

Slide	Caption(s)
Agenda	
3	<ul style="list-style-type: none"> • Managing PowerForms • The AdHoc Folder • Learning Checkpoint
Managing PowerForms	
5	Identifying Partially Completed Form Tasks
6	<ul style="list-style-type: none"> • In order for PowerForm tasks to be completed, all required fields must be addressed. There are times when forms are signed before they are finished. <ul style="list-style-type: none"> ○ When the staff member needs to address something else urgently and must sign the form before completing it; ○ When the staff member forgets to complete a required (yellow) field in the PowerForm; ○ When the required clinical data is not present at the time the form is signed. • Any tasks associated with the form will remain on Care Compass until the required information is added.
8	<ul style="list-style-type: none"> • This patient has a task to complete the Admission History PowerForm. Let's take a look...
9	<ul style="list-style-type: none"> • When I open this form, I can tell immediately that it has already been started. Look at the sections listed in the navigator. If a form has ANY sections in bold, then someone has previously started the form. • Notice that the Social History section has a red asterisk beside it. This indicates that required information is missing.
10	<ul style="list-style-type: none"> • As you can see, the CAGE Assessment question has not been answered. You might be tempted to go ahead and just complete it now. • That is NOT the right way to proceed. Were you to do that, an additional form would be added to the patient's chart. This can be problematic. • What you need to do, is MODIFY the existing PowerForm. So, what you should do in this situation is click the blue Cancel button and exit the form.

12 • Answer "Yes." You do want to exit without signing.

13 • Click the patient's name to open his chart view.

15 **Modifying PowerForms**

16 • As you may recall from our earlier eLearning course, signed PowerForms are housed on the Form Browser link.

17 • The Admission History PowerForm is showing with a red icon. This indicates that it is missing required data.

• Right-click the form and select Modify.

19 • Go to the section missing data.

20 • We can see that the Alcohol assessment was completed. The patient does not drink, and therefore, the CAGE assessment was not performed.

21 • Once the PowerForm is complete, click the green checkmark to sign it into the permanent record.

22 • The icon beside the form has changed to blue, indicating that all required fields have been completed. Let's return to Care Compass to see what's changed there.

23 • There is one task showing for our patient.

24 • It's still that Admission History PowerForm task. Let's click the Minutes Ago button to refresh the screen.

25 • The task now goes away.

27 **Uncharting PowerForms**

28 • If you need to Unchart a PowerForm, for whatever reason, come to the Form Browser and right-click the form and select Unchart.

30 • Type the reason into the Comments field. (This is required.)

31 • Click the green checkmark.

32 • If the form had embedded tools, such as Allergies and Problem History tools, then you will need to review the information entered there and make any necessary updates.

32 • You will be presented with pop-up windows for the tools needing to be addressed. I'm going to expand this window by clicking the maximize icon in the right upper corner.

- 33 • Migraines was entered in error. To fix this, I can click to select it and then click the Modify button. Or, I can right-click and select Modify Problem.
- 35 • I need to change this from an active problem, so I'm going to open that dropdown menu.
- 36 • The appropriate selection in this case is Canceled/In Error.
- 37 • The Cancel Reason is Error.
- 38 • Next, I need to close the tool by clicking the OK button within it.
- 39 • Migraines has been removed from the patient's Active Problems list. I can now click OK to proceed.
- 40 • NKA happens to be the correct allergy for this patient, so I'm going to simply Click OK (as I don't want to remove it).
- 41 • The icon beside the uncharted PowerForm has turned yellow and the form displays with a red strikethrough. These indicate that the PowerForm has been uncharted.

43 **Changing the Date/Time**

- 44 • If you ever need to change the Date and/or Time on a PowerForm, you may do so by right-clicking and selecting Change Date/Time.
- 46 • Update the Date and/or Time fields.
- 48 • Comments are optional in this window.
- 50 • Click the green checkmark to save the changes.
- 51 • The date/time will update on the PowerForm.
- NOTE: The Change Date/Time option does not work with all PowerForms. If you are unable to use the Change Date/Time feature, choose Modify instead.
- You may then update the date and time within the PowerForm, itself.

The AdHoc Folder

54 **AdHoc Folder Basics**

- 55 • Many PowerForms will not have an associated task on Care Compass and can be accessed on an as needed basis using the AdHoc folder button in the Actions tool bar.

- 57
- The window is divided into two parts. There's a navigator on the left containing various folders for different specialties.
 - Most nurses will see the Nursing Care Folder when the AdHoc window opens. Other groups will see and/or use different folders.
 - Talk to your preceptor to determine which folder contains the PowerForms you will need to use.
- 58
- This is the Behavioral Health folder.
- 59
- This folder is used by Care Management.
- 60
- This is the Respiratory Therapy folder.
- 61
- This Therapy folder is used by Physical Therapy, Occupational Therapy, and Speech Therapy.
- 62
- The PowerForms in each folder will vary, however, there are some forms that are common to most end-users.
- 62
- Note PowerForms are common to most groups. Let's start there. To open a PowerForm, you may double-click its name in the list.
- 64
- Ongoing Notes**
- 65
- The Nursing Note is one example of an ongoing note PowerForm. Various therapies have similar notes.
 - Nursing uses a 24-hour nursing note. This 24-hour period begins and ends at 07:00. Follow your specialty's process for note duration.
- 66
- First, please do not use the formatting options seen here or on other PowerForms. These adversely impact printing and other functionality.
 - These appear here simply because this type of data entry field is necessary to allow space for typed information.
 - When entering data into a note PowerForm, type the date and time first, then the note. End with your first initial, last name, and title.
 - Each entry is tracked by the system, so can be attributed correctly with research. Typing this information puts it in a place that anyone reading the note can easily find it.
- 67
- Click the green checkmark to sign the PowerForm.

- 69 • The last note(s) will appear in the data entry field, thus creating an ongoing narrative.
- 70 • Place your cursor at the end of the existing note(s).
- 71 • Create a little space after the last entry.
- 72 • And type the new note, being sure to include the date and time and your credentials.
- 73 • Click the green checkmark to sign the form.
- 74 • Ongoing note PowerForms will continue to show the entered data (generally, for the duration of the hospital visit) until it is cleared by a member of the team.
- Nurses do this with the first note of the day (after 07:00). Other groups may keep their notes ongoing for the duration of the visit.
 - Ask your clinical preceptor or supervisor what the expectation is in your work area.
 - Let me demonstrate how to clear the entries now. Let's imagine it is the next morning and I'm opening the PowerForm for the first time after 07:00.
- 75 • The note opens, showing yesterday's entries. To remove these I can click the Clear button in the tool bar at the top of the PowerForm OR...
- 77 • Highlight the data and press Delete on my computer keyboard.
- 78 • The data is removed and I can start a new note for the current day.
- 80 **Patient Plan of Care**
- 81 • The Patient Plan of Care is a multi-disciplinary care plan shared by multiple groups. Let's take a look at how to start and update the plan of care.
- 82 • This PowerForm has three required fields. However, be sure to customize your documentation to address the needs of your patient, following any hospital policies.
- Start with the three required nursing diagnoses and then add as many others as you need.
 - Before I start, take a look at the navigator. Notice that all of the sections below the first are dithered (grayed out). These sub-forms will not become available for charting until you choose them.

- 82 • Okay, let's start with Knowledge Deficit.
- 83 • The sub-form opens in a pop-up window. When starting a new problem, select "Initiate."
- 84 • Then answer the items appropriately for the patient.
- 97 • Once done, click the Return button in the upper left corner.
- 98 • Continue in this manner until all appropriate items have been selected and planned.
- 129 • Each selected problem will turn blue in the navigator. Click the green checkmark to sign the form.
- 130 • Various groups and sites have different expectations regarding how frequently the Plan of Care must be updated.
 - Be sure to ask your preceptor or supervisor what the expectations are on your unit.
 - Let's take a look at what the Patient Plan of Care looks like when accessed after it's been initiated.
- 131 • You can tell when the form has been started, because the initiated items in the main section will be pre-selected.
 - Also, their corresponding tabs in the navigator are available for charting.
 - When documenting after the form has been started, you will want to go through each open section using the navigator.
- 132 • Update the documentation, as needed.
- 146 • Be sure to add any new problems, if needed. Click the green checkmark to sign the PowerForm.
- 147 • When you are done with the AdHoc window, click the Close button.

Learning Checkpoint

- 149 You are caring for a patient who was admitted yesterday. The Patient Plan of Care was initiated by the admitting nurse at that time. Access and update the Patient Plan of Care PowerForm using the AdHoc Folder.
- 150 Scenario Details: Patient: TRAIN, EMHSRN97. S/P Surgical repair of closed fracture of left ankle r/t skiing collision; Patient has a cast on her left lower leg/foot; Patient is 24 yo with no other chronic problems
- 151 • Open the AdHoc Folder to access the Patient Plan of Care PowerForm.
- 152 • To open the form, you may double-click as demonstrated earlier, or you may put a checkmark in the box to the left of the form and click the Chart button in the lower right corner of the window.

- 153 • Click the Chart button in the lower right corner of the window.
- 154 • Since the PowerForm was started yesterday, the conditional sections corresponding to the selected problems are available in the navigator on the left.
- 155 • Be sure to view and update all open sections. Start by selecting the Knowledge Deficit section.
- 156 • You were able to discuss the fracture, mobility, and follow up with the patient. However, you feel that the patient is still in need of additional intervention.
 - Which selection should you make in the Status field, do you think? Go ahead and do so now.
- 157 • Proceed with making the most appropriate selection in the Goal Progress field.
- 158 • Click the scroll bar to see the fields at the bottom of this section.
- 161 • Click into the field where you can type additional comments regarding your interaction with the patient.
- 162 • Good job! Please select the Discharge Planning section next.
- 163 • You were able to discuss discharge with the patient. However, the husband was not present and additional teaching is needed. Please make the most appropriate selection in the Status field.
- 164 • Select the best choice in the Goal Progress field.
- 165 • Select the Self Care Deficits section next.
- 166 • Again, this education needs reinforcement. Select the best choice in the Status field.
- 167 • Select the most appropriate Goal Progress choice.
- 168 • Well done. Next up is Alteration in Comfort. Open that section now.
- 169 • If there's a section that you do not need to address because it's outside the scope of your work, then be sure to open the section and click the Clear button (the hand/pencil icon) to remove the information in the section.
 - This PowerForm, like many, pulls in the last charted data, so it's important to remove information that is not pertinent to your own assessment or evaluation of the patient.
- 171 • If you like, you may click the Details button for more information. Click Details now.
- 172 • All data on the current section will be cleared. Click Yes to proceed.

- 173 • Click the next section in the navigator to move on.
- 174 • You determined that the patient still needs some additional follow up on this problem, too. So go ahead and choose the correct Status and Goal Progress.
- 176 • It's important to add any problems that are appropriate to the patient. Click the Care Plan Main section now.
- 177 • The patient has a cast on her left lower leg and foot. This has impaired her ability to move around. Click the radio button corresponding to the problem related to altered mobility.
- 178 • You are the first to start this section. Make the appropriate selection in the Status field.
- 179 • You made progress with the patient, but since the husband wasn't there for teaching, you feel that additional work is needed. Make the best selection in the Goal Progress field.
- 180 • When you start a problem, be sure to choose all appropriate items in each multi-select field.
- 182 • In the Related To field, select: Pain, Musculoskeletal impairment, and Trauma.
- 185 • In the Evidenced By field, please select: ROM limitations, Limited muscle strength or control, Impaired coordination.
- 188 • In the Expected Outcomes/Goals field, select the first response.
- 189 • The patient should meet this goal by discharge. Make your selection.
- 192 • In the Interventions field, please select: Encourage increased activity interspersed with rest periods as tolerated; Ambulate with one assist; and Follow/assist with therapy goals.
- 193 • Click the Return button in the upper left corner of the window to return to the main PowerForm.
- 194 • Sign the PowerForm now.
- 195 • Close the AdHoc Folder window by clicking the Close button in its lower right corner.
- 196 • Nice job! You have successfully updated a patient's interdisciplinary care plan!
- 198 • You have reached the end of this eCourse! In the next eCourse, we are going to delve into documentation in the Interactive View and I&O link.
- 199 • Thank you! This concludes this eLearning module. Please contact the IS Help Desk with any questions, issues, or concerns.