

A Secondary Evaluation is the first visit by each discipline other than the admitting clinician.

Visit Documentation

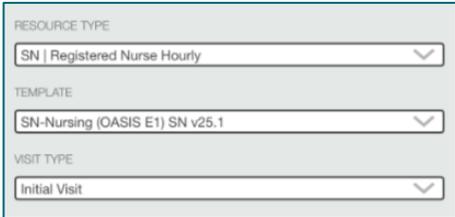
➤ Assessments

The assessments completed for the patient display on the left.

STEP 1: Tap + Add.

STEP 2: New Assessment box should auto populate for a Secondary Eval:

- **Resource Type** – your discipline.
- **Template** – your discipline & **OASIS**.
- **Visit Type** – Initial visit.



RESOURCE TYPE
SN | Registered Nurse Hourly

TEMPLATE
SN-Nursing (OASIS E1) SN v25.1

VISIT TYPE
Initial Visit

STEP 3: Tap each active section in left column.

STEP 4: Tap the + to open subsections.

STEP 5: Complete the required fields in the assessment as indicated by the orange outlines.

Clinical Monitoring

If Vital Signs, Measurements or Labs (INR or Pulse Ox) are obtained, document on this screen using the + at the lower right to add.

- To review additional education on Clinical Monitoring, please click [here](#).

Care Plan / Charting

Default screen is **Compact Charting**. Navigate to **Care Plan Editing** tab at end of screen to add or discontinue Care Plans.

STEP 1: In the Search box, enter a word in the title of a Care Plan.

STEP 2: Tap the Care Plan to open.

STEP 3: Tap the + to the far right of Goals and of Interventions to view list and select.

STEP 4: Tap the applicable Care Plan for care plan charting.



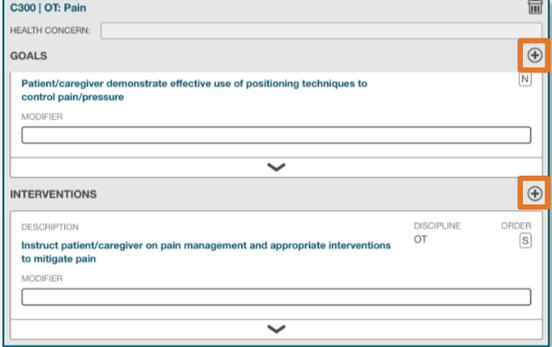
Add New Care Plan

Pain

A260 | SN: Pain

C200 | PT: Pain

C300 | OT: Pain



C300 | OT: Pain

HEALTH CONCERN:

GOALS

Patient/caregiver demonstrate effective use of positioning techniques to control pain/pressure

MODIFIER

INTERVENTIONS

DESCRIPTION	DISCIPLINE	ORDER
Instruct patient/caregiver on pain management and appropriate interventions to mitigate pain	OT	S

MODIFIER

STEP 5: Complete the required care plan charting as indicated by the orange outlines.

- Answering **Positive** or **NR/NA** does not require selecting a Modifier. It is required to select a Modifier when answering **Negative**.

The screenshot displays the 'INTERVENTIONS' section of a clinical charting interface. It contains three intervention items, each with a 'MODIFIER' field, 'DISCIPLINE' (OT), 'ORDER' (S or N), and 'PROGRESSION' (Positive, Negative, NA) radio buttons. The third item, 'Visualization/deep breathing/relaxation techniques', has 'Negative' selected for progression, and its 'MILESTONE' dropdown menu is highlighted with an orange border and contains the text 'Pain interference'.

- If a modifier needs to be edited, add an End Date to the current Goal or Intervention then add a new Goal or Intervention with the new modifier.

STEP 6: Tap the < **back arrow** to return to the charting page.

Clinical Note

The clinical notes previously completed for the patient display on the left. Navigate between **Active** and **All** (includes notes with an End date) as necessary.

STEP 1: Tap + to add a new Clinical Note.

STEP 2: Complete the required documentation.

STEP 3: Enter the Use Codes - O & C.

STEP 4: Edit date if visit was not done today.

STEP 5: Add Note. Use template (if applicable).

STEP 6: Tap Print on Cert/Recert and Send to Portal.

STEP 7: Certification Item – use drop-down to choose Assessment Information for Physician Review (at the end of the list).

STEP 8: Add Ordering Physician.

STEP 9: Tap the < **back arrow** to save the information return to the charting page.

Visit Frequency

Active visit frequencies display on the left.

STEP 1: Edit the end date of the current Visit Frequency to date of visit if applicable. Enter in **Change Reason** box - **Secondary Evaluation**.

STEP 2: Tap + to add new visit frequency.

- The certification period displays at the top left.

STEP 3: Complete the required fields:

- **Discipline**
- **Visits** - enter high (and low for a range)
- **Physician ID**
- **Duration**
- The **For** field based on the Duration

STEP 4: Tap **Cert/Recert** and **Do not create end sup order** boxes.

STEP 5: Tap the **PRN** tab at lower left to add Visit Frequencies.

- **Reason(s)** are required for PRNs.

STEP 6: Tap the **< back arrow** to save the information, enter your password to accept the changes and return to the charting page.

Calendar

STEP 1: Select **+Add**. If adding to your Calendar, then tap **Visit**.

STEP 2: For a **non-recurring visit**:

- Edit **Resource** if assigning to another clinician.
- Date will default to today, tap on date to use calendar to choose date.
- Tap **PRN** box if applicable.
- Add **Resource Type** if box is blank. If multiple Resource Types are listed, always choose the last one on list.
- Add **Visit Type**.
- Swipe up to add information to the Schedule **Notes** box. This information is viewed on the Today screen by tapping **Notes** under Staff Information.

STEP 3: For recurring visits:

- Tap **Recurring** at top of box. Edit **Resource** to assign to another clinician.
- Date will default to today, tap on date to use calendar to choose start date.
- **Recurrence** – add number of visits per Week or Day by editing number.
- Use drop down to edit the frequency in the **time(s) a** box.
- Select **Service Day(s)** and add 1 hr **Duration** for each Service Day.

- **Every** – leave as **1** unless frequency is, for example, every other day or week.
- Leave default value of **week(s)** unless frequency is **(days)**.
- Change **for** the number of **week(s)** or **day(s)** the long frequency will last.
- Select **Done** to add visit(s) to the schedule.

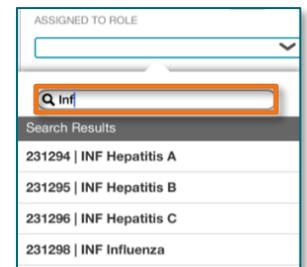
Care Team

Care Team types display on the left.

- STEP 1:** Tap + to the right of your discipline then enter your last name in the Search box if you will continue to see the patient.
- To replace the current clinician with your name, add an End date of yesterday on the line with their name. Then add your name with a Start date of today.

STEP 2: If blank, enter Code Status. In the Search field, enter CODE then tap Enter to see the options.

- STEP 3:** If any new information is discovered, enter in the appropriate Care Team Type.
- If the name of the Care Team type starts with capital letters, enter those (**INF**ections, **ALERT**s, **PRE**cautions) then tap Enter to view all options.



STEP 4: Select the < back arrow to save the information and return to the charting page.