

Helpful Hints

LET'S CHART AN ASSESSMENT:

- 💡 Open the patients' chart
- 💡 Select the **FLWSHEETS** tab
- 💡 **OPTION:** Open the RIGHT Side Bar, and select the **SIDEBAR SUMMARY**
 - Select the **SHIFT REQ DOC** hyperlink. This will show you all required documentation that is needed. As you go thru your chart, you will notice the amount of items that are still needed to be documented will continue to decrease as you work thru your assessment.
- 💡 Under the Title: FLOW SHEETS, there is a row of options- select the **REQ_DOC** tab (the stoplight; can also press ALT+Q); this will turn all mandatory fields RED. It will also turn this feature on for all of the mini tabs within the FLOW SHEETS tab.

VITAL SIGNS MINI TAB:

- 💡 If you recorded vital signs, you will document all mandatory fields in this section. All entries are **AUTOSAVED**.
 - If you make a mistake and need to adjust it- you can just change the entry. You will notice, just like in Allscripts, a small triangle in the upper right corner of that data field.
 - You can hover over it and see what was changed.
 - If you would like to enter a comment as to why it was changed, in that data field there is a piece of paper icon- click it and enter your comment.

BASIC ASSESSMENT MINI TAB:

- 💡 **PRO TIP:** Select the play button (MACRO) on the time column and you can select all areas to be listed as WDL. Then you can go thru and update all of the exception areas (time saver).
- 💡 If you choose to not use the MACRO, you will chart as you have in Allscripts
 - If something is "WDL", then that is the only section you need to chart
 - If something is "X", then you only need to chart the exceptions
- 💡 **NOTE:** If you accidentally enter the information under the wrong time column you can select the down arrow next to the time and select "Copy Column to Another Column" and then enter the correct time.


IV ASSESSMENT MINI TAB:

- 💡 **NOTE:** The **FLWSHEETS** and the **LDA AVATAR** will auto-flow information. You are able to document your assessment on either area. **You can only add a line/drain/wound via the LDA AVATAR**.
 - If you choose to document via the **FLWSHEET**, you will document just like in Allscripts.
 - If you choose to document via the **LDA AVATAR**: select the **LDA AVATAR** in the row under the Title: FLOW SHEETS.
- 💡 To enter a new line/drain/wound- type in the text box of what you want like to add and then hit **+ADD**. You will then out the required documentation at that time.
- 💡 To discontinue an IV in the mini tab: click the pencil in the **IV PROPERTIES** row label of the IV site you want, scroll down and fill out removal categories and then click **ACCEPT**.

CARE PLAN FLOW SHEET:

- 💡 If this is a DAILY ASSESSMENT, you will only need to **DOCUMENT PROGRESS**.
 - **PRO TIP:** Select PROGRESSING or NOT PROGRESSING next to "**APPLY TO ALL UNDOCUMENTED**" (on row next to MANAGE PLAN, DOCUMENT PROGRESS, and ADD CARE PLAN. This will mark all care plan topics to that. You can then manually adjust areas that you need to. Select **NEXT**.
- 💡 The SUMMARY AND NOTE section will automatically appear after you select NEXT (from above).

- 💡 A pre-populated note appears and all goals will be auto-entered.
- 💡 On left hand side, select **+ADD ALL**
- 💡 In the note itself, if there are red highlighted areas, they need to be addressed. After this is completed, **MAKE SURE TO CLICK ON THE HEART IN A BOX ICON**. Select reason for blocking. If this is not completed, these notes will automatically be shared into the My Chart of that patient during their admission.

My Note 

Care Plan • No service • 8 | The patient can view the shared note after they get an active UH MyChart account. Click to block this note from the patient

Reason for Blocking ✕

Provide the most appropriate reason why this note should be blocked from the patient.

Sharing this note could lead to physical harm to the patient or another person

The patient or proxy requested this note not be shared in the patient portal

Comments

ⓘ Select a reason to accept.

💡 After this is done, select **SIGN**.

ASSESSMENT COMPLETED 😊