

Surgery 201

(Orthopaedics, Vascular, Urology, and General Surgery)

Practice Exercises

**Provider 201
Exercise One
Logging into Meditech Expanse and Add a Patient**

Objective

In this exercise, you will log in to Expanse and add a patient. If needed, you may also set up or change your pin.

Signing On

1. Click on Meditech Expanse Icon
2. Enter Network Username and Password
3. Select 'Launch New Session'
4. Select HCIS: OAT TEST
5. Select Job: Default to Inpatient Physician
6. Click Sign On

Add a Patient:

1. Click on the Hamburger button located beside your name.
2. Click on 'Add Patient' to take you to the Add Patient overlay.
3. Click on the 'Name' Field.
4. Type your patient's name and press Search or the Enter key on your keyboard.
5. Select your patient.
6. Select 'Rounds-Show Cover' and 'Rounds-Hide Cover' then click 'Yes'
7. The patient should now appear in your Rounds List.

To Set Up Pin

1. Click on the Menu button and select Change Pin
2. Enter New Pin and re- enter to verify then click OK.

Provider 201 Exercise Two Order Management Tool

Objective

In this exercise, you will explore the use of Order Management Tool by entering an Order Set.

Enter Order Management

1. Click on an empty spot on the patient row to highlight the patient. Once highlighted, the row should be green.
2. Click on Order from Navigation Bar.

Explore Order Entry Options

1. Click on 'Enter' Tab
 - a. For Physician Assistants, a prompt will appear to ask for Provider and Source.
 - i. Provider: Doctor Inpatient, ZZ Source: Verbal/Telephone
2. Click on Drop down menu beside 'Favourites'.
3. Click on 'Orders'. Note the categories available. Expand a section by clicking on >.
4. Click Drop down menu again, this time click on 'Sets'. Note the options available.
5. Click Drop down menu and reset it to 'Favourites'.
6. Click into the Search bar.

Enter An Order Set:

1. In the search bar type a keyword for a common post op set you use.
2. Click on  , note that 'Process Orders' is now red.
3. Click on Process Orders.
4. Click on any checkboxes. As you are scrolling through the set, find and click on the following icons:
 - a.  For instructions
 - b.  For Alerts
5. When you reach the medication section, select a medication or two. Practice editing the start and stop dates.
6. Once done click Submit.
 - a. If a conflict pop-up should appear, select Override. Choose an override reason.
7. Enter your pin, then press 'Enter' on your keyboard to complete.

Provider 201
Exercise Three
Order Management: Multiple Items

Objective

In this exercise, you will practice use of Chart Viewer and enter multiple orders such as lab, diagnostic imaging, diet, and consult or referrals.

Use Chart Viewer

1. While on Order Management, click on the 'Menu' button from the black navigation bar.
2. Select '**Chart Viewer**'.
3. Click and hold on the new tab, then drag your mouse down. The tab should now be a separate window.
4. On your keyboard, press and hold on Windows key (beside Alt), then press the > key. The new window should now appear on the right side of your screen.
5. You can then select the main Expanse window to go on the left. Simply select it from the options of screens or press and hold Windows key then press < key.

Enter Multiple Items

1. Navigate to "Enter tab". Search for the following items and click  for each item.
 - a. Lytes
 - b. XR Chest 2V
 - c. Discharge Planner
 - d. Pharmacy Consult
 - e. Consult to Anaesthesia
2. Click on **Process Orders** and work through each order:
 - a. **Pharmacy Referrals:** Select BPMH Referral.
 - b. **Lytes:** Select Stat. Click on the Star to make it a Favourite. Select "Today Now" as default.
 - i. Order Lytes for the next 3 days. Click on > beside Electrolytes to see options again. Order this IN.AM x 3 days by clicking on IN.AM checkbox. To the right of IN.AM, change the number to 3 to indicate 3 days. 3
 - c. **XR Chest 2V:** Select Stat. Click Drop Down for reason for Exam and select Shortness of Breath.
 - d. **Discharge Planner:** This is selected as soon as you added to process order. Enter any other information if required.
 - e. **Consult to Anaesthesia:** Note that for this group, they require a page/call.
3. Once finished, click Submit and Enter PIN.
4. Your orders should now be in the Current tab.
5. Navigate back to Enter, find Lytes and expand. You should see the Stat option. Click on checkbox and note that the start time automatically has current date and time. Deselect checkbox to cancel order.

Stopping and Completing Consults:

1. Go back to Current Tab.
2. Find the consult order.
 - a. If consult no longer required, click on the status and select 'Stop'.
 - b. Consultants, if you are signing off and the consult is complete, you would select 'complete'

Provider 201 Exercise Four Medication Orders

Objective

In this exercise, you will practice entering medication orders.

Age and Weight

1. Ensure that these checkboxes are selected | Pt.Age Wt. |
2. If Wt has a checkmark this means a weight is recorded. You will find the patient's weight above the Acc# bubble.
3. If no weight is entered, do the following:
 - a. Click Menu from black navigation bar
 - b. Click Clinical Data
 - c. Enter Weight (E.g 70 Kg)
 - d. Click Save located on the bottom right side of the screen.
 - e. If weight does not show immediately, click refresh  or navigate away from Order Management screen then come back.

Weight Based Dosing

1. Search for Gentamicin
2. Find Gentamicin 2 mg/kg IV Once and expand by clicking >.
3. Note that dose is calculated for us already. Click on checkbox.

Entering Medication with Alternate Routes

You will order Dilaudid 1 mg PO/SC Q6HR PRN

1. Search for 'Dilaudid'.
2. On the first option, narrow options by clicking on 'PO' and 'SUBCUT'
3. Select the 1 mg PO Q4HR PRN option. You will change frequency later on.
4. Click on > beside Dilaudid to expand options again.
5. Select the 1 mg SUBCUT option.
6. Go to Process Orders. In dose instruction, type " PO or SC". This will alert pharmacy to make an alternating link.
7. Let's change the order to the following:
 - a. Dilaudid 1.5 mg PO Q6HR PRN:
 - i. Click on dose field, type 1.5 on the keypad, then press Enter.
 - ii. Click on frequency (Q4HR). Type in Q6HR in the menu then press Enter.
 - b. Dilaudid 1 mg SUBCUT x 1 STAT:
 - i. Click on frequency (Q4HR). Type ONCE then press Enter.
 - ii. Click on PRN and choose STA.
8. Click Submit and Enter your Pin.

Provider 201
Exercise Five
Medication Orders and Editing Orders

Objective

In this exercise, you will practice entering more types of medication orders: IV, Non-Formulary, and Taper. You will also look at how to edit orders from the Current tabs.

Entering IV medication –Customized Dosing

Order Vancomycin 750 mg IV Q12HR SCH.

1. Navigate to the Enter tab.
2. Search for Vancomycin.
3. Expand options by clicking IV.
4. Note that there are standard dose options. You will scroll down find the first customizable (Vancomycin XX mg) for doses <1250 mg and the right frequency.
5. Once found, click on the XX and the text will be red and dose placeholder is an asterisk.
6. Click on the asterisk, type 750, then press Enter. All text should now be green.

Entering Non-Formulary Medication

You will enter an order for Victoza 0.6 mg Subcut Daily.

1. Type 'Victoza' in search bar.
2. Order a Non-Formulary will appear. Select Medication.
3. The text is red meaning we must enter information. Enter the dose , route, and frequency.

Please note that after ordering non-formulary items, pharmacy will work with you regarding procurement or possibility of switching to a formulary item.

Entering a Taper

1. Go to search bar and type 'Prednisone'
2. Expand options by clicking PO
3. Select 50 mg PO Daily CC B.
4. Click on  for the full edit view. Scroll down to find Taper.
5. Click on drop down menu and select 'Custom Taper (Blank)'. Once selected, scroll up to see that the dose is no longer set at 50 mg and is replaced by 'See Taper'
6. Scrolling back down to Taper, fill in a few lines starting:
 - Dose: 50, Daily CC B, 7 Days
 - Dose: 45, Daily CC B, 7 Days
 - Dose :40, Daily CC B, 7 Days
7. Scroll up and click on the star to make this a favourite.

8. Click Submit and Enter your pin.
9. After submitting, go back to Enter tab. Find Prednisone in your Favourites. Click on the checkbox for 'See Taper'.
10. Click on . Next time you order this for a patient, If you wanted this to start at 45 mg instead, simply click the X for the 50 mg line.

Editing on Current Tab

Changing dose (Non-IV)

1. Go back to Current Tab
2. Find the Dilaudid PO order.
3. Click on the order and the text should appear green.
4. Click on the dose
5. Type 1 on the keypad then press Enter.

Stopping or completing an Order

1. Find the diet order
2. Click on the status (Ordered)
3. Select Stop
4. You would then have to enter a new diet in the 'Enter' tab. If time permits or desired, go ahead do so. If not, proceed to step 5.
5. Click Submit then enter your pin.

NOTE: Remember that you can edit dosing for NON-IV meds ONLY and you cannot change route.

**Provider 201
Exercise Six
Transitions of Care**

Objective

In this exercise, you will practice using the functionality of Manage Transfer and Hold queue.

Transfer Management: Pre-op

1. Go to Current Tab. Review if any orders need to be held now (e.g anticoagulation).
2. If you need to enter an order (e.g NPO order) or an order set, enter these in the 'Enter' tab.
3. Once finished entering orders, go to Transfer Tab.
4. In Reconcile tab:
 - a. Current Orders: Click No to 'New Admission' and indicate diagnosis or transfer location
 - b. Transfer Orders: Select STOP ALL
 - c. Transfer Medication:
 - i. Home Medication: HOLD ALL
 - ii. Visit Medication: STOP ALL
5. Click Submit and enter your pin.

Transfer Management: Post Op to Inpatient/Surgical Floor

Envision now that you are reviewing these orders after the case.

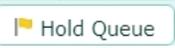
1. Navigate to the 'Transfer' tab.
2. Note the subtabs: Reconcile, Add New, and Preview.
3. In Reconcile:
 - a. Current Orders: You do not have to change anything here.
 - b. Transfer Orders: Review each item and select Continue or Stop. You may also choose to use the Continue All or Stop All buttons.
 - c. Transfer Medication:
 - i. Home Medication Reconciliation:
 1. Sort the medications by Drug Classes if you prefer.
 2. Select Continue or Hold for confirmed medications.
 3. Non-confirmed items will have ? or . For these items, be cautious when ordering. To set up alert for medication, click on  and select 'Alert'.
 - d. Visit Medication: Review each one and choose Continue or Stop.

Remember that if APS is involved, you are second to review meds and must not use 'Continue/Stop All' options to avoid overriding orders addressed by anaesthesia.

4. In Add New:
 - a. Search for Post Op Order Set of your choosing. Click on .
 - b. Once done adding new orders, click on Preview.
5. In Preview:
 - a. You should see a summary of what is New, Continued, Stopped, or Held.
 - b. If you see a 'No Action' category, you must address these items before you can submit.
6. Once all outstanding items are addressed, click Submit, and enter your pin. Notice the yellow flag. This is the indicator that Transfer Orders have been entered.

Hold Queue

You will use the same patient and envision that you are writing pre-op orders.

1. Go to Current Tab and click on the down arrow.
2. Select Hold Queue. Notice the subtabs: Summary and Add New Event.
3. Click Add New Event. Notice the subtabs: Event and Add New
4. In Event tab:
 - a. Event Reason: Pre-Op
 - b. Facility: OTMH
 - c. Event Date: Type in 'T' for Today.
5. In Add New tab: enter a pre-op order set of your choosing or enter a couple of lab items.
6. Once finished adding orders, click Submit and enter your pin.
7. Click on down arrow where it says "Hold Queue". Select "Current" to go back to Current Orders tab.
8. Note the icon  on the right hand side. This is an indicator that a Hold Queue was entered.

Provider 201
Exercise Seven
Transitions of Care: Discharge

Objective

In this exercise, you will practice using the discharge and discharge transfer functions of Expanse.

Discharge

You will use the same patient and will work through the discharge home scenario.

1. Click on Discharge button from the black navigation bar.
2. Complete the following fields:
 - **Anticipated Discharge:** Select a date on the calendar
 - **Patient Disposition:** Home
 - **Discharge Order:** Click on this. Enter information in Discharge Conditions (e.g Discharge if COVID swab negative). Click Submit and enter your Pin.
 - **Reconcile Problems:** Click in the field> Select All Problems> Address items by selecting Keep Active, Move to Inactive, Move to Hx, or Delete.

REMEMBER: Any oncology items managed by our Oncology Team must not be altered. Keep them in Active.

- **Standalone Forms:** Find and Work/Release Restrictions.
- **Activity Restrictions/Additional Instructions:** May enter your 'Return to ER...' instructions here.
 - There are limited canned texts available. Click  and select 'Canned Text'. Search for 'Appy/Chole'. Once found, click 'Apply'. If this is something you will use often, click the Star to make it a favorite.
- **Referrals:**
 - Adding yourself: Click 'Add Me'. Click your name. Indicate follow-up time frame in the "Follow-up with Referral" field (e.g 1-2 weeks). Enter a Referral note (e.g follow up on labs)
 - Adding other providers: Click On 'Referrals'. Use Search Provider (find one of your colleagues in the session). On the left hand side, Click on the checkbox beside their name. On the right hand side, enter follow up time frame and a Referral Note.
 - To Remove Referrals: Click on 'Referrals'. Select 'Edit' tab. Deselect one of the providers on the left side. Click OK.

- **Prescriptions:** Click on 'Prescription' then select "Continue to Orders" . **Review Home Medications First:**
 - **Reconcile:**
 - Any medication that is the same as visit medication, select 'Continue'
 - Any medication that was held during the visit, select 'hold' and enter Hold Instructions (e.g To be reassessed by Family Doctor).
 - Any medication that was stopped during the visit, select 'stop'.
 - Any medication that is continued but dosing has changed, select Continue on the Visit version. Indicate the Duration, quantity, and the number of refills.
 - If you need to add a prescription, you may do so in '**Add New**' Tab.
 - Once complete, click on **Preview**. This will summarize anything that is New, Continued, Held, or Stopped. If there is a "No Action" section, you **MUST** address them.
 - Once complete, click Finalize to enable the printing of the Home Medication Report for the patient.
 - Submit and enter your pin.
 - To print prescription pages for signing:
 - Click on Printer> Print Section> select checkbox for Prescriptions> click Print. A PDF and print menu should appear.
3. Once Discharge Routine is complete, select "Save & Close".

Discharge Summary

1. Navigate to 'Document' from the black navigation bar.
2. Search for Discharge Summary.
3. Click Preview to see that the information in Discharge routine is pulled into the note.
4. Close preview and review the following sections:
 - **Discharge Diagnoses:** Click 'Add'. Select from Active Problems or you may search for a different diagnosis. For each diagnosis:
 - Indicate the impact (e.g Most responsible diagnosis, secondary, or pre/post admit comorbidity)
 - Enter a problem comment (e.g for a cholecystectomy, you could comment "followed by Dr._____")
 - Enter details in Plan textbox.
 - **Past Medical History:** Automatically populated
 - **Course While in Hospital:** Enter information in the textboxes. These are narrative so you may type or use Dragon.
 - **Allergies:** Automatically populated
 - **Discharge:** Automatically populated from the Discharge Routine. You may change things here if necessary.
5. When finished, sign your note and enter your pin.

Discharge Transfer

You will use the same patient and will work through the discharge transfer to Rehab scenario.

1. For the purpose of this training only, you will have to cancel the Transfer orders that were made in Activity 6. To do this:
 - Go to Orders> find 'Transfer' section> click on status for 'Transfer Order Routine'> select 'stop'. Submit and enter your pin.
2. Click on Discharge button from the black navigation bar.
3. Complete the following fields:
 - **Anticipated Discharge:** Select a date on the calendar
 - **Patient Disposition:** Transfer Rehab Inpatient
 - **Discharge Transfer:** Click on this. Select OTMH Rehab.
 - **Reconcile:** You can select Continue or Omit. For this practice, select Continue all for all orders including Medications.
 - **Add New:** Click on this tab to enter the 'Admit to Rehab' order set. Complete the order set as desired.
 - **Preview:** Once done, the preview will allow you to review what is New, Continued, Held, or Omitted. If there were any 'No action' items, you would address these.
 - Submit and then enter your pin.
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 - **Reconcile Problems:** Click in the field> Select All Problems> Address items by selecting Keep Active, Move to Inactive, Move to Hx, or Delete.

REMEMBER: Any oncology items managed by our Oncology Team must not be altered. Keep them in Active.

 - **Standalone Forms:** Find and Work/Release Restrictions.
 - **Activity Restrictions/Additional Instructions:** May enter any other instructions here.
4. Once complete click "Save & Close"