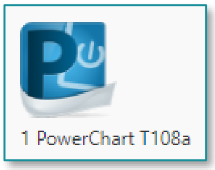
Oncology Project
Ambulatory Oncology Clinical Staff Workbook

This self-guided workbook will allow Ambulatory Oncology Clinical Staff to practice common using the new features and functionality of Cerner Oncology, complementing the PromisePoint simulation courses and instructor-led education. Please note, the following scenario is designed to demonstrate functionality and may not be inclusive of all Northern Light Health policies and procedures.

Contents

Signing into Cerner Millennium

1. From the Intranet page under **Quick Links** search for **Cerner Millennium – Train (New Hires).**
    - Cerner Millennium Train is where you can practice on training patients.
2. Click the green plus sign to add **Cerner Millennium – Train (New Hires)** to your Quick Links.
3. From Quick Links, click Cerner Millennium – Train (New Hire).
4. Click the **PowerChart T108a** icon.
5. Enter the username and password provided below.



Patients and Sign Ons

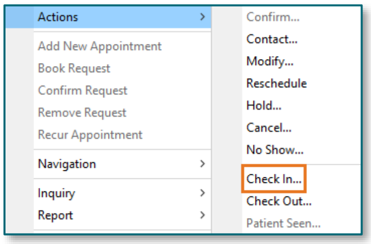
Password: train44ing

Oncology RN Sign On	MA Sign On	Adult Patients	Pediatric Patients
TRONCRN26	TRONCMA11	TRAIN, ONCCLINPRA	TRAIN, ONCPEDSPRD
TRONCRN27	TRONCMA12	TRAIN, ONCCLINPRB	TRAIN, ONCPEDSPRE
TRONCRN28	TRONCMA13	TRAIN, ONCCLINPRC	TRAIN, ONCPEDSPRF
TRONCRN29	TRONCMA14	TRAIN, ONCCLINPRD	TRAIN, ONCPEDSPRG
TRONCRN30	TRONCMA15	TRAIN, ONCCLINPRE	TRAIN, ONCPEDSPRH
TRONCRN31		TRAIN, ONCCLINPRF	TRAIN, ONCPEDSPRI
TRONCRN32		TRAIN, ONCCLINPRG	TRAIN, ONCPEDSPRJ
TRONCRN33		TRAIN, ONCCLINPRH	
TRONCRN34		TRAIN, ONCCLINPRI	
TRONCRN35		TRAIN, ONCCLINPRJ	
TRONCRN36		TRAIN, ONCCLINPRK	
TRONCRN37		TRAIN, ONCCLINPRL	
TRONCRN38		TRAIN, ONCCLINPRM	
TRONCRN39		TRAIN, ONCCLINPRN	
TRONCRN40		TRAIN, ONCCLINPRO	
		TRAIN, ONCCLINPRP	
		TRAIN, ONCCLINPRQ	
		TRAIN, ONCCLINPRR	
		TRAIN, ONCCLINPRS	

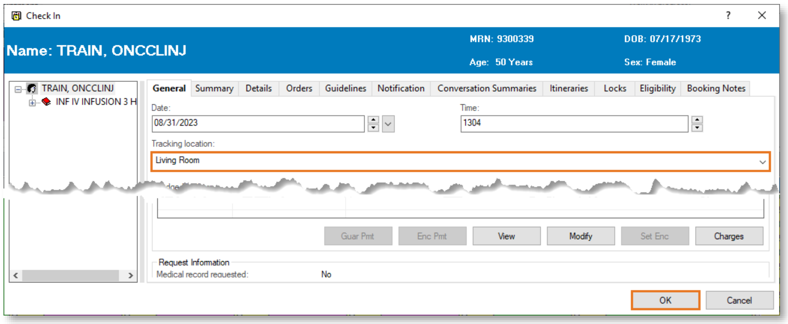
Checking Patients in to the Tracking Board

In order to perform the workflows and tasks associated with the tracking board, the patient must be checked in for their treatment visit appointment via the **Scheduling Appointment Book**. Please follow the steps outlined below to check-in the patient to the tracking board:

1. Login to **Scheduling Appointment Book** with the following training username and password.
    - Username: TRONCFO01
    - Password: train44ing
2. On the **Book** tab, click **Select**.
3. Locate and select the **E CCOM BOOKSHELF** and click **OK.**
4. Double-click the **E CCOM CHAIRS** book to open it.
5. In the calendar, go to one of the following dates to see the scheduled treatment visits:
    - 7/19/2023
    - 7/20/2023
    - 7/21/2023



6. Locate the patients you are checking in.
7. Right-click the appointment, hover over **Actions**, and select **Check In.**
8. In the Tracking Location dropdown, select **Living Room.**
9. Click **OK.**

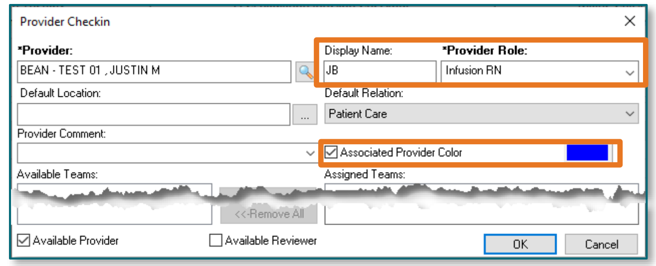


Using the Tracking board

- ➢ The Oncology Tracking Board acts as your infusion clinic patient list and provides an at-a-glance view of pertinent patient information.
- ➢ In the toolbar click **Onc Tracking Board**.

Checking In/Assigning Provider

1. Check in by clicking the **Provider Check-in** icon from the tracking board toolbar.



a. In the **Display Name** field, enter a name or initials you would like displayed in the **Nurse** or **MA/CA** column of the tracking board.

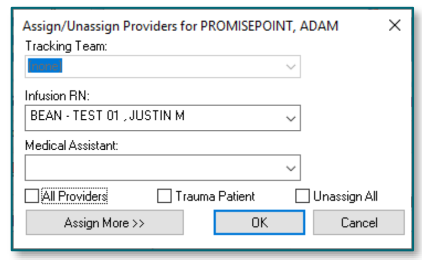
b. Select the **Provider Role** from the dropdown listing based on your position.

c. In the **Default Relation** field, select **Patient Care.**

d. If you want to have a color display with your Display Name, place a check in the **Associated Provider Color** box.

e. Select your desired color and click **OK.**

f. Complete checking in by clicking **OK.**

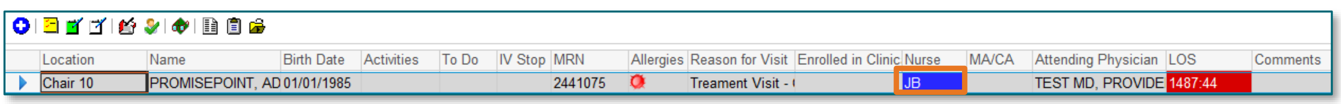


2. To assign yourself as the patient's nurse on the Tracking Board:

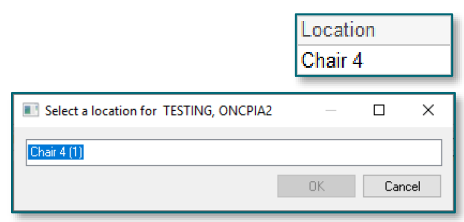
   a. Highlight the patient and double-click the cell in the **Nurse** column.

   b. In the **Assign/Unassign Providers** window select your name in the **Infusion RN** dropdown list.

   c. Click **OK.**



Updating Patient Location



1. To move the patient from the waiting room to a chair, double -click the cell in the **Location** column.
2. Select the applicable location from the list of rooms/chairs that displays.
3. Click **OK**. The patient will display as located in the new location on the tracking board.

Patient Intake

Staff will complete a patient intake via the **Tracking Board** per practice workflow.

1. From the **Tracking Board**, click the **Intake Form** icon on the Tracking Board toolbar.

   a. Fill out the applicable fields and sections of the form that apply to your site's policy and process.

   b. Click the **green checkmark** to sign the PowerForm.

2. Navigate to iView by clicking the **Interactive View and I&O** button on the Tracking Board toolbar.

   a. Open the Infusion-Oncology Navigator Band.

   b. Fill out any applicable sections per your site's policy and processes.

   c. Click the **green checkmark** to sign the documentation.

Chart Review

Verify you are on the correct encounter open before proceeding. The patient banner should display a recurring encounter specific to your location as well as the date of service.

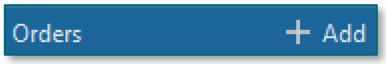
Use the following tools and views to review any applicable patient information per your locations policies and workflow.

1. **Oncology Nursing Workflow** is the updated version of the current Amb Nursing Workflow MPage used today. It now has oncology-specific components such as staging, chemotherapy review, and more. This is where most of your chart review should occur, using the various components.
2. Use other MPages and MPage components available for chart review:
    - **Infusion Prior Authorization**
    - **Chemo Dosing**
    - **Demographics**
    - **Oncology Chemotherapy component**
    - **Staging**
    - **Performance Scales & Toxicities**
    - **Oncology Flowsheet**

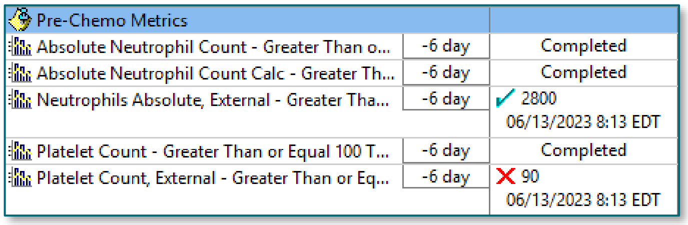
Pre-Chemo Metrics

Prior to activating any chemotherapy orders, you need to review patient information to make sure they have met the required treatment parameters, also known as Pre-Chemo Metrics.

1. Navigate to the **Orders** tab within PowerChart.



2. Navigate to the applicable day of treatment within the cycle of treatment.
3. Locate and review the **Pre-Chemo Metrics** section within the day of treatment.
4. Lab Values in the patient's chart will pull into these result fields. This includes both labs resulted in the patients chart as well as results documented on the Outside Labs PowerForm.

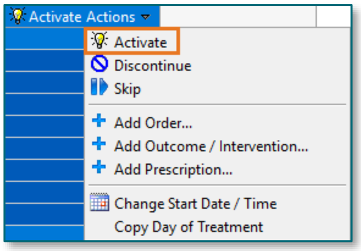


    a. If a lab value meets the parameter, a **green checkmark** will display.

    b. If a lab value does not meet the parameter, a **red X** will display.

Activating Day of Treatment Orders

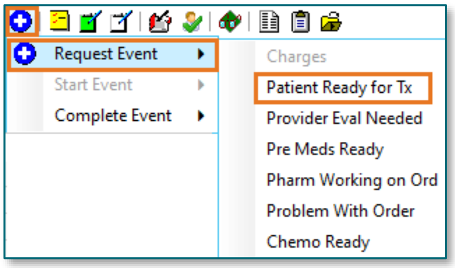
After reviewing the patient's Pre-Chemo metrics and the patient has met all the appropriate parameters, you are able to activate the day of treatment orders.



1. Confirm the date and time listed at the top of the **Day of Treatment** column is correct.
2. Click the **Activate Actions** dropdown arrow in the Day of Treatment column.
3. Select **Activate.**
4. Select **Orders for Signature** and then click **Sign.**
5. Click refresh to see the activated orders. The orders have been sent to Pharmacy to verify.

Tracking Board – Managing Events

You will notify the pharmacy the patient is ready for treatment by requesting the **Patient is Ready for Tx** event on the tracking board.



1. Navigate to the **Oncology Tracking Board.**
2. Highlight your patient.
3. Select the **Modify Event** button in the upper left-hand corner of the tracking board.
4. Hover over **Request Event and** select **Patient Ready for Tx.**

Administering Medications

Once pharmacy has been notified, they will prepare the medications to be administered. You will obtain medications from Pyxis as ordered and administer chemotherapy prepared by the pharmacy following the Barcode Medication Administration (BCMA) process.

IMPORTANT: Normally, you will follow the BCMA process. For the purposes of this workbook, to allow you to document IV stop times and do the Oncology IV Billing at the end of the patient's visit, we will document one of the medications by bypassing using the scanners.

1. You can launch the **Medication Administration Wizard (MAW)** to begin the BCMA process for administering medications:
   - Opening the **Document Activities** window from the Activities column on the Tracking Board for the patient.
   - From the toolbar within the patient's chart.
2. In the **Medication Administration Wizard (MAW)**, click **Next.**
3. In the Override Reason window, select **No Scanner Available** and click **Yes.**
4. Place a checkbox next to **CARBOplatin.**

5. In the Override Reason window, select **No Scanner Available** and click **Yes.**
6. Click the details for the **CARBOplatin**.
7. Click **Yes** in the Medications have not been verified window.
8. In the witness field enter: **TRAIN, ONCOLOGY RNLPN01.**
9. Click the green checkmark. Enter **train44ing** for the password.
10. Click **Sign.**

Discharge Process

When the patient treatment visit is complete you will complete the applicable steps for discharge.

Discharge Documentation – iView

You will navigate to iView to use the applicable iView bands to document discharge information, patient education performed, updating the plan of care, IV/Port de-access information, etc.

1. Starting on the **Oncology Tracking Board** with your patient highlighted, click the **Interactive View and I&O** button on the Tracking Board toolbar.
2. Use the applicable iView bands to document discharge information, patient education performed, updating the plan of care, IV/Port de-access information, etc.
3. Click the **green checkmark** to sign the documentation.

Document IV Stop Times Treatment Visit Charges

1. On the **Oncology Tracking Board,** double-click the **IV Pole Icon** in the **IV Stop** column.
2. The **IV Stop Times** window displays. Place a check in the box next to the infusion listed in the window.
3. Click **Document.**
4. Next enter the stop time and adjust total volume of infusion, if needed.
5. Click **Sign**.

Infusion Clinic Charges PowerForm

Now, we will access the Infusion Clinic Charges Form to submit all other infusion related charges not captured in the Oncology IV Billing MPage.

1. Starting on the Oncology Tracking Board with your patient highlighted, click the **Infusion Clinic Charges Form** icon on the toolbar.

NOTE: The Infusion Clinic Charges Form can also be accessed from AdHoc within the patient's chart.

2. The **Infusion Clinic Charges Form** displays. There are multiple sections, each with various types of charges to choose from. You will go to the correct section and add charges as they apply to the patient's infusion visit.
3. For the purpose of this workbook, we are going to add two charges, one infusion related procedure charge and one non-chemo charge.

   - In the **Infusion Related Procedure Charge** section, go to the **Central Venous Access Procedure Charges** category and enter a **1** in the **36591 CAD BLOOD DRAW ONLY** box.
   - Go to the **Non-Chemo Charges** section.
   - In the **IV Drug Push** section, enter a **1** in the **96374 IV Drug Push Single or Initial** box.
4. After you select the necessary charges in the different sections of the form applicable to the patient's visit, go to the **Date of Service** tab.
5. Select **Yes.**
6. Click the **green checkmark** ✓ to sign the PowerForm.
7. After signing the **Infusion Clinic Charges PowerForm**, the Charges icon on the tracking board automatically displays as complete.

Entering Treatment Visit Infusion Charges

Now that the IV Stop Times are documented, let's navigate to the patient chart and go to the **Oncology IV Billing MPage** to calculate the infusion billing.

1. Double-click the blue arrow next to the patient's name.
2. Go to **Menu** and select **Oncology.**
3. Select the **Oncology IV Billing** tab.
4. Infusions that have been administered display here.

NOTE: The status of the infusions is "Not Submitted;" they will remain that way until you click the Calculate button.

5. Click **Calculate.**
6. The page displays the correct CPT charge codes for the medications.
7. Click **Submit.**
8. Click **Refresh.**
9. Note the status of each infusion now displays as **Submitted.**

Creating Visit Summary

Add patient education topics and instructions for the patient in the Patient Instructions component.

Patient Education

1. In the patient's chart, go to the **Oncology Nursing Workflow** and select the **Problem List** component.
2. The patient's previously documented problems are displayed. Click the **This Visit** button to associate the appropriate diagnosis for their treatment.
3. Now, go to the **Patient Education** component.
4. Education topics automatically generate based on the associated **This Visit** problem.

5. Select the appropriate specific education for the patient.
    - You can also add in **Custom** or **More Options** buttons.
6. Selected education will print and given to the patient with their Visit Summary.

Patient Instructions

The Patient Instructions component is used to add instructions to provide to the patient on their visit summary.

1. Navigate to the **Patient Instructions** component.
2. Enter any specific instructions for the patient in this component and click **Save.**
    - Enter free text or use an auto text with commonly used instructions to save time.

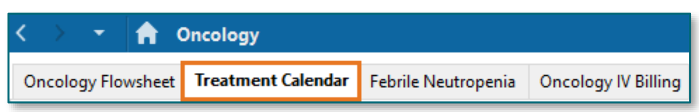
Print Visit Summary

1. Finally, we want to generate the **Patient Visit Summary** to provide to the patient.
2. Scroll down to bottom of the **Oncology Nursing Workflow** menu to the **Create Note** section.
3. Select the **Ambulatory Visit Instructions – Series** option.
4. The system generates the patient's visit summary, including medications and patient instructions.
5. Click **Sign/Submit**.
6. Click **Sign/Print**, then select the appropriate printer to print.

Treatment Calendar

The Treatment Calendar is a personalized summary of the patient's oncology care plan. It includes documentation of patient appointments, chemotherapy regimens, prescriptions, and notes from members of their care team.

1. To access the **Treatment Calendar**, go to the **Oncology** tab in the Menu.
2. Select the **Treatment Calendar** tab.

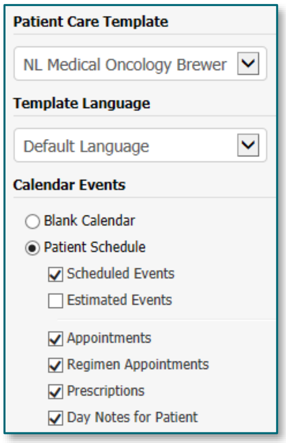


Adding Notes to the Treatment Calendar

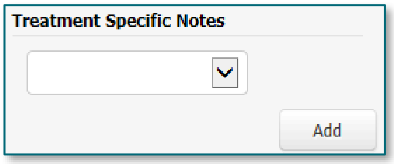
To Add a Note, complete the following:

1. Position the cursor on the day you want from the **Calendar List** or **Calendar View** and click **Add Note**
2. The Add Note(s) to Patient Treatment Calendar dialog is displayed. Type the free text note in the **Add Note** field.
3. To add the note to additional days, click the applicable days from the calendar days displayed.
    - A white checkmark with a green background will show on the days you have selected.
4. Click **OK.**
5. The free text note will show in the Calendar List on the selected date(s). The Notebook icon will appear on the Calendar View of selected of the selected date(s).

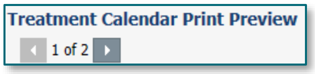
Printing the Treatment Calendar



1. To begin printing the Treatment Calendar, click the **Print Preview** icon on the right.
2. The **Treatment Calendar Print Preview** displays.
3. Update the following dropdown fields, as applicable:
    - Location Template
    - Language
    - Calendar Events: Select which calendar events to include on the calendar printout.
4. Click the dropdown arrow in the **Treatment Specific Notes** section to add a pre-populated note.



5. Select one of the options listed and click **Add**.
6. Click in the **Treatment Specific Notes field** and type a free text note.
7. Click **Add.**



8. Click the right arrow to view Page 2.
9. For the purpose of this workbook, we will click **Sign** as we do not want to print the treatment calendar.
10. Click the house icon to go to the **Oncology Nursing Workflow** MPage.
11. Navigate to the **Documents** component to review the Treatment Calendar document.

Checkout Process

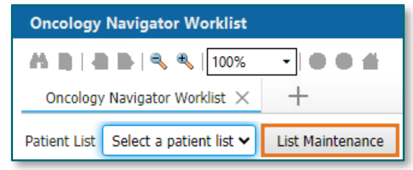
At the end of the visit, you will need to move the patient to the Checkout tab.

1. Navigate to the **Oncology Tracking Board.**
2. Double-click the **patient's** location in the Location column.
3. In the **Select a Location** window, document that the patient is checking out by selecting your location's checkout acronym. For the purposes of this workbook, we will select **IVCO ONCTR_E**.
4. Click **OK**. The Checkout window displays. To confirm the checkout process, click **Yes**.
5. The patient is moved out to the checkout tab.
6. Go to the **LFCI Adult Infusion Checkout** tab to see their patient is listed.

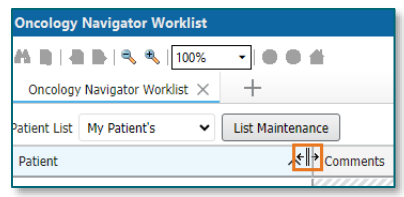
Nurse Navigator Workflows

Oncology Navigator Worklist

Nurse Navigators will have the ability to use the **Oncology Navigator Worklist.** The worklist allows nurse navigators to create a personal patient list that provides pertinent information face up to assist with managing patients in navigation.



1. Click the **Oncology Navigator Worklist** button in the toolbar.
2. When accessing the **Oncology Navigator Worklist** for the first time, nurse navigators will select **List Maintenance** to select a patient list to display in the worklist.
3. To add a new patient list, select **List Maintenance.**
4. Within **Modify Patient Lists** window, select **New** in the bottom right corner.
5. From the **Patient List Type** window, select **Custom**.
6. Type in the name of the custom list in the field at the bottom of the window.
7. Select **Finish**.
8. The **Modify Patient Lists** window appears. Select the applicable list within the available list section.
9. Click **OK**.
10. On the **Oncology Navigator Worklist,** the following columns display:

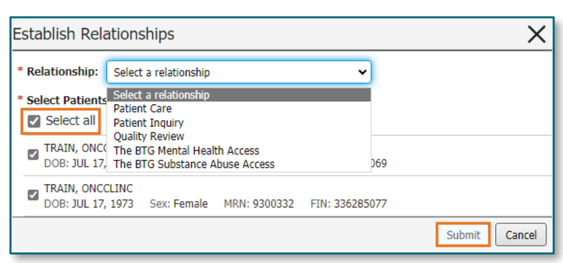


   - **Patient:** Displays Name, Age, Sex, DOB, MRN, and FIN.
   - **Problems:** Displays problems from the Problem List.
   - **Oncology Care Team:** Displays the list of Care Team members documented in the Treatment Team section of the Cancer Care Navigation Form.
   - **Future Appointments:** Displays future appointments.
   - **Insurance:** Displays patient's insurance information.
     - **Advanced Directive:** Displays documentation from the Advanced Directive section from PowerForms.
     - **Referral Navigator:** When a Referral Navigator order is placed, it will display here.
     - **Comments:** This column is used to view, add, and modify comments.

Add a Patient to the worklist

1. Click **Add Patient.**
2. Search for the patient by name and/or MRN and select a recent encounter for your facility.
3. Click **OK.**

Establish Relationships



1. Select the **Establish Relationships** button.
2. Select the appropriate relationship from the drop-down menu.
3. Use the **Select All** button to establish a relationship with all the patients on the list.

4. Click Submit. Patient data will now display in the **Oncology Navigator** Worklist.
5. Review how to Add/Edit/Delete Comments

Add a Comment

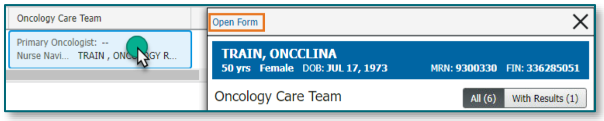
1. To add a comment, click the cell in the **Comments** column for the patient.
2. Enter text in the free text box and click **Save**.

Edit/Delete Comments

1. To view, edit, or delete comments, click the cell in the **Comments** column for the patient.
2. Click the dropdown arrow and select:
3. **Edit** to edit the note.
4. **Delete** to delete the note.

Cancer Care Navigation Form

To quickly access the **Cancer Care Navigation** Form, click the cell in the **Oncology Care Team** column for the patient and select **Open Form**.



1. This form will be used to document the details for navigation.
2. Documentation from certain fields will flow to the Oncology Navigator Worklist.
3. For purpose of this practice workbook, complete the following fields:
   - Medical Oncology Provider: TRAIN, PHYS ONCOLOGY01
   - Nurse Navigator: TRAIN, ONCOLOGY RNLPN 10
   - Fill in information in the remaining sections.
4. Click the green checkmark ✓ to sign the form.

Survivorship Care Plan

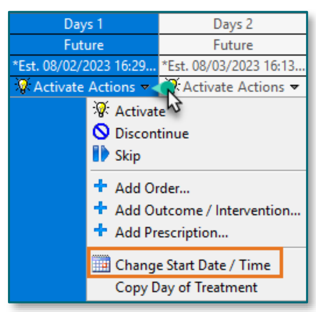
For navigators who do survivorship care plans with patients, you will use Dyn Doc to create the Survivorship Care Plan Note.

1. Fill out the **Cancer Care Navigation Form** and update the form through the course of the patient's treatment, as applicable.
2. When ready to create the Survivorship Care Plan, click the **Oncology Care Plan** in the **Create Note** section from the **Oncology Nursing Workflow** MPage to generate the note.
3. Information from certain fields in the **Cancer Care Navigation** form will automatically populate to the note.
4. Fill out all the fields that did not automatically populate to the note.
   - These fields have an underscore (_) to the items that will need to be filled out.
   - Use the F3 key on their keyboard to tab to the next field.

5. In the **Additional Cancer Specific Care Plan Information** section of the note, fire the applicable cancer specific auto text to and fill in the fields.
   - 4 different Cancer Specific auto texts available:
     - **/onc_breast_treatment_summary***
     - **/onc_colon_treatment_summary***
     - **/onc_lung_treatment_summary***
     - **/onc_prostate_treatment_summary***
6. Review the note for completeness, accuracy, and remove any information not applicable to the patient.
   - Use the following buttons in the note to remove, refresh, or add an additional free text field .
   - Make edits/remove or add information to individual items manually.
7. Click **Sign/Submit**.
8. In the **Sign/Submit Note** window, search for the provider to for signature, then click **Sign/Submit**.
9. The provider will receive the note in Message Center to review the note, make any necessary updates as needed, and then sign the note.
10. Once complete and signed by the provider, the Survivorship Care Plan will be printed and given to the patient as well as sent to all applicable care team members.

Rescheduling a Day of Treatment

To reschedule a day of treatment when the orders HAVE NOT been activated yet, complete the following steps:



1. Navigate to **Orders** tab in the menu and go to the regimen.
2. Click **Chemotherapy phase**.
3. In the **Day 1** column, select **Activate Actions**.
4. Select **Change Start Date/Time.**
5. Enter the new estimated Start Date/Time you want to reschedule the day of treatment to.
6. Place a check in the box for **Request a new appointment time**.
7. Click **Adjust All** to adjust the selected treatment periods and phase(s).
   a. This will allow you to reschedule the linked phases (Chemotherapy, Labs, and Clinical Scheduling and Tasks) at the same time.

NOTE: If you are only rescheduling a single Day of Treatment and you do not want to adjust the dates of the remaining days of treatment, you would NOT click the Adjust All button.

8. Document **Reschedule Reason.** Select an appropriate reason from the list.
9. You have the option to enter a comment in the **Comment** field, as applicable.
10. Click **Orders for Signature.**
11. Click **Sign,** then click **Refresh**.