From the Office of Health Informatics

Quick Reference Guide (QRG)

Use the Oncology Tracking Board

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This Quick Reference Guide (QRG) demonstrates the use of the Oncology Tracking Board.

Use the Oncology Tracking Board

The Oncology Tracking Board is a primary resource used daily in the infusion clinic for managing patients.

Check In

➢ **From the Oncology Tracking Board:**

STEP 1: Click the **Provider Check In** icon. 

STEP 2: In the Provider Check In window, click the **Provider Role** dropdown arrow to select the correct position.

NOTE: **The Default Relation field populates based on role.**

STEP 3: To assign a color to a provider, select the **Associated Provider Color** checkbox.

STEP 4: Click the desired color to select in the Color window.

STEP 5: Click **OK**.

STEP 6: To save all selections in the Provider Check In window, click **OK**.

NOTE: **Notice that once checked in, the Provider Check In icon changes to a Provider Check-Out icon, which will be used to check out as an available provider.** 

Assign a Provider

➢ **From the Oncology Tracking Board:**

STEP 1: Double-click the **Nurse** field/cell in the patient's row.

STEP 2: In the Assign/Unassign Providers window, click the dropdown arrow for the selected role.

STEP 3: Select name from the dropdown list.

STEP 4: Click **OK**.

NOTE: **On the Tracking Board, initials will display in the selected color.**

Update Patient Location

➢ **From the Oncology Tracking Board:**

STEP 1: To move a patient from the Waiting Room to an available chair for treatment, double click the corresponding cell in the **Location** column.

STEP 2: In the Select a Location window, click an available chair to select it.

NOTE: **Chairs displaying (1) indicate the chair is already occupied. Chairs displaying (0) are available.**

STEP 3: Then, click **OK**.

Manage Patient Events

- **From the Oncology Tracking Board:**

STEP 1: Click the row for the appropriate patient.

STEP 2: Click the **Modify Event** icon to communicate that a patient is ready for treatment.

STEP 3: Hover over Request Event in the dropdown menu; then click **Patient Ready** for Tx in the list.

STEP 4: Hover over any of the icons in the To Do column to understand the status updates. The onscreen key can also be used for reference:

	Patient Ready for Tx: Nursing will use this event to communicate to pharmacy the patient is ready for treatment.
	Pharm Working on Ord: Pharmacy will use this event to communicate to nursing they are working on the orders
	Provider Eval Needed: If the provider needs to see the patient, the Provider Eval Needed event would be used.
	Pre Meds Ready: Pharmacy will use this event to communicate to nursing the patient's pre-medications are ready.
	Chemo Ready: Pharmacy will use this event to communicate to nursing the patient's chemo is ready.
	Problem with Order: This event will be used to communicate there is a problem with the order needing further review and clarification with the provider.
	Charges: When the patient is checked in, the system will automatically fire the Charges icon to the tracking board. This will automatically be completed once nursing completes the Infusion Clinic Charges PowerForm.

NOTE: **Add another event by repeating steps 1 – 3 as needed.**

STEP 5: Right-click any icon in the To Do column to open the Events window.

STEP 6: Review the additional event details in the Events window; then, click **Close**.

NOTE: **The Events window contains checkbox filters to display events in different statuses. This window also contains a table showing each event's start time, type, status, and the user who initiated the event. Select the Complete checkbox to view events that are already in a Completed status.**

NOTE: **The Charges icon automatically populates when the patient is checked in on the Tracking Board.**

NOTE: **The Charges icon auto-completes when nursing completes the Infusion Clinic Charges PowerForm.**

Check Out a Patient

- **From the Oncology Tracking Board:**

STEP 1: Double-click the chair in the Location column for the appropriate patient.

STEP 2: In the **Select a Location** window, document that the patient is checking out by selecting the location's checkout acronym.

STEP 3: Click **OK**.

STEP 4: Click **Yes** to confirm the checkout process.

STEP 5: Click the **Checkout tab** to verify that the patient displays as checked out.