PatientTouch® Clinical Manager User Guide for Caregivers

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The Clinical Manager User Guide for Caregivers

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:

- Caregivers can assign patients, run reports or chart medication administrations on the online MAR.
- Caregivers can view, chart, edit, and print MARs.
- Lab personnel can assign/unassign phlebotomists, print draw lists, view all lab orders for patients, and change collector type.

Professional Responsibility

The PatientTouch System when used as outlined in the user guides and training documentation can help prevent serious errors. The PatientTouch System should always be used in conjunction with the caregiver's professional clinical judgment and is not a substitute for this. If the PatientTouch System is used in a manner outside of these parameters the potential for errors can increase. Examples of system misuse include ignoring system warnings or failing to positively identify the patient. These examples are for illustration only and are not intended to be a complete list.

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. If using Active Directory or LDAP, the password can be the same.

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.

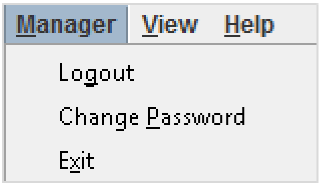
1. Double-click the **PatientTouch Clinical Manager** icon to launch the application. Or, select the link from the intranet.

2. Enter your login name and password and click **OK**. (Please note that the login name and password are case sensitive).
3. 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 the PatientTouch System is pointing to.
5. Click **Exit** to quit the Patient Touch Clinical Manager.

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.

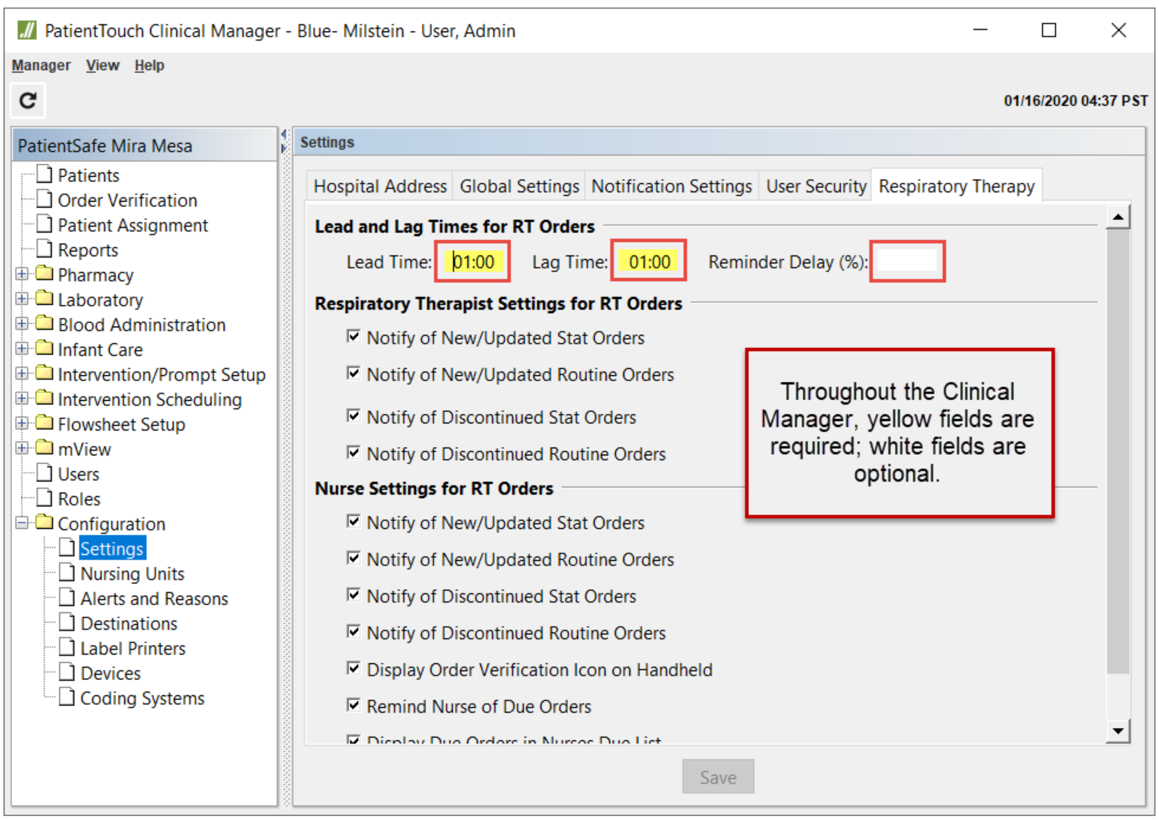


- To close the application, select **Exit** from the **Manager** menu.
- The system may also log you out automatically after a period of inactivity that is defined for your hospital to comply with hospital policies and HIPAA guidelines.

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



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.

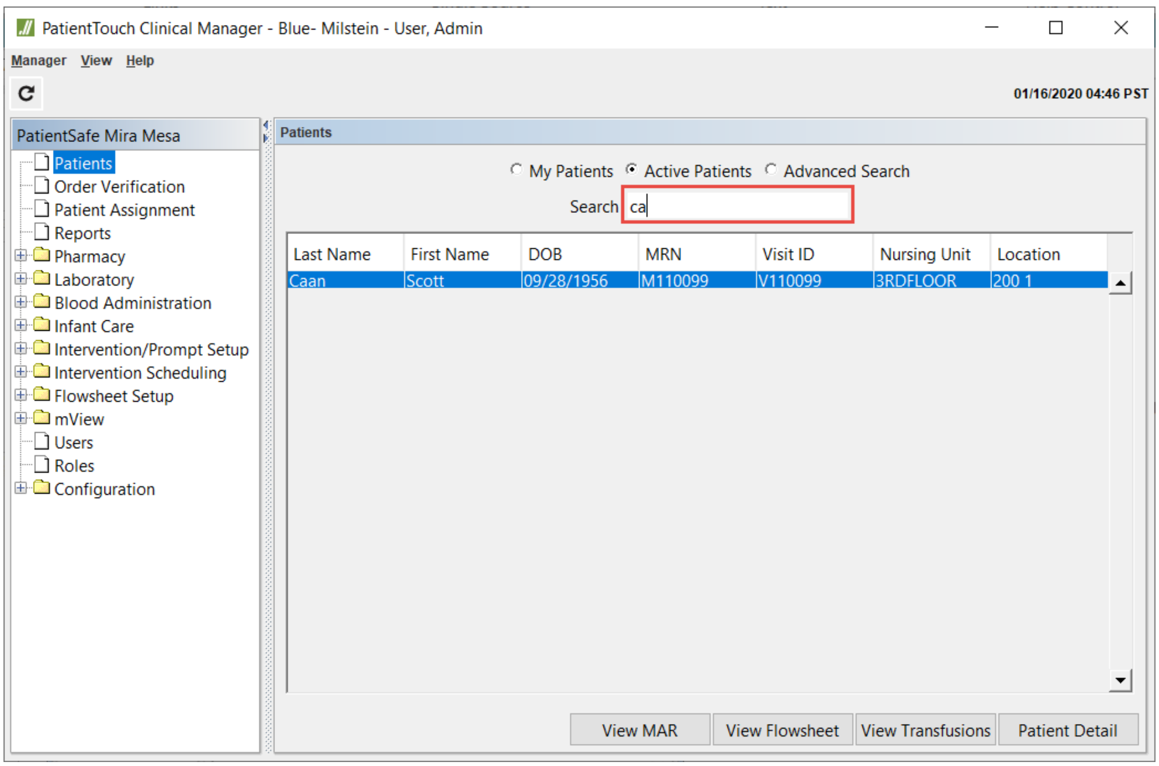
For example, caregivers with the Nurse Manager role may see options that allow them to view and edit the online MAR, run reports, open patient charts, and assign patients. Pharmacists will have options that allow them to view the master drug file or to edit SIG codes.

- 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 .
- 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.



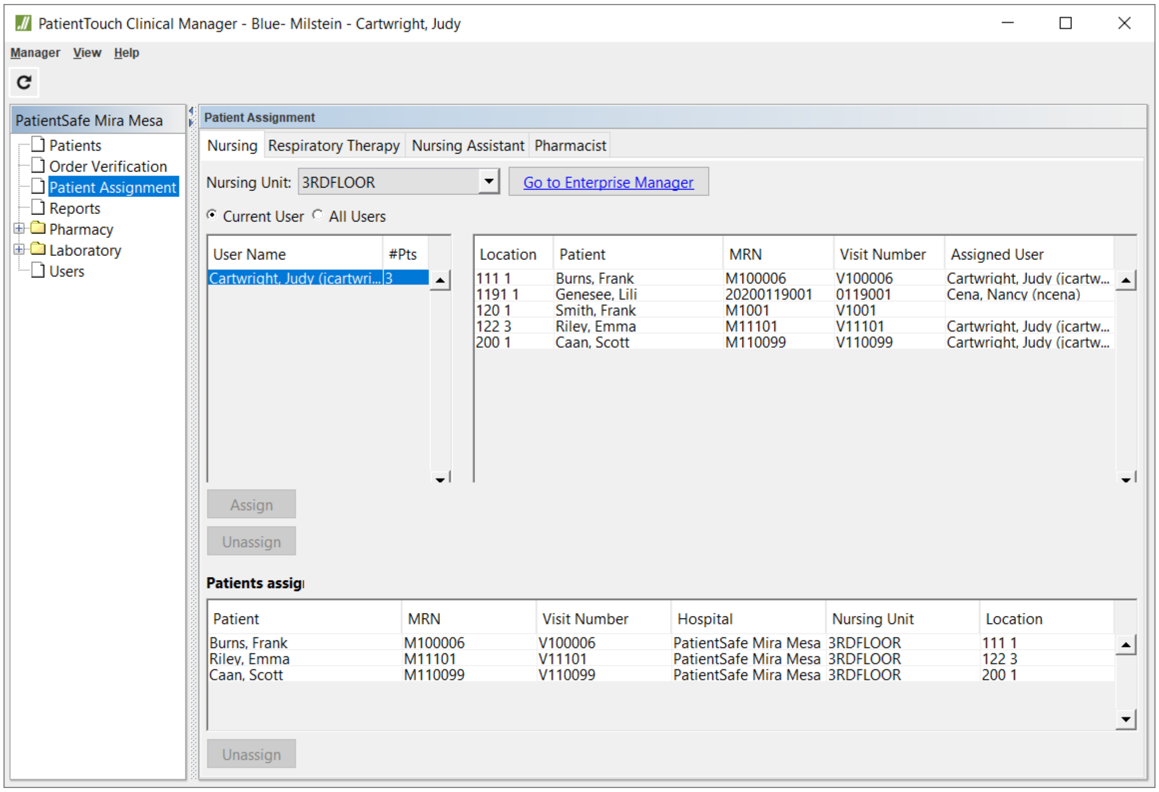
Patient Assignment

The PatientTouch Clinical Manager provides a **Patient Assignment** function, which allows users with the appropriate privilege to assign caregivers to patients. Depending on the type of caregiver, the user is either assigned to the patient(s) or the room(s)/location(s). The purpose of assigning patients/locations is to allow the system to send patient-specific alerts, reminders and notifications to the primary caregivers. Additionally, it allows other users to see the patient's primary caregivers. Patient assignment can be done from either the Clinical Manager or PatientTouch.

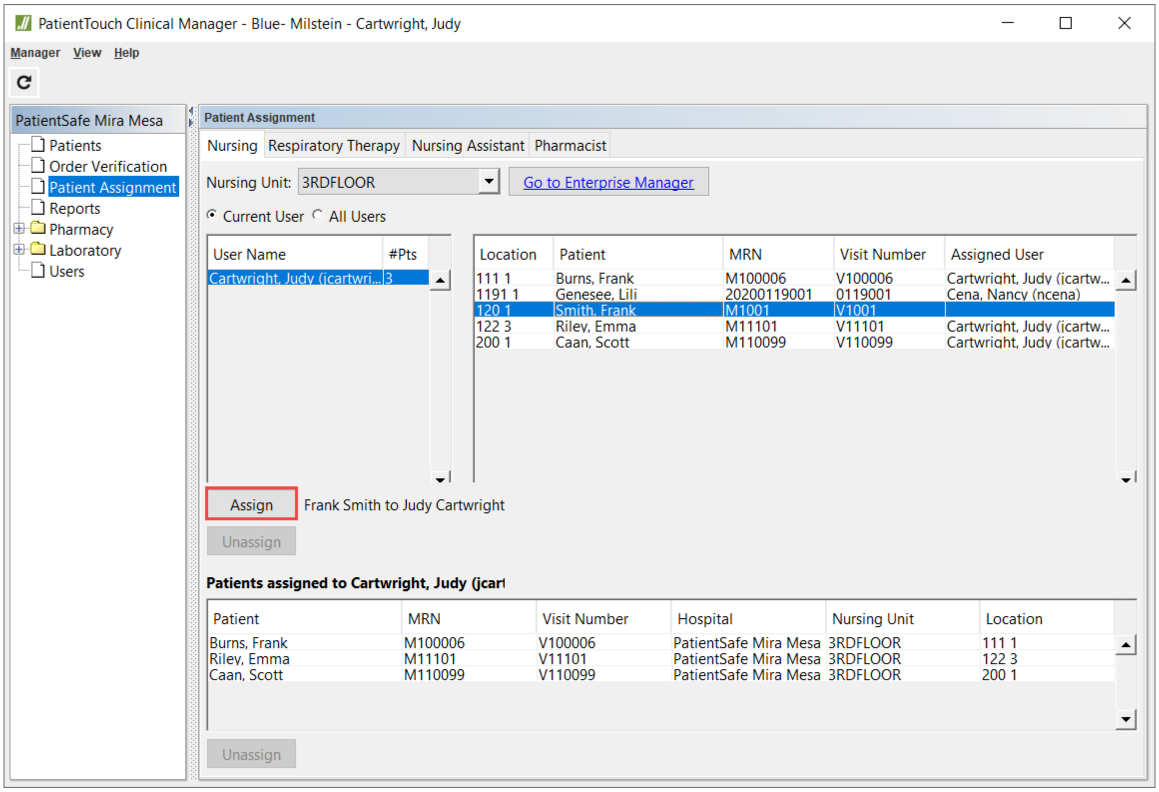
Assigning Patients

To assign patients using the Clinical Manager:

1. After logging into the Clinical Manager, select **Patient Assignment**.
2. Click the appropriate tab for the caregiver type **(Nursing, Respiratory Therapy, Nursing Assistant or Pharmacist).**



3. Click the **Nursing Unit** drop-down list and select the target nursing unit.
4. Ensure the user name is selected under the User Name column on the left.
5. Select a patient/location to assign from the table on the right. Hold down the Ctrl key to highlight and select multiple patients/locations.
6. Click **Assign** to assign the patient or room/bed number(s).



In the case of RT/Nursing/Pharmacist assignment, they are assigned to beds/rooms. Patient names may change during the shift. The room/bed does not need to be occupied for an RT to be assigned.

Caregivers can sort the assignment list by **Patient, MRN, Visit Number, and Assigned User.** Simply click on the desired sort column to change the view of the assignment list from ascending to descending order.

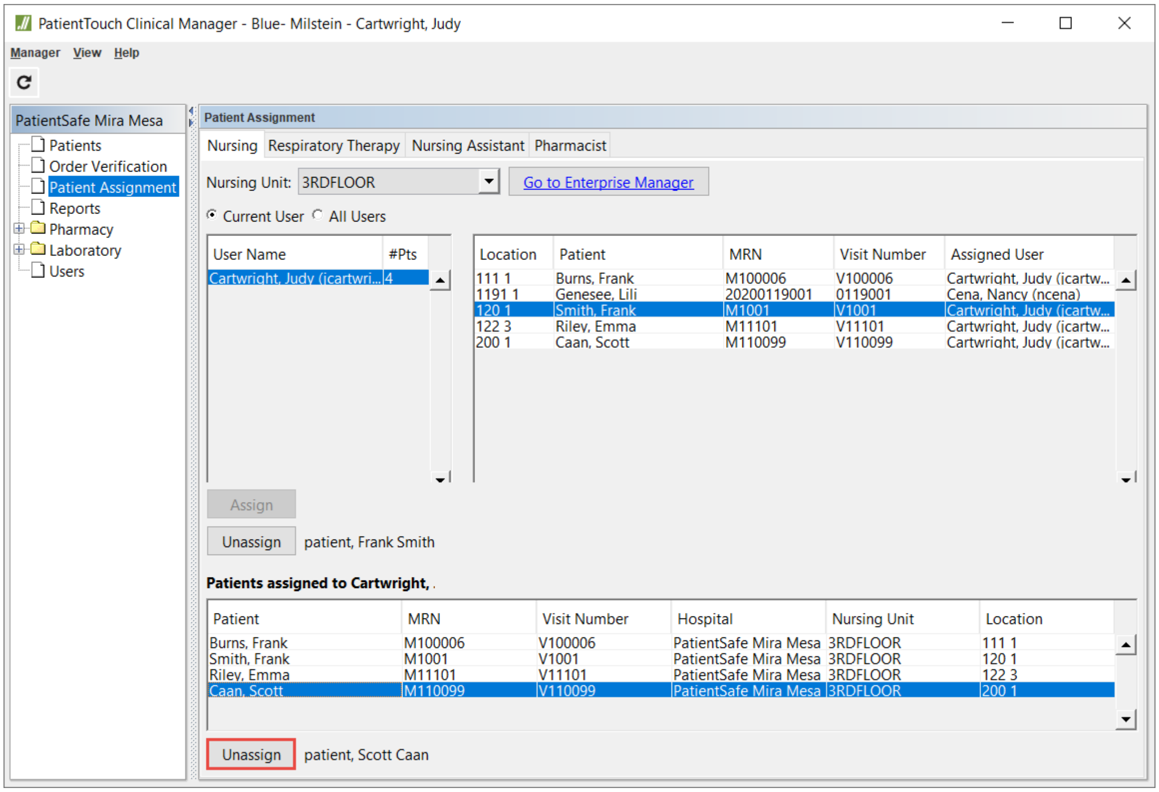
All patients assigned to the user display in the lower window (Patients assigned to…), regardless of the currently selected hospital or nursing unit.

Un-Assigning Patients

Patients are automatically un-assigned from a nurse if the patient is discharged or assigned to another nurse. RT assignments are by room/bed location. Consequently, assignment is not affected by a change in patient location.

To un-assign all patients from a user:

1. Highlight the target patient(s) in the upper or lower section of the screen.
2. Click **Unassign**.



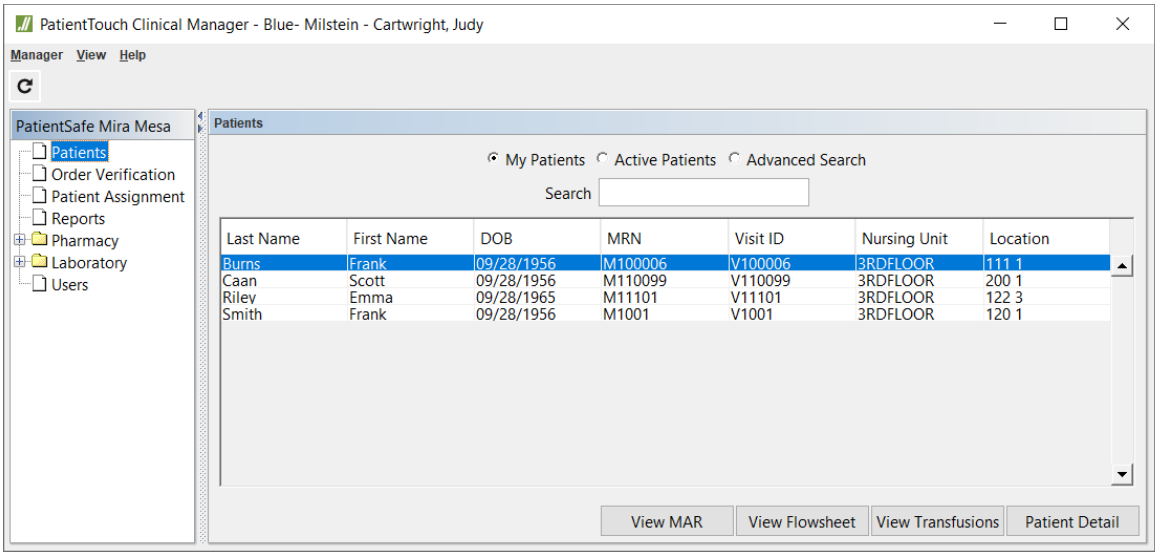
Patients

The Clinical Manager *Patients* window retrieves information about patients and patient orders automatically from the hospital admitting system and the Pharmacy Information System. If patient information is missing or incorrect, contact your system administrator.

My Patients

My Patients is the default display when you select **Patients** from the Clinical Manager menu. It displays the list of patients assigned to the logged in user. For respiratory therapists, it displays only locations with current patients. If no patients are assigned to the logged in user, the screen is blank. The list of patient information that displays includes the patient's Last Name, First Name, DOB, MRN, Visit ID, Hospital, Nursing Unit, and Location. To quickly locate a specific patient from the list, enter the first few characters of the patient's last or first name in the Search field. The resulting patient name automatically displays.

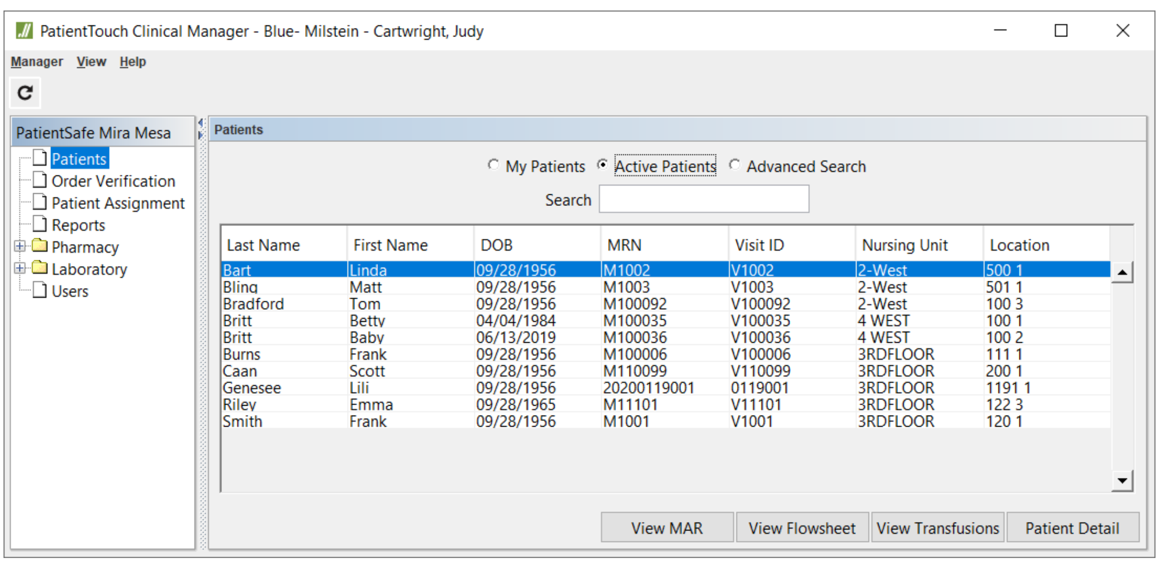
If your hospital is configured for Campus Support, and you selected a specific facility at login, only the patients in that hospital will display after a search. However, a hospital filter displays if you have selected <All> hospitals at login. Select the facility from the drop down menu for which you want to see patients or select <All> to see patients in all hospitals.



Active Patients

Select **Active Patients** to see a list of all active patients in the Clinical Manager. The list of patient information includes the patient's Last Name, First Name, DOB, MRN, Visit ID, Hospital, Nursing Unit, and Location. To quickly locate a specific patient from the list, enter the first few characters of the patient's Visit ID, MRN, last or first name in the search field. The resulting patient name automatically displays.

If your hospital is configured for Campus Support, and you selected a specific facility at login, only the patients in that hospital will display after a search. However, a hospital filter displays if you have selected <All> hospitals at login. Select the facility from the drop down menu for which you want to see patients or select <All> to see patients in all hospitals.

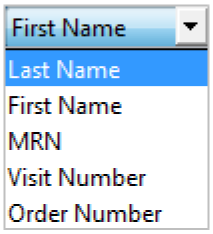


Advanced Search

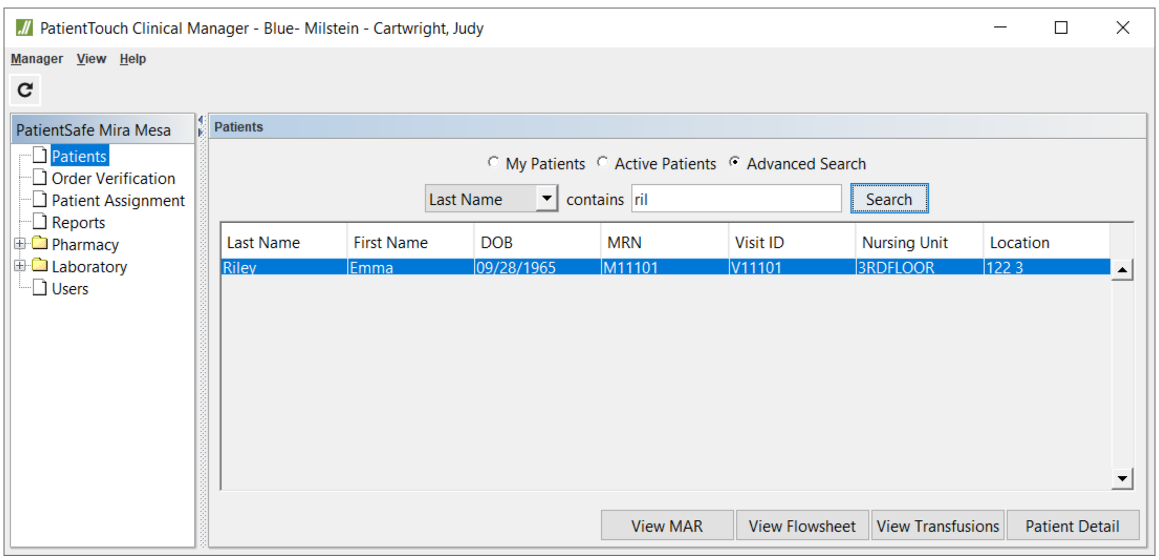
You can use **Advanced Search** to locate a patient who has been discharged, or if you have more specific criteria not included in the other search methods.

To search for a patient:

1. Select the **Advanced Search** option in the *Patients* screen.
2. Select the item by which to search from the drop-down list (Last Name, First Name, MRN, Visit or Order Number).



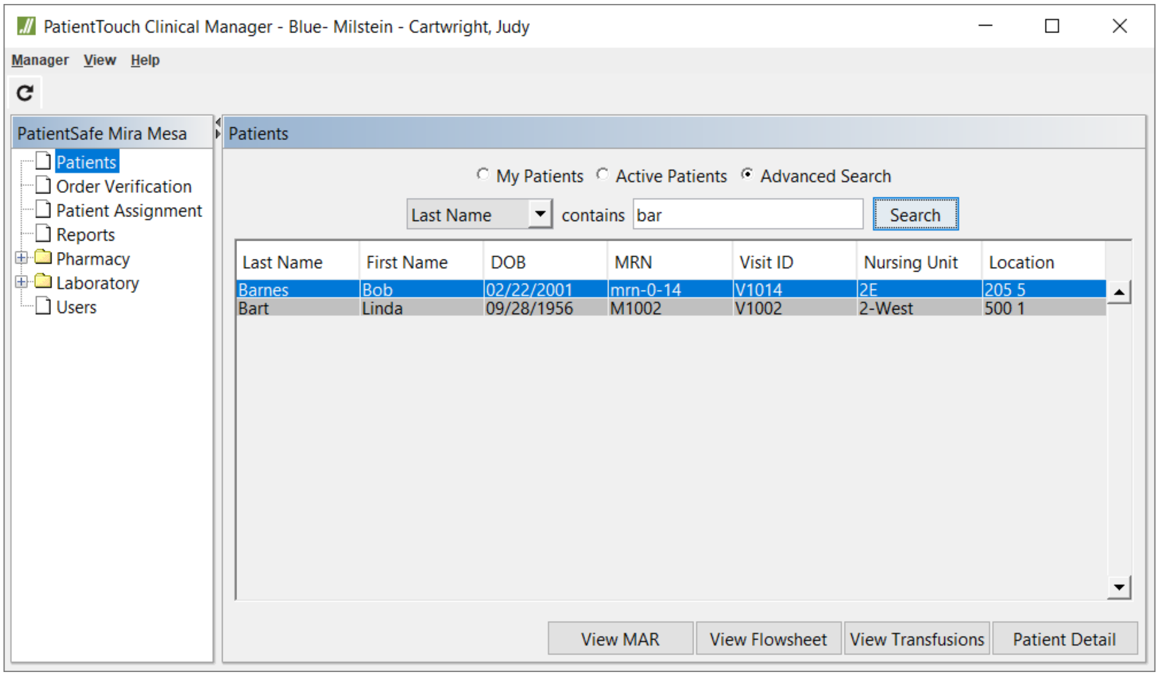
3. Enter text in the Contains field. For example: Enter "ril" (without quotation marks) to find a patient with the last name of Riley.
4. Click **Search**. The patient (s) that meet the identified criteria are listed.



Discharged Patients

The records of patients who are discharged, or the previous visits of an active patient, are displayed with a shaded background to distinguish them from active patients.

In the example below, *Linda Bart has been discharged so her name displays with a shaded background*.

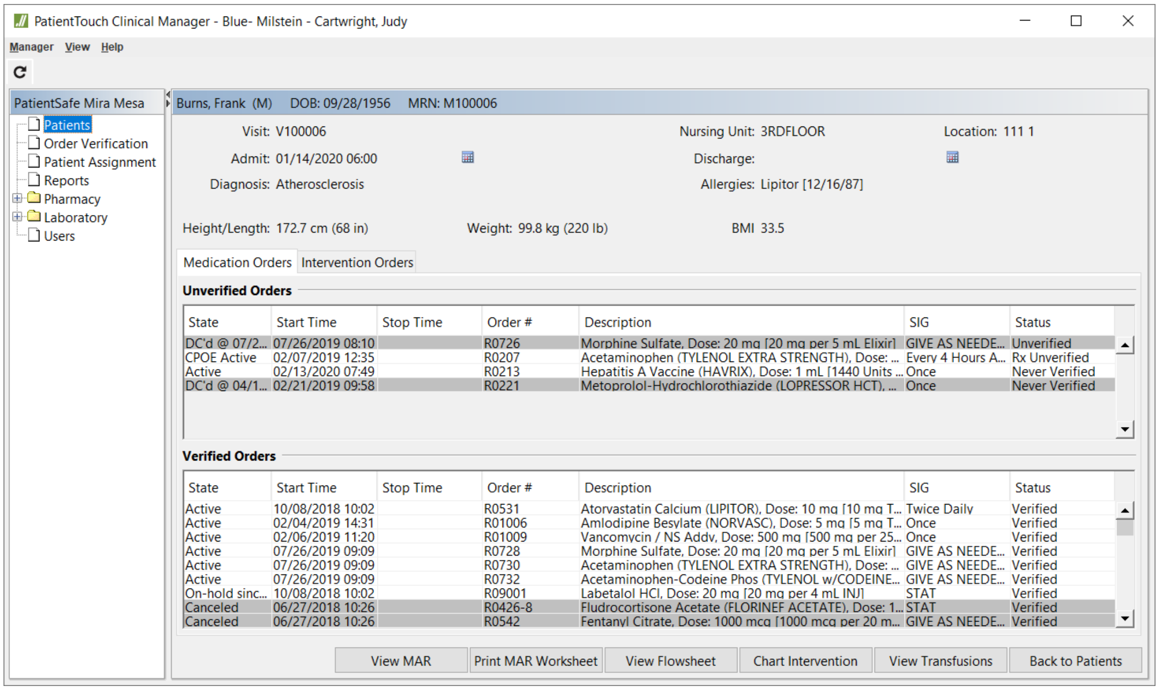


Patient Detail

If your hospital is not configured for the Medication Administration module, you will not see the Medication Orders tab.

To open a window with detailed information for a specific patient, perform the following steps.

1. Select **Patients** to open the *Patients* screen.
2. Select a patient from the list of **My Patients** or the list of **Active Patients.**
3. Click on a patient and choose one of the following options depending upon your privileges:
   - Click **View MAR** to see the online MAR for this patient.
   - Click **View Flowsheet** to see the Flowsheet(s) for this patient.
   - Click **View Transfusions** to see the Transfusion Record for this patient.
   - Click **Patient Detail** to see more complete demographic information for this patient (or simply double-click on the patient's name, which will take you to the **Patient Detail** view). **Patient Detail** displays in the screen capture below.



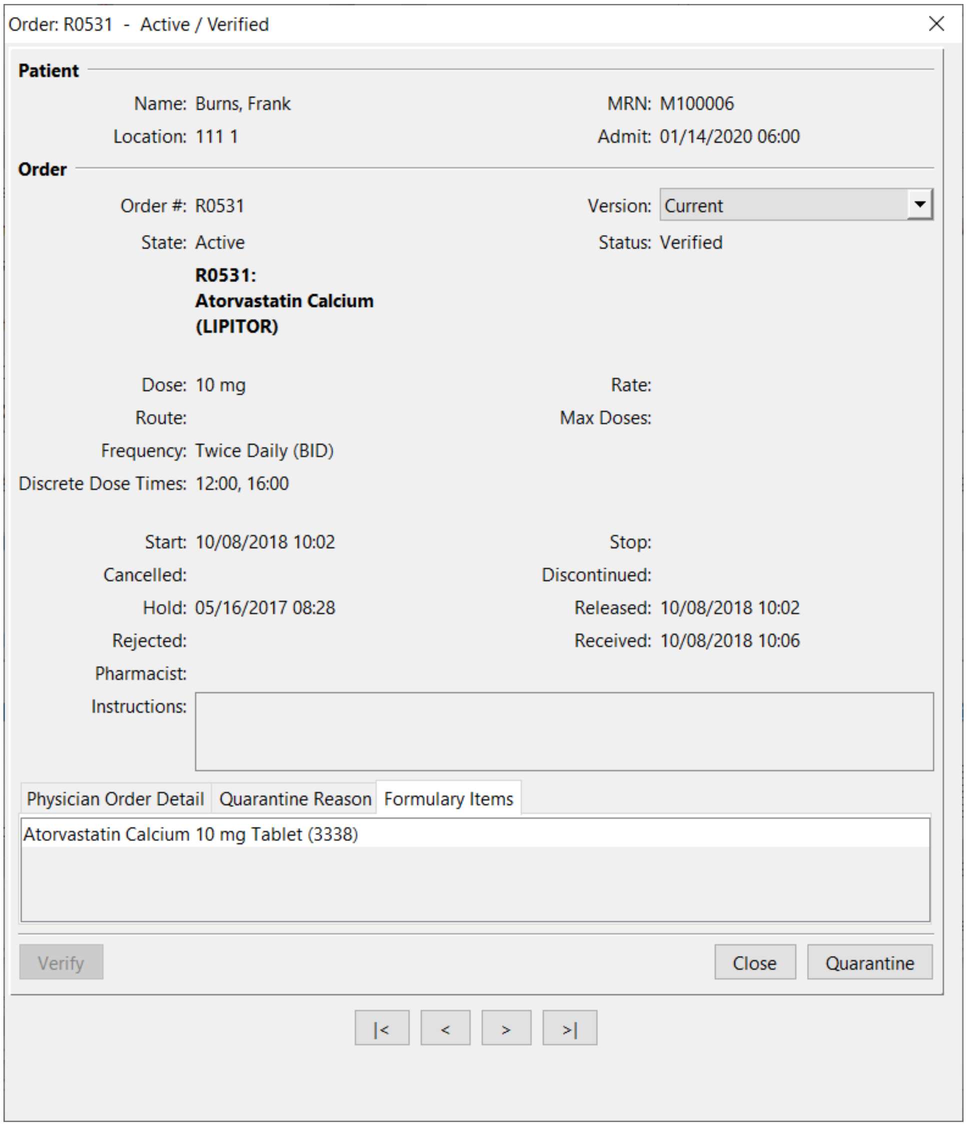
If your hospital is configured to use order verification, the *Patient Detail* window displays the list of unverified and verified orders.

If the hospital does not use order verification, the *Patient Detail* window displays the list of orders and their status (Active, Discontinued, Stopped, etc.).

If you have the Manage Patient Info privilege, you can edit the patient admission/discharge dates by clicking on the calendar icon that displays next to the associated field.

View Order Details

To view the specific details of an order, double-click on an order in the *Patient Details* window. If Order Verification is enabled for your facility, the *Order* window includes options to **Verify** or **Quarantine** an order.

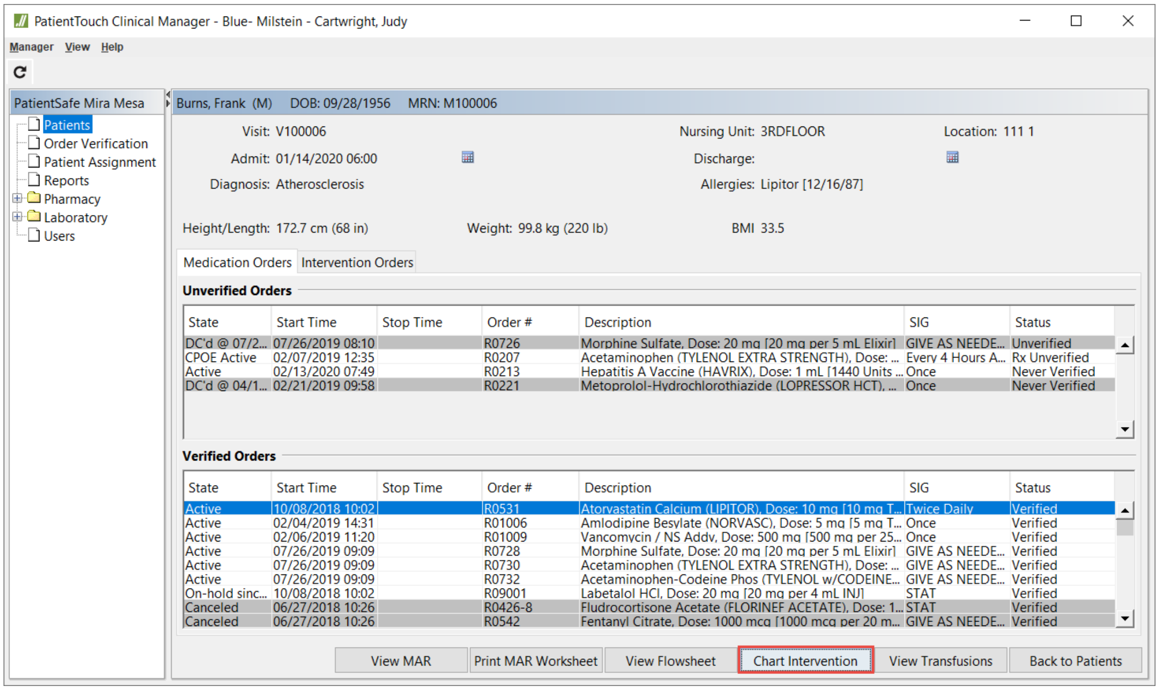


If Order Verification is not being used at your facility, the **Verify** and **Quarantine** options are not available in the *Order* window. The arrows at the bottom of the window allow you to page through all the orders for the selected patient. Patient orders are sorted by number.

Chart Intervention

Use the Patient Detail screen to chart a patient-specific intervention.

1. Click **Chart Intervention**.

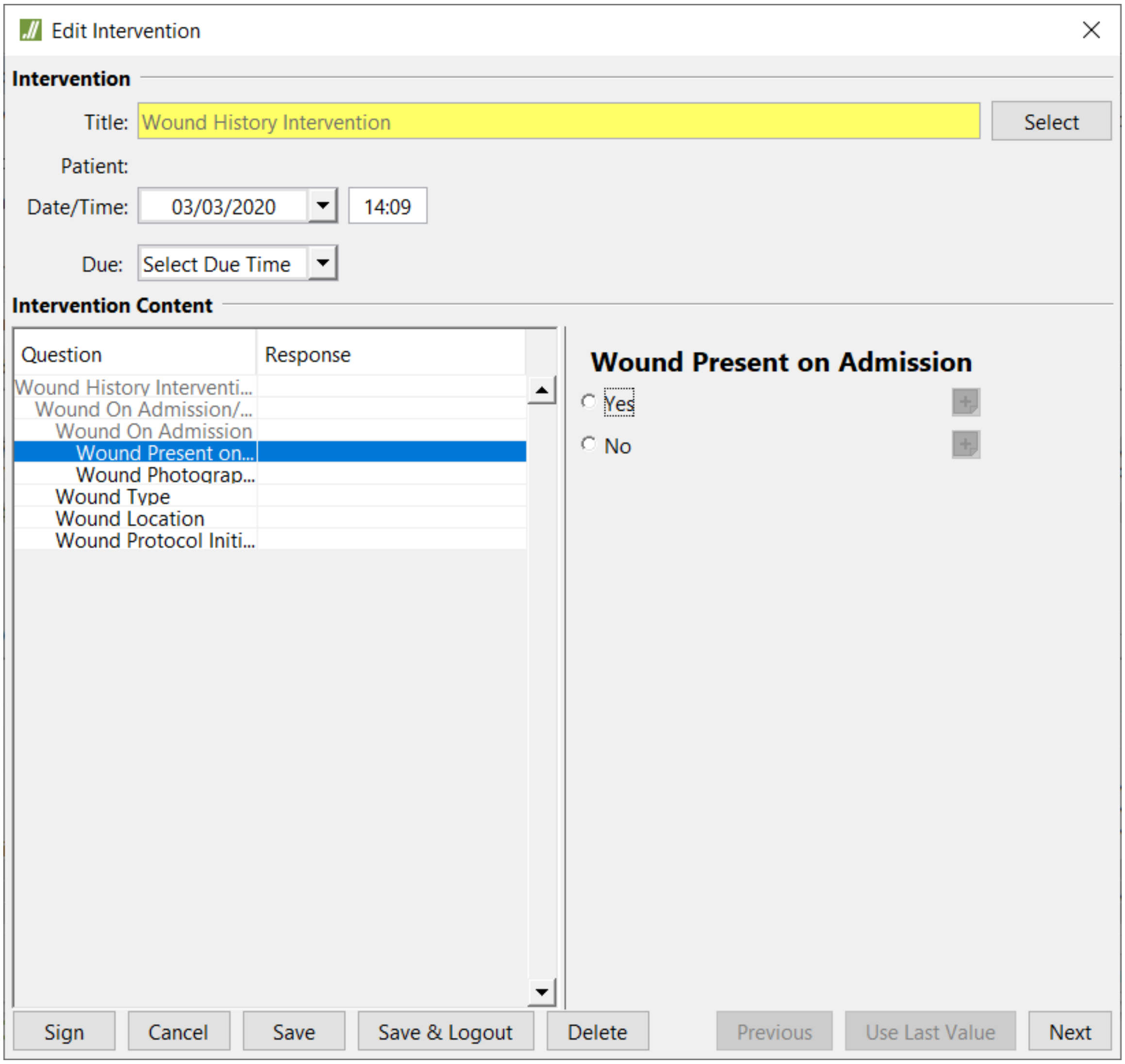


2. Click **Select** and choose an intervention from the list.

If you have Intervention Scheduling configured for your facility and you have the necessary privileges, you first need to assign these interventions to the patient using the Intervention Orders tab on the Patient Detail screen. If you do not have Intervention Scheduling configured for your site, then you need to assign these interventions to the nursing unit under Configuration>Nursing Units.

3. Enter the values for the intervention using the fields on the right hand side of the screen.
4. Use the following table to complete the intervention:

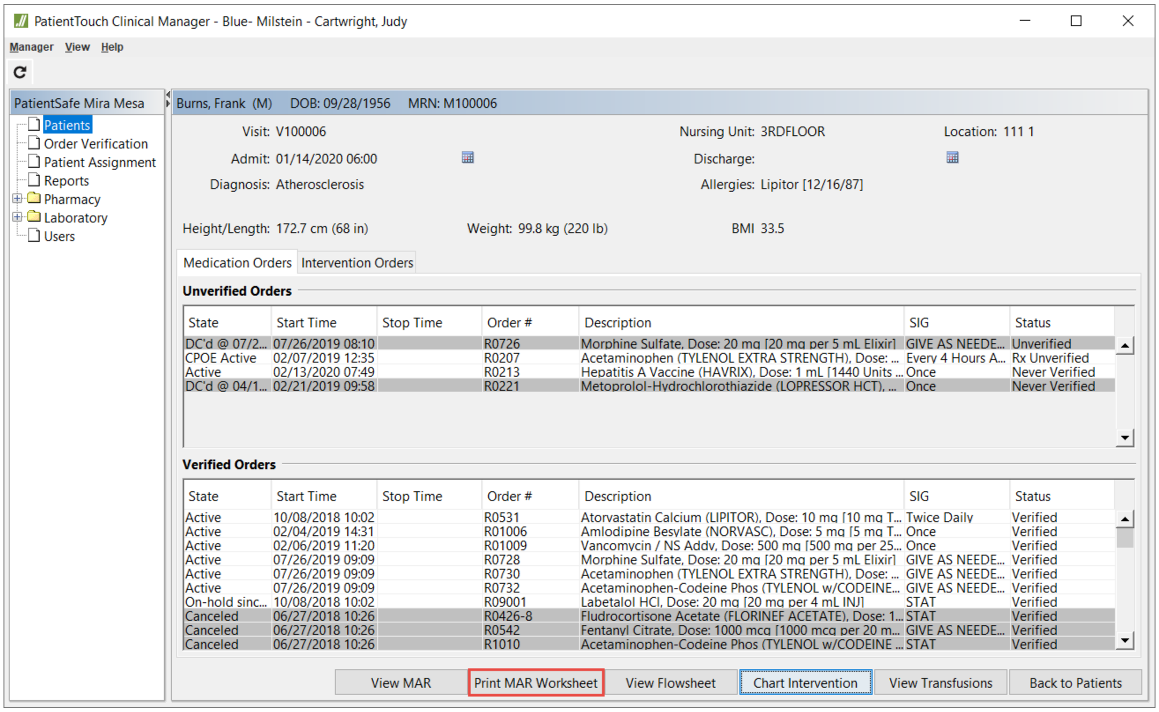
Functionality	Description
Sign	Clicking Sign publishes user documentation to the patient flowsheet and closes the Edit Intervention window. Users will typically use this button when the intervention is complete.
Cancel	Clicking Cancel exits the Edit Intervention window without saving or publishing documentation.
Save	Clicking Save adds in progress documentation to the Unfinished Interventions worklist and does not publish documentation to the flowsheet or interfaced systems. The user remains in the System Manager and is not logged out.
Save & Logout	Clicking Save & Logout adds in progress documentation to the Unfinished Interventions worklist and does not publish documentation to the flowsheet or interfaced systems. The user logged out of System Manager. All saved interventions are accessible from the System Manager>Unfinished Queue.
Delete	Delete is available for saved and signed interventions. If the intervention is signed and published to the flowsheet, the user may delete the documention. However, the deleted documentation is struck through on the printed flowsheet report and the deletion is indicated by an asterisk (*) on the online flowsheet. If the intervention is saved, the user may delete the documentation and this will remove it from their Unfinished Interventions worklist and will not be published to the flowsheet or interfaced systems.



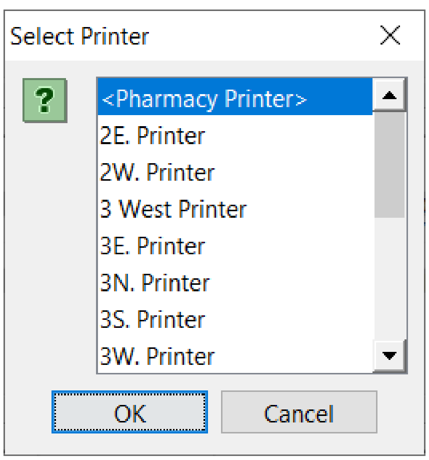
Print MAR Worksheet

Use the Patient Detail screen to print the MAR Worksheet. This worksheet is a list of all medications that have already been administered to this patient, as well as medications that have yet to be administered. Caregivers may want to use this worksheet for their daily shift.

1. Click **Print MAR Worksheet**.



2. Select the desired printer from the list.
3. Click **OK**.



Order Verification

The PatientTouch System can be set up to require order verification. Respiratory therapists with order verification privileges see only RT orders in the *Verification* window. Nursing caregivers see only nursing medication orders, unless the caregiver also has the privilege for verifying RT orders.

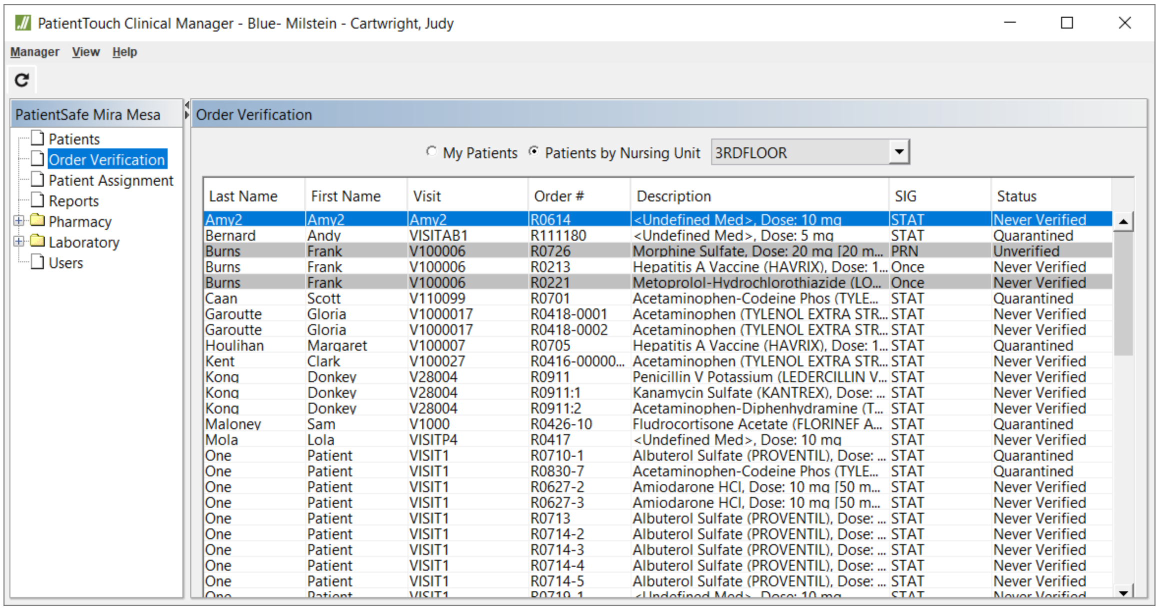
If configured at your hospital, you can verify and/or quarantine orders using the PatientTouch application. For information on using the PatientTouch application to verify and quarantine orders, refer to the *PatientTouch Medication Administration Module User Guide*.

Verify an Order

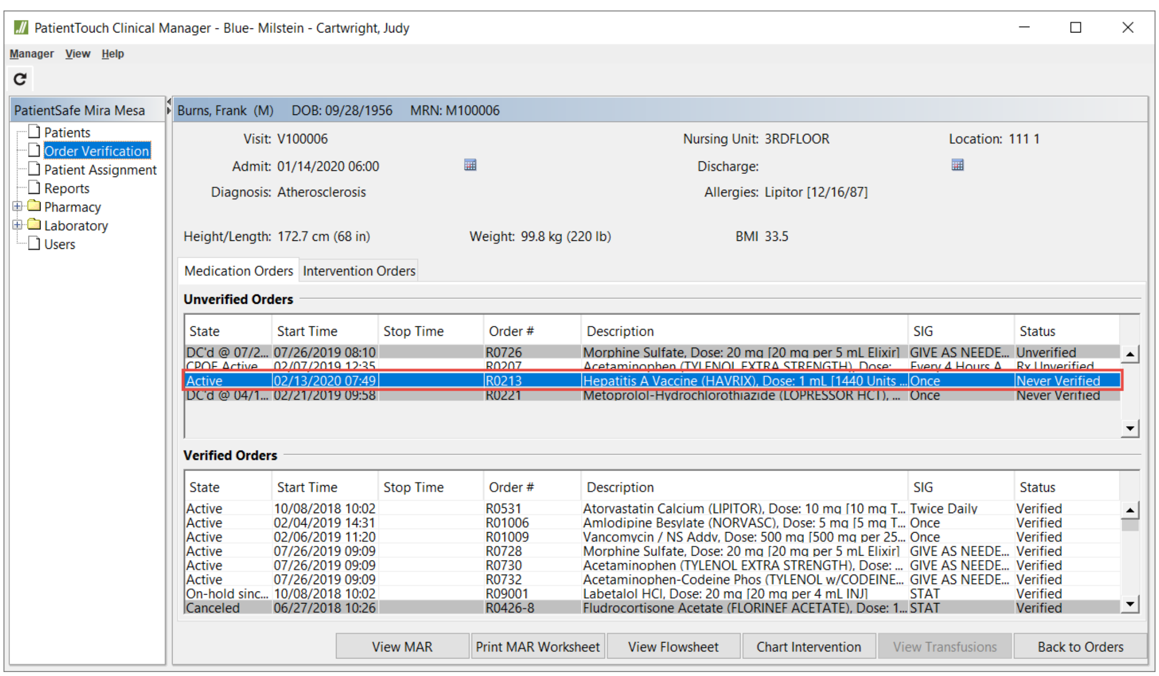
If you have the privilege to verify orders, an Order Verification option appears in the Clinical Manager.

To verify orders from the *Order Verification* window use the instructions below:

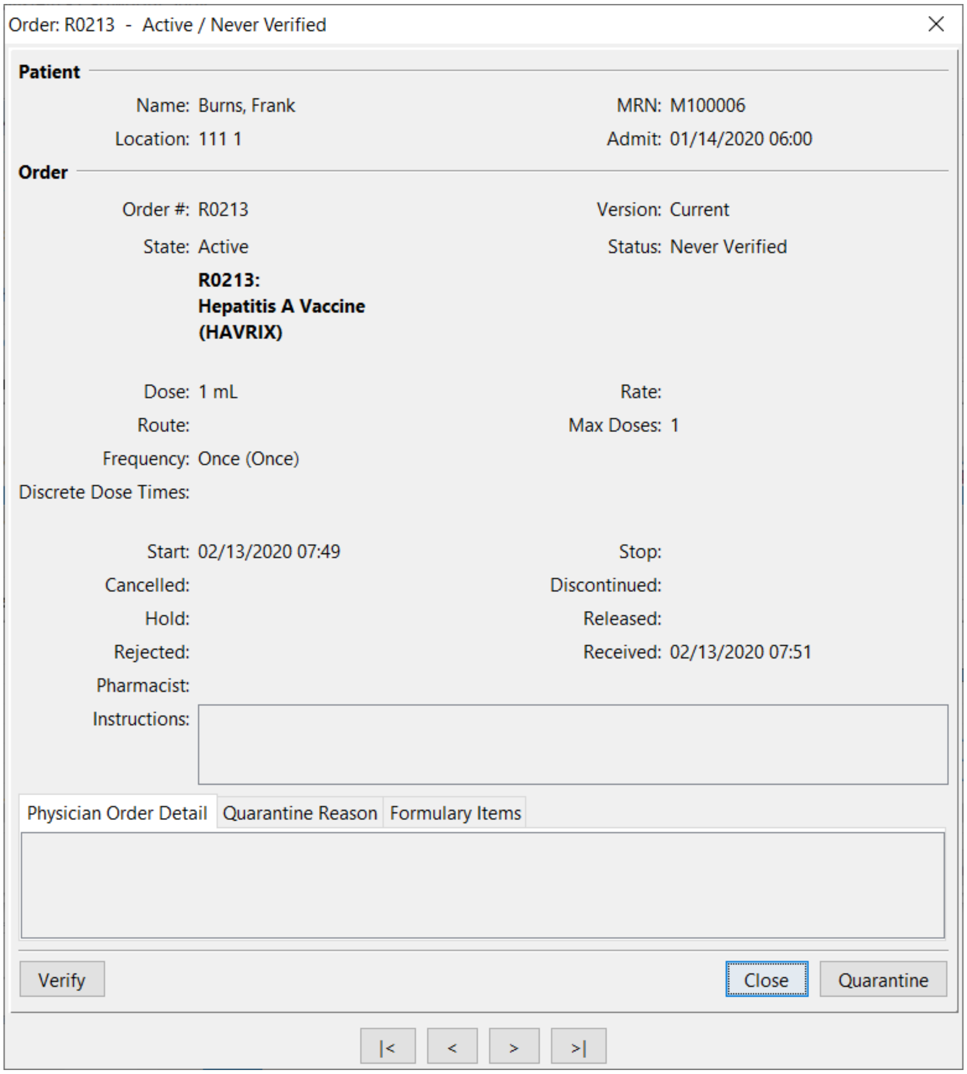
1. Select **My Patients** to view only those patients assigned to you.
2. Or, select **Patients by Nursing Unit**, and select a nursing unit from the drop down menu.



3. To verify an order, you can also open up an order directly from the *Patient Detail* window by double-clicking any of the orders listed.

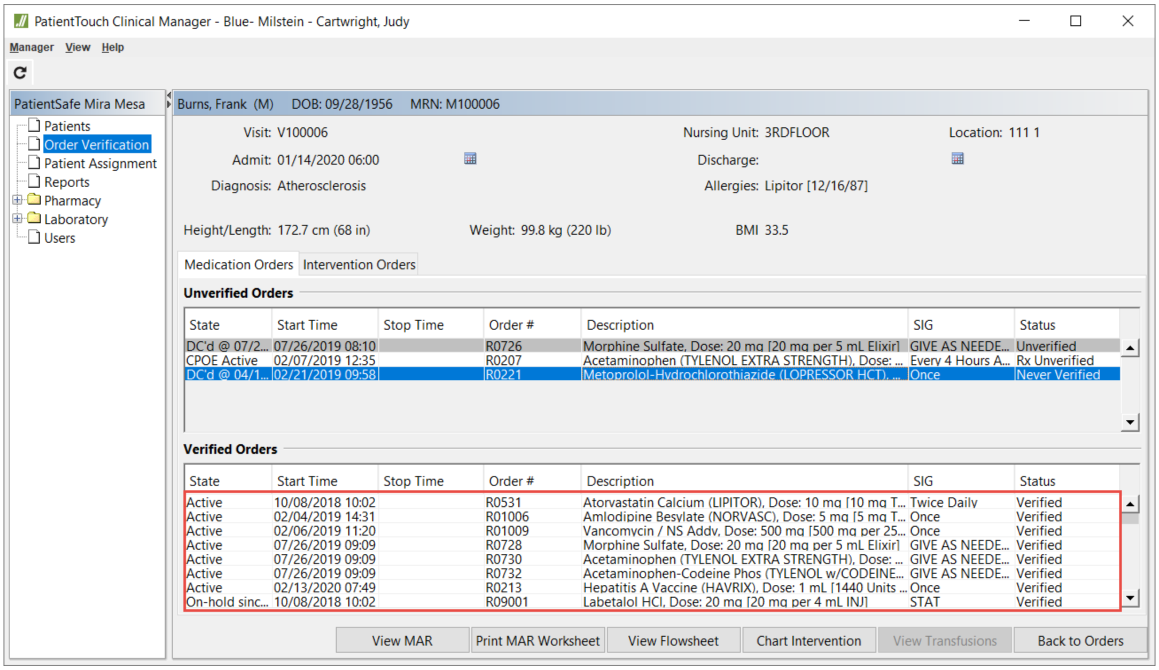


4. Review the order, and if the order is correct, click **Verify**.
5. If the order was not entered correctly, click **Quarantine**. When prompted, enter the reason you are quarantining the order. After an order is quarantined, the system notifies the pharmacy so a pharmacist can investigate the possible discrepancy.



The nurse's initials who verified or quarantined the order will display on the online MAR, and both the name and initials will display on the printed MAR.

The Order Details screen remains displayed so you can verify all unverified orders for the patient. When you have verified or quarantined all orders, the Order Detail screen closes and the Patient Detail screen remains. The orders you have verified will be in the Verified Orders list.



The order status displays in the *Patient Detail* and *Order Details* window as follows:

- Never Verified: A new order that has never been verified or quarantined.
- Unverified: The order was previously verified or quarantined and then updated or un-quarantined.
- Quarantined: The order is quarantined.
- Verified: The order was administered.

If an order status is never verified, unverified or quarantined and the caregiver scans the medication, a reason is required to override the needed verification. Administering quarantined orders places the caregiver in the “Order Not Found in System” workflow.

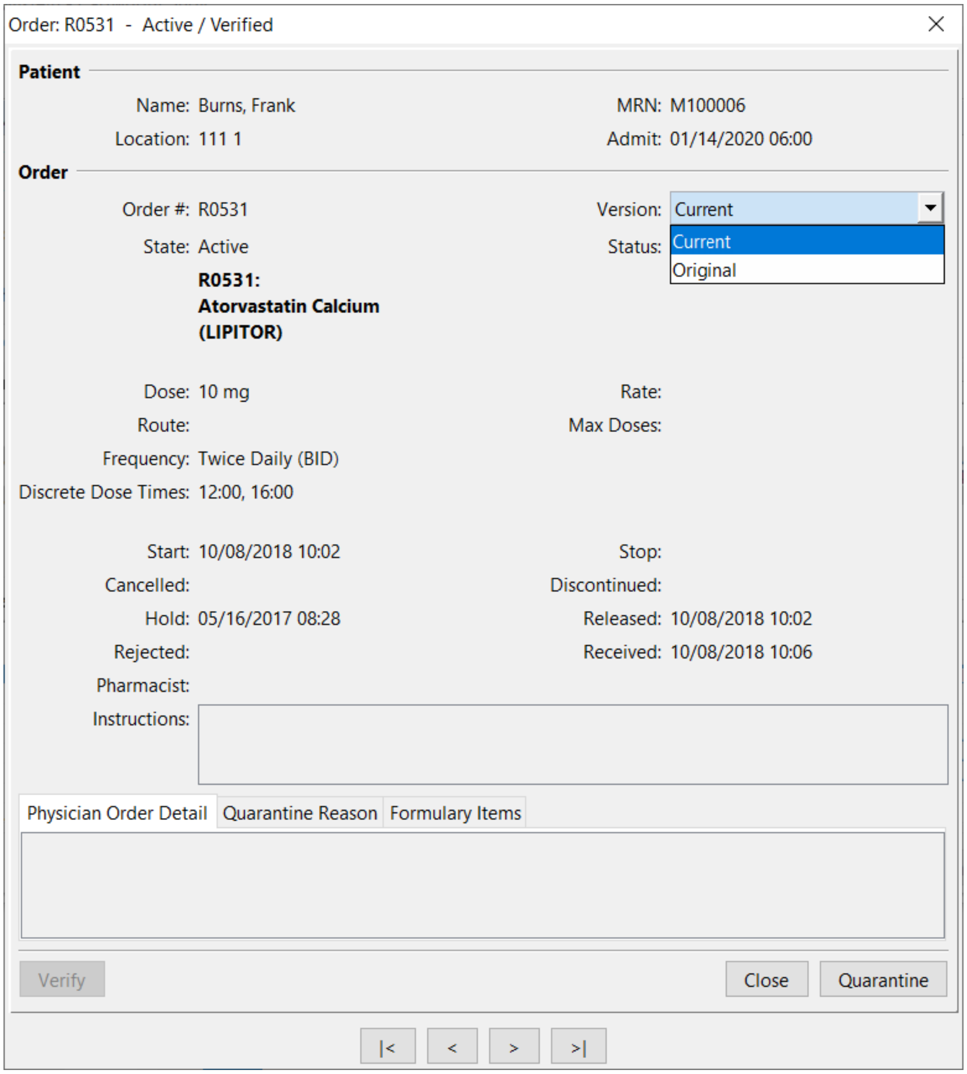
Order Updates and Order Versions

If your pharmacy enters changes or updates orders (meaning that the Order Number is the same, but the details have been updated), you can view both the current version and prior versions in the *Order* window using the **Version** drop-down list.

Only the current version of the order requires verification but prior versions are accessible for review.

The latest or most current version is listed by default.

If the order was updated once, you can view the Original version. If the order was updated more than once, each additional version is shown by the date and time of the order update.



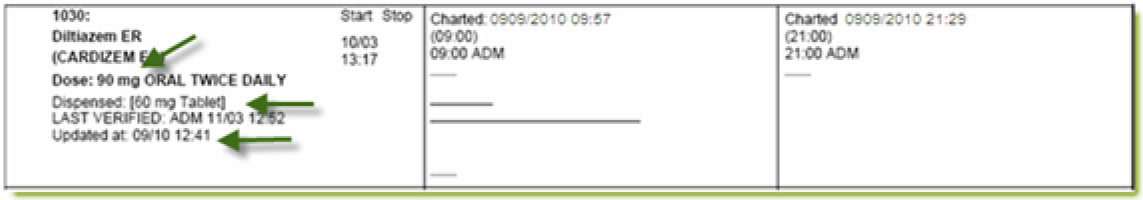
View Order History

Order history also impacts the online MAR and other MAR reports. After an order is changed, a new version appears on the online MAR, MAR Worksheet, and printed MAR report for the day on which the change occurred. However, only the current order version carries over to the next day's MAR.

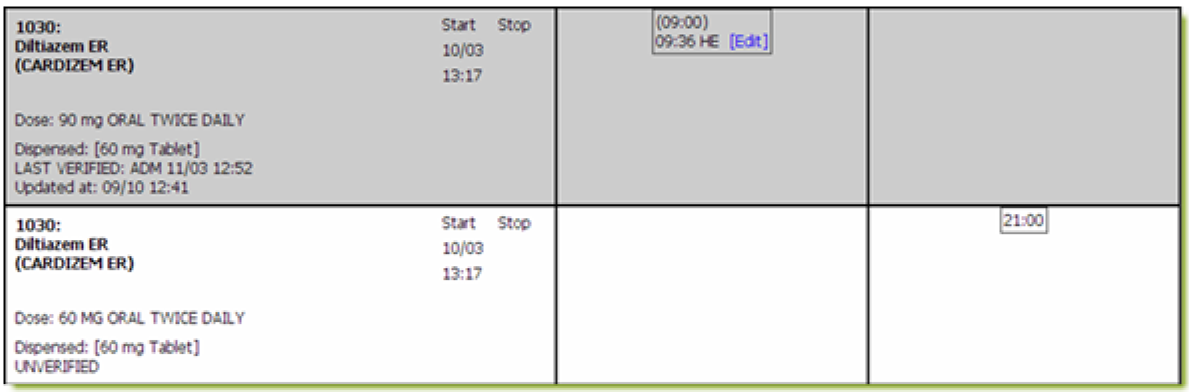
The PatientTouch application always utilizes the current version of the order. As soon as a new version is received in the PatientTouch System, past versions become inactive. If a current (new) version has a future start time, the order is inactive until that date/time.

Order History Example

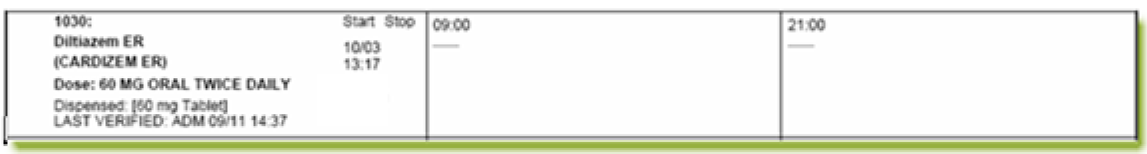
Example 1: A patient has an order for Diltiazem BID at 09:00 and 21:00 that was started in the past and the dose is changed from 90 mg to 60 mg but the schedule is unchanged. The 09:00 dose was given and the order was then updated at 12:41.



On the day the order is changed, the online MAR, MAR Worksheet and printed MAR all show the original order (grayed out) and the updated order as follows.

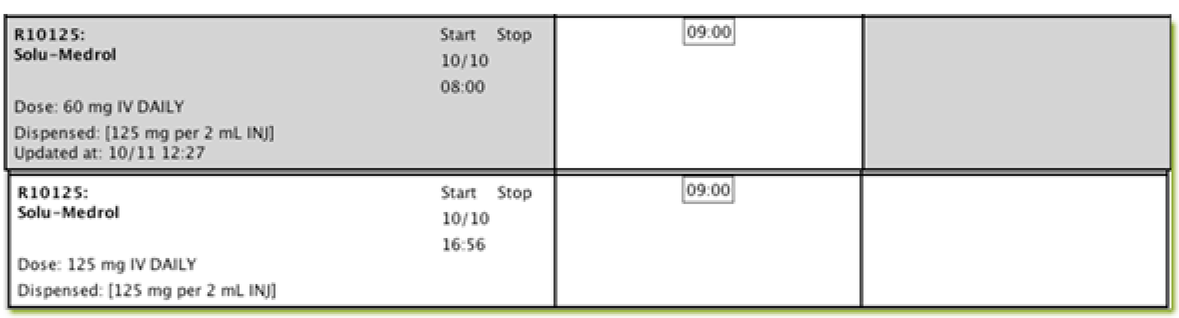


The day after the order was changed, only the new order appears:



Example 2: The patient has an order for Solu-Medrol, daily at 09:00 that was started in the past. The order was updated to change the dose from 60 mg to 125 mg with no schedule change. However, the change occurred at 16:56 and the 09:00 dose was either not administered and/or not charted at the time of the change.

The online MAR will show both versions of the order after the change is made:



However, both 09:00 doses are not due. The current version (125 mg) 09:00 dose is due. The original version (60 mg) 09:00 dose is available for charting, in case the caregiver already administered the 60 mg dose without using PatientTouch.

If necessary, the caregiver can chart the original orders 09:00 dose manually in the Clinical Manager. This dose is not available using the PatientTouch application. After either the original or current 09:00 dose is charted, the other 09:00 dose will no longer be displayed.

MAR and MAR Worksheet Grouping

After an order is updated, the order versions appear on the printed MAR and MAR Worksheet reports as follows:

The original version is always listed first on the MAR and is grayed out. The updated version is displayed beneath the original version.

Order Not Found in System administration version is displayed below the current version.

If a medication name is changed and the MAR reports are sorted alphabetically, the current version's medication name is used for sorting all the order versions.

If a SIG code type is changed (for example, the frequency changes from "PRN" to "Scheduled"), the current order's SIG code type determines the section in which all orders are displayed.

Canceled Orders

If the Pharmacy cancels an order, it does not display on the MAR unless doses were documented against the order. However, for reference, canceled orders are displayed in the Patient Detail window. Canceled orders do not require clinician verification and they are highlighted in grey to make it visually clear that they have been canceled.

Working with Online MARs Overview

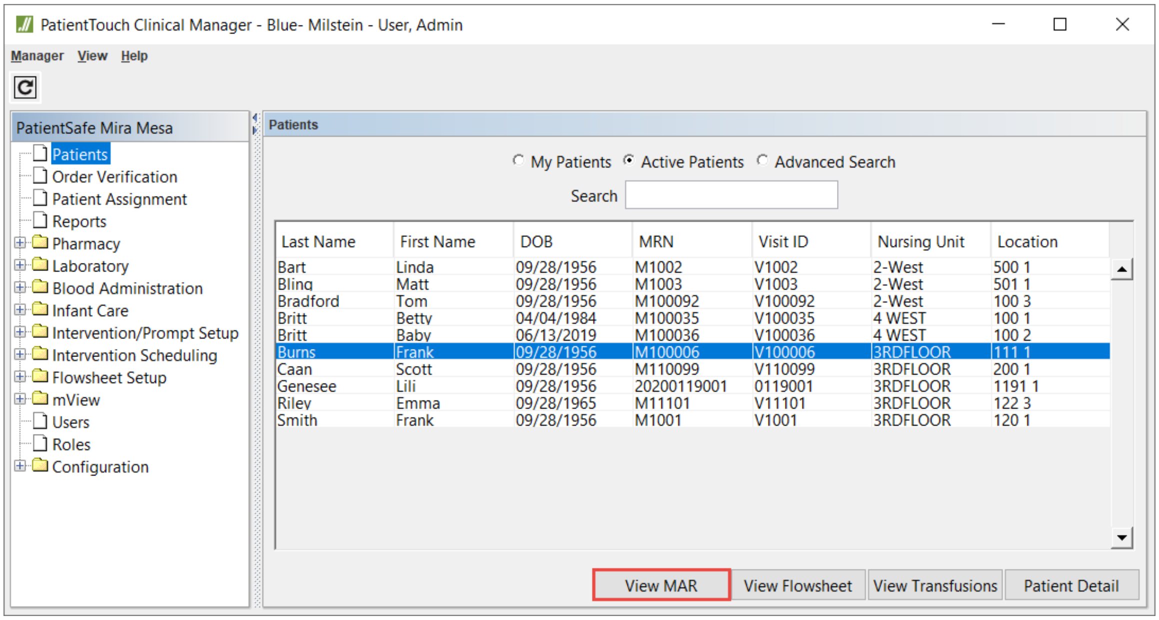
The online MAR is created as orders are entered and received from the pharmacy system. The online MAR contains both nursing and respiratory therapy medication orders.

As caregivers administer medications, the information is documented and visible on the online MAR. Users with the appropriate privileges can review and edit the online MAR when necessary. Information displayed in the online MAR subsequently appears in printed reports.

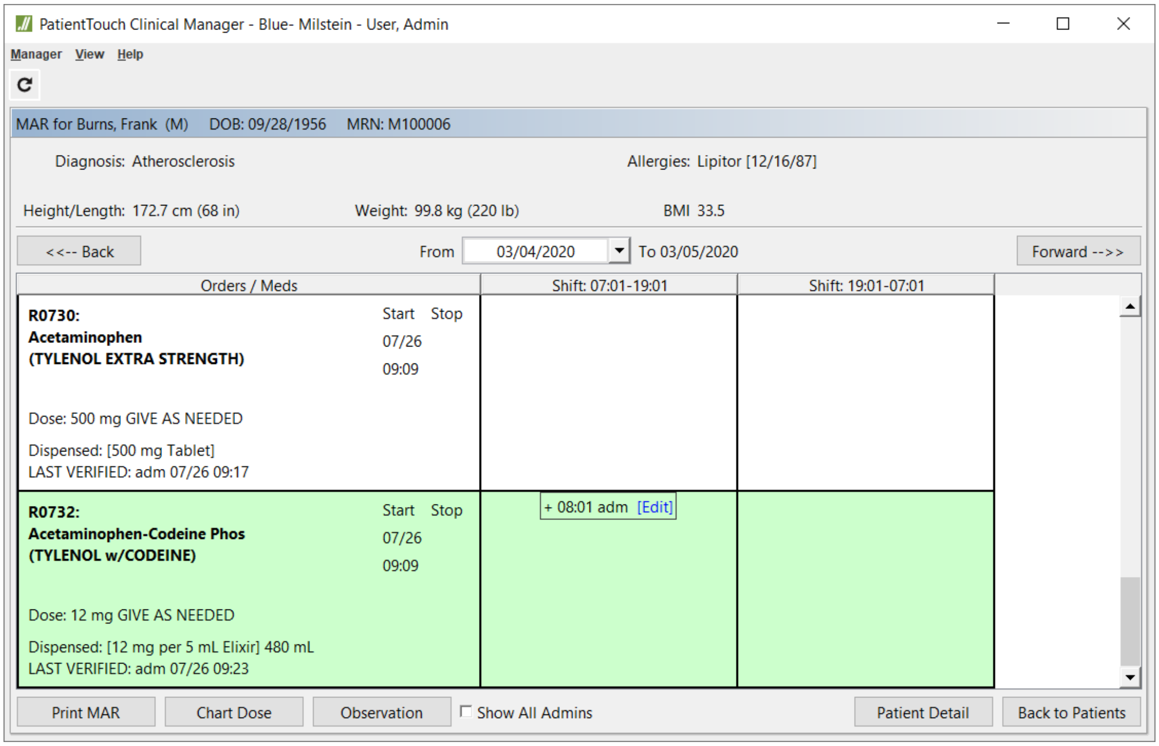
When comments/instructions get sent with a specific dose of an order (as opposed to being sent with the order message), the PatientTouch System displays this information on PatientTouch and on the online/printed MAR.

View the Online MAR

1. To view the online MAR, select a patient and click **View MAR** from the *Patients* or *Patient Detail* window.



2. From the online MAR, perform any of the following activities, as necessary:
   - Click **Print MAR** to print the MAR for this patient.
   - Click **Chart Dose** to add a new medication administration.
   - Click **Observation** to add a clinical observation.
   - Select the **Show All Admins** checkbox to also display canceled activities in the MAR.
   - Click **Patient Detail** to return to the *Patient Detail* window.
   - Click **Back to Patients** to close the MAR and return to the patients listing.
   - Click the Edit link in the box to change a specific administration.



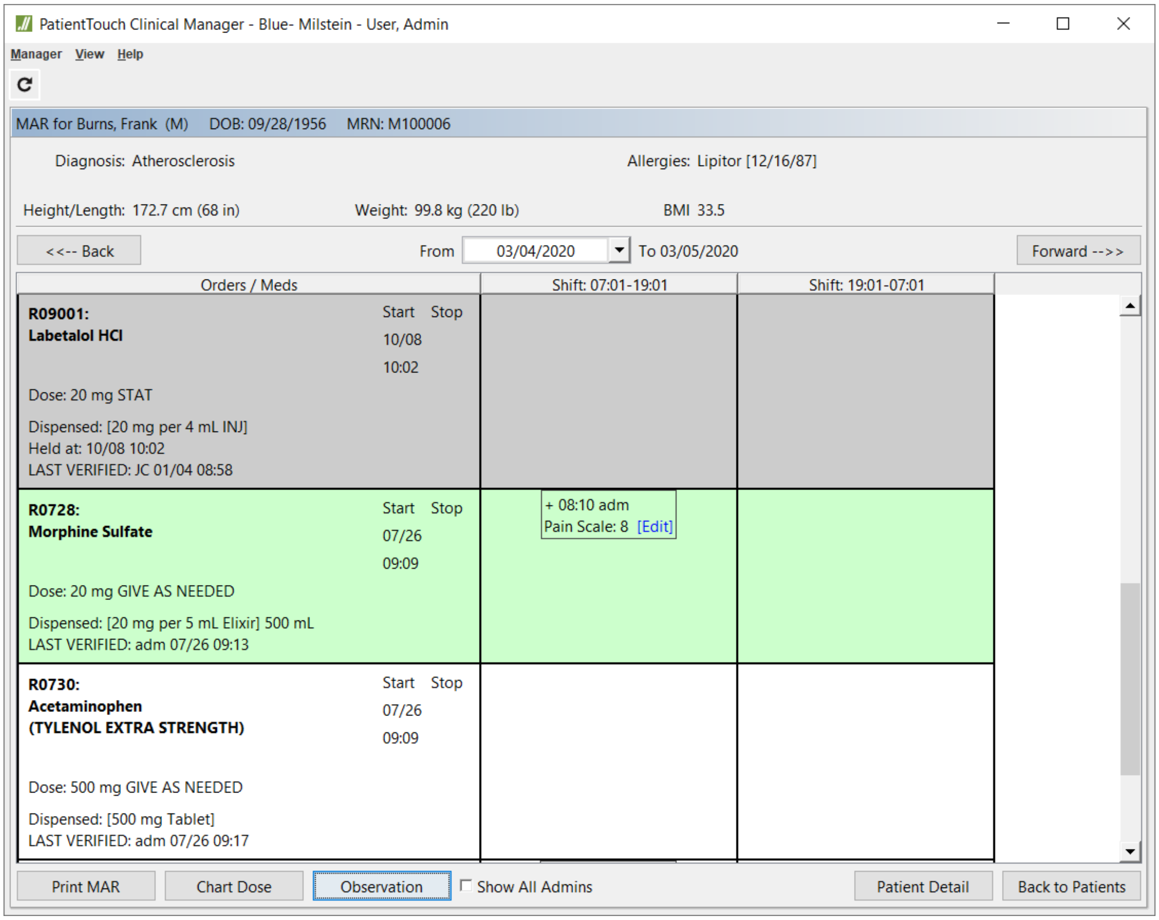
Edit a Medication Administration Online

When you edit a MAR online, each order where you changed an entry is displayed with an asterisk (*) in the documentation box to indicate that the information was modified.

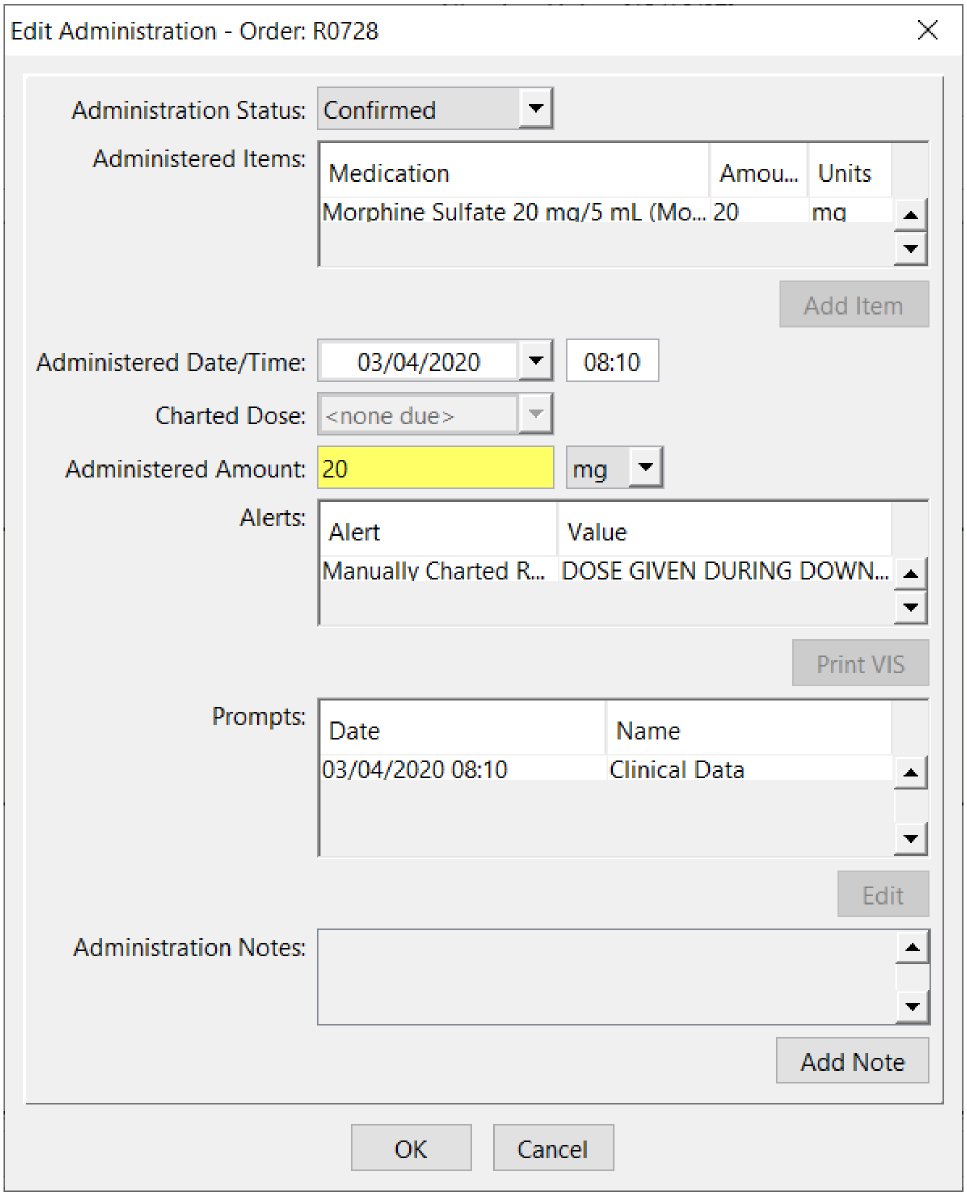
The printed MAR will not include the asterisk; but the edited text will be indicated by strikethrough (for example, ~~edited text~~).

To edit a MAR in the Clinical Manager:

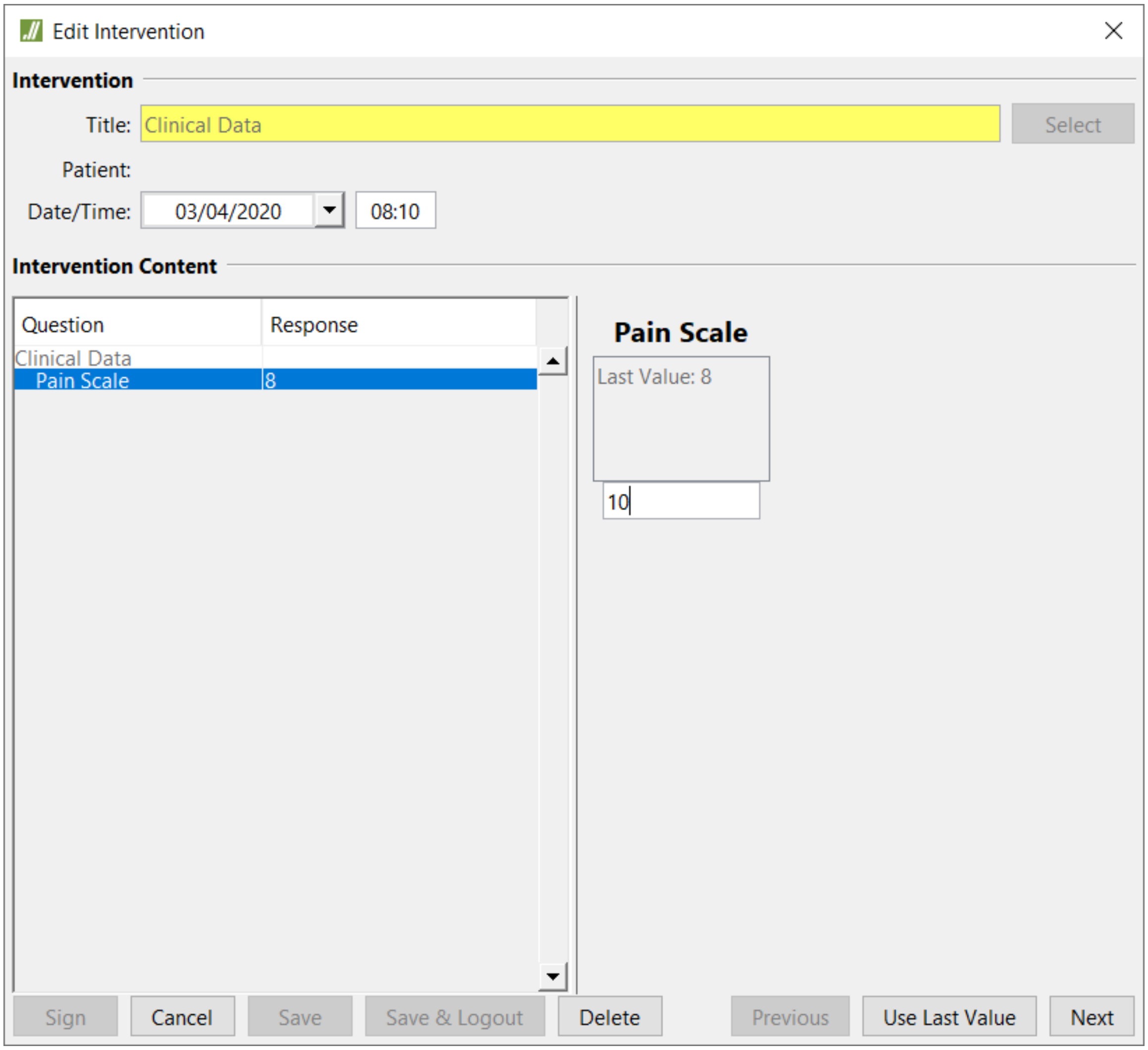
1. Open the *Patients* window and select a patient.
2. Click **View MAR** in the toolbar to display the online MAR.



3. Click **Back** or **Forward** to view the MAR for the previous or next day. You can edit your own entries in the past but cannot edit those made by another person, unless configured at your facility to include that privilege. Note that a supervisor with the required privilege can edit another person's entries.
4. To edit an existing administration time, amount, or enter a note, click the [**Edit**] link in the dose box you want to update.



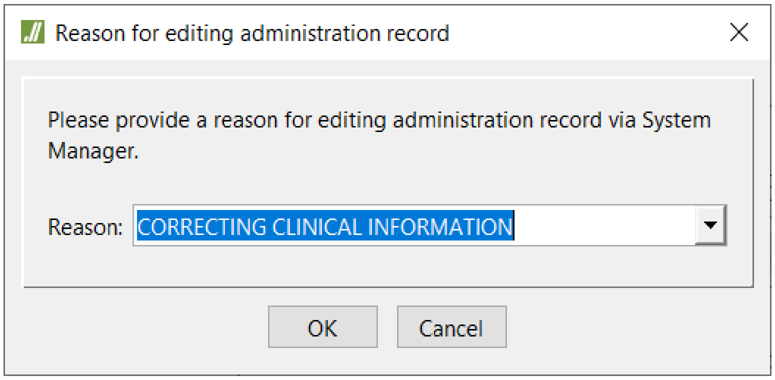
5. In the **Administration Status** drop down list, select **Confirmed**, **Not Given**, or **Canceled**. If **Not Given** is selected, the caregiver will need to select a reason from the list that displays.
6. In the Administered Date/Time field, click the arrow next to the date to display a calendar from which you can select the date. Enter the time in the adjacent field.
7. In the Charted Dose field, select the correct date and time from the drop down selection for the dose you are charting for.
8. In the Administered Amount field, edit the dosage amount administered, if necessary.
9. In the Prompts area, to add or edit clinical prompt information, select Clinical Data and then click **Edit**.



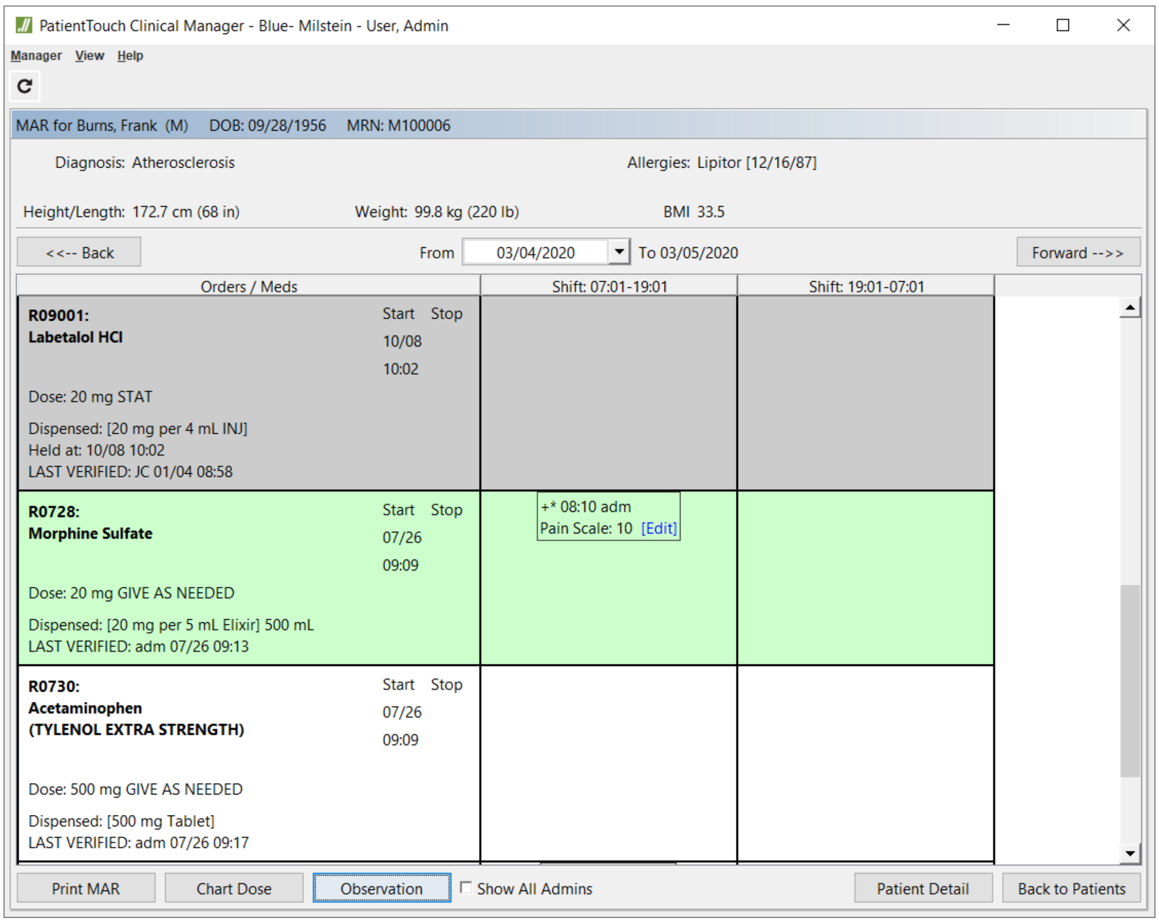
10. Edit the response by clicking in the text columns to the right.
    - Click **Next** on the *Edit Intervention* window.
    - Click **Sign** on the *Edit Administration* window when your changes are complete.
    - Click **OK** on the *Edit Administration* window to save your edited information.
11. When prompted, enter a reason for the edit(s).

Any reason(s) entered for the edit(s) WILL be part of permanent documentation.

12. Click **OK** to save your edited information.



The online MAR reappears with an asterisk (*) next to the administration to indicate it was edited.



When you have finished viewing and/or editing the MAR, click **Patient Detail** or **Back to Patients**.

Manually Document a Medication Administration

You can document a medication administration online for both ordered and unordered medications. If you document an unordered medication, you can choose the formulary items from a list.

When the Order Not Found Alert Type is set to Stop Administration, the caregiver cannot

chart a dose from the Clinical Manager without first selecting an order.

Caregivers can document or edit administrations online, but only if their assigned role includes the Document/Edit Patient MAR privilege.

The medication to be documented is an RT medication based on the order's SIG code or the pharmacy's formulary setting that permits RTs to administer unordered RT medications.

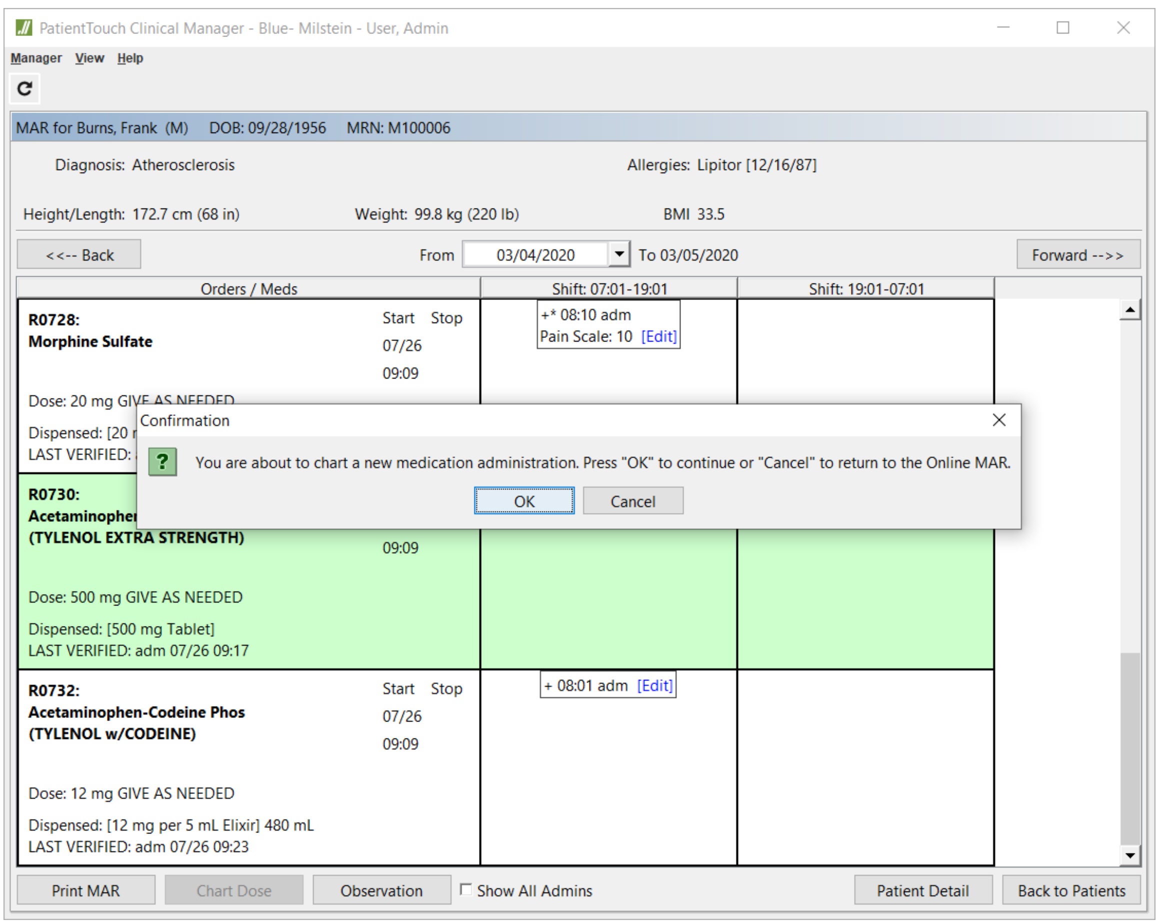
Refer to Ordered Medication and Unordered Medication for more information.

Documenting an administration online should only be used per your hospital policy. For example, it may be allowed during system downtime. If you document an administration online, a plus sign notation (+) appears next to the entry.

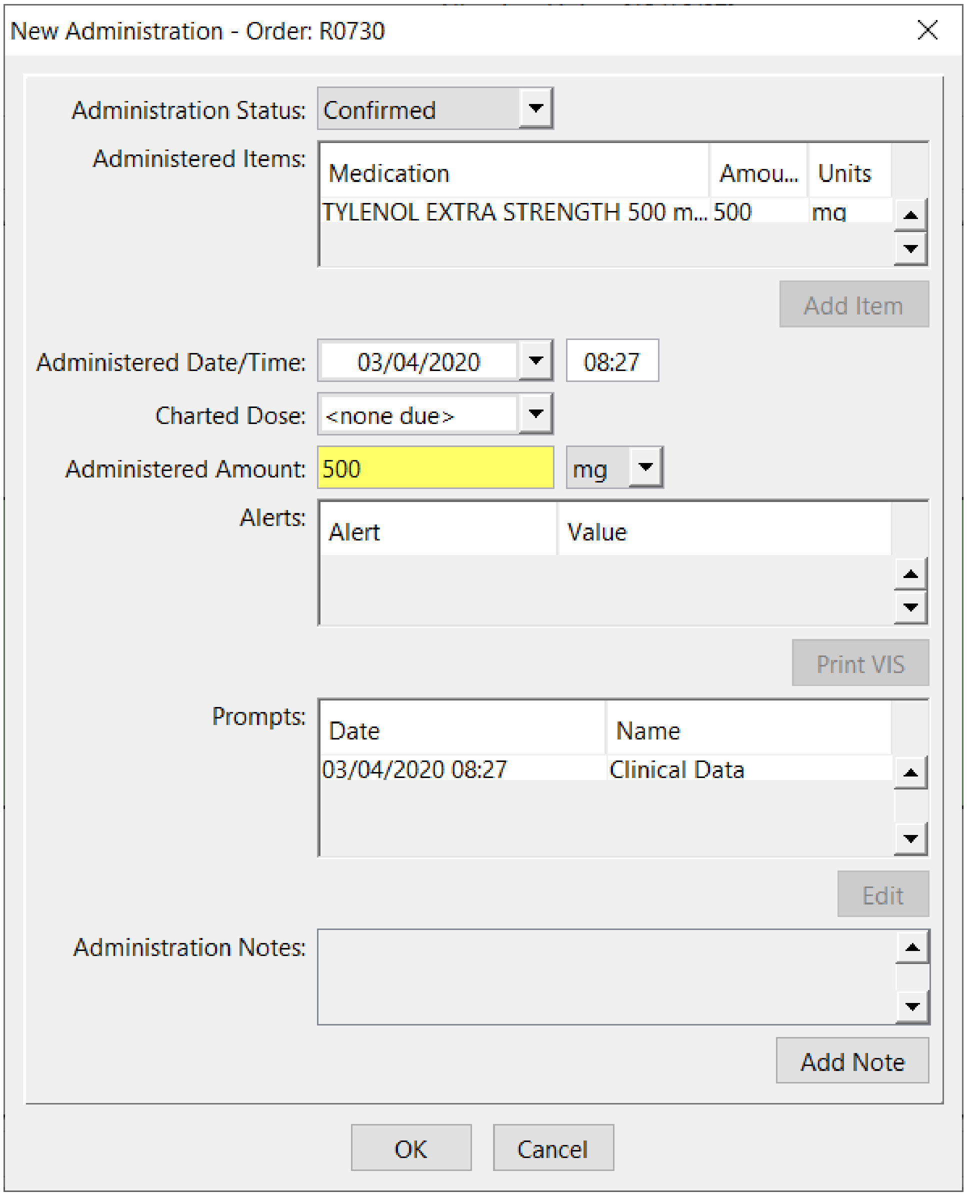
Ordered Medication

To add a new administration to the online MAR for an ordered medication:

1. Open the *Patients* window and select a patient.
2. Click **View MAR** to open the online MAR that provides a detailed record of medication orders.
3. Select the order in the Orders/Meds column. When selected, the row turns green.
4. Click **Chart Dose**. A confirmation message appears.



5. Click **OK**.



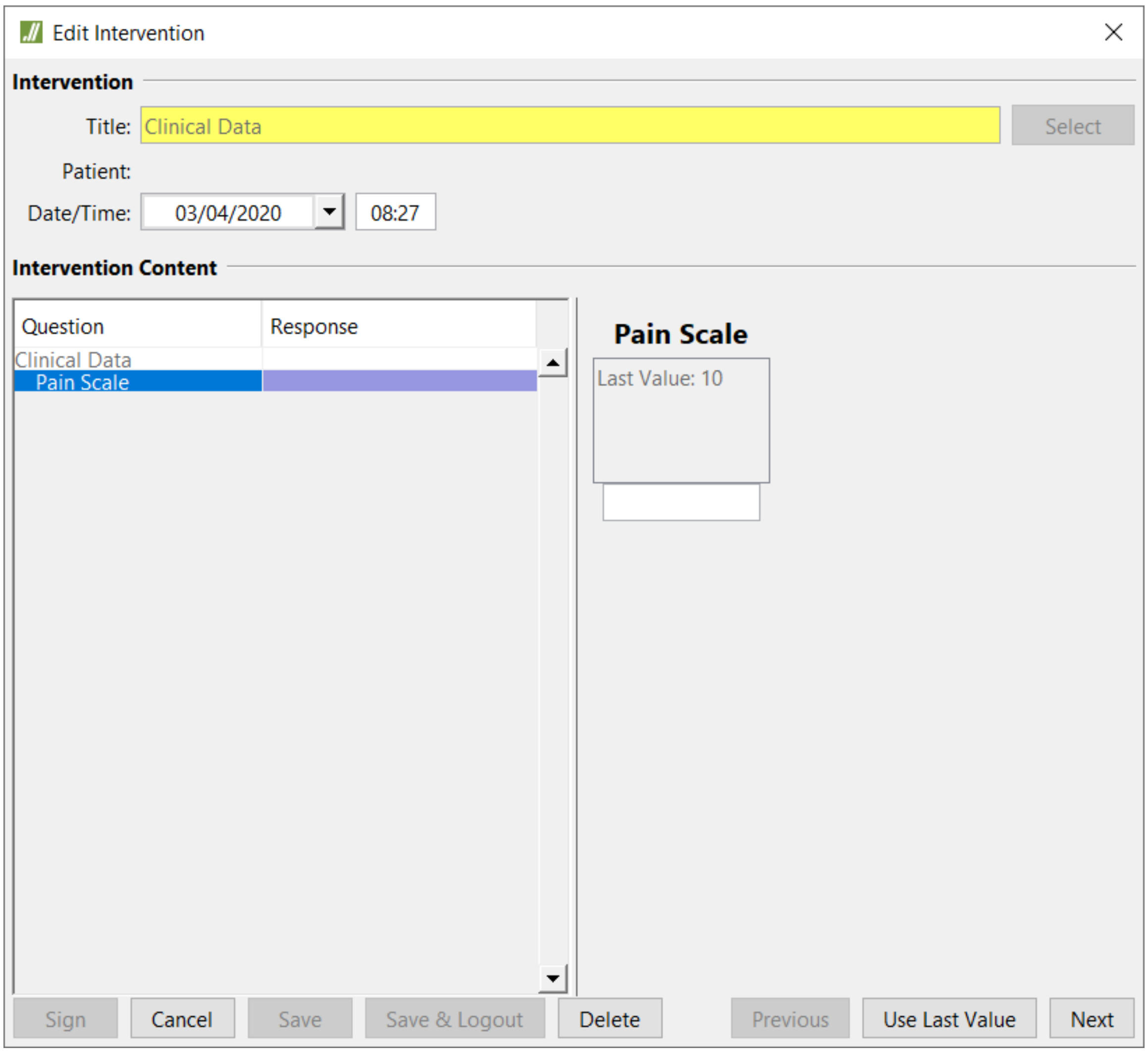
6. Then, use the descriptions below to complete the screen:

- **Administration Status**: Select **Confirmed** or **Not Given**. When **Not Given** is selected, users will have to select an override reason from the list that displays for not giving the ordered medication. If the specific override reason is configured to Allow Annotations, users should be able to free text in additional information.
- **Administered Date/Time**: Select the drop down list and select the appropriate date from the calendar that displays. In the field to the right, enter the time for which the event occurred.
- **Charted Dose**: Select the drop down list and select the appropriate dose associated with

the documentation. Make sure you select the correct dose, paying close attention to the date and time of each dose.

- **Administered Amount**: This amount should only be changed if the dose given is different than the ordered amount. In general, this applies only to “range orders,” (example: 2-4mg).
- **Alerts**: Varying alerts associated with the order display in this section. For example, if the order is on hold, the “Given while order on hold” message displays here.
- **Prompts**: If there are prompts associated with the formulary item, select Clinical Data and click **Edit**.

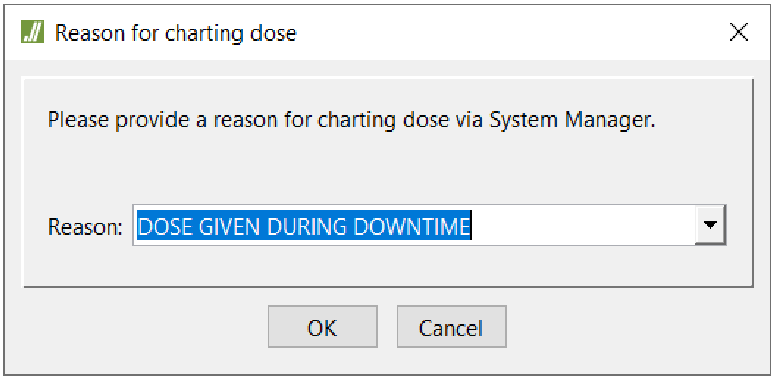
7. Enter prompt information, using the white text fields.



8. Or, if configured (see Intervention/Prompt Setup), select the **Override with reason** checkbox to override the collection of prompt information. Then, select a reason from the drop down menu.

9. Click **Next** to process through the prompt questions.
10. Click **Sign** to document the information.
11. Enter any applicable administration notes.
12. Click **OK** on the *New Administration* window to save your changes.
13. Enter a reason for charting this dose online rather than using the application. Enter text or select a reason from the drop down list.

Any reason(s) entered for the manually documenting) WILL NOT be part of permanent documentation but WILL be included in compliance reports.



14. Click **OK** to close the window.

Restrict Ability to Administer Medications Prior to Rx Verification

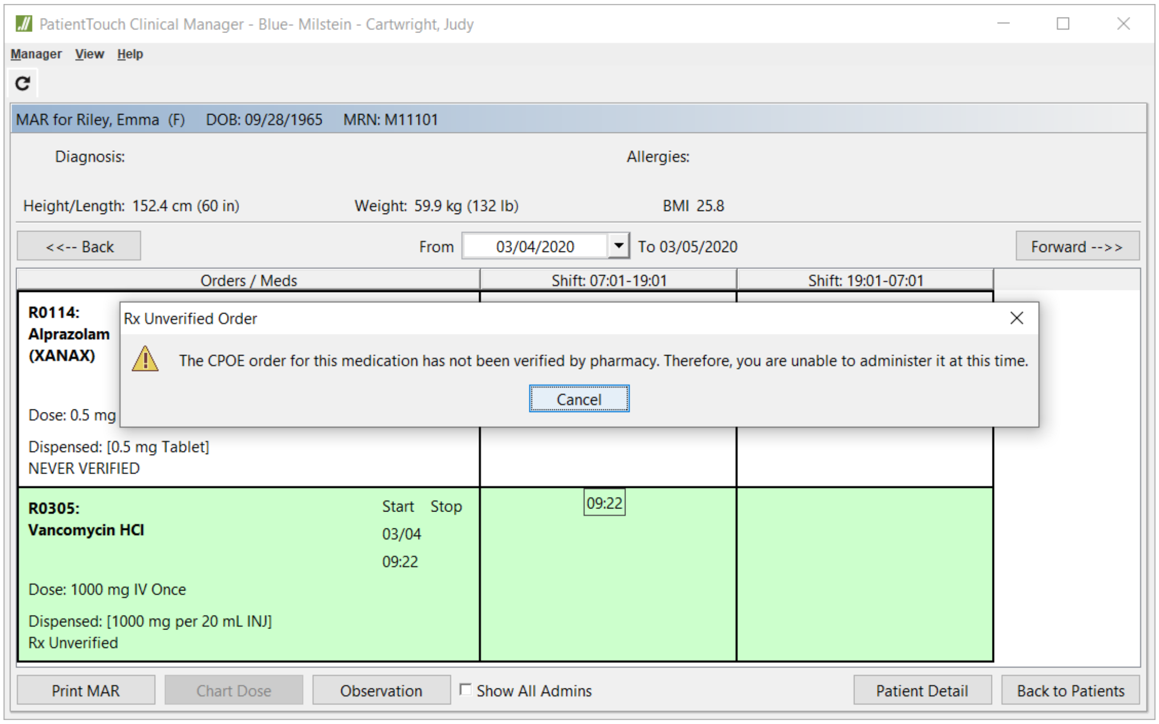
The Clinical Manager has a Restrict Ability to Administer Medications Prior to Rx Verification feature. When this setting is selected, users who are ***not*** within the designated access group(s) will ***not*** be able to administer the medications prior to pharmacy verification. If they choose to attempt to administer the med, they will receive an alert and have to cancel.

To use this feature, configure your Clinical Manager settings as follows:

Enable: Pharmacy Setup Tab>CPOE Settings>Restrict Ability to Administer Medications Prior to Rx Verification.

Disable: Order Verification Tab>Require Verification before Medication Administration.

Using the Online MAR, if users select the CPOE order, as shown in green below, and click Chart Dose, they will receive a message stating the CPOE order has not been verified by pharmacy and have to cancel.



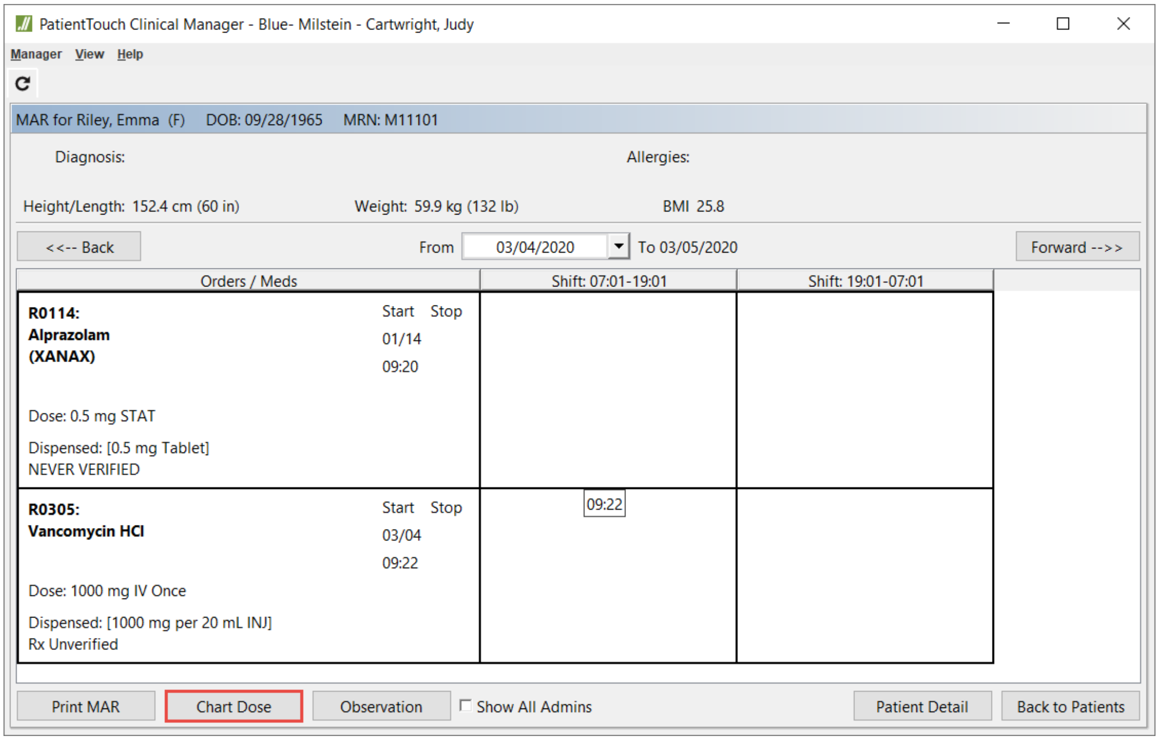
Unordered Medication

To add a new medication administration to the online MAR for a medication that has not yet been ordered, please follow the instructions below.

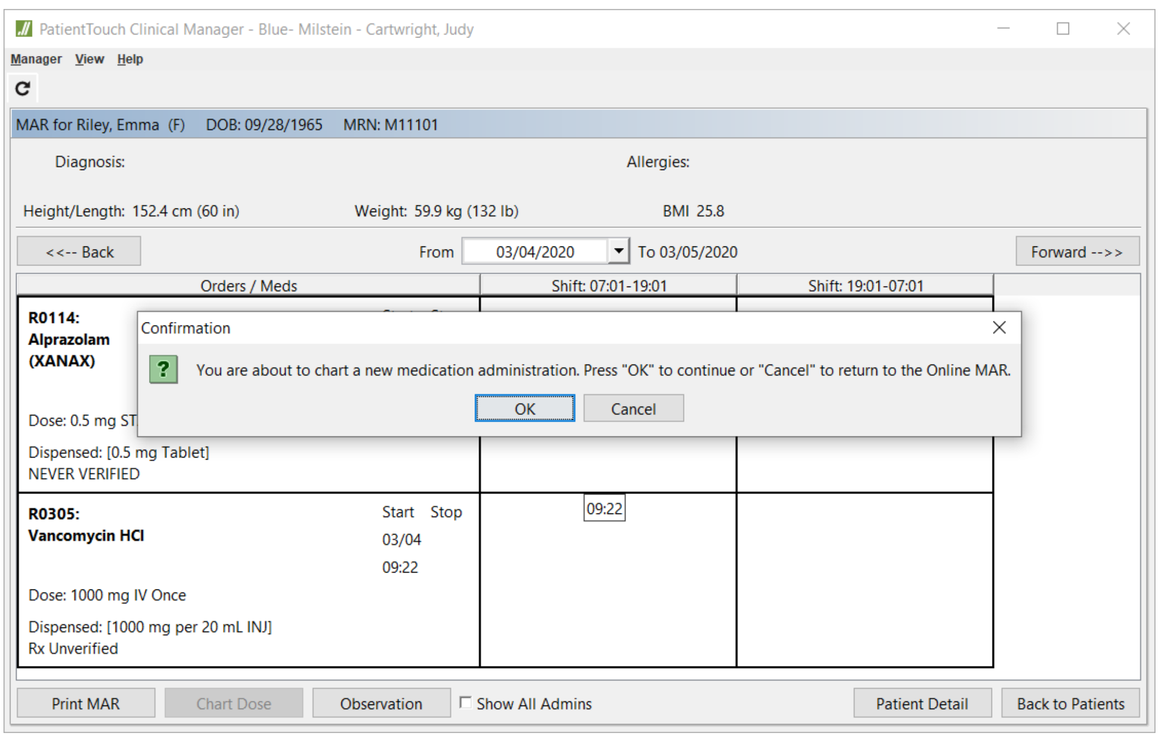
When the Order Not Found in System Alert Type is set to Stop Administration, the caregiver cannot chart a dose from the Clinical Manager without first selecting an order.

When the Order Not Found in System Alert Type is set to Warn Only and Limit Order Not Found by Access Groups is selected, any unauthorized user will not be able to document a medication that has not yet been ordered.

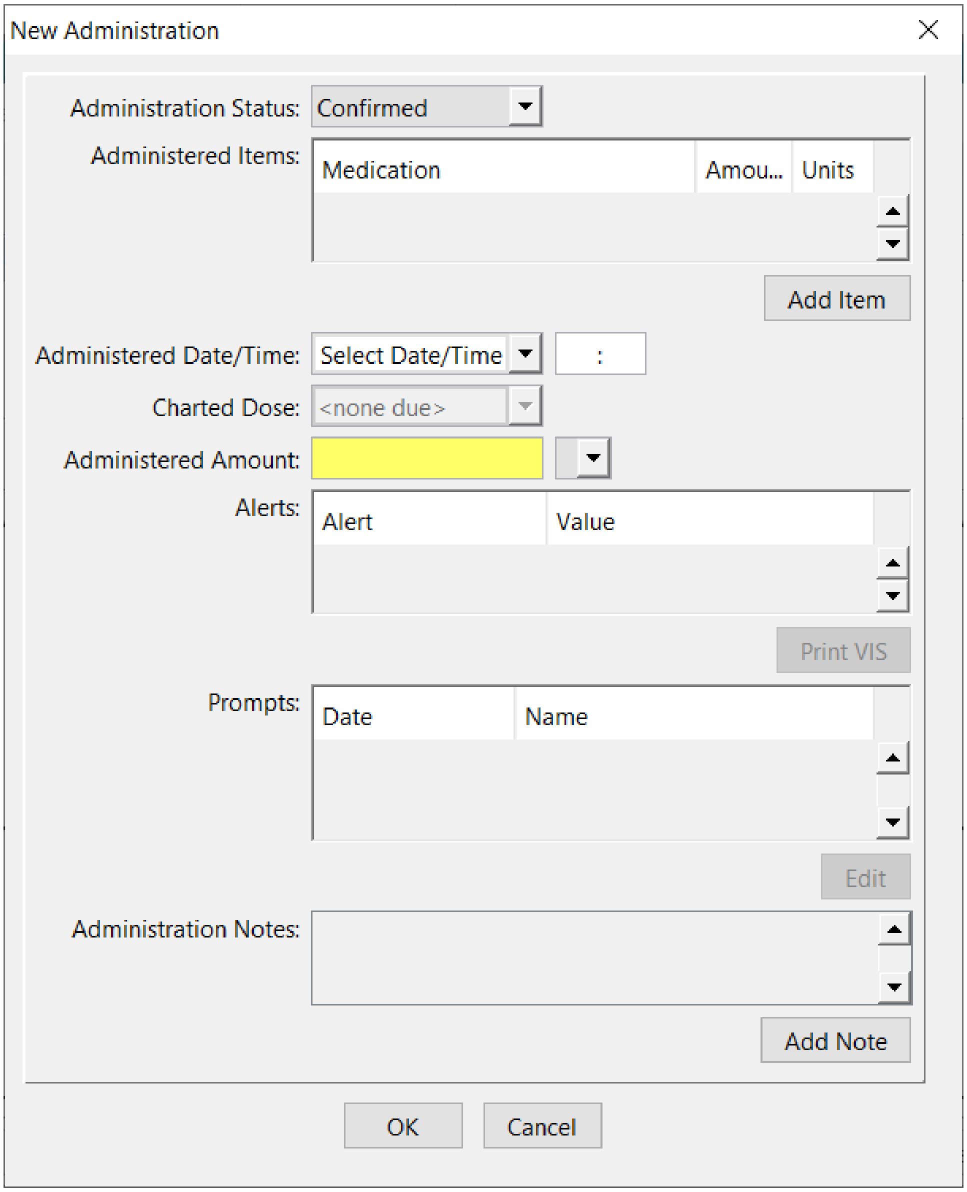
1. Open the *Patients* window and select a patient.
2. Click **View MAR**. The online MAR window opens and provides a detailed record of medication administrations.
3. Click **Chart Dose** without highlighting an order in the window.



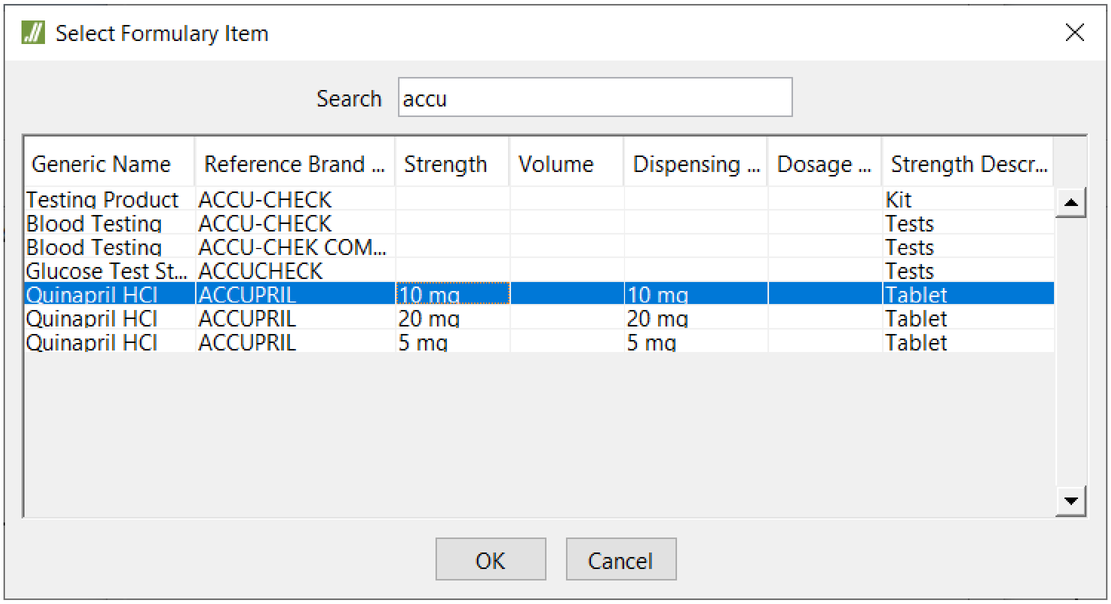
4. Click **OK** when a confirmation window is displayed.



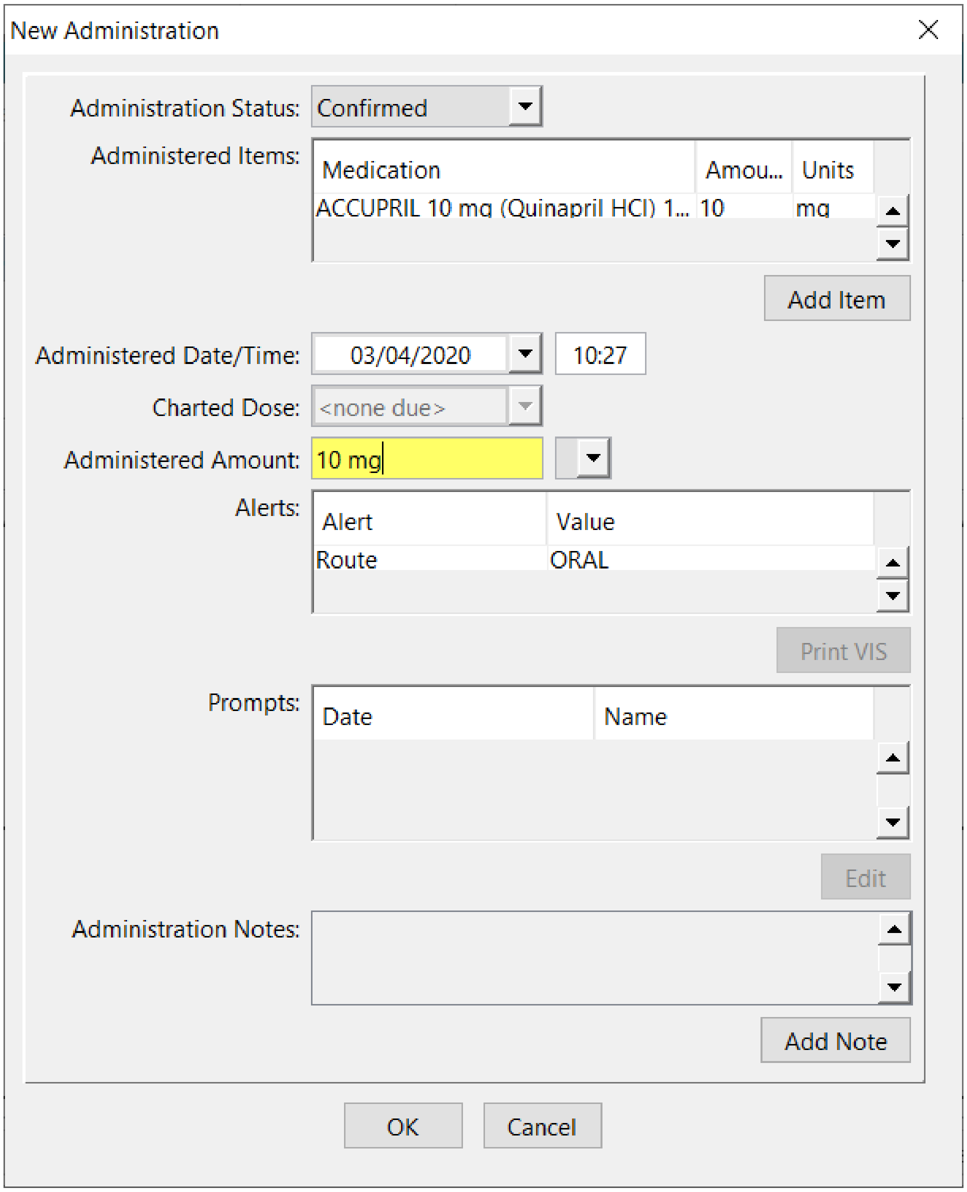
5. Leave the **Administration Status** set to Confirmed.



6. Click **Add Item**.
7. Select the medication(s) from the *Select Formulary Item* window and click **OK**. To locate the formulary item, enter the first few letters of the medication name you want in the Search field.



8. After adding the item(s) in the *New Administration* window, enter the Administered Date, Time, and the Administered Amount.
9. Add any clinical prompt information or administration notes.



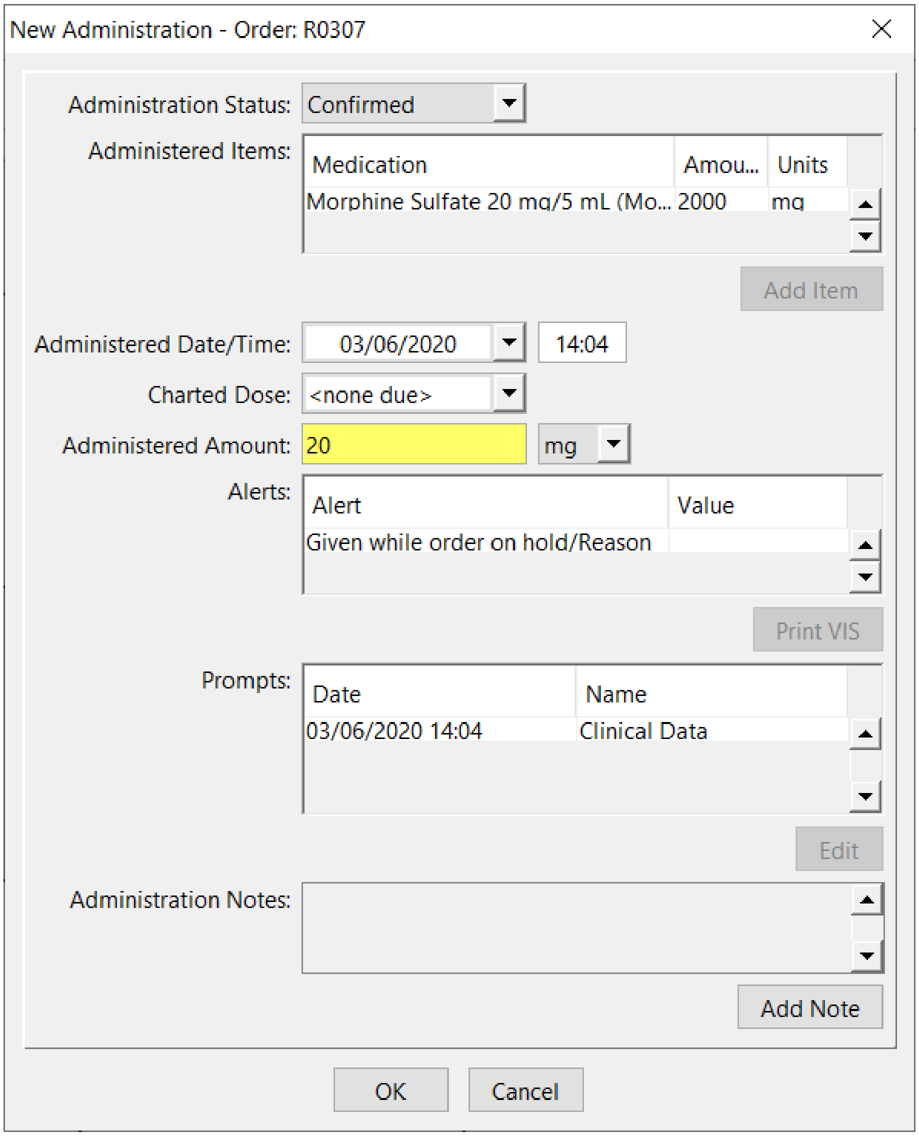
10. Enter a reason for manually charting the dose in the *Reason for Charting Dose* window (required) and click **OK**.

On Hold Order

The Clinical Manager alerts users to the fact that an order is on hold . Anyone who has the privilege to edit the MAR can see the On Hold alert from the *New Administration* window.

1. Open the *Patients* window and select a patient.
2. Click **View MAR** to open the online MAR.
3. Select the order that is on hold and click **Chart Dose**.
4. Click **OK** on the *Confirmation* window.

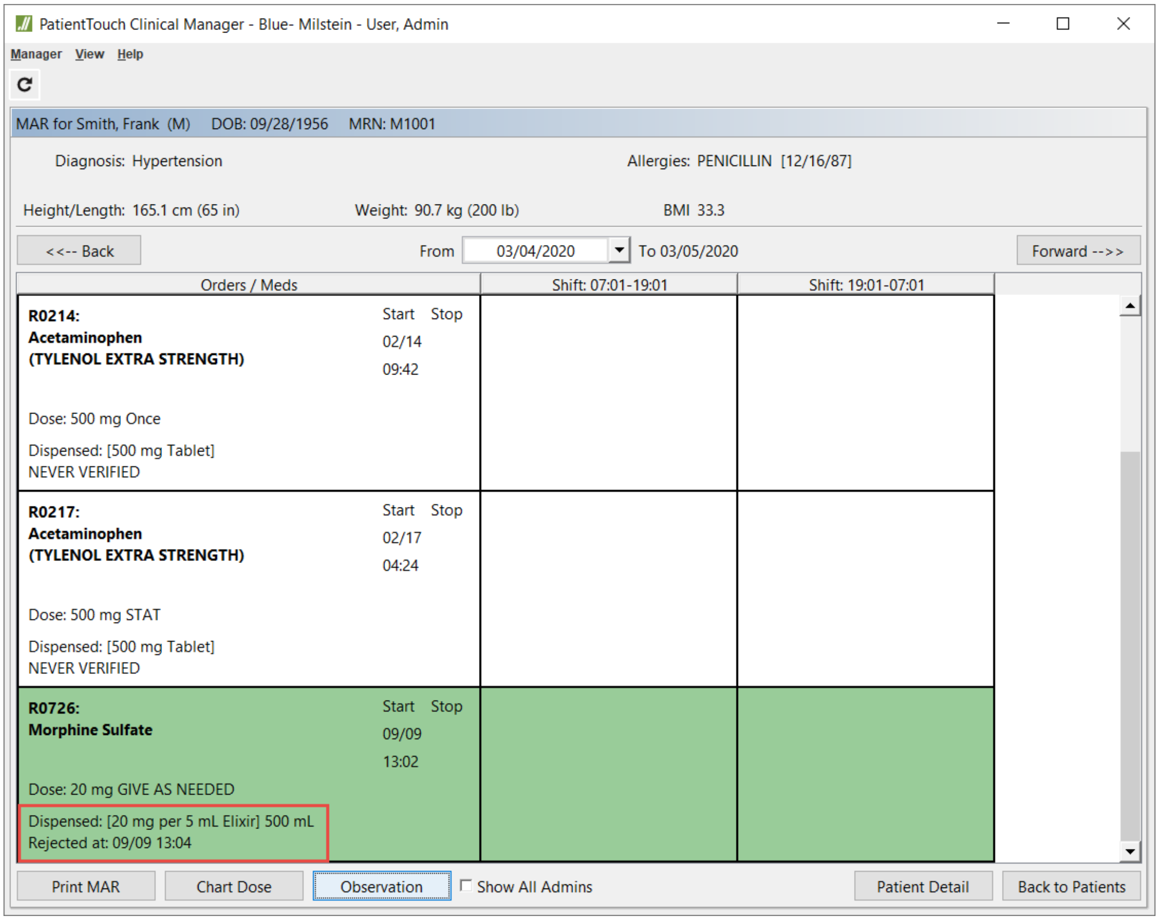
5. Enter the Administered Date/Time. **If the date and time are within the hold period, the following message displays in the Alerts section: "Given while order on hold."**



Rejected Order

The Online MAR alerts users to the fact that an order has been rejected. Depending on the settings in the Clinical Manager, you may proceed to administer this medication with an override reason (this is the default state). Or, you will receive a hard stop and have to cancel when the following setting is enabled: Clinical Manager>Pharmacy>General Settings>Pharmacy Setup>Stop administration of medication if order is in a Rejected state).

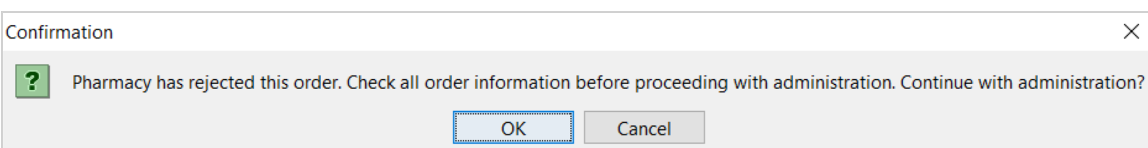
1. Open the *Patients* window and select a patient.
2. Click **View MAR** to open the online MAR.
3. Review the rejected medication.



4. Click **Chart Dose.**

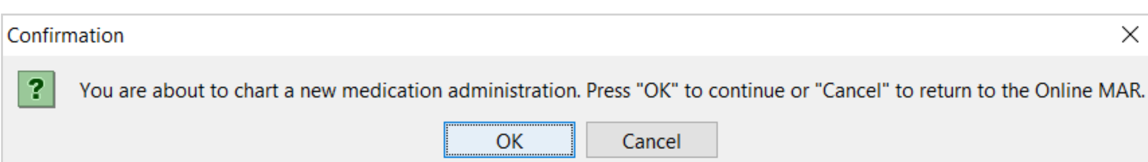
A message displays stating that Pharmacy has rejected the order. Check the order information for completeness and accuracy.

5. Click **OK** to continue with administration if the order is ready.

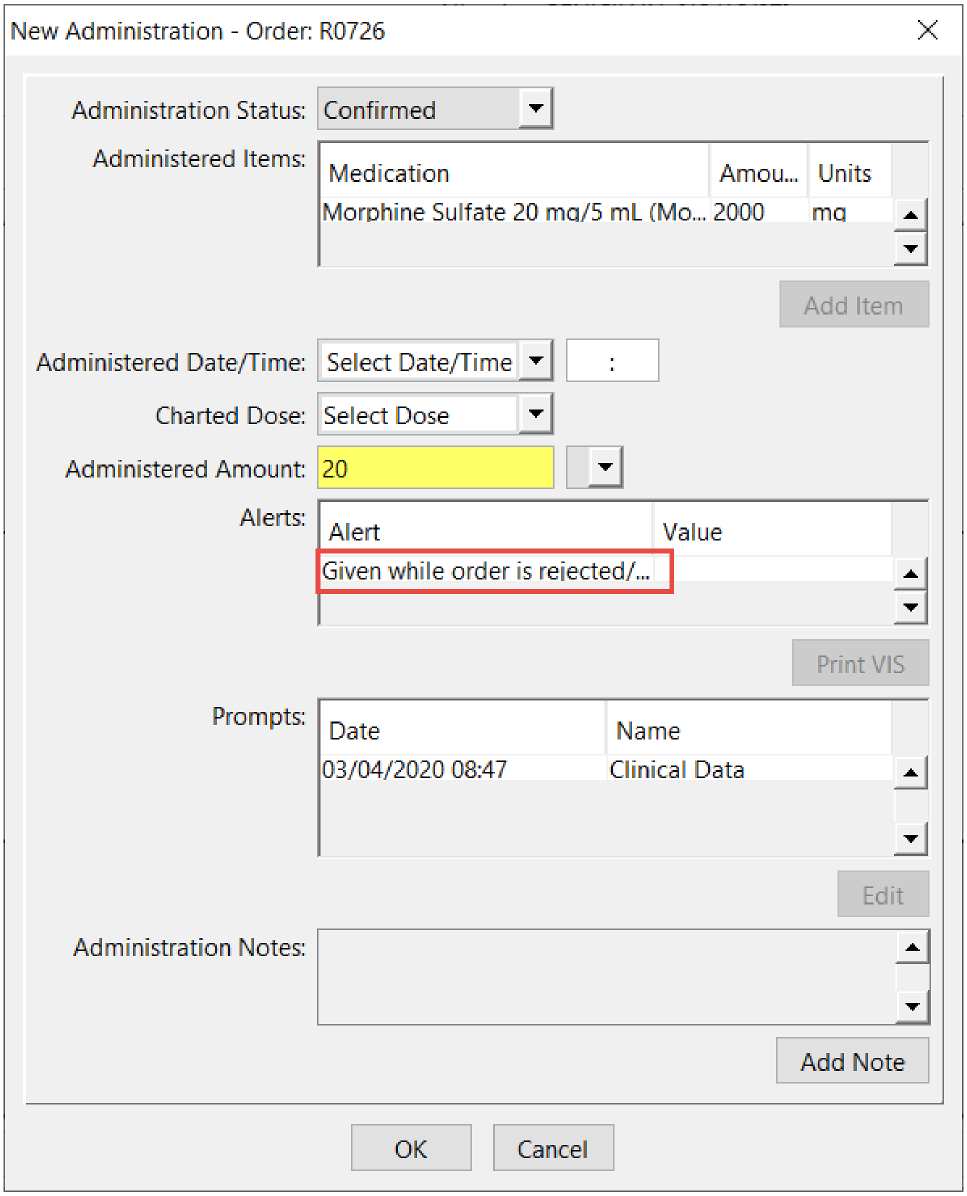


A message displays stating you are about to chart a new medication.

6. Click **OK.**



7. Continue charting this dose with an override reason if the Clinical Manager settings allow. Otherwise, you would receive a hard stop and have to cancel.



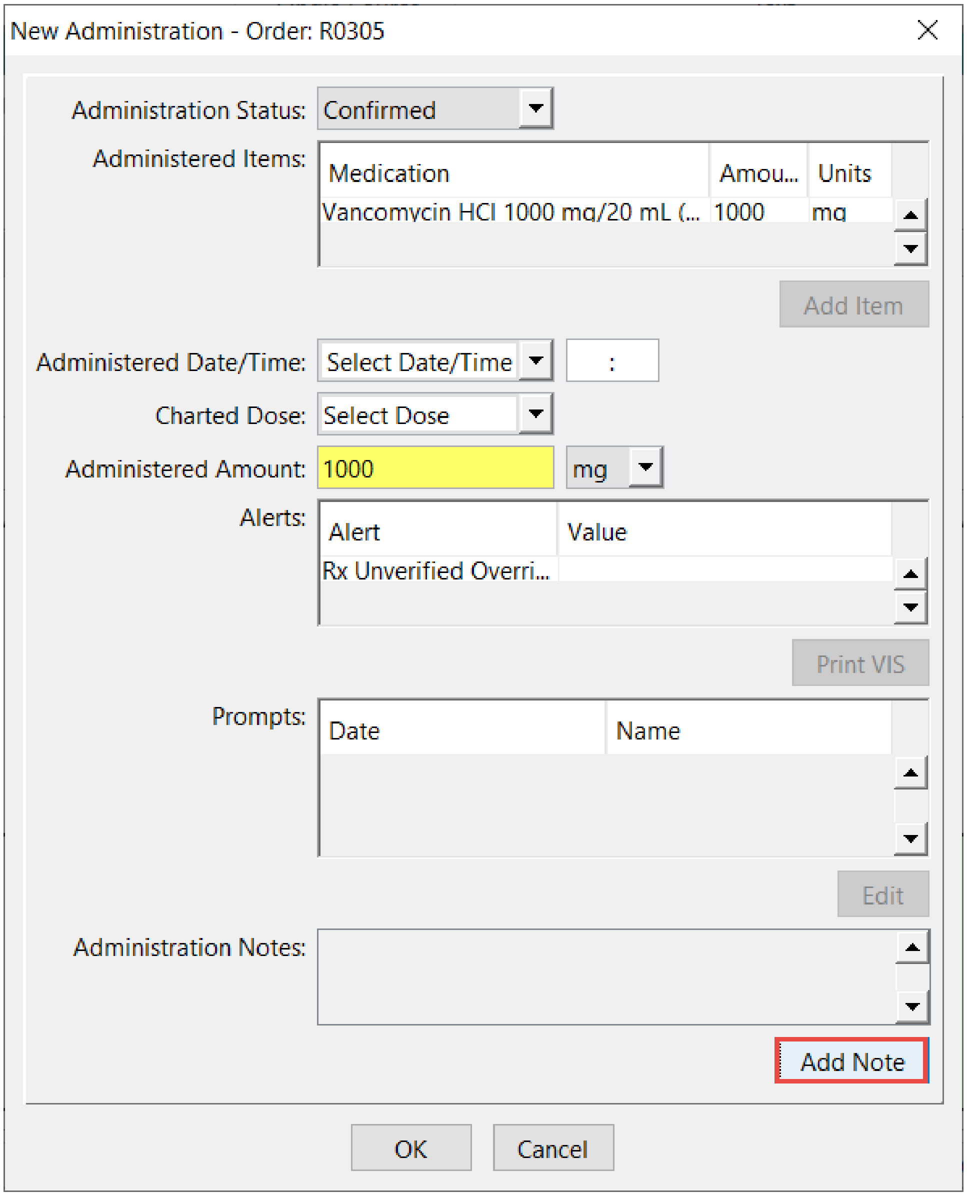
Add Notes

The Clinical Manager provides the ability to create clinical notes in the online MAR. These notes appear on the MAR with the date, time, and user.

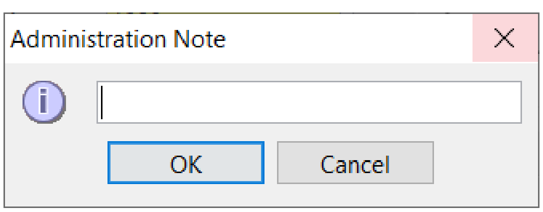
Anyone who has the privilege to edit the MAR can enter a note and the MAR always shows the user who made the change.

To add a note:

1. Open the *Patients* window and select a patient.
2. Click **View MAR** to open the online MAR.
3. Select an order and click **Chart Dose**.



4. Click **Add Note** and enter your text.



5. Click **OK** to save the note.
6. Click **OK** to close the *Edit Administration* window.
7. Provide a reason for making an edit to the record by typing your reason or selecting one from the drop down list and click **OK**.

Document an Observation Online

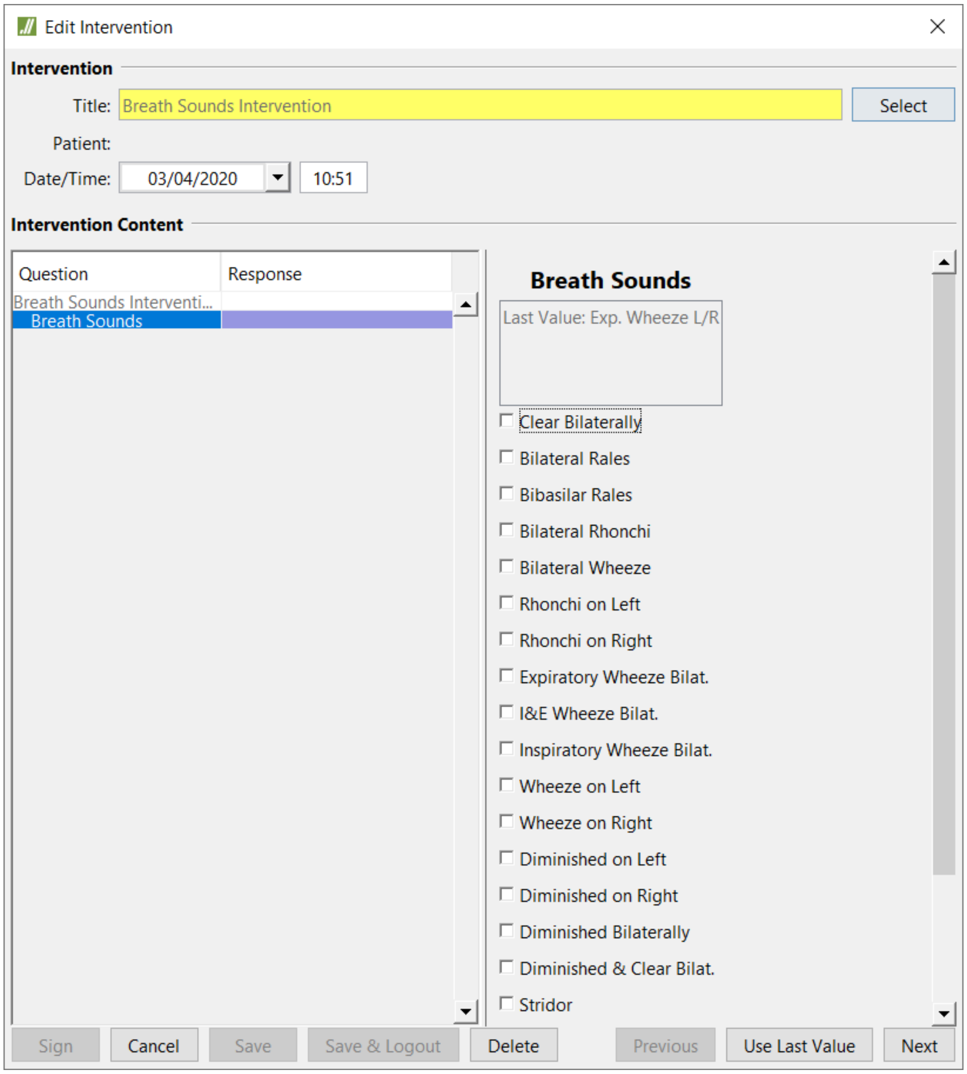
Using the clinical prompts defined with the Clinical Manager, caregivers can add discretionary clinical data to the MAR. These observations can be added while charting in the Online MAR or using PatientTouch.

This data is noted in the MAR (online and printed) as an "OBSERVATION" and recorded as part of the permanent record. Typically, the observation would be entered in the Clinical Manager only after the fact (if a caregiver was unable to document an observation using the application and subsequently wanted to make an observation part of the historical data).

When the Disable Clinical Documentation Option in Order Details is selected from the Clinical Manager>Pharmacy>General Settings tab, the Observation button on the patient's online MAR will be disabled.

To add an observation in the Clinical Manager:

1. Open the *Patients* window and select a patient.
2. Click **View MAR** in the toolbar. The online MAR opens and provides a detailed record of medication administrations.
3. Select the target Order in the Orders/Meds column and note that the selected row turns green.
4. Click **Observation** to open the *Edit Intervention* window.
5. Click **Select** next to the Title field and choose a component from the list.



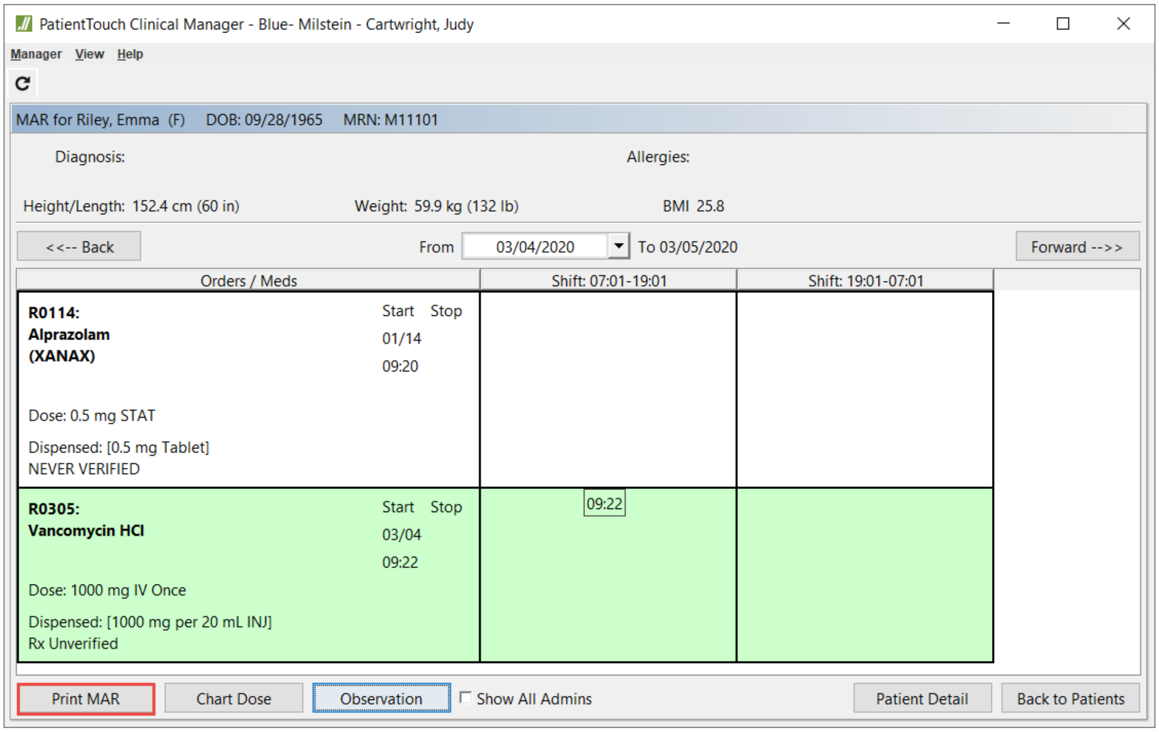
6. Click **OK** on the *Select Component* window. The **Status** will automatically be “Confirmed”.
7. The current Date/Time automatically displays.
8. Enter information in the white text fields under "Blood Pressure" in the example above.

Not all components will have responses that are modifiable.

9. Click **Next** and **OK** to close the window and add the observation to the MAR.

Print Online MAR

When you are working in the online MAR window, click **Print MAR** to print a MAR for the date and time range displayed.



Select the printer destination and click **OK**. Note that if the list of printer destinations is long, you can use the Search field to narrow the list.

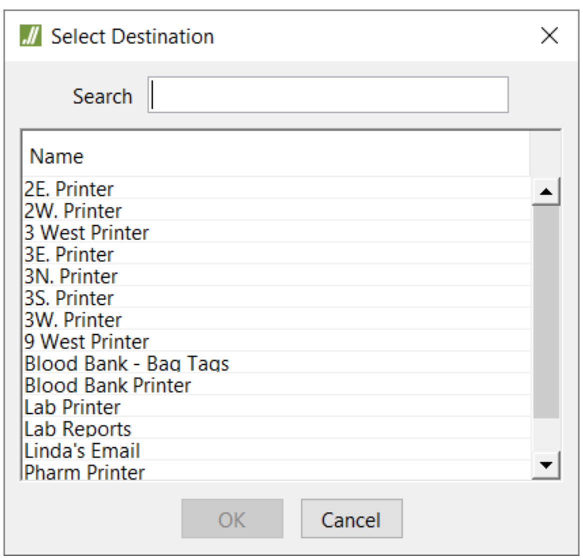


Chart in Use

A Chart In Use notification alerts a caregiver that another caregiver is either administering a medication using PatientTouch or is charting a medication on the Clinical Manager. If a nurse is in the process of administering medications at the bedside, another nurse attempting to document or edit the same patient's MAR during that time is warned. Similarly, if a nurse is documenting or editing a patient's online MAR, the other nurse is warned when entering a patient workflow at the bedside.

Nurses and respiratory therapists are able to administer medications in parallel.

When the Chart In Use notification is displayed, the user can choose to override the alert, as long as a reason is provided. This reason will be documented. The only situation that is a hard stop is when a nurse is logged on and administering medications using the PatientTouch application and then attempts to chart a dose in the Clinical Manager or vice versa.

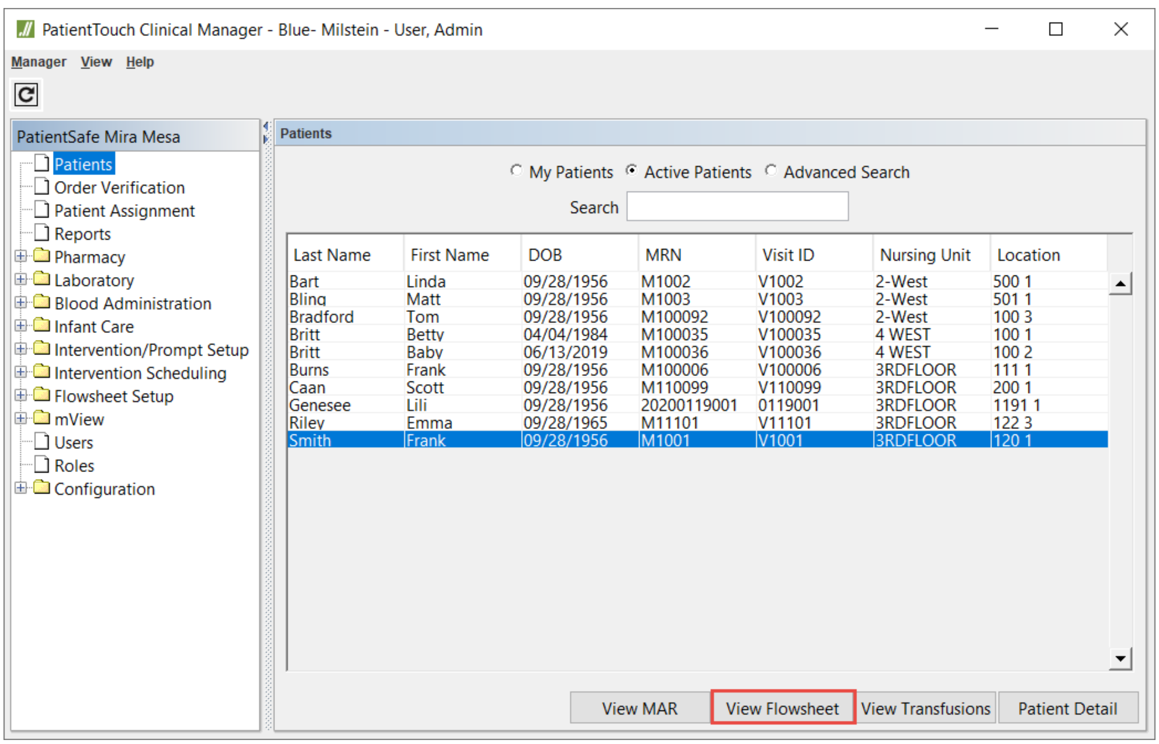
Viewing and Editing Flowsheets

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.

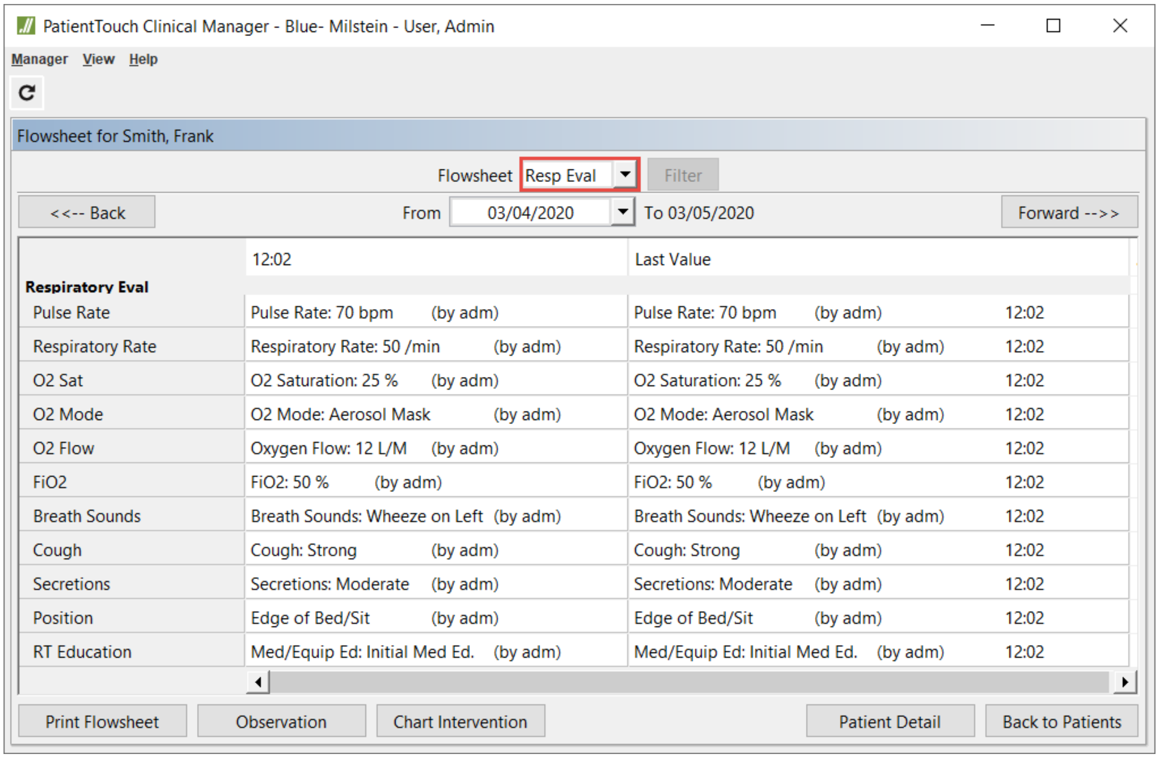
Flowsheets display all data collected for a shift, defaulting to display data collected over the current 24-hour period. You can scroll through previous days by clicking Back and Forward.

Viewing a Flowsheet

1. In Clinical Manager, select **Patients**.
2. Select the desired patient, and click **View Flowsheet**.

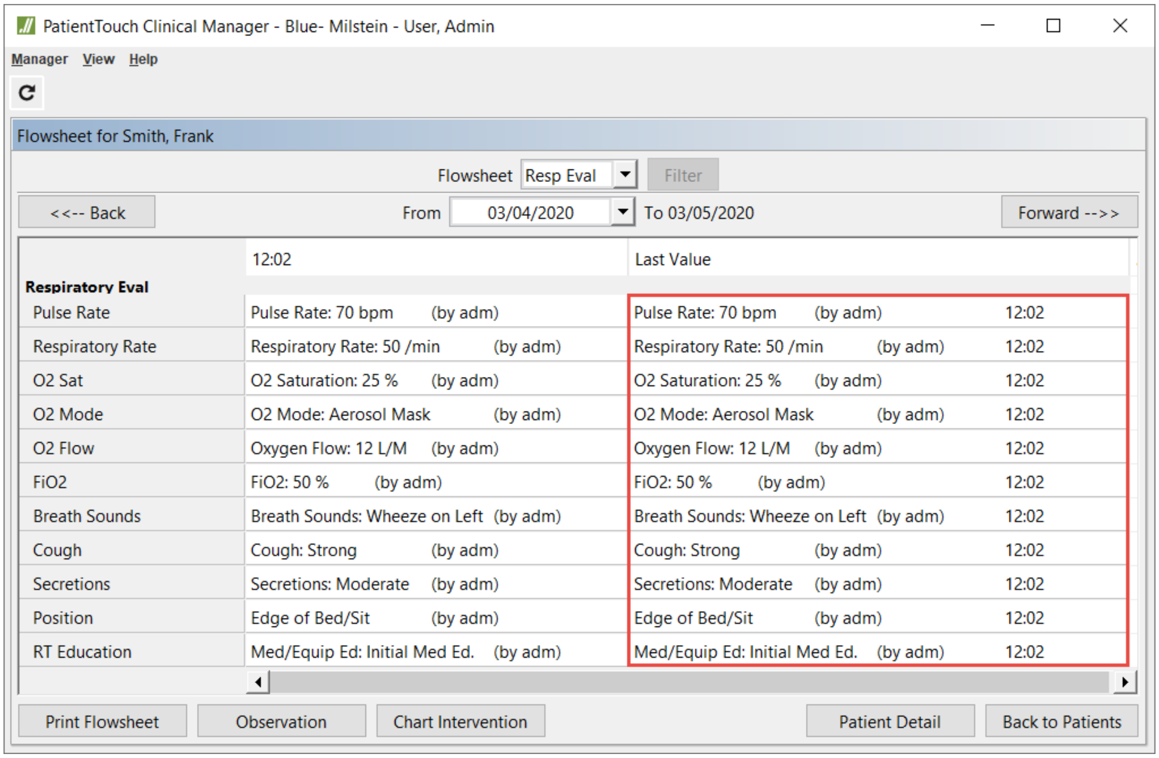


3. From the **Flowsheet** drop-down list select the new Flowsheet to display.

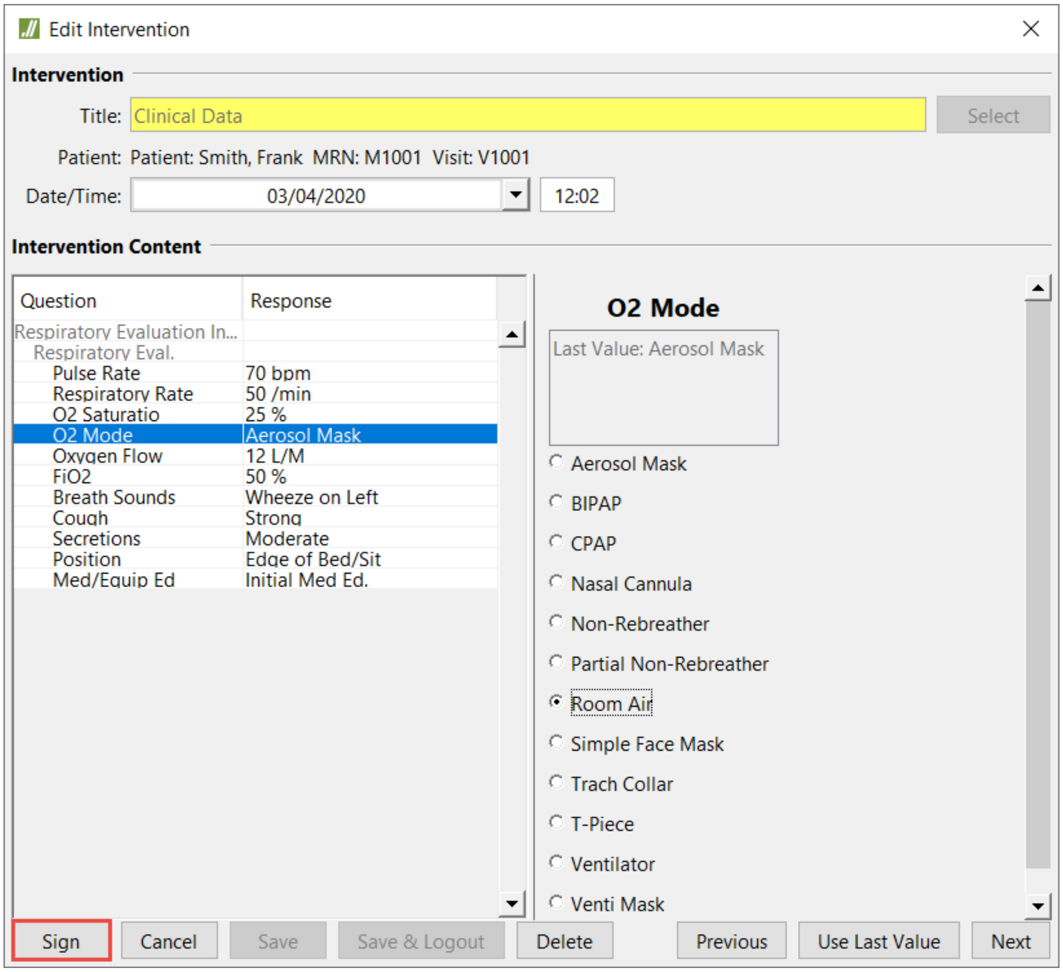


Editing a Flowsheet

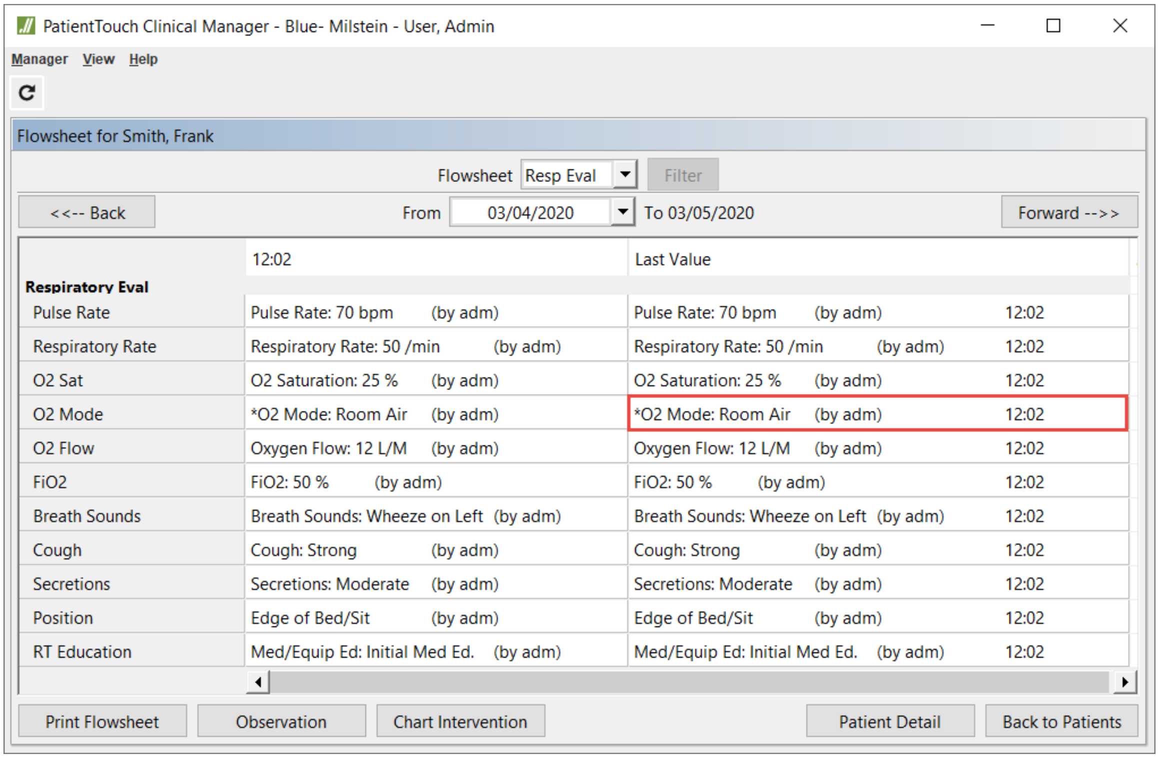
1. To edit a flowsheet, click on any of the white text response fields under Last Value. For example, in the screen capture above, click on any of the following responses: Pulse Rate, Respiratory Rate, O2 Sat, etc.



2. The **Edit Intervention** window displays. Modify any of the information in the response fields.
3. Click **Sign** when you are done.



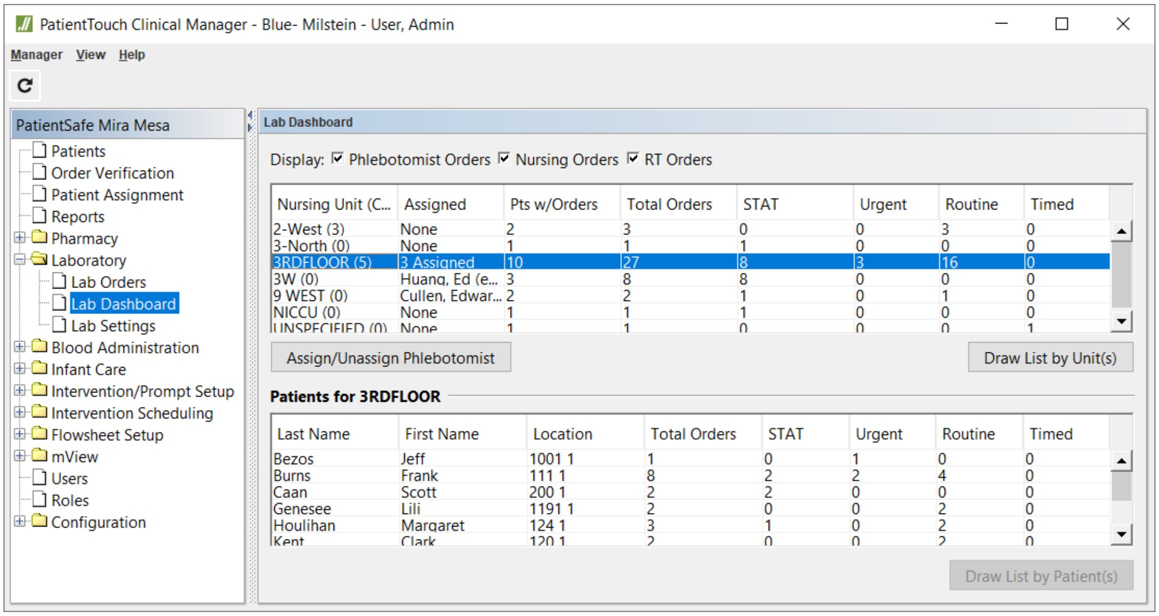
4. Edits made to the Edit Intervention window display with an asterisk (*) on the flowsheet.



Lab Operations in Clinical Manager

Lab Dashboard

The **Lab Dashboard** in the PatientTouch Clinical Manager provides a summary page of lab order activity that can be used as a workflow-balancing tool. The **Lab Dashboard** summarizes uncollected lab orders by type (stat, urgent, timed and routine) for each nursing unit, and displays the number of each type of order for individual patients on the selected unit.



The details for each lab order (tests and tubes, due time, etc.) can be viewed in the Lab Orders screen.

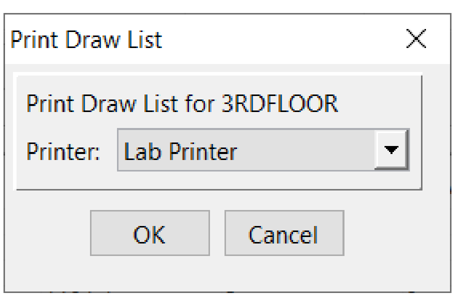
To view a summary of lab orders from the **Lab Dashboard**:

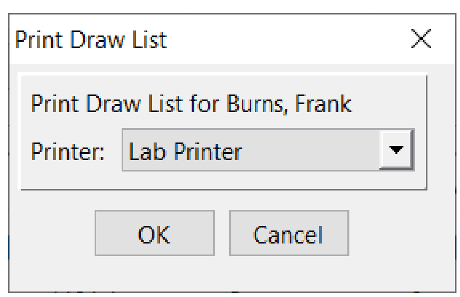
1. Click **Laboratory**, and then click **Lab Dashboard**.
2. The screen displays orders for specimens that have not yet been collected.

If your hospital is configured for Campus Support, the **Lab Dashboard** provides a list of hospitals for which you want to see a summary of orders. Select a hospital from the drop down menu. The dashboard will remain empty until a hospital is selected. If your facility is not configured for Campus Support, you will not see the Hospital drop down menu.

The **Lab Dashboard** can be filtered by order collector type to view phlebotomist orders, nursing orders, and/or RT orders. In addition, the nursing unit summary list (top pane) and nursing unit patient detail (bottom pane) can be sorted by the available columns.

The **Lab Dashboard** allows you to conveniently print a draw list by nursing unit or by patient.





- To print a draw list by nursing unit, select one or more nursing units in the top pane and click **Draw List by Unit(s)**. Then select a destination printer in the window that displays and click **OK**.
- To print a draw list by patient, select one or more patients in the bottom pane and click

Draw List by Patient(s). Then select a destination printer in the window that displays and click **OK**.

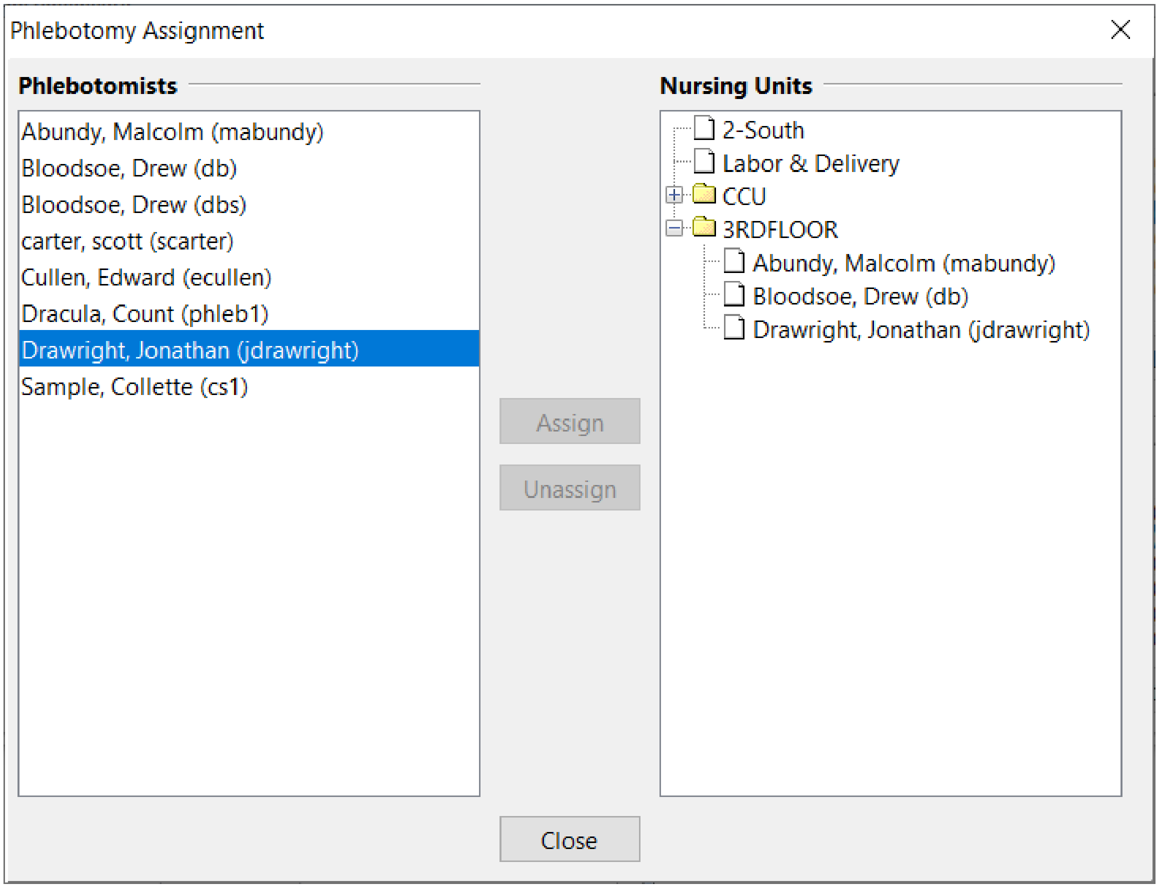
Refer to Draw List (by Unit, User, or Patient) for more information about the draw list report.

You also can use the **Lab Dashboard** to assign or unassign phlebotomists. Refer to the next section for more information.

Assign Phlebotomists to Nursing Units from the Lab Dashboard

From the **Lab Dashboard** in Clinical Manager, users with the Manage Phlebotomy Assignment privilege can assign or unassign phlebotomists to specific nursing units. A phlebotomist may be assigned to multiple nursing units, and multiple phlebotomists may be assigned to a single nursing unit.

1. From the **Laboratory** folder, click **Lab Dashboard**.
2. Click **Assign/Unassign Phlebotomist** to display the *Phlebotomy Assignment* window.
3. Select the phlebotomist to assign to a nursing unit from the Phlebotomists list in the pane on the left. The nursing units available for the user will be displayed in the tree of Nursing Units in the pane on the right.
4. Select the nursing unit to which you want to assign the phlebotomist from the Nursing Units pane.
5. Click **Assign**. The phlebotomist is now assigned to the nursing unit, and the phlebotomist's name now appears beneath the nursing unit.



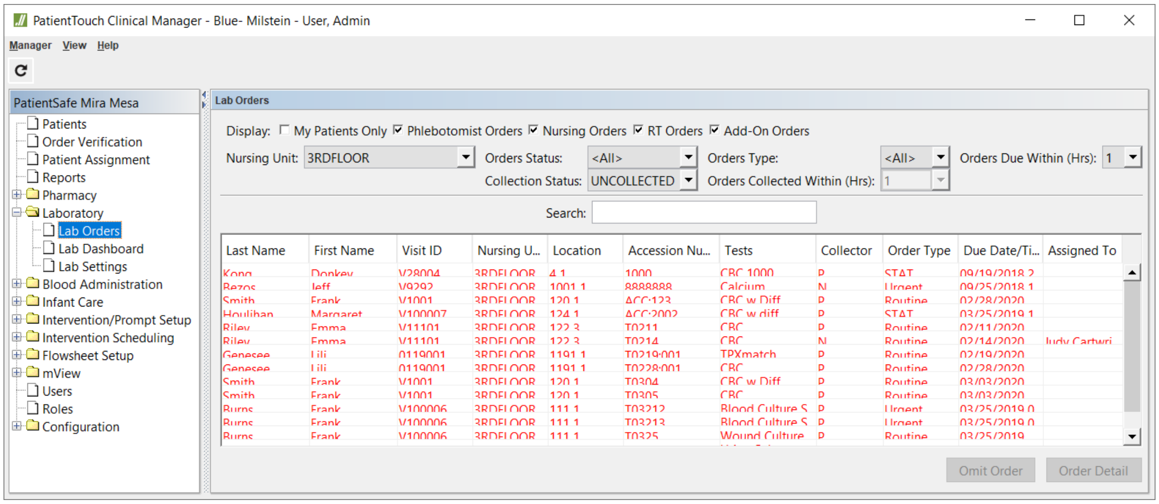
Similarly, to unassign phlebotomists, select the phlebotomist to unassign from the nursing unit in the Nursing Units list, and click **Unassign**. The phlebotomist will be unassigned from the nursing unit and the phlebotomist's name will be removed from the nursing unit in the right pane.

Manage Lab Orders

View Uncollected Lab Orders

To view uncollected lab orders, click **Lab Orders** in the **Laboratory** section of the menu tree. Select Collection Status: UNCOLLECTED. The Due Date/Time displays for all uncollected orders.

If your hospital is configured for Campus Support and you have selected <All> hospitals at login, you will see a **Hospital** drop down menu for which you can select lab orders. After you select your facility, select the associated nursing unit. If you are *not* configured for Campus Support, you will not see the Hospital drop down menu and you will only need to select the nursing unit for which you want to view lab orders.

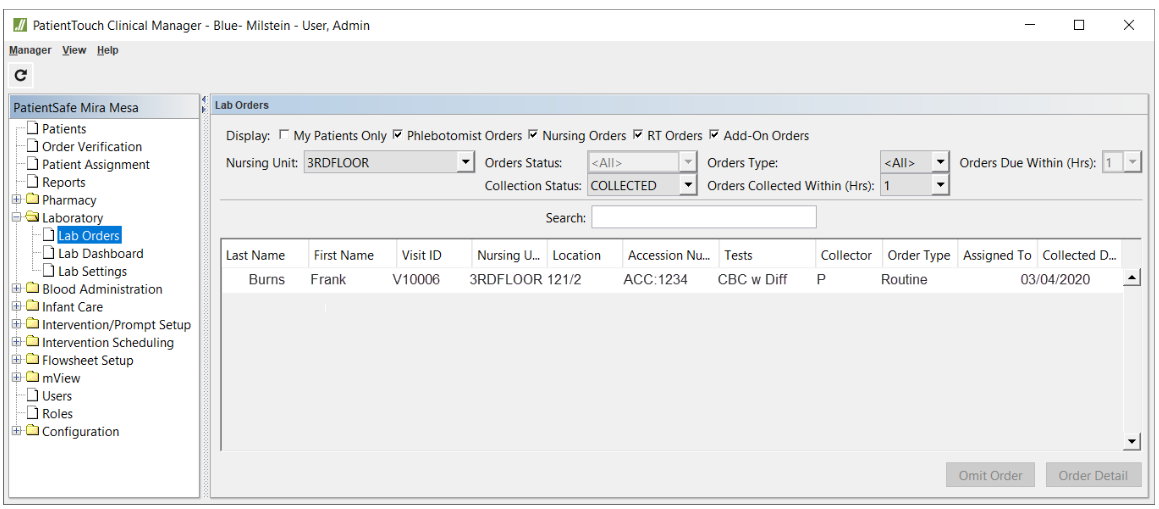


Please refer to the sections below to Sort Lab Orders and filter the orders listed, View and Edit Lab Order Details, and Omit an Order in the list.

The *Lab Orders* screen automatically refreshes every five minutes to display the latest updates to the patient order list.

View Collected Lab Orders

To view collected lab orders, click **Lab Orders** in the **Laboratory** section of the menu tree. Select Collection Status: COLLECTED. The Collected Date/Time displays for all collected orders.



Sort Lab Orders

Click the corresponding column heading to sort the lab orders by any of the following criteria:

- Patient last name
- Patient first name
- Visit ID
- Nursing unit

- Room location
- Order accession number
- Ordered tests
- Collector type
- Order type (stat, urgent, etc.)
- Due date and time
- Assigned To
- Collected Date/Time

Click the column heading again to reverse the sort order on that column.

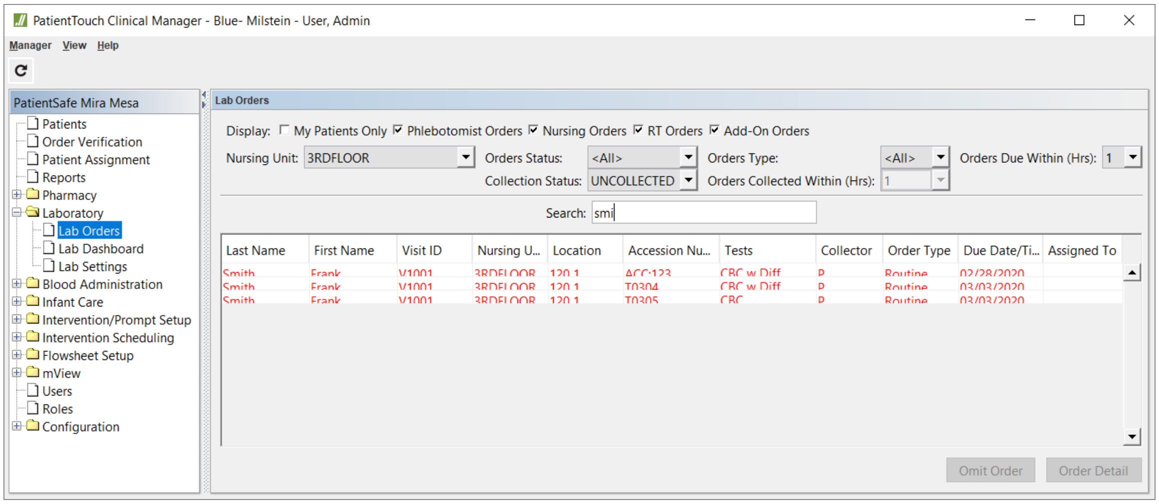
Filter Lab Orders

You can filter the information in the *Lab Orders* screen by the following criteria to manage workloads more effectively:

- Hospital (if configured for Campus Support)
- My Patients Only
- Collector type
- Nursing unit
- Orders Status
- Orders Type
- Orders Due Within (Hrs)
- Collection Status
- Orders Collected Within (Hrs)

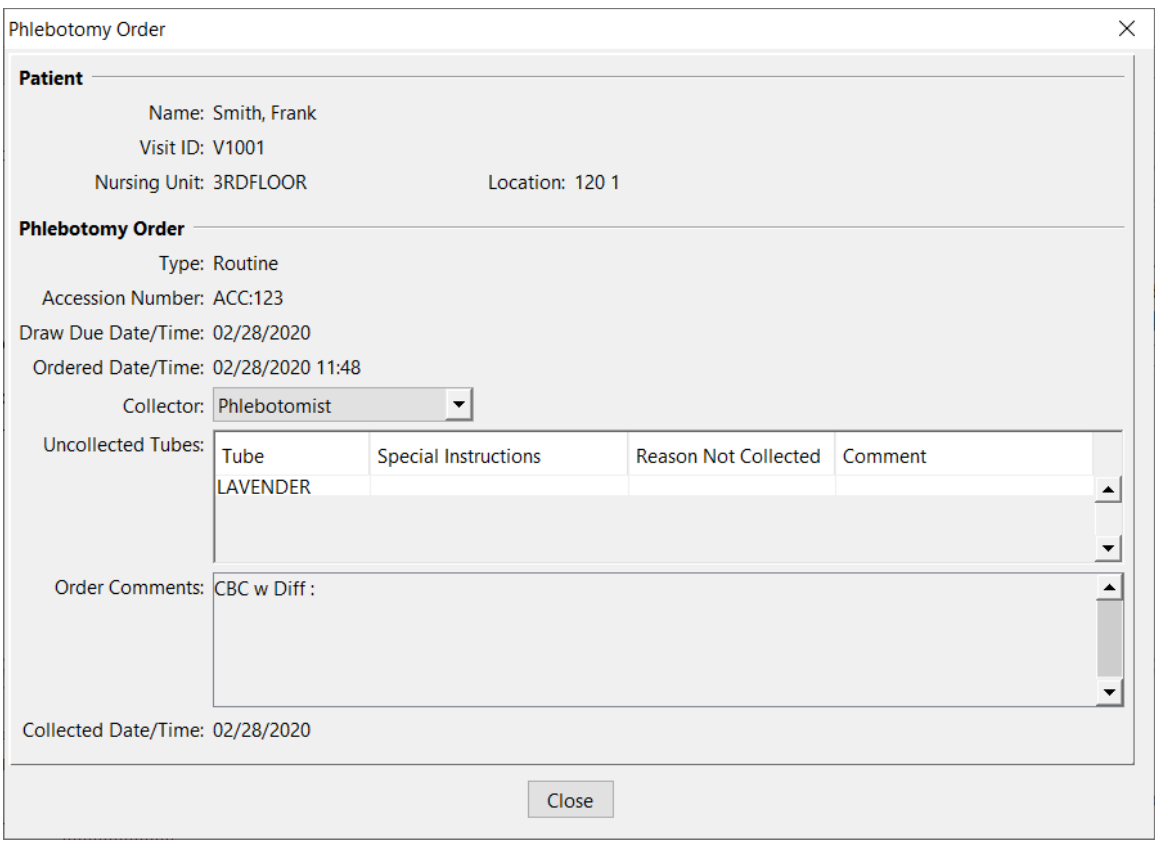
You can also filter lab orders by entering the first few letters of order/patient information in the record you want to locate in the Search field. For example, entering "in" in the Search text box filters the list of orders to show only those that contain those characters (e.g. patients with the last name Coll**in**s or first name Katr**in**a, lab orders that include the test Hemoglob**in**).

The following illustration shows filtering lab orders by entering the first few letters of a patient's name:



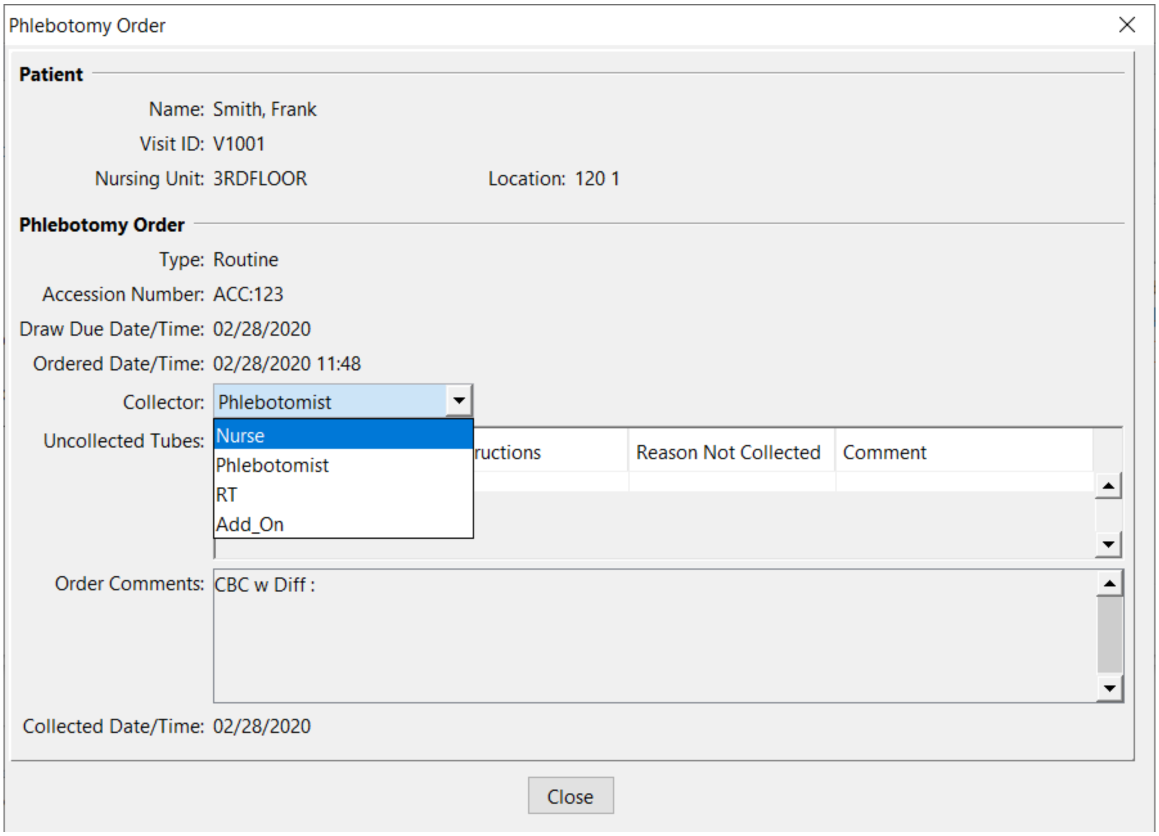
View and Edit Lab Order Details

To view order details, highlight the row that contains the order and click **Order Detail**. The screen capture below displays an example of a collected lab order – the Collected Date/Time displays in the bottom left corner of the screen.



Change Collector Type

While viewing lab order details, you can manually change the collector type for the order by selecting the collector type from the dropdown. For example, you might use this screen to change an order to the "Add-On" collector type so it can be processed in the lab by adding it to an already collected specimen, rather than collecting an additional specimen from the patient.



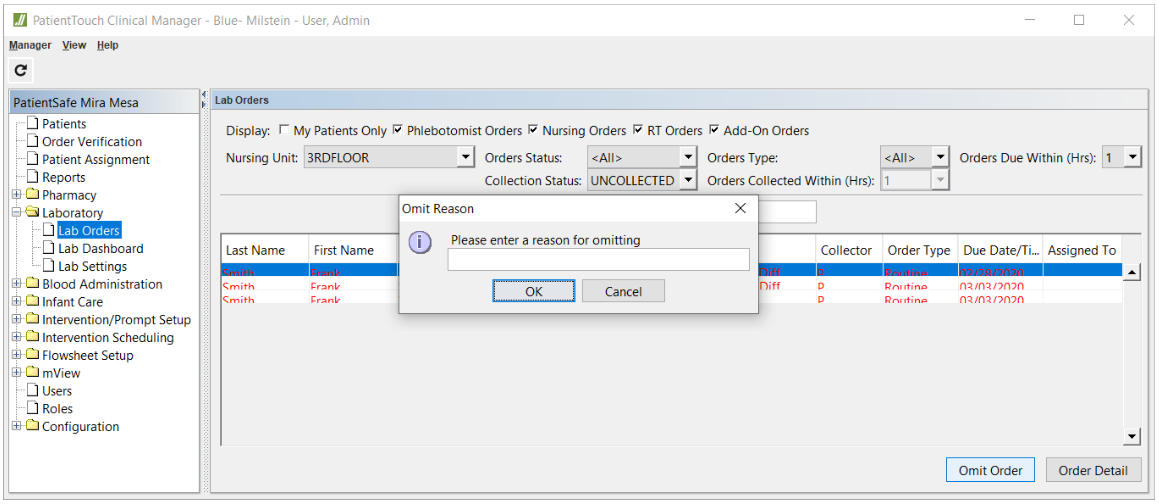
Click **Close** to dismiss the *Order Detail* window and return to the *Lab Orders* screen.

To edit lab order details, you must have the Manage Lab Orders privilege.

Omit an Order

To omit orders, users must have the Manage Lab Orders privilege.

If you are not going to collect a specimen for one of the phlebotomy orders in the PatientTouch System, you can omit that order from the *Lab Orders* screen. To do so, highlight the row that contains the order and click **Omit Order**. When the *Omit Reason* window is displayed, enter a reason for not collecting the specimen and click **OK**.



The order will be marked as omitted, and will no longer display in the Clinical Manager or on caregiver handhelds.