click Laboratory, Lab Settings, and then click the Lab Setup tab.

RatientTouch Clinical Manager - B	ue- Mästein - User, Admin 🚥 📼 📼 🗮	
Manager View Help		
C	02/05/2019 13:29 PS	ST
PatientSafe Mira Mesa	Lab Settings	1
	All Orders Selected for Nurse Collection Sava	

2. Configure the following Pooled Routine Order Settings:

Pooled Routine Order Settings							
Lead/Lag Time:	08:00	Reminder Delay %	95	Report Display:	23:00	Handheld Display:	þ4:00

 For Lead/Lag Time, enter the amount of time before or after the order due time when a pooled routine order can be collected without receiving an early or late warning on PatientTouch.



Pooled routine orders are those that are received from the Laboratory Information System (LIS) without a specified due time (i.e., with only a due date, or with no due date/time at all). These orders are due at the date/time received (or at 00:00 if the due date is in the future). For example, if the Pooled Routine Order Lead/Lag Time setting is 08:00 (eight hours), an order received at 11:00 will be due immediately and will be considered late at 19:00.

- For Reminder Delay %, enter the percentage of lag time that should elapse before the user who accepted assignment of a pooled routine order should be reminded with a popup. For example, if the Lead/Lag Time setting is 08:00 (eight hours) and the reminder delay is 95%, the assigned user would be reminded 95% of the way through the eight-hour lag time, or 24 minutes before the order becomes late. If this field is left blank, assigned users will not be reminded.
- For Report Display, enter the forward-looking window of time when pooled routine orders will print on the Draw List Report. For this option to apply, the pooled routine order must



have a future due date (since these types of orders are considered due when received). Note that any orders that have not been collected after the due date and time continue to print on the Draw List report until they are collected.

- For Handheld Display, enter the forward-looking window of time when pooled routine orders will display on PatientTouch in the To Do List and patient's Lab Orders tab. For this option to apply, the pooled routine order must have a future due date (since these types of orders are considered due when received). Note that any orders that have not been collected after the due date and time continue to display on PatientTouch until they are collected.
- 3. Configure the following Timed and Scheduled Routine Order Settings:

Timed and Scheduled Routine	Order Se	ttings				
Lead/Lag Time:	00:30	Reminder Delay % 50	Report Display:	:	Handheld Display:	23:00

- For Lead/Lag Time, enter the amount of time before or after the scheduled collection time when a timed or scheduled routine order can be collected without receiving an early or late warning on PatientTouch.
- Enter the Reminder Delay % for this order type, similar to the setting for pooled routine orders.
- For Report Display, enter the forward looking window of time when scheduled orders will print on the Draw List Report. For example, if the Report Display is set to four hours, a scheduled order due at 06:00 will not display if the Draw List is printed at 01:00. However, if the report is printed at 04:00, the 06:00 scheduled order appears on the report. For this option to apply, the order must have a future due date and time. Any orders that have not been collected after the due date and time continue to display on the Draw List report until they are collected.
- For Handheld Display, enter the forward-looking window of time when scheduled orders will display on PatientTouch in the To Do List and patient's Lab Orders tab. Similar to the Report Display, if the handheld Display is set to 12 hours, a scheduled order due at 19:00 will not display on the handheld at 06:00, but will display at 07:00. For this option to apply, the order must have a future due date and time. Note that any orders that have not been collected after the due date and time continue to display on PatientTouch, and the users will receive late reminders for those uncollected orders after the defined lag time has expired.
- 4. Configure the following STAT and Urgent/ASAP Order Settings:

STAT and Urgent/ASAP Order	Settings		
STAT Lead/Lag Time:	00:10	STAT Reminder Delay % 50 Report Display: 23:00	
Urgent Lead/Lag Time:	00:30	Urgent Reminder Delay % 50	

• For STAT Lead/Lag Time and Urgent/ASAP Order Lead/Lag Time, the interval you enter determines the amount of lag time the collector has, after the order due time, to collect the



corresponding orders without receiving a late warning on PatientTouch. For example, if the Lead/Lag Time is set to 15 minutes, the order is entered (or scheduled) at 16:00, and the patient is scanned at 16:16 or later, the draw would be late. All stat order specimens that are collected outside of this lead/lag time will appear on the early/late orders report.



Normally, a STAT or Urgent/ASAP order is available immediately, with no lead time. However, if an order designated STAT or Urgent/ASAP is scheduled for a future date/time, it may be collected within the lead time of the order's scheduled due time without receiving an Early Lab Order alert.

- Enter the Reminder Delay % for these order types, similar to the setting for pooled routine and scheduled orders.
- For Report Display, enter the forward looking window of time when scheduled draws will print on the Draw List Report. For this option to apply, the order must have a future due date and time. Any orders that have not been collected after the due date and time continue to display on the Draw List report until they are collected.
- Select either Use Urgent Order Status (the default) or Use ASAP Order Status to correspond with the terminology used by the laboratory.
- 5. Configure the following Auto-Print Settings:

Auto-Print Settings		
Auto-Print Stat and Urgent Orders	Excluded	1E
🔽 Auto-Print "Can't Get" Orders	Nursing Units:	2 West 3RDFLOOR
✓ Auto-Print "Re-Collect" Orders		
Auto-Print "Late Draw" Orders		
Lab Printer: Lab Printer		Add Remove

- Enable Auto-Print Stat and Urgent Orders to automatically print a report on the designated Lab Printer when a Stat or Urgent order is received.
- Enable Auto-Print "Can't Get" Orders to automatically print a report on the designated Lab Printer when a collector cannot collect a specimen.
- Enable Auto-Print "Re-Collect" Orders to automatically print a report on the designated Lab Printer when the specimen is rejected and the laboratory requests a re-collection.
- From the Lab Printer list, select the printer to use for the enabled auto-print reports.



# Note that the configured printer can be a desktop printer, an email address, or a network share.

6. Select the **Allow Add Tube Workflow** checkbox to turn on the *Add Tubes* workflow. Deselect the checkbox to turn off the *Add Tubes* workflow. When the *Allow Add Tube* Workflow checkbox is selected, the Add Tubes option displays from the **Options** menu on the handheld,



along with Nurse Line Draw and Dismiss. If the checkbox is deselected, the Add Tubes option does not display and the workflow is not available.

- 7. Select All Orders Selected for Nurse Collection so that all of the labs available to be collected will be pre-selected for collection on the handheld. If the nurse does not want to collect all tests, he/she will have to de-select the test he/she does not want to collect. If the checkbox is deselected, the nurse will have to select all lab tests she wants to collect.
- 8. Click **Save** to save the settings.

# **Configure Label Printer Selection Setting**

The PatientTouch System allows you to configure how handheld users select a label printer when printing specimen labels. The options include:

- The user selects the printer (by Friendly Name) from a list of label printers available in the system
- The user scans a barcode associated with (and affixed to) the printer to select it



# This option applies to workflows in which labels are printed in all installed PatientTouch modules, including Specimen Collection, Infant Care, and others as applicable.

To configure the label printer selection setting in Clinical Manager:

1. From the **Configuration** folder, click **Settings**, and then click the **Global Settings** tab.

📕 PatientTouch Clinical Manager - Blue- Milstein - User, Admin	- • • ×
Manager View Help	
C 02/	05/2019 13:31 PST
PatientSafe Mira Mesa Settings	
Patients Order Verification Hospital Address Global Settings Notification Settings User Security Respiratory Therapy	
Patient Assignment Hospital Settings	-
- Reports	
Hospital Code: -1	
Aail Server Label:	
Blood Administration     Shift Start Time: 07:01     Shift Duration: 12 Hours	
🐵 🦳 Intervention/Prompt Setup 🔽 Enable Patient Specific Medication Order Matching	
Intervention Scheduling     Enable Same Name Patient Matching	
Growsheet Setup     Due and Late Reminders	
Due and Late Reminders	
Roles Snooze Interval: 15 Minutes	=
Configuration Reset Reminders	
- Settings - Nursing Units Task Settings	
Alerts and Reasons     Enable Task Monitoring, Reminders and Escalation	
Destinations	
Upcoming Task Lead Time (hours): 12	
Devices     Label Printer Settings     Coding Systems	
C Select Label Printer by Scanning Barcode	
Select Label Printer from a List of Available Printers	
Save	



- 2. In the Label Printer Settings section, select the desired option.
- 3. If the **Select Label Printer by Scanning Barcode** option is selected, make sure that all label printers configured in the system are assigned a unique barcode that will be scanned when users print specimen labels. Refer to the Set Up Wireless Label Printers section below for more information.
- 4. Click **Save** to save the settings.

# **Set Up Wireless Label Printers**

Use the PatientTouch Clinical Manager to set up the wireless label printers that will be used to print specimen collection tube labels from the handheld. The supported printer models include:

- Zebra QLn
- Honeywell RP2
- O'Neil

A PatientSafe Solutions implementation team member can assist your hospital's Information Systems department in determining the IP addresses and wireless configuration settings for the label printers.

## Set Up a New Label Printer

To configure a wireless label printer in Clinical Manager, use the instructions below.

If your hospital is configured for Campus Support, and you have selected <All> hospitals at login, a Hospital column displays on the Label Printers screen. Select the facility for which you want to view label printers.

nager ⊻iew <u>H</u> elp			
			02/05/2019 13:
tientSafe Mira Mesa	Label Printers		
Patients		Search	
Order Verification			
Patient Assignment	Friendly Name	Network Name	Label Printer Model
Reports	3-East Printer	10.10.45.60	Zebra
Pharmacy	3rd Floor Printer	112.23.76.88	Honeywell
Laboratory	Specimen Label Printer	10.10.36.60	Honeywell
Blood Administration	test SQA	10.10.77.41	Zebra
Infant Care	TS Printer	10.10.36.35	ONeil
Intervention/Prompt Setup	Zebra ZQ610 HC	10.10.77.52	Zebra
Intervention Scheduling			
Flowsheet Setup			
mView			
Users			
Roles			
Configuration			
- Settings			
Nursing Units			
<ul> <li>Alerts and Reasons</li> </ul>			
Destinations			
Label Printers			
- Devices			
Coding Systems	1		
Coding Systems			

1. From the **Configuration** folder, click **Label Printers**.



2. Click **New** to add a printer. The *New Label Printer* window is displayed.

New Label Printer:
Friendly Name:
Network Name or IP Address:
Barcode:
Label Printer Model: ONeil
Test Printer OK Cancel Apply

- 3. If your hospital is configured for Campus Support, select the facility from the drop down menu. If your hospital is not configured for Campus Support, this field will not display.
- 4. Enter a Friendly Name that will appear in the label printer selection list on PatientTouch. If desired, the Friendly Name can be the same as the Network Name or IP address you enter, but both are required.
- 5. Enter the Network Name or IP Address of the label printer. The network name should be the same as the Station Name assigned to the printer when using DHCP.
- Enter a Barcode value if the Select Label Printer by Scanning Barcode option is selected in the Label Printer Settings section of the *Configuration > Global Settings* screen in Clinical Manager. (Refer to <u>Configure Label Printer Selection Setting</u> for more information.)
- 7. Click the Label Printer Model drop down menu and select the desired printer model from the list (O'Neil, Zebra, or Honeywell).

New Label Printer: 9 West Printer		x
Friendly Name:	9 West Printer	
Network Name or IP Address:	10.12.36.70	
Barcode:	AA0011	
Label Printer Model:	Zebra 💌	
	None	
	ONeil	
Test Printer 0	Zebra	
	Honeywell	

The barcode can be any value desired—for example, the printer's asset tag barcode, friendly name or IP address, manufacturer's serial number, etc.—but must be unique among the label printers configured in the system. Note that if you use a barcode value not already accessible on the printer (for example, the friendly name or IP address), you will need to generate and print the barcode, and then affix it to the printer so it can be scanned during specimen collection and other applicable handheld workflows.

- 8. Click **Apply** to save the printer configuration. It now appears in the list of available printers.
- 9. Click **Test Printer** to print a test label and verify that the new printer is properly configured and working.
- 10. Click **OK** to save the information and close the dialog.

## Select and Test a Label Printer on the Handheld

After you configure a wireless printer to test and confirm the connection:

- 1. Log in to a PatientTouch Handheld device. You will need to log in with someone who has a clinical profile of "Phlebotomist" or "Nurse Lab Collector" in order to see the "Test Label Printer" option.
- 2. Tap the **To Do** tab.
- 3. Tap Activities.
- 4. Select Test Label Printer.

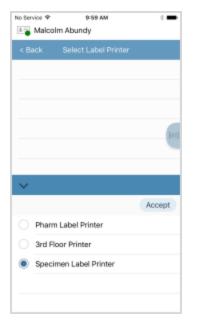
No Service 🕈	9:38 AM	* 🖚
Malcolm /	Abundy	
		Close
General (4)		
Reports		>
Lookup Item		>
Drug Informat	ion Search	>
Test Label Pri	nter	>
		200

5. Tap Select Label Printer.



No Service 🕈	8:44 AM	* 🕳
Malcol	m Abundy	
< Back		
		[20.0]
		-
	Select Label Printer	
	Select Label Printer	

6. If you have "Select Label Printer from a List of Available Printers" selected in the Configuration>Settings>Global Settings tab, select the desired printer from the list of label printers and tap **Accept**.



7. At the prompt, tap Yes, Test to print a test label.



No Service 🕈	8:44 AM	*
Malcolm Abun	dy	
< Back Select	Label Printer	
	INFO different printer. Would print a test label?	600
Yes, Test	No, Don't Test	
Select	Label Printer	

8. If you have "Select Label Printer by Scanning Barcode" selected in the Configuration>Settings>Global Settings tab, scan the desired label printer.



If the connection is successful, the printer will produce a test label. If not, no label will be printed and a message indicating the unsuccessful connection will display on the handheld.

## Edit a Label Printer

You can update an existing printer in the PatientTouch Clinical Manager.

To change a wireless label printer:

- 1. From the **Configuration** folder, click **Label Printers**.
- 2. Select the printer you want to edit.



- 3. Click **Edit** to change the friendly name or network address of the printer.
- 4. Click **OK** to save the changes and dismiss the dialog.

#### **Delete a Label Printer**

You can also delete an existing printer in the PatientTouch Clinical Manager.

To remove a wireless label printer:

- 1. From the **Configuration** folder, click **Label Printers**.
- 2. Select the printer you want to delete.
- 3. Click Delete.
- 4. At the prompt, click **Yes** to confirm you want to delete the printer.

#### **Customize Specimen Label Format**

Specimen labels may be customized for your hospital by PatientSafe Solutions. The labels generally include the following information:

- Unique barcode that identifies the specimen
- Order accession number
- Patient name, age, gender, date of birth, and room/bed number
- MRN and visit number
- Tube type
- Test name(s)
- Collection date and time
- Collector initials
- Location Code

You may also include additional fields which can be configured to display on Specimen Collection labels. These new fields must be configured to be received 1) via the interface from the Laboratory Information System and, 2) to be printed on the Specimen label by PatientSafe Solutions Technical Support. They include:

- Source
- Site
- Reporting Priority
- Service Resource
- Microbiology Additional Description
- Comments

Contact the PatientSafe Solutions Technical Support Team to discuss the interface and label configuration to add these new fields to your Specimen Collection Labels.

Separate label formats for ordered specimens, added tubes, add-on tests, and aliquot samples are available and can be configured by your PatientSafe Solutions implementation team.

# **Designate Collector Types**

Hospitals often have caregivers in several roles collecting specimens. Which caregiver is involved in collecting or managing specimens depends on the workflow and clinical conditions and hospital policies. An example of typical responsibilities might include:

- Central venous lines: exclusively collected by licensed registered nurses (RNs).
- Peripheral venipuncture: may be collected by either nurses or phlebotomists.
- Arterial puncture: may be collected by nurses or, in the case of blood gases (a common reason for arterial access), respiratory therapists.
- Non-blood specimens: may be collected by nurse technicians or practical nurses.

Occasionally, hospital blood drawing policy may be set by the level of care or by hospital geography.

For example:

- Intensive care units
- Labor and delivery units (can be exclusively RNs in some cases)
- Emergency departments

To implement the hospital policies and allow different types of caregivers to collect specimens based on the order type, the PatientTouch System has four distinct collector types:

- P: Phlebotomists
- N: Nurses
- R: Respiratory Therapists
- A: Add-On or Lab. This collector type applies exclusively to the "add-on-test" workflow.

1	00000

The Add-On collector type can be received across the interface associated with a lab order. The Lab collector type can also be designated in the Clinical Manager as a part of the add-on test workflow process.

### **Designate Collector Types for Lab Orders**

You can designate collector types for each lab order in several ways.

- An order-specific designator may be entered into the laboratory system and then sent across the interface to the PatientTouch System.
- Collector type may be defined for a test type in the Lab Settings of the PatientTouch Clinical Manager. Note that when test-level settings are applied to an order that includes multiple tests, this may change the order's collector type. Refer to the Collector Type Hierarchy section below.

• Collector type may be selected for an individual patient order from the *Lab Orders* screen of PatientTouch Clinical Manager after the order is received from the laboratory system.

The rules respect the above hierarchy.

- An order-specific designator set in the Clinical Manager will take precedence over a collector type received through the interface.
- After the order is received, a patient-specific designator may be entered into the Clinical Manager and will take precedence.

### **Collector Type Hierarchy**

When the PatientTouch System determines which caregiver(s) collector types are to receive a collection order, the system uses the following methods:

- If the test specifies a single collector type, the collector type for that test is used.
- If there are multiple collector types for the associated tests of a given order, the order is:

1. Nurse

- 2. Phlebotomist
- If neither a test-associated collector nor an order collector type is received via the interface message from the LIS, the order's collector type is set to Phlebotomist.
- If a collector type is designated for the test in the PatientTouch Clinical Manager, this designation overrides the order collector type sent via the interface from the LIS.
- If the tests associated with a given order contain collector types for all defined groups— Nurse, Phlebotomist, and Respiratory Therapist—the collector type is treated as:
  - 1. Nurse
  - 2. Phlebotomist
  - 3. Respiratory Therapist
- If an order has multiple tests and at least one test is designated Nurse Collector, the entire order is designated as the Nurse Collector type.
- If an order has multiple tests and at least one test is designated Phlebotomist and one or more test is designated Respiratory Therapist, the order becomes a Phlebotomist collector type.

The collector type for the order determines how orders are handled in the PatientTouch System for notifications and reminders, displaying tasks on the To Do List, filtering and sorting in the *Lab Orders* and *Lab Dashboard* screens in Clinical Manager, and other functions.

PatientSafe Solutions' implementation team will work with your facility to assure accurate setup of collector types.

## **Create Clinical Prompts (optional)**

Clinical prompts can be created and associated with a tube or test type to remind the caregiver to take a particular action (as instructions), or to capture documentation when collecting a specimen for the

given tube or test.

You can create clinical prompts such as "Keep on Ice," "Fill to Line," or "Invert Tube 8-10 times." These clinical prompts are similar to special handling instructions that may be configured in the test dictionary of the Laboratory Information System.

You also can create prompts to collect documentation during a draw, such as temperature for an ABG or draw site for a blood culture.

Once created, you can associate a clinical prompt with a tube or test type. Clinical prompt creation and association with tubes and tests is optional. Refer to <u>Configuring Tube and Test Types</u> for more information.



Instructions for tubes and tests may not need to be created if the special handling instructions can be sent to the PatientTouch System via the HL7 laboratory orders interface.

# **Configuring Tube and Test Types (optional)**

Tubes and tests are automatically created in the PatientTouch System when a laboratory order is received via the HL7 interface with your Laboratory Information System. You can view this information in the PatientTouch Clinical Manager and associate one or more clinical prompts with each tube or test.

### **Configure Tubes**

If you wish, you can create tubes manually in the PatientTouch Clinical Manager to represent the different tube types used to collect specimens.

You can also associate clinical prompts and instructions with specific tube types. These prompts display on the handheld immediately after the orders are displayed and prior to collection of the specimen.

### **Create a Tube**

To create a tube in Clinical Manager:

1. From the Laboratory folder, click Lab Settings, and then click the Tubes tab.

PatientTouch Clinical Manager - B	Sue- Milstein - User, Admin		
Manager View Help			
C			02/05/2019 13:53 PST
PatientSafe Mira Mesa	Lab Settings		
PatientSafe Mira Mesa Patients Order Verification Patient Assignment Reports Pharmacy Laboratory Blood Administration Blood Administration Blood Administration Pharmacy Blood Administration Pharmacy Blood Administration Pharmacy Distervention/Prompt Setup Pharmacy Pharmacy Blood Administration Pharmacy Distervention/Prompt Setup Pharmacy Distervention/Prompt Setup Pharmacy Pharmacy Distervention Scheduling Pharmacy Distervention Scheduling Pharmacy Pharmacy Distervention Scheduling Pharmacy Pharmacy Distervention Scheduling Pharmacy Pharmacy Distervention Scheduling Pharmacy Pharma	Lab Settings           Tubes         Tubes Sets           Name         Sterile Cup           Sterile Cup         Purple           ABG Syringe         Pirk           Light Blue         Yellow           Dry Heparin Syringe         Red           Blood Culture Bottles         Blue           LAVENDER         ORANGE           ORANGE         BLUE           LAGHT BLUE         PINK           ORANGE         DARK GREEN           DARK GREN         DARK GREN           DARK GREN         DARK GREN	Code SC Purple ABG Pink LT Blue Vellow Dry Heparin Syringe Red Blood Cuthure Bottle Bloe Bloed Cuthure Bottle Blue Bloe Bloe Bloe Bloe Bloe Bloe Bloe Blo	
	RED BLUE BLUE	RedSST 23-1 11	
	BLUE	blue_1	
	LAVENDER MEDITERRANEAN A7URE	LAV 1000	-
		Save List Order	
	Delete		<u>E</u> dit <u>N</u> ew

- 2. Click New to add a tube. The New Tube window appears.
- 3. Enter a name for the tube that will appear on the handheld and draw lists to identify the tube. For example, type "PURPLE" for the tube name.
- 4. Enter the tube code. This code must match the code received via the HL7 interface from the LIS. For example, enter "Gray" for the Gray tube code.

New Tube: Gray	The second se		×
Name:	Gray		
Code:	Gray		
Instructions:			
Prompts:		-	Add Prompt
			Edit Prompt
		-	Remove Prompt
	ОК		Cancel Apply



When an order is received from the LIS, the ordered tubes are matched based on tube codes in the HL7 message, so a new tube with a different tube name that matches an existing tube code will be recognized as an order for the existing tube.

- 5. Optionally, add any standard Instructions for the tube (for example, "Keep on ice", "Deliver to lab immediately").
- 6. Optionally, click **Add Prompt** to select one or more clinical prompts or interventions to display with this tube type.

Prompt Setting & Restriction	
Prompt Name: Select Prompt	
Collection Options	
Must collect, no override allowed	
C Must collect, allow override with reason	
C Skippable, don't ask in 'Collect All'	
C Skippable, ask in 'Collect All'	
OK Cancel	

7. Click **Select Prompt** and select the prompt or intervention you want to display and click **OK**.

Search	
Name	Label
Administration Site	Admin Site
Apical Pulse	Apical Pulse
Blood Glucose	Blood Glucose
Blood Pressure	Blood Pressure
Blood Pressure Position	BP Position
Blood Pressure Site	BP Site
BradenPressure UlcerAssessment	Braden Ulcer
Breath Sounds	Breath Sounds
Cardiac Assessment	Cardiac Asmt
Cardiac Capillary Refill	Capillar Refill
Cardiac Edema	Edema
Cardiac Heart Rhytm	Rhytm
Cardiac Heart Sounds	Heart Sounds
Cardiac Neck Vein Distention	Neck Distention
ОК	Cancel

8. Select the appropriate Collection Options for the prompt or intervention and click **OK**.

Prompt Setting & Restriction	
Prompt Name: Blood Pressure Select Prompt	
Collection Options	
<ul> <li>Must collect, no override allowed</li> </ul>	
C Must collect, allow override with reason	
C Skippable, don't ask in 'Collect All'	
C Skippable, ask in 'Collect All'	
OK Cancel	

- Must collect, no override allowed requires the collector to respond to the prompt or intervention before continuing with the specimen collection workflow.
- Must collect, allow override with reason requires the collector to either respond to the prompt or intervention, or select a reason for not providing a response before continuing with the specimen collection workflow.
- **Skippable, don't ask in 'Collect All'** allows the collector to either respond to the prompt or intervention, or skip responding to prompts individually.
- Skippable, ask in 'Collect All' allows the collector to either respond to the prompt or intervention, skip responding to the entire intervention, or skip prompts in the intervention individually.
- 9. Repeat steps 6–8 to select additional prompts or interventions if desired.
- 10. Click **OK** in the *New Tube* window to save the tube definition.
- 11. After you have reviewed or created all the desired tubes, you can use the arrow buttons on the right side to change the order of the tubes in the list. The order of tubes in the list determines the draw sequence that displays on PatientTouch. When you are satisfied with the tube order, click **Save List Order**.

### Edit a Tube

To modify an existing tube, select the tube from the list that appears in the PatientTouch Clinical Manager and click **Edit**. Update as needed using the same options you use to create new tubes, and click **OK** to save your changes.

#### **Delete a Tube**

To delete an existing tube, select the tube from the list that appears in the PatientTouch Clinical Manager and click **Delete**. When prompted to confirm, click **Yes**.

### **Configure Tube Sets**

If you wish, you can create tube sets in the PatientTouch Clinical Manager that comprise a standard set of multiple tubes that can be easily added to a blood draw, rather than requiring the tubes to be added individually. For example, you might create a "Chest Pain Panel" or "Trauma Panel" tube set to be used in the Emergency Department.

#### Create a Tube Set

To create a tube set in Clinical Manager:

1. From the Laboratory folder, click Lab Settings, and then click the Tube Sets tab.

PatientTouch Clinical Manager -	Blue- Milstein - User, Admin		
Manager View Help			
C			02/05/2019 13:54 PST
	Lab Settings Tubes Tube Sets Tests Lab Setup Name Stroke Trauma Triage Stoke Panel	Nursing Units 3RDFLOOR 2 West 2 West 2-West 15 15 1E	
Provide except     Provide except     Duens     Roles     Configuration	Delete		• Edit New

2. Click **New** to add a tube set. The following window appears:

New Tube Set: Tria	ge Stoke Panel	×
Name:	Triage Stoke Panel	
Tubes:	1	Add Tube
		Remove Tube
	<u> </u>	
Nursing Units:	1	Add Unit
		Remove Unit
	<u>-</u>	
	OK Ca	ancel Apply

- 3. Enter a name for the tube set that will appear on the handheld to identify the collection of tubes. For example, type "Triage Stroke Panel".
- 4. Click **Add Tube** and select from existing tubes in the system to add to the tube set, and click **OK**. To select multiple tubes, hold down the Ctrl key (or Command key on Mac OS X).

🥖 Select Lab Tubes		x
Search		
Name		
ABG Syringe		<b></b>
Blood Culture Bottles		
Blue		
BLUE		
Dry Heparin Syringe		
GREEN		
LAVENDER		
Light Blue		
ORANGE		
Pink		
Purple		
Red		
Sterile Cup		
Yellow		-
	OK Cancel	

5. Click **Add Unit** and select from existing nursing units in the system where you want to make the tube set available for specimen collection, and click **OK**. To select multiple nursing units, hold

down the Ctrl key (or Command key on Mac OS X).

// Select N	ursing Un	its	X
	Search		
Name			
10106			▲
10108			
10151			=
1E			
1E (B)			
1N			
1N (B)			
1S			
1S (B)			
1W			
1W (B)			
2 West			
2-South			
2-West			<u> </u>
		OK Cancel	

6. Click **OK** in the *New Tube Set* window to save the tube set definition.

New Tube Set: Tria	ge Stoke Panel	×
Name:	Triage Stoke Panel	
Tubes:	Blue	Add Tube Remove Tube
Nursing Units:	1E A IS 2 West 2-West Vest Vest Vest Vest Vest Vest Vest V	Add Unit Remove Unit
	ОК С	ancel Apply

After you have reviewed or created all the desired tube sets, they will be available to collectors in the All Tube list displayed on PatientTouch when adding unordered tubes to a draw.



### Edit a Tube Set

To modify an existing tube set, select the tube set from the list that appears in the PatientTouch Clinical Manager and click **Edit**. Update as needed, using the same options you use to create a new tube set, and click **OK** to save your changes.

#### **Delete a Tube Set**

To delete an existing tube set, select the tube set from the list that appears in the PatientTouch Clinical Manager and click **Delete**. When prompted to confirm, click **Yes**.

### **Configure Tests**

You can either create tests in the PatientTouch Clinical Manager or the tests are automatically created when the PatientTouch System receives lab orders for the tests from the Laboratory Information System.

Similar to how you configured tubes, you can associate clinical prompts and/or instructions with specific tests. During a blood draw workflow, these prompts display on the handheld before the specimen labels are printed.

#### Create a Test

To create a test in Clinical Manager:

1. From the Laboratory folder, click Lab Settings, and then click the Tests tab.

lanager View Help				
C				02/05/2019 13:55
PatientSafe Mira Mesa	Lab Settings			
PatientSafe Mins Mesa  PatientS  Order Verification Patient Assignment Reports  Pharmacy Lab Orders Lab Denboard Lab Denboard  Minstruction Blood Administration Infant Care Intervention/Prompt Setup I	Lab Settings Tubes Tube Sets Tests Lab Setup Name ABG Ammonia, Plasma Basic Meta Profile blood C-Reactive Protein, Cardiac Risk Calcium Calcium Calcium CBC CBC 1000 CBC 1050 CBC 2100 CBC 210 CBC	Code ABG Ammonia Lavel BMP blood_1 C-RPCR Cal Ca Ca CBC D000 3100 CBC with Diff CBC wi	Display Name ABG Ammonia, Plaama Basic Meta Profile blood C-Reactive Protein, Cardiac Risk Calcium Cal	

Click **New** to add a test. The following screen displays.

Display Text:	Folate, Serum		
Test Code:	Folate		
ocation Code:			
Instructions:			
	Hospital	Collector	
	PatientSafe Mira Mesa		<u> </u>
Collectors:		Phlebotomist Nurse RT	-
Prompts:	, 		Add Prompt
			Edit Prompt
			Remove Prompt

- 2. Enter a name for the test that will appear on the handheld and draw lists to identify the test.
- 3. Enter the test code. The code must exactly match the code received via the HL7 interface from the LIS.
- 4. Optionally, enter a location code to designate a specific area of the laboratory to which the specimens for this test should be routed. The Location Code can be configured to print on the specimen labels.
- 5. Optionally, add any standard instructions for the test.
- If your hospital is configured for Campus Support, and you have selected <All> hospitals at login, all associated facilities will display under the Hospital column. Select a specific Collector type—Phlebotomist, Nurse, or Respiratory Therapist—for each hospital.



Be sure these collector types match the types that are received from the LIS across the HL7 interface.

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I	<b>9</b>
IL	

If different collector types are in different areas of the facility, you can define a test for each area. For example, you can define a test type "CBC-Med Surg" (with the Phlebotomist collector type) and "CBC-ICU" (with Nurse as the collector type). Note that defined test codes must match those used in the LIS.

- 7. Optionally, click **Add Prompt** to select one or more clinical prompts to display with this test or tube type.
- 8. Click Select Prompt and select the prompt you want to display and click OK.
- 9. Select the appropriate Collection Options for the prompt or intervention and click **OK**.

- 10. Repeat steps 8–10 to select additional prompts if desired.
- 11. Click **OK** in the *New Test* window to save the test definition.

### Edit a Test

To modify an existing test, select the test from the list that appears in the PatientTouch Clinical Manager and click **Edit**. Update as needed, using the same options you use to create new tests and click **OK** to save your changes.

### **Delete a Test**

To delete an existing test, select the test from the list that appears in the PatientTouch Clinical Manager and click **Delete**. When prompted to confirm, click **Yes**.

# **Configuring the Infant Care Module**

The Infant Care folder is only available if you have purchased the Infant Care Module.

The following sections explain how to configure the PatientTouch Infant Care Module, including the Infant Care folder of the PatientTouch Clinical Manager. We begin with an overview of the necessary roles and users.

# **Setting Up User Roles and Users**

Caregivers who will care for infants in the facility must have appropriate privileges before they can perform the required tasks. The following system privileges are available in connection with the Infant Care module:

Privilege	Description
Breast Milk Collection and Administration	Document the collection of breast milk from admitted mothers, print labels for home collection, receive and verify matching of bottles for storage, create labels for breast milk storage bins, and document the administration of correctly matched breast milk to infants.
Mother-Infant Matching	Verify that infants are correctly matched to inpatient or discharged mothers and other authorized visitors at the bedside, as well as matched to the correct cribs in the nursery.

Refer to the Roles and Users section of this user guide for more information about defining roles and creating users.

# **Getting Started**

Once you have configured the Infant Care module in the PatientTouch Clinical Manager, the workflows for breast milk collection and management, infant feeding, and mother-infant matching are available on PatientTouch.

Before you can use the Infant Care module, you must perform the following configuration tasks. Click a link below or from the Contents tab on the left:



- Mother-Baby Link
- Configure Label Printer Selection Setting
- Set Up Wireless Label Printers
- Customize Breast Milk Bottle Label Format
- Add Infant Care Activities to Nursing Units
- Configure Clinical Prompts for Infant Care Workflows (optional)

### **Mother-Baby Link**

When both mother and baby are admitted to the hospital, the PatientTouch System links them using admission data provided by the hospital information system. To ensure that breast milk is properly labeled and retrieved for feeding, each container of milk collected from an inpatient mother is labeled with the mother's admission data, including MRN and account/visit number.

For home collection, the labels printed at the hospital identify the baby. When the mother uses these labels during home collection and returns the milk to the hospital for feeding, the caregiver who feeds the baby scans the label and the baby's wristband to ensure a match.

## **Configure Label Printer Selection Setting**

The PatientTouch System allows you to configure how handheld users select a label printer when printing breast milk bottle labels and bin labels.

The options include:

- The user selects the printer (by friendly name) from a list of label printers available in the system.
- The user scans a barcode associated with (and affixed to) the printer to select it.



This option applies to workflows in which labels are printed in all installed PatientTouch modules, including Infant Care, Specimen Collection, and others as applicable.

To configure the label printer selection setting in Clinical Manager:

1. From the **Configuration** folder, click **Settings**, and then click the **Global Settings** tab.

PatientTouch Clinical Manager - E	Blue- Milstein - User, Admin	x
Manager View Help		
C	02/05/2019 13	:31 PST
PatientSafe Mira Mesa	Settings	
Patients     Order Verification     Patient Assignment     Patient Assignment     Patient Assignment     Patient Assignment     Defect of the second se	Hospital Address Global Settings Notification Settings User Security Respiratory Therapy Hospital Settings Hospital Code: -1 Mail Server Label: Shift Start Time: 07:01 Shift Duration: 12 Hours F Enable Patient Specific Medication Order Matching F Enable Same Name Patient Matching Due and Late Reminders Snooze Interval: 15 Minutes Reset Reminders Task Settings F Enable Task Monitoring, Reminders and Escalation Upcoming Task Lead Time (hours): 12	E
Label Printers     Devices     Coding Systems	Label Printer Settings  C Select Label Printer by Scanning Barcode  Select Label Printer from a List of Available Printers  Save	•

- 2. In Label Printer Settings, select the desired option.
- 3. If the **Select Label Printer by Scanning Barcode** option is selected, make sure that all label printers configured in the system are assigned a unique barcode that will be scanned when users print labels. Refer to Set Up Wireless Label Printers below for more information.
- 4. Click **Save** to save the settings.

### **Set Up Wireless Label Printers**

You must set up the wireless label printers that will be used to print breast milk bottle labels and bin labels from the handheld in PatientTouch Clinical Manager.

A PatientSafe Solutions implementation team member can work with your hospital's Information Systems department to determine the IP addresses and wireless configuration settings for the label printers.

#### Set Up a New Label Printer

Refer to the <u>Configuring the Specimen Collection Module>Configure Label Printer Selection Setting</u> section for details on how to set up and test a label printer.

## **Customize Breast Milk Bottle Label Format**

Labels for collected breast milk bottles may be customized for your hospital by PatientSafe Solutions. The labels typically include the following information:

- Unique barcode that identifies the bottle.
- Patient name and room/bed number (for infant or mother, depending on collection method).
- Patient MRN and visit number.
- Patient date of birth.
- Collector's name.
- Collection date and time.

### Add Infant Care Activities to Nursing Units

Infant Care activities must be assigned to the desired nursing units in your facility—for example, Labor and Delivery, Nursery, or NICU—before they can be available for use by clinical staff. Each infant care workflow can be individually assigned to specific nursing units. Activities will only display in the PatientTouch application for users who have the privileges to perform them.

To set up the nursing unit for infant care, follow the instructions below.

- 1. Select Configuration>Hospitals and Nursing Units.
- 2. Select the nursing unit and click **Edit**, or double-click it.
- 3. Click the Infant Care Unit checkbox.

Nursing Unit: Pediatrics	23
Unit Settings Clinical Checks	
Name: Pediatrics	
Non-Profile Unit	
✓ Infant Care Unit	
Rooms: 3101 1	
OK Cancel	Apply

# **Configure Clinical Prompts for Infant Care Workflows**

Using the PatientTouch Clinical Manager, you can configure the clinical data that you want to capture for the following infant care activities:

- Infant Feeding, for prompts to display during the feeding procedure and/or as post-feeding follow-ups.
- Reprint a Damaged Breast Milk Bottle Label for prompts to capture collection date, witness, and other information.

To configure prompts for these activities:

1. In the Clinical Manager, select the Infant Care folder and click Infant Care Prompts.

PatientTouch Clinical Manager Manager View Help			
c			02/05/2019 14:09 PS
PatientSafe Mira Mesa	Infant Care Prompts		
Order Verification     Order Verification     Patient Assignment     Reports     Defents     Defe	Infant Care Activities	Clinical Prompts - Name Feeding Route	Type Clinical Prompt
Intervention/Prompt Setup     Intervention/Prompt Setup     Intervention Scheduling     Interventing     Intervention Scheduling     Intervention Scheduling     Inte	Workflow Options		Add Prompt Remove Prompt Schedule Options C During activity only - no follow up C Follow up only C During activity and follow up
	Collection Options Must collect, no override allow Must collect, allow override wi Skippable, don't ask in 'Collect Skippable, ask in 'Collect All'	ith reason	Follow-up Schedule <ul> <li></li></ul>
			Save

- 2. From the list in the upper left pane, select an activity (e.g. Infant Feeding) for which you want to configure prompts. The prompts associated with the selected activity are displayed in the list to the right.
- 3. Click **Add Prompt** and select the desired clinical prompts and interventions to associate with the activity.

Search		
Name	Туре	
Adverse Reaction	Clinical Prompt	
Amount Fed	Clinical Prompt	E
ANC	Clinical Prompt	-
Apical Pulse	Clinical Prompt	
BC Collection Site 1	Clinical Prompt	
BC Collection Site 2	Clinical Prompt	
Bed Position	Clinical Prompt	
Blood Cultures	Clinical Prompt	
Blood Glucose	Clinical Prompt	
Blood Pressure	Clinical Prompt	
Braden Pressure Ulcer Assessment	Intervention	
Breath Sounds	Clinical Prompt	
Breath Sounds Location	Clinical Prompt	
BUN	Clinical Prompt	-

4. Select one or more prompts or interventions to associate with the activity and click **OK**. To select multiple prompts, hold down the Ctrl key (or Command key on Mac OS X).

Search		
Name	Туре	
CNA Output	Intervention	
Creat	Clinical Prompt	
Current Dose	Clinical Prompt	
Disposition	Clinical Prompt	-
Expiration Date	Clinical Prompt	E
FeedingIntake	Clinical Prompt	
FeedingRoute	Clinical Prompt	
Foley Output	Clinical Prompt	
Glasgow Coma Scale	Intervention	
Heart Rate	Clinical Prompt	
IM Injection Site	Clinical Prompt	
InputOutput	Intervention	
Intake	Intervention	
Intake Oral	Clinical Prompt	
Intake Snack	Clinical Promot	_

- 5. Use the vertical arrows it to the right of the prompts list to change the order in which the prompts will be displayed when the selected activity workflow is performed on PatientTouch.
- 6. Select a prompt in the Clinical Prompts list and configure the options in the bottom pane, below the prompt list.

Workflow Options	Schedule Options		
Bedside Only (patient scan required)	• During activity only - no follow up		
Display last values for this activity only	C Follow up only		
Pre-Answer	C During activity and follow up		
Collection Options	Follow-up Schedule		
Must collect, no override allowed	Fixed Interval times, repeat every :		
C Must collect, allow override with reason	C Variable Interval Edit		
C Skippable, don't ask in 'Collect All'	Prompt Lead : Collapse Time :		
C Skippable, ask in 'Collect All'			

7. For Workflow Options, select whether the patient must be scanned to allow the prompt to be answered, and whether the caregiver should see last values for this infant care activity, or the last time it was collected for the patient during any activity.

For Collection Options, select the appropriate option:

- Must collect, no override allowed requires the collector to respond to the prompt or intervention before continuing with the workflow.
- Must collect, allow override with reason requires the collector to either respond to the prompt or intervention, or select a reason for not providing a response before continuing with the workflow.
- Skippable, don't ask in 'Collect All' means if the collector selects the 'Collect All' workflow, this particular prompt will not be asked as part of the 'Collect All' workflow.
- Skippable, ask in 'Collect All' means if the user selects the 'Collect All' workflow, allows the collector to either respond to the prompt or intervention, or skip responding to the prompt in the workflow.

For Schedule Options, select whether caregivers should respond to the prompt only while completing the infant care activity (workflow), only as a follow-up to the activity, or both. If you choose an option for follow-up, enter the desired schedule—either repeating one or more times at a fixed interval, or a variable series of follow-up times—in the Follow-Up Schedule section.

- 8. Repeat step 6 for each prompt you added to the activity.
- 9. Repeat steps 2 7 for each of the available infant care activities, as desired.
- 10. Click **Save** to save the configuration settings for all prompts associated with each of the available infant care activities.

# **Flowsheet Setup**

Flowsheets and *mView* can display medications, vital signs, user-entered responses to prompts and interventions and data imported from external clinical systems such as lab results.

Flowsheets display all data collected for a shift, defaulting to display data collected over the current 24hour period. You can scroll through previous days by clicking Back and Forward. You can view and print Flowsheets through the Clinical Manager.

The *mView* display on the handheld shows the last value collected for that component.

When setting up Flowsheets, it is best to work from the bottom up on the Clinical Manager menu tree (start with Flowsheet Rows and finish with Flowsheet Configurations).

Flowsheet Setup				
Flowsheet Rows				

Click a link below or from the Contents tab on the left to learn more.

#### Create a Flowsheet row

The Flowsheet row defines the type of clinical data that will be displayed, such as blood pressure.

#### Create a Flowsheet category

The Flowsheet category defines a group of Flowsheet rows that make sense to display together, such as vital signs, assessments, procedures, and lab values.

#### Create the Flowsheet configuration

The Flowsheet configuration defines a collection of Flowsheet categories available for the nurse to select to display, such as insulin/blood sugar, antibiotic/temp/CBC.

# **Creating a Flowsheet Row**

Flowsheet rows are created based on the clinical data types you set up in Intervention/Prompt Setup>Clinical Types.

1. In Clinical Manager, select Flowsheet Setup > Flowsheet Rows.



PatientTouch Clinical Manager - B	ue- Milstein - User, Admin	- C ×
Manager View Help		
C		02/05/2019 14:14 PST
	Flowsheet Rows	
Patients     Order Verification     Patient Assignment     Reports     Pharmacy     Laboratory     Infant Care     Infant Care     Intervention/Prompt Setup     Plowsheet Carliguration     Plowsheet Categories     Noveneet Nove     Vers     Roles     Configuration	Search  Flowsheet Row Config Name  Apical Puble Blood Pressure Breath Sounds Cough FlO2 Is it Hot? O2 Mode - RT O2 Mode - RT O2 Mode - RT O3 Search Pointion Pain Scale Position Pulse Oximety Pulse Rate Respiratory Rate RT Education Secretions Temperature TEST all types	
• m •	Delete	Edit New

2. Click **New** to display the *New Flowsheet Row* window.



New Flowsheet Ro	w:	x
New Flowsheet Ro Name: Display Name: Row Type:		
	OK Cancel Ap	oply

- 3. Enter a name for the row. In this example, we will create a Temperature row.
- 4. Select **Clinical Type** from the **Row Type** drop down list.



If no display name is entered, the Flowsheet will display the Clinical Type name.



New Flowsheet Roy	w: Temperature			x
Display Name: Row Type:	Temperature Clinical Type Always Show Display as Graph on Mult	▼ i-Day Flowsheet		_
Clinical Type		Total Component Name	•	
		ОК	Cancel App	ły

5. Click Add Clinical Type and then Select Clinical Type.

	×
Clinical Type:	Select Clinical Type
Totaling Component	<u>_</u>
	OK Cancel

6. Select a Clinical Type.

	Select Clinical Type	X
	Search	
	Clinical Type Name	
	Serum Creatinine	<u> </u>
	Shift End Time	
	Shift Start Time	
I	Shift Total	
	Sodium Level	
	TB Erythema	
	TB Induration	
	Temperature	
	Temperature Route	
1	Titration Rate	
	Tubing Change Witness Calculation	
	Witness Calculation	=
	Witness Required	- 1
	Interest required	
	OK Cancel	

- 7. Click **OK** three times.
- 8. The new Flowsheet Row appears on the screen.
- 9. Repeat these steps for each new Flowsheet Row.

PatientTouch Clinical Manager - B	ue- Milstein - User, Admin	
Manager View Help		
C		02/05/2019 14:15 PST
	Flowsheet Rows	
Patients     Order Verification	Search	
Patient Assignment     Reports	Flowsheet Row Config Name	
Pharmacy     Laboratory     Laboratory     Laboratory     Laboratory     Infant Care     Intervention/Prompt Setup     Intervention Scheduling     Rowsheet Setup     Plowsheet Configuration     Rowsheet Rows     Wiew     Users     Roles     Configuration	Apical Pulse Blood Pressure Broath Sounds Cough FiO2 Sit Hot? Q2 Mode - RT Q2 Mode - RT Q3 Mode - RT Q5 Mode	
x >	Delete	Edit New

# **Creating a Flowsheet Category**

Flowsheet categories are created from the flowsheet rows you created in Flowsheet Setup>Flowsheet Rows.

1. Select **Flowsheet Setup > Flowsheet Categories** to display the *Flowsheet Categories* screen.

🖉 PatientTouch Clinical Manager - Blue- Milstein - User, Admin 🗈 💌 🕮			
Manager View Help	Manager View Help		
C		02/05/2019 14:16 PST	
	Flowsheet Categories		
Patients     Order Verification	Search		
Patient Assignment     Reports	Name		
B- Dharmacy B- D Laboratory	Braden Ulcer Default	<u> </u>	
Blood Administration     Infant Care	Lab Results Medications		
B- Cal Intervention/Prompt Setup	MEWS POST Tx Assessment		
Intervention Scheduling     Flowsheet Setup	Respiratory Respiratory Evaluation		
Flowsheet Configurations     Flowsheet Categories	TEST all types		
Flowsheet Rows	Vital Signs		
mView     Users			
Roles     Gonfiguration			
		<u>-</u>	
• m •	Delete	fit New	

2. Click New to display the New Flowsheet Category window.

New Flowsheet Category:
Name: Display Name: Type: Clinical Types Clinical Types Configuration
Name
Add Flowsheet Row Config       Remove       Remove All         Totaling Component:           Show Total         Show Current Total         Show Cumulative Total
OK Cancel Apply

- 3. In the Name field, enter a unique name (mandatory).
- 4. In the Display Name field, enter the name that will display in the handheld (mandatory).

New Flowsheet Cat	tegory: Respiratory
Name:	Respiratory
Display Name:	Respiratory
Type:	Clinical Types
Clinical Types (	Configuration
Name	
	<b>▲</b>
	<u>-</u>
Add Flowsh	eet Row Config Remove Remove All
Totaling Comp	onent:
Show Total	
Show Curre	nt Total
Show Cum	ulative Total
	OK Cancel Apply

5. Select **Clinical Types** from the **Type** drop down list.



Configurations will change based upon the selection from the Type drop down list.

- 6. Click Add Flowsheet Row Config.
- 7. Select the row you want to add to this Flowsheet category.



Rows can only be added one at a time.



	Search			
Flowsheet Row Co	nfig Name			
Apical Pulse				
Blood Pressure				
Breath Sounds				
Cough				
FiO2				
O2 Mode - RT				
Oxygen Flow				
Oxygen Saturation				1
Pain Scale				
Position				
Pulse Oximety				
Pulse Rate				
Respiratory Rate				
RT Education				
Secretions				
Delete			Edit	New

8. Click OK.

New Flowsheet Category: Respiratory				
Name:	Respiratory			
Display Name:	Respiratory			
Туре:	Clinical Types			
Clinical Types (	Configuration			
Name				
Blood Pressure	e 🔺			
	-			
Add Flowsh	eet Row Config Remove Remove All			
Totaling Comp	vonent:			
Show Total				
Show Currer	nt Total			
Show Cumu	ulative Total			
	OK Cancel Apply			

- 9. If the row you're adding prompts for a **Totaling Component**, select the appropriate checkbox for the desired behavior:
  - **Show Total** displays the current total for all rows in the category requiring totals.
  - Show Current Total displays the current total for the cell.
  - Show Cumulative Total displays the cumulative total for the row.

If necessary, change the order of the components by selecting a component and clicking the up or down arrow on the right to move the component to the desired location.

10. Click **OK**. The new category appears in the list of available categories.



🖉 PatientTouch Clinical Manager - Blue- Milstein - User, Admin		
Manager View Help		
C		02/05/2019 14:17 PST
PatientSafe Mira Mesa	Flowsheet Categories	
Patients Order Verification	Search	]
Patient Assignment     Reports	Name	
B- D Pharmacy	Braden Ulcer Default	
B Blood Administration	Lab Results Medications	
Infant Care     Infant Care     Intervention/Prompt Setup	MEWS POST Tx Assessment	
B- DIntervention Scheduling	Respiratory	
E Flowsheet Setup	Respiratory Evaluation Temperature Test	
Flowsheet Configuration     Flowsheet Categories	TEST all types	
Flowsheet Rows	Vital Signs	
Image:		
Users 1 Roles		
B-Configuration		
<	Delete	Edit New

# **Creating a Flowsheet Category for Medication Orders**

Create a new flowsheet category for Medication Orders for mView to display a Medication Orders tab. The new mView tab will display the full list of medication orders that are currently profiled for a patient, regardless if the medication has been administered.

This tab does not show medication data details, it only shows medication orders.

This flowsheet category will not populate flowsheet data with medication orders, it will only allow users to create a tab in mView.

1. From the Flowsheet Categories tab, click New.



🖉 PatientTouch Clinical Manager - Blue- Milstein - User, Admin					
Manager View Help	Manager View Help				
C		02/20/2019 13:59 PST			
PatientSafe Mira Mesa	Flowsheet Categories				
Patients     Order Verification	Search				
Patient Assignment     Reports	Name				
Pharmacy     Laboratory     Laboratory     Infant Care     Infant Care     Intervention/Prompt Setup     Intervention Scheduling     Flowsheet Setup     Flowsheet Categories     Flowsheet Categories     Flowsheet Rows     Noise     Mview     Users     Roles     Configuration	Braden Ulcer Default Feeding Route Lab Results Medications MEWS POST Tx Assessment Respiratory Evaluation Temperature Test TEST all types Vital Signs				
· · ·	Delete	Edit New			

- 2. Enter the Name and Display Name as Medication Orders.
- 3. Select Medication Orders from the Type drop down menu.

New Flowsheet Ca	tegory: Medication Orders
	Medication Orders Medication Orders
Type:	Clinical Types
Clinical Types	Clinical Types Medications Infant Care Lab Results Intervention MedicationOrders
Add Flowsh Totaling Comp Show Total	
Show Cum	Ilative Total OK Cancel Apply

- 4. Click Include Discontinued Medication Orders, if you want to include them in the mView tab.
- 5. Enter a value in the **Display the last \_\_\_\_\_ hours of Discontinued Orders.** The maximum is 12 hours.
- 6. Click OK.

New Flowsheet Cat	tegory: Medication Orders	×
Name:	Medication Orders	
Display Name:	Medication Orders	
Type:	MedicationOrders 💌	
MedicationOrd	ders Configuration	_
Include Disc	continued Medication Orders	
Display the	e last 12 hours of Discontinued Orders	
	OK Cancel A	pply

- 7. The new flowsheet category **Medication Orders** displays.
- 8. Next, you will need to add this flowsheet category as an mView Tab Group.

PatientTouch Clinical Manager - Bl	ue- Milstein - User, Admin	
Manager View Help		
C		02/20/2019 14:00 PST
PatientSafe Mira Mesa	Flowsheet Categories	
Patients     Order Verification	Search	
Patient Assignment     Reports	Name	
B- D Pharmacy	Braden Ulcer Default	1
Laboratory     Blood Administration	Feeding Route	
E- Dinfant Care	Lab Results Medication Orders	
B- Dintervention/Prompt Setup	Medications	
Intervention Scheduling	MEWS POST Tx Assessment	
Flowsheet Setup	Respiratory	
Flowsheet Configuration:     Flowsheet Categories	Respiratory Evaluation	
Flowsheet Rows	Temperature Test	
B- mView	TEST all types	
Users	Vital Signs	
- Roles		
Configuration		
· · ·	Delete	Edit New

# **Creating a Flowsheet Configuration**

Flowsheet configurations are created from one or more flowsheet categories you created in Flowsheet Setup>Flowsheet Categories.

1. In Clinical Manager, select **Flowsheet Setup > Flowsheet Configurations**.

M PatientTouch Clinical Manager - E	Blue- Milstein - User, Admin	
Manager View Help		
C		02/05/2019 14:17 PST
PatientSafe Mira Mesa	Flowsheet Configurations	
Patients Order Verification	Search	
Patient Assignment	Name	
Hopotal     Hopotal     Hopotal     Hopotal     Hopotal     Hopotal     Hopotal     Hopotal     Howsheet Setup     Howsheet Setup     Howsheet Categories     Howsheet Categories     Howsheet Rows     Howsheet Rows     Houses     Holes     Hoes	Default Resp Eval Vital Signs	<b>▲</b>
4 m >	Delete	Edit New



- 2. Click New.
- 3. In the Name field, enter a unique name (mandatory).

4. Click **Add Category Configuration**. Choose a category. Categories can only be added one at a time. Repeat these steps for each category you want to add.



	Search				
Name					
Default					-
Lab Results					
Medications					
POST Tx Assessment					
Respiratory		 			
Respiratory Evaluation	)	 			
Vital Signs					
					-
1					_
Delete				Edit	New
		 	_		

5. Click **OK** to accept the entries.

ew Flowsh	eet Config: Resp Eval	×
Name:	Resp Eval	
Name		
Respirat	tory Evaluation	<b>_</b>
		•
	Add Category Configuration Remove	Remove All
	C	OK Cancel Apply

6. Click **OK** again to add this entry to the Flowsheet Configuration.

Manager View Help	
C 02/05/	2019 14:18 PST
PatientSafe Mira Mesa	
Patients Search	
Patient Assignment	
Reports     Default     Default     Reso Eval	1
Blood Administration	
- Infant Care	
🛞 🗀 Intervention/Prompt Setup	
Intervention Scheduling	
Plowsheet Setup     Flowsheet Configuration	
- Flowsheet Categories	
Piowsheet Rows	
B-     mView     Users	
Roles	
	•
4 m b Delete Edit	New

# **Viewing Flowsheets**

1. In Clinical Manager, select Patients.

nager <u>V</u> iew <u>H</u> elp								
*							02/05/2019	14:19
tientSafe Mira Mesa	Patients							
Patients			C My Patien	ts (* Active Patie	ents C Advanced	Search		
Order Verification								
Patient Assignment Reports			Searc	:h				
Pharmacy	Last Name	First Name	DOB	MRN	Visit ID	Nursing Unit	Location	
Laboratory	Ahab	Captain	01/15/1962	M000031	V000031	2-West	6016 1	
Blood Administration	Algar	Garth	08/10/1960	M000115	V000115	2-West	60291	-
Infant Care	Amidala	Padme	09/12/1971	M000157	V000157	2-West	6021 1	
Intervention/Prompt Setup	Bradford	Tom	09/28/1956	M100092	V100092	2-West	100 3	
	Britt	Betty	04/04/1984	M100035	V100035	4 WEST	100 1	
Intervention Scheduling	Britt	Baby	09/01/2018	M100036	V100036	4 WEST	100 2	
Elowsheet Setup	Burns	Frank	09/28/1956	M100006	V100006	3RDFLOOR	121 2	
Flowsheet Configurations	Houlihan	Margaret	09/27/1956	M100007	V100007	3RDFLOOR	124 1	
Flowsheet Categories	Kent	Clark	09/28/1960	M100027	V100027	3RDFLOOR	120 1	
Flowsheet Rows	Lockhart	Abby	09/28/1956	M100093	V100093	2-West	150 3	
mView	McCallister	Kevin	01/16/1962	M000001	V000001	9 WEST	6001 1	
Users	Riley	Emma	09/28/1965	M11101	V11101	3RDFLOOR	122 3	
Roles								
Configuration								
	,							-

- 2. Select the desired patient, and click View Flowsheet.
- 3. From the **Flowsheet** drop-down list select the new Flowsheet to display. In this case, it is the Resp Eval flowsheet.

;					02/05/2019 14:2
owsheet for Burns, Frank					
		Flowsheet Resp Eval 💌	Filter		
<< Back	From	m 02/05/2019 💌	To 02/06/2019		Forward>>
	14:22		Last Value		
espiratory Eval Pulse Rate	Pulse Rate: 68 bpm	(by adm)	Pulse Rate: 68 bpm	(by adm)	14:22
Respiratory Rate	Respiratory Rate: 15 /min	(by adm)	Respiratory Rate: 15 /min	(by adm)	14:22
O2 Sat		(by adm)	O2 Saturation: 45 %	(by adm)	14:22
02 Mode	O2 Mode: Nasal Cannula	(by adm)	O2 Mode: Nasal Cannula	(by adm)	14:22
02 Flow	Oxygen Flow: 11 L/M	(by adm)	Oxygen Flow: 11 L/M	(by adm)	14:22
FiO2	FiO2: 45 % (by adm)		FiO2: 45 % (by ad	im)	14:22
Breath Sounds	Breath Sounds: Clear Bilateral	(by adm)	Breath Sounds: Clear Bilate	eral (by adm)	14:22
Cough	Cough: Weak	(by adm)	Cough: Weak	(by adm)	14:22
Secretions	Secretions: Small	(by adm)	Secretions: Small	(by adm)	14:22
Position	Low Fowlers	(by adm)	Low Fowlers	(by adm)	14:22
RT Education	Med/Equip Ed: Equip Use Ed.	(by adm)	Med/Equip Ed: Equip Use	Ed. (by adm)	14:22

# **mView Configuration**

*mView*, which stands for mobile view, can be configured to display patient-specific clinical data to clinicians on the handheld. The power of *mView* is in bringing information to the user instead of the user having to go to various locations (computers, pieces of paper, another person, etc.). *mView* includes user-entered documentation including medication administrations, vital sign collection, interventions, assessments, and lab values. The information displays in tab groups as seen in the picture below (Resp, Vitals, Meds, Labs). Tap a Tab Group to see patient specific information.

\$ 100% 🔜 +
Done
ink
3RDFLOOR: 121/2
is Labs
0.125mg (sered Nurse)
10mg
40mg
5mg (sered Nurse)
500mg isered Nurse)
50mg
20mg (sered Nurse)

*mView* also displays lab values from the laboratory information system. The font of the lab results display according to the results of the test: normal, abnormal, or critical. When there are abnormal results of a lab test, the font of the results displays in the following mannor:

If the result is abnormal high or abnormal low, the result will display a black \* beside the test name along with bold black font and a black up arrow for abnormal high results and a black down arrow for abnormal low results.



No Service 🕈	12:58 РМ mView	\$ 100% <b>=</b> + Done	No Service 4		2:58 PM nView	\$ 100% <b>■</b> + Done
28 Sep 1962 (M)	irns, Frank	3RDFLOOR: 121/2	28 Sep 1962	(M)	ns, Frank	3RDFLOOR: 121/2
Resp VS	Meds	Labs	T Lab Resu		Meds	Labs
LAB_Potassiun  LAB_Sodium  Sodium  138-145		28 Jul 08:56 28 Jul 08:52 152 mmol/L H	▼LAB_Pot Potassi 3.4-5.0 ▶LAB Soc	um	+	28 Jul 08:56 3.0 mmol/L L 28 Jul 08:52
►LAB_Chloride	•	05 Jun 08:40	►LAB_Chi			05 Jun 08:40
▶ LAB_Calcium *		02 May 10:00	►LAB_Cal	cium *		02 May 10:00

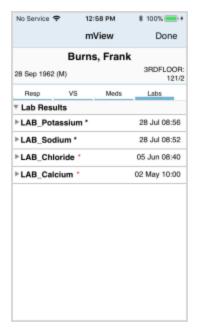
Abnormal High

Abnormal Low

 If result is critical high or critical low, the result will display a red \* beside the test name along with bold red font.

No Service 🕈	12:58 РМ mView	\$ 100% <b>■</b> + Done	No Service 🜩	12:58 PM	\$ 100%
Bi	mView	Done			
Bi		Done		mView	Done
	ırns, Frank		E	Burns, Frank	
28 Sep 1962 (M)		3RDFLOOR: 121/2	28 Sep 1962 (M)		3RDFLOO 121
Resp VS	Meds	Labs	Resp V	/S Meds	Labs
Lab Results			* Lab Results		
LAB_Potassiun	n *	28 Jul 08:56	► LAB_Potassi	um *	28 Jul 08:5
LAB_Sodium *		28 Jul 08:52	►LAB_Sodium	•	28 Jul 08:5
*LAB_Chloride	•	05 Jun 08:40	►LAB_Chloride	e *	05 Jun 08:4
Chloride	140	) mmol/L * HH	*LAB_Calcium	•	02 May 10:0
98-108			Calcium		2.3 mg/dl * Ll
►LAB_Calcium *		02 May 10:00	8.4 - 10.2		
Critical Hig	<sup>7</sup> h		Critical Low	1	





When the tests are collapsed, the critical results display with a red asterisk and the abnormal results display with a black asterisk.

# **Tab Groups**

The information displayed in mView is highly configurable. To define what displays, Tab Groups are created to logically group data together. Tab groups are based on Flowsheet Categories.

To create Tab Groups:

- 1. From the menu tree, select **mView > Tab Groups** to display the *Tab Groups* screen.
- 2. Click **New** to create a new tab group.



PatientTouch Clinical Manager - Blue	e- Milstein - User, Admin	
Manager View Help		
C		02/21/2019 08:56 PST
PatientSafe Mira Mesa	Tab Groups	
Patients	Search	
Patient Assignment     Reports     Patient Assignment     Reports     Patient Assignment     Reports     Patient Assignment     Laboratory     Blood Administration     Infant Care     Infant Care     Intervention/Prompt Setup     Intervention Scheduling     Flowsheet Setup     Tab Groups     Unit Visibility     Users     Roles     Configuration	Name         Infant Care         Is it Hot?         Labs         Medications         Test All Types         Vital Signs	▲ Edit New

The New Tab Group window appears.

New Tab Group: Res	piratory Eval		<b>X</b>
	Respiratory Eval Respiratory Eval Select flowsheet categories	Select nursing units	
	Name Vital Signs Respiratory Eval POST Tx Assessment Respiratory Default Meds	Name All 10106 10108 10151 1E	-
	Lab Results		-
		OK Cancel	Apply

- 3. Enter a Tab Group Name.
- 4. Enter a Display Name. This is the tab name that will appear on mView of the handheld. It is best to keep this name short.
- 5. Select the Flowsheet category(s) that should appear in this tab. Flowsheet categories must be



configured in order to create *mView* tab groups.

- 6. Select the Nursing unit(s) for which to display this tab.
- 7. Click **OK** to accept your entries.

M PatientTouch Clinical Manager - Blue- Milstein - User, Admin		
Manager View Help		
C		02/21/2019 08:57 PST
PatientSafe Mira Mesa	Tab Groups	
Patients     Order Verification	Search	
Patient Assignment	Name	
Patient Assignment     Reports     Pharmacy     Blood Administration     Infant Care     Infant Care     Intervention/Prompt Setup     Intervention Scheduling     Flowsheet Setup     Isters     Users     Roles     Configuration	Infant Care Is it Hot? Labs Medications Respiratory Eval Test All Types Vital Signs	1
	Delete	Edit New

# **Adding Medication Orders Tab Group**

Users can create a new mView tab to display Medication Orders. The new tab will display the full list of medication orders that are currently profiled for a patient, regardless if the medication has been administered.

This tab does not show medication data details, it only shows medication orders.

You must have a Medication Orders Flowsheet Category created in order to add the mView tab.

- 1. Select **mView>Tab Groups** from the menu tree.
- 2. Click New.

🗾 PatientTouch Clinical Manager - Blue- Milstein - User, Admin		
Manager View Help		
C		02/21/2019 08:35 PST
PatientSafe Mira Mesa	Tab Groups	
Patients Order Verification	Search	
Patient Assignment     Reports     Pharmacy     Laboratory     Blood Administration     Infant Care     Intervention/Prompt Setup     Intervention Scheduling     Flowsheet Setup     Mview     Tab Groups     Unit Visibility     Users     Roles     Configuration	Name Infant Care Is it Hot? Labs Medications Respiratory Respiratory Eval Test All Types Vital Signs	<b>▲</b>
	Delete	Edit New

- 3. Enter a Tab Group Name of Medication Orders.
- 4. Enter the **Display Name** as **Med Orders** (shorten the name so it displays well on the mView tab list on handhelds).
- 5. Select the flowsheet category of **Medication Orders** from the list that displays.
- 6. Select the associated nursing units.
- 7. Click OK.

New Tab Group: Medication O	rders		×
Tab Group Name: Medicat Display Name: Med Orc Assignment: Select flo	lers	Select nursing units	
☐ Respi ☐ TEST ☐ Temp ☐ Brade ☐ MEW ☐ Feedi	esults ratory all types perature Test en Ulcer	Name           ✓ 3-South           □ 3.N           ✓ 3E           ✓ 3E           ✓ 3E           ✓ 3S	H
		OK Cancel	Apply

8. The **Medication Orders Tab Group** has now been entered as a new mView tab.

PatientTouch Clinical Manager - B	ue- Milstein - User, Admin	
Manager View Help		
C		02/21/2019 08:36 PST
PatientSafe Mira Mesa	Tab Groups	
Patients Order Verification	Search	
Patient Assignment	Name	
Reports     Pharmacy     Pharmacy     Laboratory     Blood Administration     Infant Care     Intervention/Prompt Setup     Intervention Scheduling     Flowsheet Setup     MView     Tab Groups     Unit Visibility     Users     Roles     Configuration	Infant Care Is it Hot? Labs <u>Medication Orders</u> Medications Respiratory Respiratory Eval Test All Types Vital Signs	<b>▲</b>
	Delete	Edit New

# **Unit Visibility**

Unit visibility controls the order in which each nursing unit will see the *mView* data on their handhelds.



1. Select **mView>Unit Visibility** from the menu tree.

PatientTouch Clinical Manager - B	ue- Milstein - User, Admin	
Manager View Help		
C		02/21/2019 08:37 PST
PatientSafe Mira Mesa	Unit Visibility	
Patients     Order Verification     Patient Assignment     Reports     Pharmacy     Laboratory     Laboratory     Blood Administration     Infant Care     Infant Care     Intervention/Prompt Setup     Intervention Scheduling     Flowsheet Setup     MView     Tab Groups     Unit Visibility     Users     Roles     Configuration	Nursing Unit: 3RDFLOOR	

- 2. Select a nursing unit from the **Nursing Unit** drop down list. The tab groups configured for this unit will be displayed.
- 3. Use the up/down arrows to select the order of the tab groups to display in *mView* on the handheld.

M PatientTouch Clinical Manager - Blue- Milstein - User, Admin	
Manager View Help	
C	2/21/2019 08:38 PST
PatientSafe Mira Mesa 4 Unit Visibility	
<ul> <li>Patients</li> <li>Order Verification</li> <li>Patient Assignment</li> <li>Reports</li> <li>Pharmacy</li> <li>Laboratory</li> <li>Blood Administration</li> <li>Infant Care</li> <li>Intervention/Prompt Setup</li> <li>Intervention/Prompt Setup</li> <li>Flowsheet Setup</li> <li>Wedications</li> <li>Tab Groups</li> <li>Unit Visibility</li> <li>Users</li> <li>Roles</li> <li>Configuration</li> </ul>	