Checklist – Modernized Vital Signs & Clinical Entry Workspace Project

Document and forward any additional questions that you are unable to answer to the appropriate member of the team. Do not leave concerns open-ended; YOU are responsible for following up.

Please note the following are priorities during your time with the staff:

Modernized Vital Signs

- How to document from the Vital Sign component
- How to correct documentation performed within the component
- Changes to Temperature documentation (Temperature and Temperature Method are one field)

Clinical Entry Workspace

- Providers: How to default components to the top of CEW
- Providers: How to edit a custom autotext dropdown from CEW
- Clinical staff: How to search for Powerforms and make them a favorite
- Clinical staff: How to document a new Powerform from CEW

Date:____

CI/Support Name:____________________________________

Staff Member Name:__________________________________

Staff Position:_______________________________________

Task	Yes	No	N/A
1. Vital Sign Component Overview			
Use Add Vitals button to select documentation forms.			
Use arrows to pull in additional columns (single arrow = 1 column, double arrow = 5 columns).			
Latest button – pulls most recent vital signs into the far left column, displays in orange.			
Look Back dropdown – changes the timeframe for vital signs.			
Select Date Icon (calendar) – used to pull a certain date into the far left column.			
Zoom in and Zoom out buttons to change the display.			
Click date header to change Vital Sign interval view.			
2. Pain Scales and Assessments and Vitals and Measurements Form Functionality			
Chart At – be sure to update the time to reflect the time the vital signs were obtained or time the assessment was performed if not documenting in real time.			
Document by clicking into the field or use the dropdown arrow.			
Black carat collapses the Pain Assessment tool/Vital Sign sections to decrease scrolling.			

Comment icon becomes available once something is documented in the field.			
Green bubble on the comment icon indicates a comment has been made, clicking the green bubble will open the comment for review before signing.			
Must scroll to the bottom to sign to save documentation.			
Can pull in vital signs into the Vitals and Measurements Charting form in the Vital Signs component if the patient is associated to the monitor.			
Vitals signs pulled in from a monitor will have a purple diamond and will have Device:Date/Time below the documentation field.			
If Vitals are pulled in, nurse should be sure to change the form time to the time listed below the vital sign so the vitals are not documented in the wrong time column.			
3. Temperature Documentation			
Temperature and Temperature Method are now one documentation field in the Vital Sign Component, iView, and Powerforms.			
Inpatient Nurses using BMDI/EP2DA – Temperature Monitored has a required Temperature Method field that opens when temperature result is pulled in from a device.			
4. Correcting Documentation Performed Within the Vital Signs Component			
Click the documentation cell and select Modify in the viewing pane that opens.			
Update the documentation or add additional documentation.			
Sign.			
A blue triangle displays in the Vital Sign documentation component cell indicating the documentation has been modified. (Even if modified from iView.)			
5. Uncharting Documentation Performed Within The Vital Signs Component			
Can't remember if the documentation was from iView or the component? Click the cell to be uncharted/modified.			
An Advisory popup will display if the documentation occurred in outside of the Vital Sign component prompting the user to return to the location in which the documentation was charted.			
Navigate to iView and unchart the documentation.			
6. Viewing a Comment			
Click the comment icon in the cell to open the viewing pane.			
7. Clinical Entry Workspace Overview			
Documentation from the Vital Sign Component forms will display in the Charting section.			
Documentation from Adhoc forms display in Charting section with their status – Completed, In-Progress etc..			
Documentation components that populate Dyn Doc Notes are moved to Clinical Entry Workspace and no longer seen in the MPage component menu.			

Use filters in Charting to customize how many forms and status of forms to be seen.			
Use the Refresh icon to refresh just Clinical Entry Workspace.			
8. Setting Up Clinical Entry Workspace			
Each MPage will need to be set up, the settings do not carry from one MPage to another.			
Settings Button will be dithered when there are no documentation components for that MPage.			
Click Settings to change the order of the display – defaults to Charting Components first (Powerform display).			
Providers will want to change it to Documentation Components First.			
Providers will want to drag the documentation components to the order that fits their workflow.			
Click Apply to save the Settings changes.			
Remind to exit Powerchart/FirstNet through the Exit door to make sure the changes stick.			
9. Resizing Clinical Entry Workspace			
Use the Toggle Workspace icon to close/open Clinical Entry Workspace.			
Click the Workspace Setting Tool icon to change the size of Clinical Entry workspace display (Small (default setting), Medium, or Large.			
Customize the size by hovering over the left edge and drag to the desired size.			
10. Editing Custom Auto Text Dropdowns from Clinical Entry Workspace			
Enter the auto text in a documentation component.			
Click Edit.			
Modify, add, or remove a dropdown option.			
Click Apply.			
11. Searching For a Form to Document			
Under Charting, click Add form.			
Type the name of the Powerform in the Search field (no need to hit Enter – options will display to select from based on the search word).			
12. Documenting Forms From Clinical Entry Workspace Charting			
Click the box next to the form name.			
Click Add. The form opens.			
Multiple forms can be selected at one time, just like in AdHoc.			
13. Making a Form a Favorite			
Click the open Star to add the form to Favorites for easy future acess. Star turns black when it is a favorite form.			
Tip: Search for and add forms that are frequently used and add them to Favorites.			

14. Form History			
Set the Range and Sort filters to view forms used during that time range.			
15. Accessing Form Browser From Clinical Entry Workspace			
Click Form Browser button under Charting.			
Click the This Encounter box if you only want to see forms documented on for this encounter.			
Set the Range filter for the timeframe. (Defaults to 7 days)			
Set the Status filter for the form statuses you want to see.			
Use the Author filter if you only want to see forms you documented.			
Click the column header to filter that column. An arrow displays down or up. Only one column can be filtered at a time.			
Use the First, Previous, Next, and Last buttons to navigate through Form Browser when there are multiple pages.			
To open a form, click the line row or the arrow to the right of author.			
Options to Modify, View, or Unchart.			
Click arrow back on the upper left corner to return to Form Browser in CEW.			
16.			
17.			
18. Weird Gotchas			
19. Review where to find more materials			
20. Comments/Concerns			