McKESSON
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STAR 2000™

STAR PATIENT CARE REFERENCE GUIDE
Clinical Management Module

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Reader comments

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Trademarks

Preface

This volume of the *STAR Patient Care Reference Guide* provides a detailed explanation of the Clinical Management Module*.*

This book provides information on order entry and order evaluation, worklist processing, schedule processing, workload processing, online reports, midnight processing, and tables. This document briefly discusses areas of Order Management and Patient Scheduling. For detailed information regarding these areas, refer to *Order Management/Charge Processing - Volumes I and II,* and the *Patient Scheduling Module*, both of the *STAR Patient Care Reference Guide.*

Documentation Conventions

Documentation for McKesson's STAR 2000™ line of products follows these conventions:

Revisions
Text revisions are indicated by a change bar in the left margin. Paragraphs that contain grammatical changes that do not affect content are not marked.

Canadian Documentation
This volume may include documentation for Canadian users of this product. Complete sections of Canadian text are identified by "CN" and "CN Only."

Key Names
Named keys, such as SHIFT, CTRL, ALT, and ENTER, are displayed in this document in uppercase (capital) letters. A symbol key is written as text in this document followed by the symbol in parentheses, such as hyphen (-) and asterisk (*).

Key Chords
Key chords are key entries that require you to hold down one or more keys (typically, CTRL, ALT, or SHIFT) before pressing another key. In this document, key chords are displayed as the names of each key in the chord separated by a hyphen (-) (for example, CTRL-ALT-DEL).

Enter
ENTER is a key on a computer keyboard used to complete an entry on a STAR system. (This key may also be referred to as NEW LINE or NL in the STAR system.)

Data Entries
Letters or words you enter in response to the system are displayed in **bold** letters in this document. For example: Enter **Y** for Yes or **N** for No.

Selecting an Entry
This document often instructs you to "select an entry." The method you use to select an entry depends on whether you are using STAR from a terminal or IBM-compatible personal computer. Entry methods include:

- Entering the option number
- Using your arrow keys to highlight the option and pressing ENTER
- Clicking on the option using a mouse or other pointing device (PC only)

For more information about these options, see the *General Information Volume*.

Prompts
System prompts are displayed at the bottom of many STAR screens when the system requests an entry or displays a message. In this document, these prompts are indented and the text italicized, as shown in the following example:

Enter patient name--

Field Characteristics

STAR product documentation provides field explanation codes, in addition to a narrative description for each field on a screen. These codes display the maximum length of your entry in the field, the type of entry you make in the field, and whether the field is required. This information displays in the following format:

- DISPLAY ONLY for a field you cannot edit.
- For X-YY-Z field types, where:
  - X is the maximum number of characters permitted in the field:
    - P for a field length determined by a Parameter
    - T for a field length determined by a Table
    - U for a field having an Undefined length
  - YY is the type of entry technique permitted in the field:
    - A for Letters only
    - AC for Letters and Punctuation only (no numbers)
    - AN for Numerals and Letters only (no punctuation)
    - C for Characters (including punctuation)
    - N for Numerals only
    - NC for Numerals and Punctuation only (no letters)
  - Z is the requirement indicator of the field:
    - C if an entry is Conditionally required or optional
    - O if an entry is Optional to complete the function
    - R if an entry is required to complete the function

      NOTE: Facilities can designate that certain fields be Required. STAR product documentation does not display R for fields designated as Required by a facility.
  - For YY-Z field types, where YY is:
    - DATE for a field subject to the date entry conventions described in the *General Information Volume*.
    - SPECIAL FORMAT for a field having data entry requirements not conforming to standard format. The field definition contains the specific data entry requirements for the field.
    - TABLE LOOKUP for a field that enables you to select from a displayed table. See the *General Information Volume* for more information regarding this entry technique.
    - TIME for a field subject to the time entry conventions described in the *General Information Volume*.

  For use of the Z position in this format, refer to the explanations for Z under X-YY-Z.

Table of Contents

Chapter 4 - WORKLIST PROCESSING

Chapter 5 - CHARGING

Chapter 6 - DOCUMENTATION

Chapter 7 - WORKLOAD PROCESSING

Chapter 8 - ONLINE REPORTS

Table of Illustrations

Introduction

The Clinical Management Module is one of the STAR Patient Care series of product modules. This module provides additional functionality for those departments not addressed through existing products and interfaces currently offered by McKesson. It provides support for many departments that are currently run manually, including Respiratory Care, Physical, Occupational, and Speech therapies, as well as EEG/EKG or Radiation Therapy.

This introduction provides a description of each chapter in this manual, as well as an overview of the Clinical Management Module and its functional/operational processes.

Chapter 1: Clinical Management Order Entry Flow

This chapter describes how the Clinical Management Module integrates with the Order Management portion of the Order Management/Charge Processing Module. It discusses the impact of Order Management screens, fields, functions and processes on Clinical Management. It also explains how to initially transfer orders to Clinical Management, which brings a department Live on the Clinical Management Module.

Chapter 2: Order Evaluation

This chapter describes the process of evaluating and interpreting Scheduled and Worklist items. It also describes how the evaluation process can be used for order additions and for setting up the order for streamlined scheduling and worklist processes.

Chapter 3: Scheduling Process

This chapter describes how to use the Clinical Management Module for scheduling orders after they have been evaluated and for scheduling additional orders through the Link Order to Appointment Processor.

Chapter 4: Worklist Processing

This chapter describes screens and processes associated with the Worklist functions of Clinical Management. These functions provide a worklist for departments that do not schedule procedures at a specified date and time.

Chapter 5: Charging

This chapter describes the integration of the Clinical Management Module with the Charge Processing portion of the Order Management/Charge Processing Module. This integration makes current charging and pricing structures available when charging through Clinical Management functions.

Chapter 6: Documentation

This chapter describes how to set up tables and parameters for evaluation and progress notes as well as how to enter and process those notes.

Chapter 7: Workload Processing

This chapter describes the mechanisms within Clinical Management that enable the department to develop workload to reflect its unique organizational structure.

Chapter 8: Online Reports

This chapter describes the reports available through the Clinical Management Module.

Chapter 9: Midnight Processing

This chapter describes the reports available through Midnight Processing with the Clinical Management Module.

Appendix A: Tables

This chapter describes the fields, tables, and files used by the Clinical Management Module.

Module Overview

The Clinical Management Module establishes a link between the Order Management/ Charge Processing Module and the Patient Scheduling Module of STAR Patient Care. Clinical Management provides increased benefits and accuracy to these modules, as well as providing additional features and functionality for the other departments in the hospital, particularly the therapy and rehabilitation departments.

A flexible set of functions provide the ability to manage order flow based on department parameters as follows:

- Evaluation and translation of textual orders into specific coded treatments.
- Create departmental worklists for unscheduled treatments and resource schedules for scheduled treatments.
- Simplify and monitor charge input.
- Collect hospital-defined workload statistics for management reporting and productivity analysis.

This module provides the following benefits:

- Increased accuracy and additional inherent benefits due to integration with existing STAR Patient Care modules (especially Order Management/Charge Processing, Patient Scheduling, and Care Planning and Documentation) and other STAR products.
- One flexible, parameterized departmental system that can apply to several departments.
- User control as to which departments are to use Clinical Management.
- One logical data base containing patient treatment data to be available not only for other departments, but also for the Electronic Medical Record strategy.
- Accurate patient order data and treatmentstatus information available hospital-wide.
- Decreases time currently allocated to resource assignment, paperwork, and redundant tasks, thus increasing patient care time.
- Automated worklists and assignment of treatments to resources.
- Automatic recording of patient visits.
- Provides efficient means of charging as a by-product of logging treatment statuses, decreasing the possibility of *lost charges*.
- Provide worklists for patient evaluation and treatments.
- Ability to order and schedule treatments.
- Ability to assign treatments by workload values/location.
- Additional Management Reporting such as:
    - Order Assessment Report
    - Charge Audit/Capture Reporting
    - Employee Productivity
    - Workload Recording
    - Treatment Reporting

Module Integration

This module provides increased benefit and accuracy to the Order Management/ Charge Processing, Patient Scheduling, and Care Planning and Documentation modules as follows:

- Additional information and warning messages such as hours and days of operation, and exam-specific shift information based on parameterized fields to aid nurses and other ordering personnel during the process of placing orders.
- Capability to Evaluate/Interpret/Schedule and Cancel original orders as appropriate, while at the same time updating the Order Management/Charge Processing, and Care Planning and Documentation modules, thus providing an audit trail indicating what has been done and why.
- Automatically updates prep and special instruction information for nursing, as well as ensuring that the Patient Care Profiles truly reflect the ancillary department's intentions.
- Provides online inquiry as to the status of each of the orders within the department's work flow.
- Provides a link to treatments previously scheduled, once the order has been placed, or allows for a streamlined method of entering a scheduled visit in the department.
- Automatically updates Visit History with a departmental Visit Check In for outpatient visits.
- Automatically updates appointment status as a by-product of the treatment status for scheduled items.

Functional/Operational Overview

After an order is placed by the originating user and evaluated by the department, the order follows one of two distinct pathways through Clinical Management. The pathways are Worklist Processing or Schedule Processing. Worklist Processing is used in a department such as Respiratory Therapy, or where the patient is not scheduled for a particular treatment date, resource, and time. Schedule Processing is used to assign the order to a specific resource, date and time, as in outpatient treatments or departments such as Physical Therapy.

Worklist Processing provides automatic or manual assignment of work to resources, based on hospital-defined workload information linked to the appropriate treatments (SIM items), the resources available, including the type of resource and their location preference or specialty, and their existing workload.

Once work is distributed (either automatically, manually, or a combination of both), a Resource Worklist can be printed for use during the care giving process. This worklist is parameterized and can include patient information and order information, as well as the patient's existing scheduled treatments for other departments. This can be printed at any time, and can print one page per patient, or multiple patients per page.

Schedule Processing provides the department with the capability to link one or more orders to a predefined time slot for a particular resource. It also provides the option to log a transportation request to a centralized or decentralized transportation department.

The actual scheduling of a time slot is performed using the Patient Scheduling Module of STAR Patient Care; therefore, that module must be present to use this functionality of Clinical Management. A resource's schedule is extremely flexible and completely controlled by the department. All appropriate conflict checking is performed.

The report used as a worklist for orders that are scheduled in this fashion includes schedule information, order information, and associated workload value. This report can be printed one patient per page or multiple patients per page.

After scheduled or worklisted treatments are performed, the resource can indicate which treatments have been performed, and can place associated charges in a streamlined fashion providing a clear link between the original order and the modalities truly performed. If treatments are performed, they automatically log a Visit Check-In and log workload statistics appropriately. If treatments are not performed, this is indicated along with specification as to why they were not performed. The capabilities exist to complete, cancel, or discontinue orders as well.

At the end of a shift, the supervisor can review the status of each worklist/schedule to ensure that all worklists/schedules are complete and associated charges have been entered. Once this is done, they indicate that the worklists/schedules have been audited.

Various management reports are available to analyze and streamline departmental procedures and workflow as follows:

- Incomplete Worklist Report
- Workload Summary by Sub Department, and Detail by Element (Daily and Monthly)
- Workload Summary by Employee, and Detail by Element (Daily and Monthly)
- Workload Summary by Group, and Detail by Element (Daily and Monthly)
- Workload Peak Analysis (Daily and Monthly)
- Charge and Treatment Exception Reports

- Monthly Status Report (by Resource/Employee and Department)
- New Patient Report
- Order Assessment Report
- Follow Up Report
- Disposable Item Report
- Departmental Daily Report/SIM
- Medicare Therapy Medical Information Form
- Order Origination Report

The following flow chart provides a visual representation of the flow of an order through Clinical Management in varying levels of detail:

```
                          Order Placed
                               |
                                                                 Normal Order
                                                                 
                   Department Using Clinical Management? --> No ---> Management
                               |                                 Processing
                              Yes                                    ^
                               |                                     |
         Worklisted or Scheduled <-------------------------> Disposable or Standard
              |               |
Displays in            Displays in Link Orders to Appointment
Review/Assign Orders

                                              |
     (M)-------------(S)-------------------(Y)------------------(A)
      |               |                     |                    |
 View Medical     View Schedule       Accept Evaluation     Add SIM Items
      |               |                     |                    |
Allows viewing  Allows viewing of     Accepts the order  Items are added and the
of nursing's    the patient's         as is. The status  ordered item can be
medical         current schedule      is update to       cancelled.  Added items
information.    as well as linking    Evaluated.         update Order Inquiry/
The status is   to an existing              |            Update, Preps & PCPs.
not changed.    appointment.  If            |            The status is updated
     |         linked, the status           |            to Evaluated.
     |         is updated to                |                    |
     |         Scheduled.                   |                    |
     |              |                       |                    |
     |>-------------->--------------------------<--------------------<
                                              |
           Worklisted SIM Items <-------------------> Scheduled SIM Items
                   |                                          |
The Review/Assign Orders processor      The Link Orders to Appointment
enables orders to be assigned,          processor allows one or multiple
manually or automatically, to a         treatments to be scheduled to a
resource, depending upon the            specific resource/date/time. It then
frequency, workload values, patient     displays under Schedule Procedures to
location and resource requirements.     allow more appts. to be scheduled. This
                                        is also done using Copy Appointments.

In this processor, items set to be evaluated display prior to Resource selection.  Once
the evaluation is complete for all evaluated items, the option to select a resource
occurs.


Once assigned, work can be approved or
moved (manually or automatically) to
one or multiple resources through the
Audit/Transfer Worklist processor.
Treatments remain on worklists until
discontinued, cancelled, or performed,
based on Requested Date/Time/Shift/
Frequency Duration, Day of the Week,
and SIM Criteria.

Once approved (manually or               The resource's schedule is printed to
automatically, detailed worklists can    begin treatments.
be printed to begin treatments.

                   |                                          |
                     ------------------------------------------
                                          |
Treatment statuses are updated and charges input using the Documentation processor to
Performed (P), Discontinued (D), Unable to Perform (U), and Cancelled (C).  Charges can
be input at the time the status is changed or at a later time prior to auditing.  Any
treatment not performed or cancelled requires entry of a reason.  Performed treatments
automatically log associated workload values and a visit check-in.  Updating the
treatment status automatically updates Order Inquiry/Update and the associated
appointment for scheduled items.  Resource's worklists and schedules are audited to
verify entry of status updates and charges using the Worklist and Schedule Status
Processors
```

Chapter 1 - CLINICAL MANAGEMENT ORDER ENTRY FLOW

INTEGRATION WITH ORDER MANAGEMENT

The STAR Patient Care Clinical Management Module is integrated with the Order Management/Charge Processing Module. This chapter describes the ordering screens, fields, functions, and processes that impact the Clinical Management Module. The following screen contains an example of the main menu that displays when you access Clinical Management:

```
                  General Hospital DRT Station ID Processor
                                                  Thu Apr 11, 1996 05:11 pm

DRT Station ID Input Options
            Option No.  Option
            ----------------------------------------
                 1       Department Orders

                 2       Worklist Processing
                 3       Schedule Processing

                 4       Documentation
                 5       Display/Print Patient Notes
                 6       Patient Text Entry

                 7       Departmental Management
                 8       Workload Processing
                 9       Send Message

                10       Patient/Charge Information
                11       Cancel/Discontinue Orders
                12       Departmental Patient Information
 Enter option number--
```

The general categories of Order Management that are affected by the addition of the Clinical Management Module are as follows:

- Expands on the original order during evaluation, by ordering additional or alternative procedures/treatments/exams. Streamlined cancellation of parent orders and occurrences by the department when applicable.
- Includes scheduled treatments, updating Order Management (Order Inquiry) with the Order Status of Scheduled. Order Status distinguishes items entered by nursing or other users versus items entered in the department as part of the evaluation process. Order Inquiry displays items once the date and time the procedure is to be performed is scheduled. Only pending and active items display with Order Inquiry.
- Automatically updates associated Patient Prep Information scheduled for the original or new SIM item(s) in Nursing and Order Management for the next print.
- Displays additional warning messages during Order Entry to guide you when entering the order's requested date and time. These messages are based on the departmental operation information contained in the user-controlled SIM Department table.

In Order Management, the date and time for an order to be performed are the start date and time entered by the user at the time of the order or the date and time calculated by the system as a result of the frequency and ordering priority parameters entered. For several departments, the actual date and time is rarely the same as the requested date and time.

If an order contains Preps and Special Instructions that are scheduled to be performed prior to the actual exam or procedure, the system activates the prep for nursing, but not the order itself. As a result, the shift to be performed on the summary screen reflects the shift associated with the earliest prep or special instruction, yet the detail screen for the order displays the shift associated with the requested date and time of the actual order. This is done so the item becomes active and prints on the appropriate nursing documents in time for the prep to be performed.

Once Nursing or a department enters orders for treatments, flags are checked to determine if this item needs to be scheduled. If this is the case, these items are written to a file of treatments to be scheduled prior to, or in addition to, their activation by the Order Management module. If these items do not need to be scheduled, but do need to be included in a worklist, they are written to a pending worklist file. In either case, it may be required to evaluate the order in the scheduled or worklist files.

Priority/Start Date and Time

Additional processing is performed when the start date and time is calculated by the system or is entered by the user for departments active on Clinical Management. This processing creates appropriate warning messages if a start date and time is not within the guidelines set in the SIM Department table.

The start date and time calculated is compared to the information contained in the Holiday table and the SIM Department table to determine whether the department is typically open at this time. The Dept Days and Hours Open fields are compared to the requested date and time entry. If there is a conflict, a warning message displays explaining that the department is not open during that date and time. At this time, the Priority or Start Date and Start Time fields can be revised by the ordering personnel. This is just a warning message however, and the previously entered information does not have to be revised.

If the department is open during this time, the equivalent SIM information is checked for conflicts. The Shift, Hours, and Dept Days fields of the SIM Maintenance-Clinical Management screen are also checked. If there is a conflict, a different warning message displays explaining that the time is invalid for the ordered item. As with the warning message above, the ordered item can be adjusted to reflect the information displayed, but it is not required.

The final check uses the valid shift information contained in the Frequency table for the frequency entered for the ordered item. This check is performed only within the departments that collect frequency during order entry.

Order Evaluation

The interpretation or evaluation of an order applies well to the therapy departments. Although the therapy orders are coded, there is freeform text associated with the order that may need to be read or interpreted by someone in the performing department. Additionally, due to the patient's current condition, a gradual progression to the treatment prescribed may be necessary. Clinical Management allows a knowledgeable person in the department to expand an order into specific treatments. These individual treatments are SIM items that are then scheduled or placed on a worklist by the department.

At the time of expansion, the determination is made as to whether the ordered item should be cancelled or whether these items should be added as new orders. This expansion/replacement process is limited to items within the same ordering department, and in some cases the same subdepartment.

An audit trail exists for order cancellations, both on the transaction log printer in Data Processing, and through status displayed online along with the associated reason. The original order can be accepted as it was originally ordered.

Nursing orders can easily be reviewed, evaluated and interpreted by appropriate departmental personnel. They can be accessed by patient, department, or SIM item (treatment). At this time, additional orders can be entered, if necessary, by individual treatment or by selection of a cross-referenced item in a routine order set. If a cross-referenced Routine Order Set is selected, a list of associated treatments displays and the desired items can be chosen from the list displayed.

Order Scheduling

Clinical Management provides an option that enables the department to control the date and time assignment of orders by entering the scheduled date, time and resource for each treatment. This date and time can be determined through the normal appointment process of the Patient Scheduling Module, but with the original ordering information being retained to streamline this scheduling process.

The status of the procedure is available to the rest of the hospital personnel and physicians; therefore, the amount of human intervention and phone calls currently used to inquire on this information should be decreased.

There are additional charging capabilities included in the Clinical Management Module. Refer to “Chapter 5 - CHARGING” for detailed information concerning charge processing adjustments.

Order Review/Order Inquiry

In the Order Management Module, there are two ways to review orders: Order Review and Order Inquiry. Nursing stations can access Order Review only, while departments can access both Order Review and Order Inquiry.

Order Review provides detailed information for all patient orders, as long as the patient's visit is active. Order Inquiry provides the same information, including information on charges and credits. In addition, with the clinical systems in the network, you can view results entered on STAR from both Order Review and Order Inquiry.

Order Review and Order Inquiry are complex features. For detailed information on each, refer to *Order Management/Charge Processing - Volume I* of the *STAR Patient Care Reference Guide.*

Clinical Charge Inquiry

The Clinical Charge Inquiry function reflects all charges, chargeable orders, and credits that have been applied to a given patient account and allows for cancellation of orders/charges previously placed, maintaining an audit trail. You can access it from the department's main menu.

Clinical Charge Inquiry is a complex feature. For detailed information, refer to *Order Management/Charge Processing - Volume I* of the *STAR Patient Care Reference Guide.*

Enterprise Order X-Ref

Enterprise Order X-Ref is a function on the Orders submenu. Using this function, you can access an order by the Placer Number, regardless of what system it was ordered on in the enterprise setting. An enterprise environment may include several order entry systems, with each system assigning its own external order number. To make tracking down an order easier, it is necessary to use a universal number, call the Placer Number, to identify an order across the enterprise.

For detailed information on Enterprise Order X-Ref, refer to *Order Management/ Charge Processing Volume I* of the *STAR Patient Care Reference Guide.*

ORDER SCREENS

The ordering departments that typically use the Clinical Management Module are Physical Therapy, Speech Therapy, Occupational Therapy, and Respiratory Therapy. However, its usage is not limited to just these departments; the module can be used by any ordering department except Dietary, Radiology, Pharmacy, and Laboratory that is also not considered a non-SIM department.

This chapter discusses the order, update, and inquiry screens associated with the Physical, Speech, Occupational and Respiratory Therapy departments. The features found in these departments are available to the other departments as well. For more information regarding the order, update, and inquiry processes, refer to the *Order Management/Charge Processing Volume* of the *STAR Patient Care Reference Guide*.

After you identify the department, patient, and item(s) to be ordered, the appropriate Order screen displays for entry of the order data. The following screen is used for Physical, Speech, and Occupational Therapy orders. For an example and explanation of the Respiratory Therapy Order screen refer to the "Respiratory Therapy Order Screen" on page 1-22.

Physical/Speech/Occupational Therapy Order Screen

```
                  General Hospital Department Orders Processor
PHYSICAL THERAPY Order                                Tue Feb 24, 2009 02:25 pm
  No           Name             Sex    BD    Room    Physician    SVC ICD Status
              JAMES, STEVEN      M  03/25/53
                                                                              1
 1 Item                                 2 Initi 3 Print Loc     4 Priority
   1011 BODY WHIRLPOOL I                  K B     Department      TIMED,RECU
 5 Frequency     6 Schedule Days       7 Times
   QD            DAILY                   10:00am
 8 Start Date  9 Start Time    10 Duration     11 Stop Date    12 Stop Time
   02/23/09      10:00am          5 Days         02/27/09        11:59pm
13 Transportation                    14 Comment
   BEDSIDE/PO
15 Ordering Physician                16 Performing Physician
   32 ADAIR,FRANK K                     630 SCOTT,EDWARD D
17 Prompt Response / Message         18 Ordering Diagnosis
                                        I10-ESSENTIAL(PRIMARY)HYPERTENSIO
19 Modifier                          20 Instructions
                                        No
               |                                    |
               |                                    |
               |                                    |
Enter field number or '/' starting field number--
```

Field Explanations

1. ITEM (DISPLAY ONLY)

This field displays the code and description from the Service Item Master of the item selected to be ordered. If the item needs to be changed, the order should be aborted and an alternate item selected.

2. INITIALS (3-A-R)
If security is implemented for the person placing the order, the initials automatically display and cannot be edited. If security is not implemented, the system requires entry of the initials of the person placing the order.

3. PRINT LOCATION (1-A-O)
This field enables you to redirect the printed requisition for the order to a location other than the receiving department (for example, to the actual patient location or ordering location). This field is only accessible when the original order is placed; it cannot be revised.

NOTE: All occurrences generated for this order are printed to the same location identified by the parent order. If at some point you want to change the location for future occurrences, you must cancel, complete, or discontinue (whichever applies) the original order and enter a new parent to redefine the print location.

The prompt for this field is:

Enter printer location code or '-' to list--

Enter the code for the location you want if you know it, or press hyphen (-)and ENTER to select from a list of available printers. You can select one of these hardcoded options:

- A - Patient Nurse Station (patient location at time the order becomes active)
- B - Ordering CRT (at the time the order is originated)
- C - Patient Nurse Station & Department
- D - Department (only)
- E - Ordering CRT & Department

For options A and C, the Patient Nurse Station is defined as the station where the patient is located at the time the occurrence order becomes active. Therefore, if the patient has future pending occurrences and is transferred to a new location, upon transfer, the system redirects pending orders (that is, any that have not yet printed) to the new patient location.

For SIM items that are most often redirected, you can designate (on the Default Order Values screen in the Service Item Master processor) the print location where the orders should be redirected. If the SIM item has a default print location attached to it, the location is automatically displayed in the Print Location field. To redirect the requisition, access this field during initial order placement and change the print location.

4. PRIORITY (TABLE LOOKUP)
This field indicates the manner in which the procedure should be performed (for example, ASAP, pre-op, routine). When you access the Priority field, the following prompt displays:

Enter table code or '-' for table--

Enter the priority code if you know it, or enter a hyphen (-) to display the list of valid priorities for the ordering department. The ordering department can require the entry of a priority.

If the Start Date/Start Time Entry field on the Priority table for this priority is set to Time Only or Neither Date/Time, the system automatically fills in the Start Date field on the order screen. These two entries are designed specifically to prevent you from entering or editing the Start Date field.

Five fields depend on the value in the Priority field: Start Date, Start Time, Duration, Stop Date, and Stop Time. Each time you modify the Priority field, the system clears these five fields and either recalculates new values for each or prompts you to enter new values.

5. FREQUENCY (5-C-R) or (TABLE LOOKUP)
This field displays the frequency code for the order. Using the value in the Duration field, the system calculates the Stop Date and Stop Time fields. The following prompt displays:

Enter description '-' or code [1]--

Enter the code or the full description for the desired frequency if you know it, or enter the first few letters of the description and a hyphen (-) to select from a list of frequencies that partially match the criteria. If you do not know either the code or description at all, enter a hyphen (-) and select the desired frequency from the displayed Frequency table. The default is 1 for Once.

The following conditions apply:

- If times are defined for the frequency in the Times field of the Frequency table, then the times are displayed in the Times field on this screen, and the first time from the Frequency table is used for the frequency selected. The system calculates the Start Date and Start Time fields based on these parameters.
- If no scheduled days are associated with the frequency, the system blanks out the Schedule Days field.
- If a schedule is associated with the frequency, the system fills the Schedule Days field on this screen with that schedule and sets the Duration field to the value specified for the associated schedule.

Five fields depend on the value in the Frequency field: Start Date, Start Time, Duration, Stop Date, and Stop Time. Each time you modify the Frequency field, the system clears these five fields and recalculates new values for each.

If the Duration field in the Scheduled Days table associated with this frequency is set to 1 Occurrence, then the system sets default values in the Duration, Stop Date, and Stop Time fields. However, you can enter **/6** to return to the Duration or Stop Date field and either blank it out or change it. For any other duration (for example, Q6H), the system does not enter default values in these fields.

6. SCHEDULE DAYS (20-AN-R) or (TABLE LOOKUP)

This field identifies the default scheduled days on which the item should occur (for example, daily), which is defined in the Schedule field on the Frequency table. The Schedule Days, in which case the predetermined days display in the field.

To revise the default scheduled days, enter the code assigned to a specific schedule, or enter a hyphen (-) and select the desired schedule from the displayed Schedule table.

If you revise the frequency in the Frequency field, the system updates the Schedule Days field with the schedule associated with the new frequency. If no schedule is associated with a frequency, the system blanks out this field.

If the Scheduled Days field is filled in with a schedule that is defined as Scheduled Days, the following prompt displays:

```
 Page:01                          Scheduled Days
 ( 1) ALL DAYS OF WEEK       ( 5) EVERY THIRD DAY       ( 9) MONDAY THRU FRIDAY
 ( 2) DAILY                  ( 6) MON. WED. FRI.        (10) ONCE
 ( 3) EVERY DAY              ( 7) MON/WED/THUR          (11) ONE TIME
 ( 4) EVERY OTHER DAY        ( 8) MONDAY AND FRIDAY     (12) PRN

Enter choice--                                 next page(/)
```

After you enter your choice of days, the Scheduled Days field then fills in with up to seven days of the week (for example, Su M Tu W Th F Sa). The following prompt displays:

Enter first letters '-' or schedule code--

If you do not make any selections at the prompt and you press ENTER, the following error message displays:

Error: Field Required!

If the frequency you select is of a PRN schedule type, the following message displays:

PRN selected, no occurrences generated!

If the frequency you select is of a PRN schedule type, the Duration field does not accept occurrences. The following error message displays:

PRN frequency cannot have occurrences selected or as defaults!

The ordering screen accepts a duration only of Days or Hours.

If you fill in an ordering screen with a frequency that has a schedule that was defined as PRN, and you attempt to change the Schedule field, the following error message displays:

Error: Frequency has PRN schedule type, field cannot be edited!

You must change the Frequency field first, and the default schedule associated with it is updated.

7. TIMES (65-C-O)

This field identifies the specific times that a treatment or task should be administered. The system automatically fills this field using the Times field for the patient's nurse station, as defined in the Frequency table. You can revise the default times. Enter the desired times using military time (the 24:00 clock), or standard time (the 12:00 clock, with A for am and P for pm). You can enter up to 16 times on the Order screen; however, only a limited number displays during the order process due to field size. If you need a larger number than 16, use an interval.

The following prompt displays:

Enter times--

You can access this field based on whether the chosen frequency is defined using times or interval, and whether the Allow Times Edit? field in the Frequency table is set to Yes or No. The following conditions apply to accessing and editing the Times field on all order screens:

Frequency type	**Allow Times Edit? field setting**	**Cursor stops in Times field?**	**Can edit Times field?**
Interval	Yes or No	No	No
Times	Yes	No	Yes
	No	No	No
No times, no interval	Yes	Yes	Yes
	No	No	No

8. START DATE (DATE-R)

This field identifies the date when the order is to begin generating occurrences. You are prompted to enter the start date *except* under the following conditions:

- The Start Date/Time Entry field on the Priority table for the order's priority is set to either Time Only or Neither [for neither date nor time]. These two priorities are specifically designed to prevent the user from entering or editing the Start Date field. In this case, the system automatically fills this field with today's date.

- If you are in an ordering session with multiple orders and the Carry Freq Forward field in the Order Management Facility Options table is set to Yes, then both the start date and start time from the first order are carried forward to all the other orders in the session. If you change the start date and start time during the ordering process, the new start date and time are carried forward from that point on to the rest of the orders in the session.

  However, if the order's duration is 1 Occurrence as defined in the Schedule Days table assigned to the frequency entered, then the Duration, Stop Date and Stop Time fields also default in an order session. If the frequency is *other than* 1 Occurrence (for example, Q6H), then the Duration, Stop Date, and Stop Time fields are *not* defaulted in an order session.

If the frequency does not have a specific time associated with it, the system requests a Start Date in this field. You can either enter the date, use the shortcuts T, T+1, and so on, or leave the field null and have the program calculate the appropriate date. If the frequency does not have a specific time associated with it, you must manually enter a date; the system does *not* accept a default date. You must either enter a valid date or use a shortcut entry. (For order-entry techniques, see the *STAR Patient Care Reference Guide: General Information Volume*.)

The Start Date field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Start Date field and recalculates a new value for it.

If you accessed the ordering process from STAR Patient Scheduling, this field contains the time indicated in the Appointment field on the appointment screen.

If you enter an invalid start date for the selected frequency, the following error message displays:

Start Date is invalid for this freq! Press NL.

If you enter a valid start date for the selected frequency, but the Department Days Valid is incorrect, the following error message displays:

Start Date is invalid for this item & dept! Press NL.

Start Time is invalid for this department! Press NL.

The following prompt displays:

Enter new order start date--

You can use this field when you need to enter an order initiated while the system is unavailable for some reason, and require a requisition. If you do not require a requisition, you should typically enter a charge for the procedure rather than a backdated order.

The hospital controls the number of days in the past that the Start Date can be set to in the SIM Departments table. If you enter a date that exceeds the department's valid number of back days, the system displays the following error message before redisplaying the original prompt:

Error: Date precedes admission/registration date or departmental limit!

This same prompt displays if you enter a date that precedes the patient's admission date. The Start Date is intended to be equal to today's date or some date in the future; however, if you enter a date that is within the department's valid number of back days, the system accepts the entry and displays the following warning message:

WARNING: Less than current date and time!

The hospital also controls the number of days in the future to which the Start Date can be set. If you enter a date that exceeds the department's valid number of days in the future, the system displays the following error message before redisplaying the original prompt:

Error: Date exceeds departmental limit!

9. START TIME (TIME-R)
This field identifies the time when the order is to begin generating occurrences. The following prompt displays:

Enter start time--

Enter the time using one of the time-entry techniques described in the *STAR Patient Care Reference Guide, General Information Volume*.

The Start Time field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Start Time field and recalculates a new value for it.

- If Times are specified and the start date is greater than today, the system uses a default prompt of the first time specified.
- If Times are specified and the start date is not greater than today, the system calculates the time based on current time. If the default start time is for a date/

time other than today, the prompt includes the default start date. Here are some examples:

Enter start time for yesterday [04:00pm]--

Enter start time for Monday 06/25 [04:00pm]--

If you accept the default start time, or enter an override start time, the system sets the start date to the date displayed in the prompt. To override the start date and start time, enter the date and time, separated by a space (for example, T 2P, 06/26,T N).

After you enter a start time, the system verifies that the start date and start time is not later than the stop date and stop time.

If a duration is specified, the system automatically calculates a default stop date and stop time.

If you accessed the ordering process from STAR Patient Scheduling, this field contains the time specified in the Appointment field on the appointment screen.

The start date and time associated with an order is intended to be equal to or some time after the current date and time. However, if you enter a time that causes the start date and time to be prior to the current date/time, the system accepts the entry and displays the following warning message:

WARNING: Less than current date and time!

If the date you enter is past the cutoff time specified for the department and the priority selected, the system accepts the entry after the following warning message displays:

WARNING: Past cutoff time!

If your institution has set the Back Date Orders field in the SIM Departments table to No, then backdating and backtiming of orders is disallowed in most situations (see note below). If you enter a time in this field that is earlier than the current time, the system displays the following error message before redisplaying the original prompt:

Error: Time precedes departmental limit!

NOTE: If your institution has set the Back Date Orders field in the SIM Departments table to No, then backdating and backtiming of orders is disallowed, except under the following condition: If an order is placed that contains a frequency that has "times" associated with it, setting the field to No causes the function to work as if the Back Date Orders field was set to 0. If an order isplaced that contains a frequency that does not have "times" associated with it, the selection of a time prior to the current system time gives the error message and does not allow you to continue until the appropriate response is selected.

You receive this same error message if the frequency for the order does not have predefined times associated with it and you enter a start time prior to the current time. In each case, you must enter a valid time before preceding.

If your institution has set the Back Date Orders field in the SIM Departments table to zero, then backdated orders are allowed if they are less than one day in the past (that is, on the current day from midnight to 11:59 pm.) The ordering screen accepts a backdated time from the current time for the current day. However, the system displays the following warning message:

Warning: Less than current date and time!

You receive this same error message if the frequency for the order has predefined times associated with it and you enter a start time prior to the current time. In each case, although you receive this error message, the cursor moves to the next field and you can continue working.

For orders with a priority of Stat, the Stat field on the Priority table is set to Yes, and the order's start time is the current system time. Any predefined times associated with the order is cleared out. The current system time is captured as the start time on the first order , and that time is used on all orders in the set. This ensures that orders are grouped correctly for STAR Laboratory accession numbers.

10. DURATION (10-AN-R)

This field specifies the period of time that the order remains active. If a default duration is specified for the ordered item in the Default Order Values table (in the Service Item Master Processor), then the system fills this field with the default duration. If no default duration is specified there, but a duration *is* specified on the Scheduled Days table associated with the frequency for this order, then that duration is displayed. For more information on default durations, see the Default Order Values table and Scheduled Days table in "Appendix A - TABLES". You can override either default duration by entering a duration in this field.

The Duration field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Duration field and recalculates a new value for it.

If you enter the duration here, the system calculates the stop date and stop time. The following prompt displays:

Enter order duration ##Hours, ##Days or ##Occurrences or (I)ndefinite--

This field is required. If you want the order to be open ended, enter **I** for Indefinite. The Stop Date and Stop Time fields are bypassed.

WARNING: If you enter **I** for Indefinite to specify an open-ended order, then the parent order generates occurrences continuously until the order is discontinued or canceled, or the patient is discharged. See the end of this field explanation for more consequences of leaving an order open-ended.

If you enter a number in place of the ## and do not follow it with H, D or O, another prompt displays:

Enter (H)ours, (D)ays or (O)ccurrences--

- To specify duration in terms of hours, enter the number of hours with a suffix of H (48H).
- To specify duration in terms of days, enter the number of days with a suffix of D (2D).
- To specify duration in terms of occurrences, enter the number of occurrences with a suffix of O (6O).

Suppose you place an order with a start date and time of March 5 at 2:00 pm. Based on the information you enter, the system calculates the duration in one of the following ways:

If the duration or default is defined in terms of . . .	**Then the system calculates the duration as beginning with the . . .**	**In this example, the Stop Date and Time is . . .**
Days Example: 2 days	Start Date at 12:00 midnight and ending Today+ 1 at 11:59 pm	March 6th at 11:59 pm
Hours Example: 24 hours	Start Date and Time and ending at exactly 24 hours	March 6th at 1:59 pm
Occurrences Example: 4 occurrences	Start Date and Time and ending exactly when the last occurrence should be scheduled, based on whether the frequency is defined as times or interval.	For a frequency of *times* defined as 9:00 am and 3:00 pm, the Stop Date and Time is March 7th at 9:00 am For a frequency of *interval* defined as every 6 hours (Q6H), the Stop Date and Time is March 6th at 8:00 am

If you enter an order that has times associated with the frequency and you enter a start time that is not one of the predefined times associated with the order's frequency, and the duration is 1 Occurrence (either entered manually in the Duration field or because the Recurring field in the Priority table is set to No), then an error message is displayed:

Error: Invalid start time and/or duration.

If you enter **I** for Indefinite, the duration is ongoing and the following occurs:

- Occurrences continue to generate daily until the patient is discharged, depending on what the interval is set to in the Scheduled Days table (for example, every 1 day, every 2 days).
- When the patient is discharged, a Discontinue is sent for all active patient orders (In Proc).
- Active occurrences with request times that have passed remain active.
- Active occurrences with request times that have not passed are cancel-requested (Order-Cnc).
- Pending occurrences are canceled. Cancel requisitions are generated with a cancel reason of Patient Discharged.
- The audit of the parent and occurrences is updated with the reason of Patient Discharged.
- Any future orders placed that currently have no occurrences do not generate any occurrences.
- You must manually cancel or complete active occurrences. You can complete active occurrences from the department.

NOTE: Functionality exists to hold orders and delay the discontinue of orders at Discharge or Final Disposition. Refer to "Hold Orders and Delay Discontinue" in Chapter 2: ORDER REVIEW in *Order Management/Charge Processing, Volume 1* of the *STAR Patient Care Reference Guide.*

11. STOP DATE (DATE-C or R)

This field identifies the date that the order stops generating occurrences. If you enter a duration in terms of occurrences, hours or days, the system automatically fills this field with a revisable, system-calculated stop date, and this field becomes required.

The Stop Date field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Stop Date field and either recalculates a new value for it or prompts you to do so.

You can revise the calculated stop date in response to the following prompt:

Enter stop date--

If you enter a stop date that is before the start date, the system displays an Invalid Date message and does not accept your entry. If you change the stop date, the Duration field blanks out. If you want the order to be open-ended, leave the Stop Date field blank.

12. STOP TIME (10-C or R)
This field identifies the time that this order stops generating occurrences. If the Stop Date field contains a response, this field is required. If you entered a duration in terms of occurrences, hours or days, the system automatically fills this field with a revisable, system-calculated stop time, and this field becomes required.

The Stop Time field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Stop Time field and either recalculates a new value for it or prompts you to do so.

You can revise the default stop time in response to the following prompt:

Enter stop time--

If you want the order to be open-ended, leave the Stop Time field blank.

13. TRANSPORTATION (TABLE LOOKUP)
This field indicates the mode of transportation the patient or exam requires. Each ordering department has a separate table of modes of transportation that are valid for their department. Enter the transportation code if you know it, or press hyphen (-) and ENTER to view a list of valid transportation codes for selection.

14. COMMENT (36-C-O)
This field contains information pertinent to the patient or the procedure ordered.

15. ORDERING PHYSICIAN (TABLE LOOKUP-R)
This field indicates the physician who is placing the order for the patient. If you accessed the ordering process from STAR Patient Scheduling, this field contains the entry in the Referring Physician field on the appointment screen.

The following prompt displays:

Enter name'-', (-') for staff, (\-)NSCG, table code, [R]--

'-'name to override, or Physicians of Record(R)

Use one of the following methods to make an entry:

- Enter the physician's name if you know it.
- Enter a hyphen and apostrophe (**-'**)to display a list of the staff for your selection.
- Enter a backslash and hyphen (\-) to display a list of the NSCG for your selection.
- Enter **R** or press ENTER to display a table of the patient's physicians of record. The table displays the physician's name, office location (if you facility is using

multiple office processing), and the relationship of the physician to the patient. You can select a physician of record from this table.

- Enter a hyphen (-) to view a listing of the Physician table if you do not know the ordering physician's code. Due to the size of the Physicians table, enter the first few characters of the physician's last name, followed by a hyphen (-), to reduce the list to be viewed.

- Enter the code of the ordering physician, if you know it.

- Enter the physician's name as an override by entering a hyphen (-) before the physician's name, if the physician who is placing the order is not in the Physician table.

If you enter a physician table code or a physician of record, you are prompted to select the physician's office location, if the following three conditions are met:

- The hospital-controlled facility option for the second office address is set to Yes.

- The selected physician's multiple office address parameter is set to Yes.

- The selected physician is not already a physician of record.

If you enter an override physician as the ordering physician, address processing does not occur.

16. PERFORMING PHYSICIAN (TABLE LOOKUP-O)
Enter the physician who performed or performs the treatment in this field. There are several field-entry options, which are the same as those for the Ordering Physician field. For a detailed explanation of these field-entry techniques, see the Ordering Physician field.

17. PROMPT RESPONSE/MESSAGE (36-C-C, O, or R)
This field contains questions or instructions which can be linked to an individual test. If a prompt is associated with a test, the cursor stops at this field. If no prompt is associated with a test, this field is bypassed.

Prompts can be either Required or Informational. If a prompt is required, the Prompt Response/Message field is required. For an informational prompt, the field is optional.

18. ORDERING DIAGNOSIS (30-A-O) or (TABLE LOOKUP)
This field is required only for Cardiology, Radiology, and EEG orders. Enter the ICD code for ordering this item. This ICD code is the reason, or ordering diagnosis, for ordering the test or exam. Instead of entering an ICD code, you can enter a freeform diagnosis. The following prompt displays:

Enter ICD diagnosis code--

'U-'ser diagnosis code, `A-`pproved List' '-' for list, -free form

You can make an entry using one of the following methods:

- Enter the ICD diagnosis code when you know it.
- Enter **U** and hyphen (-) to display a list of the facility's diagnosis codes for your selection. You can limit the search by entering one or more characters after the U. The system matches the codes in this table to the equivalent ICD code.
- Enter **A** and a hyphen (-) to display the list of approved diagnosis codes. This option is only available when the parameter in the SIM departments table is turned on, and the exam's HCPCS code has valid ICD diagnosis codes assigned in the HCPCS Table Maintenance function.
- Enter hyphen (-) to display a list of ICD diagnosis codes for your selection.
- Enter hyphen (-) and freeform text that describes the diagnosis. If you enter a number which exists in the DSM® Pointer table, the system displays the number followed by its corresponding description.

The system uses the ICD code you enter in this field to satisfy governmental requirements for CMS (Centers for Medicare & Medicaid Services) 1500 claim billing. STAR Patient Care passes the code to STAR Financials for billing. When you enter freeform text for the diagnosis, STAR Patient Care passes only the first few characters of the text to STAR Financials, which is not suitable for 1500 billing for professional fee charges.

19. MODIFIER (20-A-O)
The modifiers in this field apply to the SIM item and display for selection during the ordering/charge entry process for CMS compliant outpatients and professional fees. Up to ten modifiers can be selected but on the claim for the UB-92 only two display, and for the 1500, only four modifiers display. The modifiers are built in the Medical Records UM Maintenance Tables, in the HCPCS Modifiers Table. The user can indicate which departments the modifiers are used for as well as whether the modifiers are used for Pro Fees, Non-Pro Fees, or Both, and they indicate in what priority they display.

20. INSTRUCTIONS (108-C-O)
This field is used to enter freeform instructions that should accompany the order. It allows the entry of **Y** for Yes or **N** for No, with a default of No. If Yes is entered, you are allowed to access three lines of a text processor. If No is entered, the text processor is not accessed.

Impact

After you accept the screen, the following takes place:

If the department is active on Clinical Management, the following additional processing occurs:

- If the item is an Item Type of Disposable or Standard, the normal order processing occurs.

- If the item has an Item Type ofWorklist, the normal order processing occurs and the item displays in the Review/Assign Orders processor. These items are not placed in a “hold” state by definition of the worklist type process. Worklisted items are not scheduled for specific dates and times; they are scheduled by shifts based on the requested date and time and frequency. Requisitions print as they do with normal Order Management processing.

- If the item has an Item Type of Scheduled, the item displays in the Link Orders to Appointment processor. The order displays in Order Inquiry and Order Review. These orders are not placed in a Hold state. Requisitions print as they do with normal Order Management processing showing the requested date/time.

  These orders display in Order Inquiry and in Order Review, but not in on any nursing documents until the treatment is evaluated and scheduled. Once scheduled, the order displays in Order Inquiry and Order Review.

- Upon entry of the order, the associated Preps and Special Instructions Notice may print on the patient's current nursing station's associated printer. These notices print either at the beginning of the shift of the first prep or special instruction, or at the time the order becomes active.

- As a new order is placed, if it is the first time an order is being placed for that account within this department, it is logged to a separate file for initial new patient assessment reporting purposes.

  As each new order is received, it is logged as well. Not only do the new orders display in the Evaluation queue as necessary, they are also logged for reporting purposes as new orders.

- If the SIM item being ordered is an item withan associated Oxygen Therapy linked in the SIM, the patient is added to the appropriate Oxygen Census when the order is performed. If the patient is receiving treatment linked to different types of oxygen therapy codes, the oxygen therapy census reflects the most current treatment marked as performed.

  Patients are removed from the Oxygen Therapy Census if the treatment being marked as discontinued or canceled has the same oxygen therapy code as the one currently defined for the patient. If they do not match, the patient is not removed from the census. These patients are automatically updated as a by-product of the treatment being started, discontinued or canceled.

- The HCPCS code, along with any modifiers entered in the order entry process, is passed to the charge detail when the order is updated to "Performed" in the Clinical Management application when the following conditions are met: the Service Item is flagged as charge on order (NO); the charge is to be generated through Clinical Management; the department is *not* set for either ABN and/or Duplicate HCPCS Processing; and the patient is flagged as CMS compliant.

- When the order becomes Active or Completed, a requisition prints in the department and charges are generated if the item is set to charge upon order. If priority charges are to be generated, they are done at the time the item charge is generated.

- The order displays and can be accessed through Order Inquiry or Order Review for revisions or cancellation requests.

- The charges generated as a by-product of the order display in Charge Inquiry for viewing and cancellation/crediting.

- If the order was placed on a patient registered to a contract account, the charge displays on the contract's account and not the patient's. These orders can be viewed on Order Inquiry, but any charges generated can only be viewed under the Contract Charge Inquiry function under the contract account to which the patient is registered. The normal Charge Inquiry function does not list any charges against the patient's account.

- Any charges generated are sent to the financial system.

Respiratory Therapy Order Screen

After you identify the department, patient and item(s) to be ordered, the Respiratory Therapy Order screen displays for entry of the order data.

The following is a sample Respiratory Therapy Order screen:

```
                  General Hospital Department Orders Processor
RESPIRATORY THERAPY Order                        Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
              JAMES,STEVEN      M  03/25/53
                                                                              1
 1 Item                                 2 Initi 3 Print Loc     4 Priority
   601 OXYGEN HUMIDIFIER                  K B     Department      ROUTINE
 5 Frequency    6 Schedule Days      7 Times
   ONCE           ONCE                 08:00am
 8 Start Date  9 Start Time    10 Duration     11 Stop Date    12 Stop Time
   02/23/09      08:00am         1 Occur         02/23/09        08:00am
13 Transportation                    14 Medications
   BEDSIDE/PO                           -
15 Ordering Physician                16 Performing Physician
   32 ADAIR,FRANK K                     805 CAMPBELL,ALEXANDER
17 Prompt Response / Message         18 Ordering Diagnosis
                                        I10-ESSENTIAL(PRIMARY)HYPERTENSIO
19 Modifier                          20 Comment

21 Instructions
   No

Enter field number or '/' starting field number--
```

Field Explanations

1. ITEM (DISPLAY ONLY)

This field displays the code and description from the Service Item Master of the item selected to be ordered. This field cannot be accessed. If the item needs to be changed, the order should be aborted and an alternate item selected.

2. INITIALS (3-A-R)

If security is implemented for the person placing the order, the initials automatically display and cannot be edited. If security is not implemented, the system requires entry of the initials of the person placing the order.

3. PRINT LOCATION (1-A-O)

This field enables you to redirect the printed requisition for the order to a location other than the receiving department (for example, to the actual patient location or ordering location). This field is only accessible when the original order is placed; it cannot be revised.

NOTE: All occurrences generated for this order are printed to the same location identified by the parent order. If at some point you want to change the location for future occurrences, you must cancel, complete, or discontinue (whichever applies) the original order and enter a new parent to redefine the print location.

The prompt for this field is:

Enter printer location code or '-' to list--

Enter the code for the location you want if you know it, or press hyphen (-)and ENTER to select from a list of available printers. You can select one of these hardcoded options:

- A - Patient Nurse Station (patient location at time the order becomes active)
- B - Ordering CRT (at the time the order is originated)
- C - Patient Nurse Station & Department
- D - Department (only)
- E - Ordering CRT & Department

For options A and C, the Patient Nurse Station is defined as the station where the patient is located at the time the occurrence order becomes active. Therefore, if the patient has future pending occurrences and is transferred to a new location, upon transfer, the system redirects pending orders (that is, any that have not yet printed) to the new patient location.

For SIM items that are most often redirected, on the Default Order Values screen in the Service Item Master processor, you can designate the print location where the orders should be redirected. If the SIM item has a default print location attached to it, the location is automatically displayed in the Print Location field. To redirect the requisition, access this field during initial order placement and change the print location.

4. PRIORITY (TABLE LOOKUP)

This field indicates the manner in which the procedure should be performed (for example, ASAP, pre-op, routine). When you access the Priority field, the following prompt displays:

Enter table code or '-' for table--

Enter the priority code if you know it, or enter a hyphen (-) to display the list of valid priorities for the ordering department. The ordering department can require the entry of a priority.

If the Start Date/Start Time Entry field on the Priority table for this priority is set to Time Only or Neither Date/Time, the system automatically fills in the Start Date field on the order screen. These two entries are designed specifically to prevent you from entering or editing the Start Date field.

Five fields depend on the value in the Priority field: Start Date, Start Time, Duration, Stop Date, and Stop Time. Each time you modify the Priority field, the system clears these five fields and either recalculates new values for each or prompts you to enter new values.

5. FREQUENCY (5-C-R) or (TABLE LOOKUP)
This field displays the frequency code for the order. Using the value in the Duration field, the system calculates the Stop Date and Stop Time fields. The following prompt displays:

Enter first letters '-' or frequency code--

Enter the code for a specific frequency, or enter a hyphen (-) and select the desired frequency from the displayed Frequency table.

The following conditions apply:

- If times are defined for the frequency in the Times field of the Frequency table, then the times are displayed in the Times field on this screen, and the first time from the Frequency table is used for the frequency selected. The system calculates the Start Date and Start Time fields based on these parameters.
- If no scheduled days are associated with the frequency, the system blanks out the Schedule Days field.
- If a schedule is associated with the frequency, the system fills the Schedule Days field on this screen with that schedule and sets the Duration field to the value specified for the associated schedule.

Five fields depend on the value in the Frequency field: Start Date, Start Time, Duration, Stop Date, and Stop Time. Each time you modify the Frequency field, the system clears these five fields and recalculates new values for each.

If the Duration field in the Scheduled Days table associated with this frequency is set to 1 Occurrence, then the system sets default values in the Duration, Stop Date, and Stop Time fields. However, you can enter /6 to return to the Duration or Stop Date field and either blank it out or change it. For any other duration (for example, Q6H), the system does not enter default values in these fields.

6. SCHEDULE DAYS (20-AN-R) or (TABLE LOOKUP)
This field identifies the default scheduled days on which the item should occur (for example, daily), which is defined in the Schedule field on the Frequency table. The Schedule Days, in which case the predetermined days display in the field.

To revise the default scheduled days, enter the code assigned to a specific schedule, or enter a hyphen (-) and select the desired schedule from the displayed Schedule table.

If you revise the frequency in the Frequency field, the system updates the Schedule Days field with the schedule associated with the new frequency. If no schedule is associated with a frequency, the system blanks out this field.

If the Scheduled Days field is filled in with a schedule that is defined as Scheduled Days, the following prompt displays:

```
 Page:01                          Scheduled Days
 ( 1) ALL DAYS OF WEEK      ( 5) EVERY THIRD DAY       ( 9) MONDAY THRU FRIDAY
 ( 2) DAILY                 ( 6) MON. WED. FRI.        (10) ONCE
 ( 3) EVERY DAY             ( 7) MON/WED/THUR          (11) ONE TIME
 ( 4) EVERY OTHER DAY       ( 8) MONDAY AND FRIDAY     (12) PRN

Enter choice--                                 next page(/)
```

After you enter your choice of days, the Scheduled Days field then fills in with up to seven days of the week (for example, Su M Tu W Th F Sa). The following prompt displays:

Enter first letters '-' or schedule code--

If you do not make any selections at the prompt and you press ENTER, the following error message displays:

Error: Field Required!

If the frequency you select is of a PRN schedule type, the following message displays:

PRN selected, no occurrences generated!

If the frequency you select is of a PRN schedule type, the Duration field does not accept occurrences. The following error message displays:

PRN frequency cannot have occurrences selected or as defaults!

The ordering screen accepts a duration only of Days or Hours. If you fill in an ordering screen with a frequency that has a schedule that was defined as PRN, and you attempt to change the Schedule field, the following error message displays:

Error: Frequency has PRN schedule type, field cannot be edited!

You must change the Frequency field first, and the default schedule associated with it is updated.

7. TIMES (65-C-O)

This field identifies the specific times that a treatment or task should be administered. The system automatically fills this field using the Times field for the patient's nurse station, as defined in the Frequency table. You can revise the default times. Enter the desired times using military time (the 24:00 clock), or standard time (the 12:00 clock, with A for am and P for pm). You can enter up to 16 times on the Order screen; however, only a limited number displays during the order process due to field size. If you need a larger number than 16, use an interval.

The following prompt displays:

Enter times--

You can access this field based on whether the chosen frequency is defined using times or interval, and whether the Allow Times Edit? field in the Frequency table is set to Yes or No. The following conditions apply to accessing and editing the Times field on all order screens:

Frequency type	Allow Times Edit? field setting	Cursor stops in Times field?	Can edit Times field?
Interval	Yes or No	No	No
Times	Yes	No	Yes
	No	No	No
No times, no interval	Yes	Yes	Yes
	No	No	No

8. START DATE (DATE-R)
This field identifies the date when the order is to begin generating occurrences. You are always prompted to enter the start date, *except* under the following conditions:

- The Start Date/Time Entry field on the Priority table for the order's priority is set to either Time Only or Neither [for neither date nor time]. These two priorities are specifically designed to prevent the user from entering or editing the Start Date field. In this case, the system automatically fills this field with today's date.

- If you are in an ordering session with multiple orders and the Carry Freq Forward field in the Order Management Facility Options table is set to Yes, then both the start date and start time from the first order are carried forward to all the other orders in the session. If you change the start date and start time during the ordering process, the new start date and time are carried forward from that point on to the rest of the orders in the session.

  However, if the order's duration is 1 Occurrence as defined in the Schedule Days table assigned to the frequency entered, then the Duration, Stop Date and Stop Time fields also default in an order session. If the frequency is *other than* 1 Occurrence (for example, Q6H), then the Duration, Stop Date, and Stop Time fields are *not* defaulted in an order session.

If the frequency does not have a specific time associated with it, the system requests a Start Date in this field. You can either enter the date, use the shortcuts T, T+1, and so on, or leave the field null and have the program calculate the appropriate date. If the frequency does not have a specific time associated with it, you must manually enter a date; the system does *not* accept a default date. You must either enter a valid date or use a shortcut entry. (For order-entry techniques, see the *STAR Patient Care Reference Guide, General Information Volume*.)

The Start Date field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Start Date field and recalculates a new value for it.

If you accessed the ordering process from STAR Patient Scheduling, this field contains the time indicated in the Appointment field on the appointment screen.

If you enter an invalid start date for the selected frequency, the following error message displays:

Start Date is invalid for this freq! Press NL.

If you enter a valid start date for the selected frequency, but the Department Days Valid is incorrect, the following error message displays:

Start Date is invalid for this item & dept!. Press NL.

Start Time is invalid for this department!. Press NL.

The following prompt displays:

Enter new order start date--

You can use this field when you need to enter an order initiated while the system is unavailable for some reason, and require a requisition. If you do not require a requisition, you should typically enter a charge for the procedure rather than a backdated order. The hospital controls the number of days in the past that the Start Date can be set to in the SIM Departments table. If you enter a date that exceeds the department's valid number of back days, the system displays the following error message before redisplaying the original prompt:

Error: Date precedes admission/registration date or departmental limit!

This same prompt displays if you enter a date that precedes the patient's admission date. The Start Date is intended to be equal to today's date or some date in the future; however, if you enter a date that is within the department's valid number of back days, the system accepts the entry and displays the following warning message:

WARNING: Less than current date and time!

The hospital also controls the number of days in the future to which the Start Date can be set. If you enter a date that exceeds the department's valid number of days in the future, the system displays the following error message before redisplaying the original prompt:

Error: Date exceeds departmental limit!

9. START TIME (TIME-R)
This field identifies the time when the order is to begin generating occurrences. The following prompt displays:

Enter start time--

Enter the time using one of the time-entry techniques described in the *STAR Patient Care Reference Guide: General Information Volume*.

The Start Time field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Start Time field and recalculates a new value for it.

- If Times are specified and the start date is greater than today, the system uses a default prompt of the first time specified.
- If Times are specified and the start date is not greater than today, the system calculates the time based on current time. If the default start time is for a date/ time other than today, the prompt includes the default start date. Here are some examples:

  Enter start time for yesterday [04:00pm]--

  Enter start time for Monday 06/25 [04:00pm]--

If you accept the default start time, or enter an override start time, the system sets the start date to the date displayed in the prompt. To override the start date and start time, enter the date and time, separated by a space (for example, T 2P, 06/26,T N).

After you enter a start time, the system verifies that the start date and start time is not later than the stop date and stop time.

If a duration is specified, the system automatically calculates a default stop date and stop time.

If you accessed the ordering process from STAR Patient Scheduling, this field contains the time specified in the Appointment field on the appointment screen.

The start date and time associated with an order is intended to be equal to or some time after the current date and time. However, if you enter a time that causes the start date and time to be prior to the current date/time, the system accepts the entry and displays the following warning message:

WARNING: Less than current date and time!

If the date you enter is past the cutoff time specified for the department and the priority selected, the system accepts the entry after the following warning message displays:

WARNING: Past cutoff time!

If your institution has set the Back Date Orders field in the SIM Departments table to No, then backdating and backtiming of orders is disallowed in most situations (see note below). If you enter a time in this field that is earlier than the current time, the system displays the following error message before redisplaying the original prompt:

Error: Time precedes departmental limit!

NOTE: If your institution has set the Back Date Orders field in the SIM Departments table to No, then backdating and backtiming of orders is disallowed, except under the following condition: If an order is placed that contains a frequency that has "times" associated with it, setting the field to No causes the function to work as if the Back Date Orders field was set to 0. If an order isplaced that contains a frequency that does not have "times" associated with it, the selection of a time prior to the current system time gives the error message and does not allow you to continue until the appropriate response is selected.

If you enter a time in this field that is earlier than the current time, the system displays the following error message before redisplaying the original prompt:

Error: Time precedes departmental limit!

You receive this same error message if the frequency for the order does not have predefined times associated with it and you enter a start time prior to the current time. In each case, you must enter a valid time before preceding.

If your institution has set the Back Date Orders field in the SIM Departments table to zero, then backdated orders are allowed if they are less than one day in the past (that is, on the current day from midnight to 11:59 pm.) The ordering screen accepts a backdated time from the current time for the current day. However, the system displays the following warning message:

Warning: Less than current date and time!

You receive this same error message if the frequency for the order has predefined times associated with it and you enter a start time prior to the current time. In each case, although you receive this error message, the cursor moves to the next field and you can continue working.

For orders with a priority of Stat, the Stat field on the Priority table is set to Yes, and the order’s start time is the current system time. Any predefined times associated with the order are cleared out. The current system time is captured as the start time on the first order , and that time is used on all orders in the set. This ensures that orders are grouped correctly for STAR Laboratory accession numbers.

10. DURATION (10-AN-R)

This field specifies the period of time that the order remains active. If a default duration is specified for the ordered item in the Default Order Values table (in the Service Item Master Processor), then the system fills this field with the default duration. If no default duration is specified there, but a duration *is* specified on the Scheduled Days table associated with the frequency for this order, then that duration is displayed. For more information on default durations, see the Default Order Values table and Scheduled Days table in "Appendix A - TABLES". You can override either default duration by entering a duration in this field.

The Duration field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Duration field and recalculates a new value for it.

If you enter the duration here, the system calculates the stop date and stop time. The following prompt displays:

Enter order duration ##Hours, ##Days or ##Occurrences or (I)ndefinite--

This field is required. If you want the order to be open ended, enter **I** for Indefinite. The Stop Date and Stop Time fields are bypassed.

WARNING: If you enter **I** for Indefinite to specify an open-ended order, then the parent order generates occurrences continuously until the order is discontinued or canceled, or the patient is discharged. See the end of this field explanation for more consequences of leaving an order open ended.

If you enter a number in place of the ## and do not follow it with H, D or O, another prompt displays:

Enter (H)ours, (D)ays or (O)ccurrences--

- To specify duration in terms of hours, enter the number of hours with a suffix of H (48H).
- To specify duration in terms of days, enter the number of days with a suffix of D (2D).
- To specify duration in terms of occurrences, enter the number of occurrences with a suffix of O (6O).

Suppose you place an order with a start date and time of March 5 at 2:00 pm. Based on the information you enter, the system calculates the duration in one of the following ways:

If the duration or default is defined in terms of...	Then the system calculates the duration as beginning with the...	In this example, the Stop Date and Time is...
Days Example: 2 days	Start Date at 12:00 midnight and ending Today+ 1 at 11:59 pm	March 6th at 11:59 pm
Hours Example: 24 hours	Start Date and Time and ending at exactly 24 hours	March 6th at 1:59 pm
Occurrences Example: 4 occurrences	Start Date and Time and ending exactly when the last occurrence should be scheduled, based on whether the frequency is defined as times or interval.	For a frequency of *times* defined as 9:00 am and 3:00 pm, the Stop Date and Time is March 7th at 9:00 am For a frequency of *interval* defined as every 6 hours (Q6H), the Stop Date and Time is March 6th at 8:00 am

If you enter an order that has times associated with the frequency and you enter a start time that is not one of the predefined times associated with the order's frequency, and the duration is 1 Occurrence (either entered manually in the Duration field or because the Recurring field in the Priority tableis set to No), then an error message is displayed:

Error: Invalid start time and/or duration.

If you enter **I** for Indefinite, the duration is ongoing and the following occurs:

- Occurrences continue to generate daily until the patient is discharged, depending on what the interval is set to in the Scheduled Days table (for example, every 1 day, every 2 days).
- When the patient is discharged, a Discontinue is sent for all active patient orders (In Proc).
- Active occurrences with request times that have passed remain active.
- Active occurrences with request times that have not passed are cancel-requested (Order-Cnc).
- Pending occurrences are canceled. Cancel requisitions are generated with a cancel reason of Patient Discharged.

- The audit of the parent and occurrences is updated with the reason of Patient Discharged.
- Any future orders placed that currently have no occurrences do not generate any occurrences.
- You must manually cancel or complete active occurrences. You can complete active occurrences from the department.

11. STOP DATE (DATE-C or R)
This field identifies the date that the order stops generating occurrences. If you enter a duration in terms of occurrences, hours or days, the system automatically fills this field with a revisable, system-calculated stop date, and this field becomes required.

The Stop Date field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Stop Date field and either recalculates a new value for it or prompts you to do so.

You can revise the calculated stop date in response to the following prompt:

Enter stop date--

If you enter a stop date that is before the start date, the system displays an Invalid Date message and does not accept your entry. If you change the stop date, the Duration field blanks out. If you want the order to be open-ended, leave the Stop Date field blank.

12. STOP TIME (10-C-C or R)
This field identifies the time that this order stops generating occurrences. If the Stop Date field contains a response, this field is required. If you entered a duration in terms of occurrences, hours or days, the system automatically fills this field with a revisable, system- calculated stop time, and this field is required.

The Stop Time field depends on the values in the Priority and Frequency fields. Each time you modify either of these fields, the system clears the Stop Time field and either recalculates a new value for it or prompts you to do so.

You can revise the default stop time in response to the following prompt:

Enter stop time--

If you want the order to be open-ended, leave the Stop Time field blank.

13. TRANSPORTATION (TABLE LOOKUP)
This field indicates the mode of transportation the patient or exam requires. Each ordering department has a separate table of modes of transportation that are valid for their department. Enter the transportation code if you know it, or press hyphen (-) and ENTER to view a list of valid transportation codes for selection.

14. MEDICATIONS (33-C-O)
This field allows a freeform entry of pertinent medications the patient is currently taking.

15. ORDERING PHYSICIAN (TABLE LOOKUP)
This field indicates the physician who is placing the order for the patient. This field is required. If you accessed the ordering process from STAR Patient Scheduling, this field contains the entry in the Referring Physician field on the appointment screen.

The following prompt displays:

Enter name'-', (-') for staff, (\-)NSCG, table code, [R]--
'-'name to override, or Physicians of Record(R)

Use one of the following methods to make an entry:

- Enter the physician's name if you know it.
- Enter a hyphen and apostrophe (-')to display a list of the staff for your selection.
- Enter a backslash and hyphen (\-) to display a list of the NSCG for your selection.
- Enter **R** or press ENTER to display a table of the patient's physicians of record. The table displays the physician's name, office location (if you facility is using multiple office processing), and the relationship of the physician to the patient. You can select a physician of record from this table.
- Enter a hyphen (-) to view a listing of the Physician table if you do not know the ordering physician's code. Due to the size of the Physicians table, enter the first few characters of the physician's last name, followed by a hyphen (-), to reduce the list to be viewed.
- Enter the code of the ordering physician, if you know it.
- Enter the physician's name as an override by entering a hyphen (-) before the physician's name, if the physician who is placing the order is not in the Physician table.

If you enter a physician table code or a physician of record, you are prompted to select the physician's office location, if the following three conditions are met:

- The hospital-controlled facility option for the second office address is set to Yes.
- The selected physician's multiple office address parameter is set to Yes.
- The selected physician is not already a physician of record.

If you enter an override physician as the ordering physician, address processing does not occur.

16. PERFORMING PHYSICIAN (TABLE LOOKUP-O)

Enter the physician who performed or performs the treatment in this field. There are several field-entry options, which are the same of those for the Ordering Physician field. For a detailed explanation of these field-entry techniques, see the Ordering Physician field.

17. PROMPT RESPONSE/MESSAGE (36-C-C)

This field contains questions or instructions which can be linked to an individual test. If a prompt is associated with a test, the cursor stops at this field. If no prompt is associated with a test, this field is bypassed.

Prompts can be either Required or Informational. If a prompt is required, the Prompt Response/Message field is required. For an informational prompt, the field is optional.

18. ORDERING DIAGNOSIS (30-A-O) or (TABLE LOOKUP)

This field is required only for Cardiology, Radiology, and EEG orders. Enter the ICD code for ordering this item. This ICD code is the reason, or ordering diagnosis, for ordering the test or exam. Instead of entering an ICD code, you can enter a freeform diagnosis. The following prompt displays:

Enter ICD diagnosis code--

'U-'ser diagnosis code, `A-`pproved List, '-' for list, -free form

You can make an entry using one of the following methods:

- Enter the ICD diagnosis code when you know it.
- Enter **U** and hyphen (-) to display a list of the facility's diagnosis codes for your selection. You can limit the search by entering one or more characters after the U. The system matches the codes in this table to the equivalent ICD code.
- Enter **A** and a hyphen (-) to display the list of approved diagnosis codes. This option is only available when the parameter in the SIM departments table is turned on, and the exam's HCPCS code has valid ICD diagnosis codes assigned in the HCPCS Table Maintenance function.
- Enter a hyphen (-) to display a list of ICD diagnosis codes for your selection.
- Enter a hyphen (-) and freeform text that describes the diagnosis. If you enter a number which exists in the DSM Pointer table, the system displays the number followed by its corresponding description. If the number is not in the DSM Pointer table but is in the ICD Diagnosis Pointer table, the system displays the number followed by its description from the ICD Diagnosis Pointer table.

The system uses the ICD code you enter in this field to satisfy governmental requirements for CMS 1500 claim billing. STAR Patient Care passes the code to STAR Financials for billing. When you enter freeform text for the diagnosis, STAR Patient Care passes only the first few characters of the text to STAR Financials, which is not suitable for 1500 billing for professional fee charges.

19. MODIFIER (20-A-O)
The modifiers in this field apply to the SIM item and display for selection during the ordering/charge entry process for CMS compliant outpatients and professional fees. Up to ten modifiers can be selected but on the claim for the UB-92 only two display, and for the 1500, only four modifiers display. The modifiers are built in the Medical Records UM Maintenance Tables, in the HCPCS Modifiers Table. The user can indicate which departments the modifiers are used for as well as whether the modifiers are used for Pro Fees, Non-Pro Fees, or Both, and they indicate in what priority they display.

20. COMMENT (36-C-O)
This field contains information pertinent to the patient or the procedure ordered.

21. INSTRUCTIONS (108-C-O)
This field is used to enter freeform instructions that should accompany the order. It allows the entry of **Y** for Yes or **N** for No, with a default of No. If Yes is entered, you are allowed to access three lines of a text processor. If No is entered, the text processor is not accessed.

Impact

After you accept the screen, the following takes place:

If the department is active on Clinical Management, the following additional processing occurs:

- If the item is an Item Type of Disposable or Standard, the normal order processing occurs.
- If the item has an Item Type ofWorklist, the normal order processing occurs and the item displays in the Review/Assign Orders processor. These items are not placed in a *hold* state by definition of the worklist type process. Worklist items are not scheduled for specific dates and times; they are scheduled by shifts based on the requested date and time and frequency. Requisitions print as they do with normal Order Management processing.
- If the item has an Item Type of Scheduled, the item displays in the Link Orders to Appointment processor. However, any revision to the original requested date and time are not reflected in the Order Inquiry screens, nor do the preps and special instructions etc. reflect the update. The order displays in Order Inquiry and Order Review.

- Upon entry of the order, the associated Preps and Special Instructions Notice may print on the patient's current nursing station's associated printer. These notices print either at the beginning of the shift of the first prep or special instruction, or at the time the order becomes active.

- As a new order is placed, if it is the first time an order is being placed for that account within this department, it is logged to a separate file for initial new patient assessment reporting purposes.

- As each new order is received, it is logged as well. Not only do the new orders display in the appropriate queue as necessary, they are also logged for reporting purposes as new orders.

- The HCPCS code, along with any modifiers entered in the order entry process, is passed to the charge detail when the order is updated to "Performed" in the Clinical Management application when the following conditions are met: the Service Item is flagged as charge on order (NO); the charge is to be generated through Clinical Management; the department is *not* set for either ABN and/or Duplicate HCPCS Processing, and the patient is flagged as CMS compliant.

- If the SIM item being ordered is an item with an associated Oxygen Therapy linked in the SIM, then the patient is added to the appropriate Oxygen Census when the order becomes active. Since these treatments are not started and discontinued, the patient must be removed from the census manually by using the Revise Patient (Nursing) processor once the treatment is completed.

- If the ordered item is of a type that is to be evaluated, the patient is not added to the census until after evaluation and treatment begins. These patients are automatically updated as a by-product of the treatment being started, discontinued or cancelled.

- When the order becomes Active or Completed, a requisition prints in the department and charges are generated if the item is set to charge upon order. If priority charges are to be generated, they are done at the time the item charge is generated.

- The order displays and can be accessed through Order Inquiry and Order Review for revisions or cancellation requests.

- The charges generated as a by-product of the order display in Charge Inquiry for viewing and cancellation/crediting.

- If the order was placed on a patient registered to a contract account, the charge displays on the contract's account and not the patient's. These orders can be viewed on Order Inquiry, but any charges generated can only be viewed under the Contract Charge Inquiry function under the contract account to which the patient is registered. The normal Charge Inquiry function does not list any charges against the patient's account.

- Any charges generated are sent to the financial system.

TRANSFER ORDERS TO CLINICAL MANAGEMENT

The Transfer Orders to Clinical Management function enables you to transfer orders that have a Scheduled or Worklisted Item type to the Clinical Management Module. This function provides the mechanism to bring a department Live on Clinical Management while also allowing error corrections in the future. If the files are not initially set up properly and you enter an order that is not processed through Clinical Management, you can correct the files and select the order to be transferred to Clinical Management.

After you access the Departmental Management menu and then the Transfer Orders to Clinical Management option, you are prompted to select a patient with an active account number. The following screen displays the patients orders for the department contained in the Charge Department field in the CRT Names table for your PC:

```
       General Hospital Transfer Orders to Clinical Management Processor
                                              Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD     Room    Physician    SVC ICD Status
92014-00015   DALT,DAISY        F  01/01/50 1204-2  ADAIR,FRANK  DSU 10 IP  157

Orders for  Selected Department  During the 24 Hours Ending  02/19/09

No Ord# Dep Description                       Ord'd  Req'd  Type      Status
             (`~`=recurring,`^`=1st recurring)
 1    9 PT  CERVICAL TRACTION                 0526P  0526P  Order-Cmp
 2    9 PT  CERVICAL TRACTION/WATER BAG       0526P  0526P  Order-Cmp
 3    9 PT  CERVICAL COLLAR                   0527P  0526P  Order-Cmp






Enter number for detail or [previous day]--
                          End of orders for above date
```

The prompt enables you to select an order for detail or press ENTER for the previous day's orders.

When you select an order, the Order Inquiry Detail screen displays. For information on this screen, see the Order Inquiry section of Chapter 1: Order Management of *Order Management/Charge Processing Volume 1* of the *STAR Patient Care Reference Guide*.

If the ordered item does not have a result status displayed under the Status field on the Order Inquiry Detail screen (indicating it has already been processed through Clinical Management), you can select the item and bring it over to the Clinical Management Module.

On the Order Inquiry Detail screen, enter **T** to transfer the order to Clinical Management. The order is sent to the Review/Assign Orders queue or the Link Orders to Appointment queue, based on the item type and whether or not the item is to be evaluated for inpatients, outpatients, neither, or both. The order(s) are then processed through Clinical Management as if the order was placed while the module was active and files were correctly set.

For information on the Reviews/Assign Orders function, see Chapter 3: Order Evaluation Procedures. For information on the Link Orders to Appointment function, see Chapter 3: Scheduling Process.

Impact

When you accept this screen, orders are transferred to Clinical Management into either the Review/Assign Orders or Link Orders to Appointment processors based on the Item Type, Patient Type, and whether the item requires Evaluation.

Chapter 2 - ORDER EVALUATION PROCEDURES

INTRODUCTION

Additional processing is performed for orders placed for departments active on Clinical Management. Orders placed for departments not using Clinical Management flow through normal Order Management processing. That is, they remain Pending until activated to Active or Completed based on the department's Valid Hours/Days parameters. When the order is activated, a requisition prints in the department as notification of the physician's order. These orders display in Order Inquiry as long as they have an Active or Pending status.

When a department is active on Clinical Management, each item in the department's Service Item Master (SIM) is identified as either Scheduled, Worklisted, Disposable or Standard. Disposable and Standard items do not queue to the Review/Assign Orders or Link Orders to Appointment processor and flow through normal Order Management processing. Worklisted items are queued to the Review/Assign Orders processor and flow through normal Order Management processing as well. There is no need to interrupt the normal flow since these items are typically not scheduled for a specific date/time. Scheduled items queue to the Link Orders to Appointment processor.

The evaluation process can be performed for all Scheduled and Worklist items. This process not only allows for evaluation and interpretation of the original order, it also allows for order additions and sets up the order for streamlined scheduling and worklist processes. Only ordered items can be evaluated; charges bypass this process.

EVALUATION THROUGH REVIEW/ASSIGN ORDERS

A SIM item that has been ordered must be evaluated if the Evaluate? field for the item is set to Yes on the Clinical Management Information screen in the Service Item Master (under Service Item Maintenance). You evaluate orders throughout the Review/Assign Orders process.

To evaluate a worklisted order, select the Worklist Processing option from the main Clinical Management menu, shown below:

```
                  General Hospital DRT Station ID Processor
                                                   Thu Apr 11, 1996 05:11 pm

DRT Station ID Input Options
            Option No.  Option
            ----------------------------------------
                 1       Department Orders

                 2       Worklist Processing
                 3       Schedule Processing

                 4       Documentation
                 5       Display/Print Patient Notes
                 6       Patient Text Entry

                 7       Departmental Management
                 8       Workload Processing
                 9       Send Message

                10       Patient/Charge Information
                11       Cancel/Discontinue Orders
                12       Departmental Patient Information
 Enter option number--
```

The following screen displays:

```
                 General Hospital Worklist Processing Processor
                                                  Tue Apr 16, 1996 09:13 am
Worklist Processing Input Options

            Option No.  Option
            ----------------------------------------
                1       Review/Assign Orders

                2       Audit/Transfer Worklist

                3       Documentation
                4       Display/Print Patient Notes

                5       Display/Print Worklist
                6       Incomplete Worklist Report

                7       Cancel/Discontinue Orders
                8       Departmental Patient Information



Enter option number--
```

Select Review/Assign Orders from the Worklist Processing submenu. The system displays the following prompt:

Enter charge department ('-' to list) --

When you select a charge department, the following prompt displays for that department:

(V)iew existing worklists or (A)ssign orders [A] --

If you enter **V** to view existing worklists, you are prompted to select a date and shift to process. A screen displays, listing the worklists for the selected date and shift. You can then select a worklist to cancel, transfer, or display stations or you can approve the worklists.

If you enter **A** to assign orders, a screen displays for you to select the available dates and shifts. When you do so, the following screen displays, listing the orders that need to be assigned to a resource. Those that need to be evaluated display with the <E> symbol in front of them. You can select specific orders to assign or **A** for All.

```
              General Hospital Review/Assign Orders Processor
                                                   Tue Apr 16, 1996 11:16 am
RESPIRATORY THERAPY 04/16/96 Shift 1
          <E> = Evaluation required
Page:01                                                         ##=Current Choices
     Patient Name             Room/Bed       Account No     Sex/Age
 No      Item Description      Freq      Priority  Ord Physician   Ord#  Wkld
( 1) RIVERS,MARY              ICU ICU-01     A9609300008    F / 23Y
         BEDSIDE SPIROMETRY    BID       ROUTINE   ADAIR,FRANK K    9     1
( 2) RIVERS,MARY              ICU ICU-01     A9609300008    F / 23Y
         AEROSOL TREATMENT     TID       ROUTINE   CASPER,DAVID     20    2
( 3) NAGLER,DANIELLE M        PED 4103-02    A9607100008    F / 12Y
     <E> AEROSOL TREATMENT     TID       STAT      CASPER,DAVID     40    1







 Enter choice, choices (i.e. 1,3-5), (A)ll, or (P)rint [A] --
                                end selection(NL)
```

If one of the items selected needs to be evaluated, the following evaluation screen displays:

```
             General Hospital Review/Assign Orders Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No         Name             Sex    BD    Room    Physician    SVC ICD Status
9607100008   NAGLER,DANIELLE M F  02/25/84 4103-02 CASPER,DAVID LIM 10 I/P 36
  1 Order No.  2 Department          3 Item
    40         RESPIRATORY THERAP      2941 AEROSOL TREATMENT
  4 Entered By         5 Enterer's Loc       6 Order Date/Time       7 Quantity
    #32091               DRT                   02/16/09 11:07A         1
  8 Priority           9 Order Status       10 Reason
    STAT                 In process
 11 Start Date/Time   12 Stop Date/Time     13 Freq    14 Schedule  15 Interval
    02/16/09 13:00P      02/16/09 13:00P       TID        DAILY
  16 Times

17 Duration          18 Days              19 Days On  20 Days Off
    1O                   M,Tu,W,Th,F,Sa,Su
 21 Ordering Physician                  22 Order Diagnosis
    100 CASPER,DAVID
 23 Comment                             24 Prompt Response / Message

Accept (E)valuation, (A)dd orders, or (C)ancel [E]--   View more
(I)nformation,(O)ccurrences,patient's (S)chedule,or (M)edical page
```

You have several options before interpreting the order that assist in the evaluation process. The options consist of viewing, accepting the order as itwas entered, adding additional items to the order (A), cancelling an ordered item (C), viewing the patient's medical information as it was entered on the Nursing - Revise Patient function (M), and/or accessing/viewing the patient's existing scheduled appointments (S).

If you enter **E** to accept the evaluation, the system proceeds to the next item for evaluation. Selecting the default causes the system to accept the evaluation and proceed to either the new order to be evaluated or, if all orders have been evaluated, the resource selection prompt. When all of the items have been evaluated, the Resource Selection screen displays.

The ability to view any or all of the occurrence information is available from this prompt. The evaluation is done on the parent-order level. No individual occurrence evaluations are formally done in the Review/Assign Orders processor. You can view them and/or cancel them from this prompt.

Once the Evaluation processing has been completed, the system displays the following prompt for order assignment:

View (D)etail, (M)anually assign, or (A)utomatically assign orders [A]--

ADD ON ORDERS

To add orders, enter **A**. This enables you to add orders or replace items if an incorrect item was ordered.

The interpretation or evaluation of an order applies well to the therapy departments. Although the therapy orders are coded, there is freeform text associated with the order that may need to be read or interpreted by someone in the performing department. Additionally, due to the patient's current condition, a gradual progression to the treatment prescribed may be necessary. Clinical Management enables a knowledgeable person in the department to expand an order into specific treatments. These individual treatments are SIM items that are then scheduled by the department.

After you enter **A**, the appropriate order screen for the department displays for selection of additional SIM items. See "Chapter 1 - CLINICAL MANAGEMENT ORDER ENTRY FLOW" for field explanations.

CANCEL

You can initiate the Cancel function by entering **D** (Detail) for a selected order from the following screen.

```
                General Hospital Review/Assign Orders Processor
                                                    Tue Apr 16, 1996 02:49 pm
RESPIRATORY THERAPY 04/16/96 Shift 1
           <E> = Evaluation required
Page:01                                                        ##=Current Choices
      Patient Name            Room/Bed       Account No     Sex/Age
 No      Item Description      Freq      Priority  Ord Physician   Ord#  Wkld
( 1) NAPLES,DANIELLE M        PED 4103-02    A9607100008    F / 12Y
     <E> AEROSOL TREATMENT     TID       STAT      DOCTOR,ADMITTIN  40    1
( 2) CARRINGTON,NANCY SUE     ER             A9610700006    F / 39Y
     <E> RT ORDER              ONCE      STAT      WELLER,ERIC L    10    1
( 3) CARRINGTON,NANCY SUE     ER             A9610700006    F / 39Y
         ROOM VAPORIZER        ONCE      STAT      WELLER,ERIC L    10    60
( 4) CARRINGTON,NANCY SUE     ER             A9610700006    F / 39Y
         ROOM VAPORIZER        ONCE      STAT      ADAIR,FRANK K    9     60
( 5) CARRINGTON,NANCY SUE     ER             A9610700006    F / 39Y
         ROOM VAPORIZER        ONCE      STAT      ADAIR,FRANK K    8     60
( 6) CARRINGTON,NANCY SUE     ER             A9610700006    F / 39Y
     <E> CONCHA THERM HEATER   ONCE      STAT      WELLER,ERIC L    10    1
( 7) CARRINGTON,NANCY SUE     ER             A9610700006    F / 39Y
         SUCTIONING            ONCE      STAT      WELLER,ERIC L    10    45

View (D)etail, (M)anually assign, or (A)utomatically assign orders [A]--
```

After you select an individual order, this screen is displayed:

```
               General Hospital Review/Assign Orders Processor
                                                   Tue Feb 24, 2009 02:25 pm
  No           Name             Sex    BD    Room    Physician    SVC ICD Status
9610700006    CARRINGTON,NANCY  F  02/14/57         WELLER,JOHN LMED 10 ER
  1 Order No.  2 Department           3 Item
    10           RESPIRATORY THERAP      2602 ROOM VAPORIZER
  4 Entered By         5 Enterer's Loc       6 Order Date/Time       7 Quantity
    #10065               ERN                   02/16/09 14:08P          1
  8 Priority           9 Order Status       10 Reason
    STAT                 In process
 11 Start Date/Time   12 Stop Date/Time     13 Freq    14 Schedule  15 Interval
    02/16/09 14:08P      02/16/09 14:08P       ONCE       ONCE
 16 Times

17 Duration          18 Days               19 Days On  20 Days Off
    1O                   M,Tu,W,Th,F,Sa,Su
 21 Ordering Physician                  22 Order Diagnosis
    3042 WELLER,JOHN L                     784.0-HEADACHE
 23 Comment                             24 Prompt Response / Message


(C)ancel this order, or (A)dd new orders--
              View additional order (I)nformation or (O)ccurrences--
```

Enter **C** to cancel the displayed order. The system requires a reason for cancellation. The following prompt displays for entry of the cancellation reason:

Enter the cancellation reason code, `-` to list, or `-`free form reason--

When you enter the reason, the system displays the list of occurrences for this parent order and prompts for thecancellation of the entire order or only selected occurrences. This following screen illustrates this processing:

```
              General Hospital Review/Assign Orders Processor
                                                 Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
9610700006    CARRINGTON,NANCY  F  02/14/57         WELLER,JOHN LMED 10 ER

Page:01            All occurrences for Parent Order Number 9  ##=Current Choices
           Ord# Dept  Description                  Req Dt/Tm     Freq  Dpt Status
( 1)         9  RT    ROOM VAPORIZER               02/16 1406P   ONCE    Received










Select occurrences to cancel or `A`ll (including parent)--
                                end selection(NL)
```

If you enter **A** for All, the system cancels each occurrence and displays the message:

Order for RT Aerosol requested for 3/16/96 0700 cancelled

The occurrence is removed from the Review/Assign Orders processor. The cancellation message flashes by for each of the occurrences, followed by the cancellation message for the parent order.

Parent Order Cancelled

Once the parent order is canceled, the order is removed from the Review/Assign processor and you are returned to the assignment prompt.

Cancellation notices may print for all departments live on Clinical Management. These notices are directed to the same printer that generates the requisitions for the department.

NOTE: The notices display the header *CAN REQ* for procedures that were requested for cancellation by the nursing station *after* the procedure was assigned to a work list or scheduled by the department.

The notices display the header *CANCEL* for procedures that were cancelled in the department, or were requested for cancellation by the nursing station *before* the procedure was assigned or scheduled. These occurrences have a true Cancel status.

Cancel notices can print based upon two parameter settings. If the Cancel status for the department in the Department Statuses table is set to Not Autocancel, and the Print Req field in the Service Item Master - Order/Requisition information is set to None, then no requisitions print. If parameters indicate that requisitions are to print, then the system uses the following logic:

- If a parent is cancelled and there is at least one active occurrence, then only one cancel requisition prints.
- If an occurrence is cancelled, then a cancel requisition prints.
- If a pending order is cancelled, then no cancel requisitions prints.

VIEW MEDICAL PAGE

You can view the patient's medical information entered by Nursing by entering **M**. The following screen displays, enabling you to access specific medical information that may be important regarding the method of treatment given to the patient.

```
                General Hospital Evaluate Procedures Processor
                                                   Tue Feb 24, 2009 02:25 pm
  No           Name             Sex    BD    Room    Physician    SVC ICD Status
90116-00005   BENNETT,PATRICK T M  01/12/51 2102-1  ADAIR,FRANK CMED 10 I/P 1

 1 Working Diagnosis                    2 Allergies
   001.0-CHOLERA D/T VIB CHOLERAE         NKA
 3 Precaution 1                         4 Precaution 2

 5 Precaution 3                   6 Condition           7 Level of Care
                                    Good                    1
 8 Height              9 Weight             10 IBW      11 BSA
   5'10.0'' / 177.8cm     180lbs/81.8 kg        73.70kg     2.00 sq m
12 Isolation          13 Oxygen Therapy      14 IV Therapy
                                    CPY CANOPY             HYP HYPERALIMENTAT
15 Surgery Scheduled                                             16 Date
   None




Press NL--
```

All fields on this screen are display only; they cannot be edited.

For detailed field explanations, refer to the *Patient Processing Module* of the *STAR Patient Care Reference Guide*.

Press ENTER to return to the original prompt.

VIEW/ACCESS PATIENT SCHEDULE

To view/access the patient's existing schedule, enter **S**. Accessing a list of the patient's current appointments enables you to view treatments that are already scheduled, as well as linking the order being evaluated to an existing appointment.

Viewing the patient's existing appointments enables the department to view existing scheduled treatments being performed by all departments using the Patient Scheduling Module. This function helps in coordinating treatments for multiple departments.

Linking existing appointments to orders allows the department to schedule treatments in advance of the patient's visit and then allows the order to be linked when the patient arrives and an order is placed. This is extremely important for outpatients when treatments are typically scheduled prior to the patient arriving for treatment. Once the order is placed, it can be linked to the existing appointment.

If an appointment is already linked to an order, it can be linked to additional items with the same order number, but cannot be linked to items with different order numbers.

After you enter **S**, the following screen displays the patient's appointments beginning with the current date (today's date):

```
                General Hospital Evaluate Procedures Processor
                                                 Tue Sep 11, 1994 06:35 am
  No.          Name              Sex    BD    Room    Physician     SVC   Status
90115-00001   DRAN,SUSAN          F  05/07/58 1N1-4   JAMES,STEVEN  MED   I/P 17
 #   Day Date  Time  Type  Dpt Resource           Reason               Status
Page:01
( 1) Mon 09/11 900A  CONS  RT  THERAPIST,SUE Q    Multiple Orders      Pending
( 2) Mon 09/11 1030A CONS  RT  THERAPIST,SUE Q    CONSULTATION         Pending
( 3) Mon 09/11 1200N CONS  RHB THERAPIST,JOHN Q   6016+EVALUATION PT   Pending
( 4) Mon 09/11 500P  GEN   RHB THERAPIST,JOHN Q   6082 CERVICAL TRACTI Pending











Select the appointment to view or link with order #54--
```

The first screen that displays after you enter **S** is the screen used by Scheduling to display the patient's pending schedules. Refer to the *Patient Scheduling Module* of the *STAR Patient Care Reference Guide* for detailed field explanations.

If a plus sign (+) displays in front of the SIM item number and description, it indicates that the appointment contains multiple treatments. If *+Multiple* displays under the Reason heading, it indicates that a primary item was not identified when the evaluated treatment was scheduled. If a primary treatment was identified, the SIM Item code and description display under the Reason heading and are preceded by a plus sign (+).

You can display additional information for a particular appointment by selecting the desired appointment from the summary screen. The additional treatments or procedures contained in the appointment can be viewed.

To view/revise any of the appointment information or to link an unlinked appointment to an order, select the appropriate scheduled appointment.

If the selected appointment is from a department for which this terminal is not allowed to schedule, the following error message displays prior to redisplaying the summary display of appointments:

Error: Wrong department!

If this terminal is allowed to schedule for the selected department as defined by the Scheduling Department field in the CRT Names table, the following screen displays:

```
                 General Hospital Evaluate Procedures Processor
                          Edit Appointment Screen     Tue Sep 11, 1994 06:35 am
  No.         Name             Sex    BD    Room    Physician     SVC   Status
90115-00001   DARN,SUSAN        F  05/07/58 1N1-4   JAMES,STEVEN  MED   I/P 17
 1 Resource                            2 Visit Type  3 Appointment
   THERAPIST,JOHN Q                      CONS          Mon 09/11/94 1030A
 4 New Visit        5 Account    6 Ord #  7 Length      8 Service Department
   No                 90115-00001  54       45            PHYSICAL THERAPY
 9 Visit Reason              10 Comment
   CONSULTATION
11 Add'l Items  12 Referring Source      13 Referring Physician
                                            ADAIR,FRANK
14 Transport       15 Priority          16 Display              17 Chart
   Wlchair            Medical              VIEW REASON               Yes
18 Additional Comment #1                19 Additional Comment #2

20 Working Diagnosis                    21 Check-In Time     22 Check-Out Time




Are you sure you want to link this appointment? (Y/N) [N]--
```

Field Explanations

1. RESOURCE (DISPLAY ONLY)
This is the name of the resource associated with the selected appointment.

2. VISIT TYPE (DISPLAY ONLY)
This is the type of visit associated with the selected appointment.

3. APPOINTMENT (DISPLAY ONLY)
This is the day of the week, date and time of the scheduled appointment.

4. NEW VISIT (DISPLAY ONLY)
Prior to the appointment being linked to the order, this field displays Yes if this is a new visit and the type of visit is unknown. If the type of visit is known, Outpatient or Inpatient displays instead of Yes. If the appointment is already associated with an account number, this field displays No. The associated account number displays in the Account field.

After the appointment is linked to an order, this field displays No with the associated account number in the Account field.

5. ACCOUNT (DISPLAY ONLY)
This field displays the account number associated with the selected appointment if the New Visit field is set to No. This field is blank if the field is set to Yes.

As soon as the appointment is linked to an order, the account number associated with the order displays. If a different account number existed in the appointment prior to linking, a warning message displays to ensure that the correct appointment has been selected. If the appointment is linked anyway, the appointment account number is replaced with the order account number.

6. ORD # (DISPLAY ONLY)
This field displays the order number to which the appointment is linked. If the appointment is not linked, this field is blank.

7. LENGTH (3-N-R)
This field reflects the length associated with the appointment type previously selected. If the ordered item has a length defined in the SIM, that length replaces the original length.

If the displayed length is not appropriate for the test being performed, the field can be accessed and changed.

If the length is changed (automatically or manually) from the length associated with the appointment type, the system collapses additional slots of the same type if the Insert field in the Resource Master is set to No. If this field is set to Yes, the system does not perform a collapse and accepts the revised length.

For additional information on collapsing, refer to the *STAR Patient Care Reference Guide, Patient Scheduling Module*.

8. SERVICE DEPARTMENT (DISPLAY ONLY)
This field displays the SIM department associated with the selected appointment. Once linked, the field displays the SIM department associated with the order.

9. VISIT REASON (DISPLAY ONLY)
This field displays the visit reason entered for the selected appointment. This can be a freeform entry, the description of the appointment type selected, or a SIM item. Once linked, this field displays the SIM item associated with the order.

If the selected appointment is associated with another order that has several treatments being performed in the same appointment, a plus sign (+) displays prior to the visit reason. The visit reason contains a SIM item if a primary treatment was selected when the initial appointment was scheduled. If a primary treatment was not identified, then Multiple displays. The system currently does not allow multiple orders/ treatments to be linked to an existing appointment. If multiple treatments are being scheduled, they must be added through evaluation and then scheduled through the Schedule Initial Appointments processor.

10. COMMENT (45-C-O)

The freeform comment entered for the appointment displays. It can be revised if necessary.

If the Visit Reason field contains a SIM item and SIM Item Scheduling Instructions have been built for the items, they display when this field is accessed. The prompt displays below the 15 lines of instructions enabling entry of a response or a comment. If instructions are not built, the additional screen does not display.

11. ADD'L ITEMS (DISPLAY ONLY)

If the selected appointment is associated with another order that has several treatments being performed in the same appointment, the multiple treatments display in this field. If additional items exist, this field displays Yes. If selected, the additional items display. If additional items do not exist, the field displays No. If selected, the following error message displays prior to redisplaying the screen:

Additional SIM Items do NOT exist!

Up to a maximum of 15 SIM items can be associated with one appointment if added through the Review/Assign Orders processor and then scheduled through the Link Orders to Appointment processor.

12. REFERRING SOURCE (TABLE LOOKUP-O)

The referring source entered for the appointment displays. If selected, it can be revised. Enter the code associated with the referring source if you know it. If you do not know the code, enter a hyphen (-) to display a table listing for selection. To enter a source not contained in the table, press hyphen (-) followed by your freeform entry.

13. REFERRING PHYSICIAN (TABLE LOOKUP)

The referring physician associated with the selected appointment displays until the appointment is linked to an order. Once linked, the ordering physician displays as the referring physician.

If accessed, this field enables entry of the physician's code, selection from a table display or a freeform entry. You can enter an equal sign (=) to default to the attending physician associated with the account number in the Account field. If the Account field is blank, the equal sign (=) is not allowed.

This field is required if the Req Ref Phys field in the Resource Master is set to Yes. If the Req Ref Phys field is set to No, this field is optional.

14. TRANSPORT (TABLE LOOKUP-O)

The transport method associated with the selected appointment displays until the appointment is linked to an order. Once linked, the transport entered in the order displays as the appointment's transportation method.

If accessed, this field enables entry of the transport code, selection from a table display or a freeform entry. Entries defined for the ordering department's transportation can be entered. Appointments with this field entered display under Transportation Schedule Census. Appointments scheduled on the same date generate Transportation Notices at the time the original appointment is made.

15. PRIORITY (TABLE LOOKUP-O)

The priority associated with the selected appointment displays. This field is not filled in with the order priority if the appointment is linked because they have different meanings. The ordering priority typically indicates timed, ASAP, routine, etc., where the appointment priority typically indicates medical, rescheduled, etc. If accessed, the Appointment Priority table displays to allow selection of the appropriate entry.

16. DISPLAY (TABLE LOOKUP)

The display security defined for the selected resource in the Display Security field of the Resource Master displays for the selected appointment. This field can be revised. It is not impacted by the linking of an appointment to an order.

If accessed, the display security entries are displayed, enabling selection of either View Reason, Restrict Reason or Restrict Name. This field is used to prevent the name of the resource and/or the appointment visit reason from displaying for scheduling departments that are not allowed to schedule foryour department. If this field is set to View Reason, both the resource's name and the visit reason for the appointment display on inquiry functions for all scheduling departments. If the field is set to Restrict Name, then other departments are able to see the resource associated with the appointment, but not the visit reason. If the field is set to Restrict Name, then other departments are not able to see the name of the resource or the visit reason.

17. CHART (1-A-R)

The Chart Request indicator entered for the selected appointment displays. It is not impacted by the linking of the appointment to an order. If this field is set to Yes, then the appointment is included on Chart Pull Lists generated for future appointments. If the appointment was a same day appointment when originally placed, a Stat Chart Request Notice is sent to Medical Records instead of being included on a Chart Pull List.

If accessed, the field can be changed to Yes or No. This field is required, but defaults to the value indicated in the Resource Master when the appointment is first made.

18. & 19. ADDITIONAL COMMENTS (36-C-O)

The freeform comments entered for the selected appointment display. If accessed, both fields allow entry of any additional information pertaining to the appointment.

20. WORKING DIAGNOSIS (34-AN-R)
This is a table-driven field. The default response is the working diagnosis. If the working diagnosis is the valid diagnosis, press ENTER and the working diagnosis automatically displays in the field. If the diagnosis is different from the working diagnosis, enter the code that describes the patient's diagnosis.

If you do not know the code and intend to use the table lookup to search, be aware of the following: Because there are so many diagnosis codes in the system, the table lookup for this field has been expanded. There are hospital-defined pointer tables which help you specify how to search for commonly used codes. When entering actual codes, you can enter leading zeros or decimal points, but the system does not require them. For example, you can enter one of the following to initiate a code search:

- Enter **U** and a hyphen (**U-**) to display the entire pointer table in alphabetic order. Make your selection from this table.

- Enter **U**, an alpha character or characters, and a hyphen (**UA-**, **UB-**, etc.) to display the pointer table that begins with a specific alpha character. For example, entering UAN-, might cause the codes for Aneurysm, Angina, and Ankle Fracture to display if they have been built into the pointer table. Make your selection from this table.

- Enter a numeric digit (or digits) and a hyphen (**22-**, **250-**, etc.) to display the diagnosis table by specific numeric range of codes. For example, if you know that the code you are searching for begins with 22, enter 22- and all the codes beginning with 022.0 (CUTANEOUS ANTHRAX) are displayed. Make your selection from this table.

- Enter a hyphen (**-**) to display the entire diagnosis table in numeric code order, i.e., starting with 001.0 (CHOLERA D/T VIB CHOLERA).

The code and the diagnosis description display. To override the table, enter a hyphen (-) followed by a freeform entry. If you enter a number which exists in the DSM Pointer table, the system displays the number followed by its corresponding description. This enables you to enter an admitting diagnosis that cannot be defined by an ICD code. If the number is not in the DSM Pointer table but is in the ICD Diagnosis Pointer table, the system displays the number followed by its description from the ICD Diagnosis Pointer table.

21. CHECK-IN TIME (SPECIAL FORMAT-T)
The time the patient arrives for the appointment.

22. CHECK-OUT TIME (SPECIAL FORMAT-T)
The time the patient departs from the appointment.

Impact

- The linking of appointments to orders using this method is typically done with outpatients since appointments are generally scheduled well in advance of the patient being admitted or the order placed.
- The evaluation process is complete and the order is available for assignment.
- The patient appointment information entered in the system can now be accessed through the patient, resource, department or nurse station functions available throughout the system.

Output

- If the Referral Source field was completed, this patient appointment information displays on the Monthly Referral report.
- If the Transportation field was completed, the appointment displays on the Transportation Schedule Census Display and Print and may generate a Transportation Notice.
- If the Chart Request field is Yes, this appointment information displays on the Chart Pull List and Outguide List when they are prepared and may generate a Stat Chart Pull Notice.
- If revisions are made when an appointment is linked to an order, an Audit Notice may print on the department's printer if defined in the Scheduling Department table. An Appointment Notice may also print if set up in the same table and the revision is occurring on the same day for which the appointment is scheduled.

Chapter 3 - SCHEDULING PROCESS

INTRODUCTION

When a department is using Clinical Management, orders with an item type of Scheduled display in the Link Orders to Appointment processor until scheduled. Only ordered items can be evaluated and subsequently scheduled; charges bypass this process. As soon as the order is scheduled, it displays in the Schedule Procedures processor allowing additional appointments to be scheduled from the one order.

Additional appointments can be scheduled through the Link Orders to Appointment or the Copy Appointment processor, whichever is appropriate. The Schedule Procedures processor pulls ordering information to the appointment and subsequently allows re-entry or revision of specific data. The Copy Appointment processor, on the other hand, copies all appointment data from another appointment and does not allow revision. Revisions can be done after completion of the copy through the Revise Patient Appointment, Check In/Out or End of Day processors.

Since the Patient Scheduling Module is required to process Clinical Management treatments that have a Scheduled item type, all functions found within the Patient Scheduling Module are available to the department as well. All functions allowing revision of appointment data are used to revise/reschedule appointments scheduled through Clinical Management as if they were processed through Scheduling. If appointments are placed using the Scheduling module's Appointment or Walk-In processors, the resulting appointment is not linked to an order or processed through Clinical Management.

The Clinical Management functions used to schedule appointments, update treatment statuses and audit schedules are described on the following pages. For more information on the Scheduling functions available, refer to the *Patient Scheduling Module* of the *STAR Patient Care Reference Guide*.

LINK ORDERS TO APPOINTMENT

The Link Orders to Appointment processor allows orders with Scheduled item types to be scheduled for their appointments. After you select the Link Orders to Appointment procedures, the facility is determined.

If this terminal can access more than one facility, a screen displays enabling selection of a facility. If this terminal can only access one facility, that facility is assumed and the facility screen is bypassed. Once the facility is determined, the following prompt displays enabling you to view orders by patient, department, or SIM item:

Link Orders to Appointment by (P)atient, (D)epartment, or SIM (I)tem [D]--

View Orders By Department

To view orders by department, press ENTER or **D**. The following screen displays if this CRT can access more than one charge department as defined in the CRT Names table:

```
                 General Hospital Schedule Initial Procedures
                                                 Tue Sep 11, 1994 03:27 pm

Page:01                           Departments
( 1) REHABILITATION
( 2) RESPIRATORY THERAPY









Enter choice--
```

This screen is bypassed if there is only one charge department in the CRT Names table. That charge department is assumed and the process continues. If there are no charge departments in the CRT Names table, an error displays and the process is stopped.

Upon entry of a charge department, this screen displays if the department is separated into subdepartments. If subdepartments have not been defined, this screen is bypassed and the process continues.

```
                General Hospital Schedule Initial Procedures
                                           Tue Sep 11, 1994  03:30pm

 Page:01              Sub-Departments for PHYSICAL THERAPY   ##=Current Choices
 ( 1) OCC THERAPY SUBDEPT
 ( 2) SPEECH THERAPY SUBDEPT

 Enter choices (eg. 1,3,5-9), `-`choices to remove or NL for Master [PT]--
                                  end selection(NL)
```

The prompt allows entry of one or multiple subdepartments. Press ENTER to view the Master SIM Department if you do not want to access subdepartment information.

After you enter the subdepartment(s) or press ENTER for the master charge department, the following screen displays orders that are to be scheduled:

```
                  General Hospital Link Orders to Appt Processor
                                                      Mon Apr 29, 1996 01:14 pm
          <E> = Evaluation required
Page:01                Treatments for RESPIRATORY THERAPY
         Item Description        Req Dt & Tm    Ord#   Patient Name
Loc
( 1)     MIP,VC,OR PEAK FLOW/EA. 04/03/96 0800A    1   LANE,THOMAS       CCU
( 2)     LUNG VOLUMES            04/03/96 0800A    1   LANE,THOMAS       CCU
( 3)     DLCO                    04/03/96 0900A    1   LANE,THOMAS       CCU
( 4)     LUNG VOLUMES            04/04/96 0700P   23   TEST,DRP          CCU
( 5)     LUNG VOLUMES            04/05/96 0700A   23   TEST,DRP          CCU
( 6)     LUNG VOLUMES            04/05/96 0700P   23   TEST,DRP          CCU
( 7)     LUNG VOLUMES            04/06/96 0700A   23   TEST,DRP          CCU
( 8)     LUNG VOLUMES            04/06/96 0700P   23   TEST,DRP          CCU
( 9)     LUNG VOLUMES            04/07/96 0700A   23   TEST,DRP          CCU
(10)     LUNG VOLUMES            04/07/96 0700P   23   TEST,DRP          CCU
(11)     LUNG VOLUMES            04/08/96 0700A   23   TEST,DRP          CCU
(12)     LUNG VOLUMES            04/08/96 0700P   23   TEST,DRP          CCU
(13)     LUNG VOLUMES            04/09/96 0700A   23   TEST,DRP          CCU
(14)     LUNG VOLUMES            04/09/96 0700P   23   TEST,DRP          CCU
Enter choice, (P)rint or (C)ancel--
                                  next page(/)
```

This screen displays each of the occurrences for the order that was placed. If a SIM item needs to be evaluated, an <E> is displayed before each occurrence of that SIM item on an order. However, you have to evaluate only one of the occurrences. Once one of the occurrences is evaluated, the <E> preceding the other occurrences is removed.

When you select an occurrence for assignment, the system displays all of the SIM Items associated with an order. This enables you to link all of the items to one appointment or to link each item to its own appointment. You can also select a primary item.

Field Explanations

<E> (DISPLAY ONLY)
This code designates an order that needs to be evaluated before resource assignments are made.

DESCRIPTION (DISPLAY ONLY)
The SIM description displays.

REQ DT & TM (DISPLAY ONLY)
The requested date and time entered at the time the order was placed displays.

ORD# (DISPLAY ONLY)
The order number assigned at the time the order was placed displays.

PATIENT NAME (DISPLAY ONLY)
The patient's name displays in the following format: last name, first name.

Impact

After you accept this screen, the actual scheduling process begins. Any orders that were linked to an appointment are removed from this processor. All status updates for these orders is done through the documentation processor.

Output

If you enter **P**, a hard copy of the orders waiting to be scheduled prints on the default printer associated with the requesting CRT as defined in the CRT Names table. If the selection includes an item requiring evaluation, the Order Detail screen displays:

```
               General Hospital Link Orders to Appt Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No          Name            Sex    BD    Room    Physician    SVC ICD Status
9609300008    RIVERS,MARY      F  09/01/72 ICU-01  ADAIR,FRANK KMED 10 MH  28
 1 Order No.  2 Department           3 Item
   21           RESPIRATORY THERAP      2803 DLCO
 4 Entered By         5 Enterer's Loc       6 Order Date/Time       7 Quantity
   #46897               ICU                   02/15/09 14:44P         1
 8 Priority           9 Order Status       10 Reason
   ROUTINE              In process            PHYSICIAN ORDER
11 Start Date/Time   12 Stop Date/Time     13 Freq    14 Schedule  15 Interval
   02/15/09 07:00A      02/15/09 23:59P       TID        DAILY
16 Times

17 Duration          18 Days               19 Days On  20 Days Off
    4D                   M,Tu,W,Th,F,Sa,Su
21 Ordering Physician                   22 Order Diagnosis
   ADAIR,FRANK
23 Comment                              24 Prompt Response / Message

Accept (E)valuation, (A)dd orders, or (C)ancel [E]--
  View more (I)nformation,(O)ccurrences,patient's (S)chedule,or (M)edical page
```

To accept an order as is, enter **E**. This is the default. You can also enter **A** to add a new order, or enter **C** to cancel an order. The prompt also lists several options to aid in your evaluation. Enter **I** to view more information, **O** to list all occurrences of this SIM on the parent order, **S** to see the patient's schedule, or **M** to view the patient's medical page.

For field explanations of the Order Inquiry Detail screen, refer to *Order Management/ Charge Processing Volume 1* of the *STAR Patient Care Reference Guide.*

View Orders by Patient

To view orders by patient, enter **P** at the prompt on the initial Link Orders to Appointment screen. The active patient name inquiry prompt displays as follows:

Enter acct #, `-`bed code, first chars of name--

Refer to the Information Entry Techniques chapter in the *General Information Volume* of the *STAR Patient Care Reference Guide* for details of available entry options.

After you select a patient, the following screen displays:

```
          General Hospital Schedule Initial Appointment Processor
                                                Tue Feb 24, 2009 02:25 pm
  No          Name            Sex    BD    Room    Physician    SVC ICD Status
9607000001    NAPLES,NEIL      M  08/30/30 3306-02 JAMES,STEVEN MED 10 I/P 51

          <E> = Evaluation required
Page:01                         Treatments to Link
     Dept      Item Description              Req Dt & Tm        Order #
( 1) PT    <E> B-EXERCISE/15 MIN             02/17/09 0906A          16
( 2) PT        CARPAL TUNNEL SCRN-INDUS      02/17/09 0906A          16
( 3) PT        BRACE MEASURE                 02/17/09 0906A          16
( 4) PT        A/K STUMP SHRINKER            02/18/09 0700A          16








Enter choice, (P)rint or (C)ancel--
```

Evaluated orders with an item type of Scheduled that have not yet been scheduled display for the selected patient with an <E> before the SIM description. Only orders for the department(s) listed as valid charge departments in the CRT Names table display for selection.

If there are more orders awaiting their initial appointment than can fit on one screen, the traditional paging options are available.

If you enter **P**, a hard copy of the display of orders awaiting their initial appointment prints on the requesting CRT's associated default printer as defined in the CRT Names table.

When you enter **C** to cancel, the system asks you to identify which order with the following prompt:

Enter choice for cancellation --

Enter the option number associated with the order you want to cancel. The system asks you to enter a code representing the reason you are cancelling this order:

Enter order cancellation reason code or '-' free form response --

Enter the reason code if you know it. If you do not know the reason code, enter a hyphen (**-**) to choose from the displayed list of order cancellation reason codes. If you want to enter a free form response, enter a hyphen (**-**) before typing the reason.

NOTE: If you enter a free form response on a patient with an assigned Critical Pathway, the system gives you the option to enter a variance with the following prompt:

Record a variance (Y/N) [N] --

Enter **Y** to record a variance. Enter **N** or press ENTER to continue with the cancellation.

After you enter the order cancellation reason, the system displays the following verification message:

Ordered Cancelled!

The treatment is removed from the list of treatments in the Link Order to Appointment Processor.

The scheduling process is described later in this chapter, after the initial entry options are discussed.

Field Explanations

The traditional patient header line displays for the patient selected.

DEPT (DISPLAY ONLY)
The department for which the order was placed displays.

CODE (DISPLAY ONLY)
The SIM item number for the order displays.

DESCRIPTION (DISPLAY ONLY)
The SIM description displays.

REQ DT & TM (DISPLAY ONLY)
The requested date and time entered at the time the order was placed displays.

ORDER # (DISPLAY ONLY)
The order number assigned at the time the order was placed displays.

Impact

After you accept this screen, the actual scheduling process begins.

Output

If you enter **P**, a hard copy of the orders waiting to be scheduled prints on the default printer associated with the requesting terminal as defined in the CRT Names table.

View Orders by SIM Item

To view orders by SIM item, enter **I** at the prompt on the initial Link Orders to Appointment screen. The following prompt displays if there is more than one department identified in the Charge Department field in the associated CRT Names table entry:

Enter charge department ('-' to list)--

If there is only one charge department defined in the CRT Names table, that department is assumed and this prompt is bypassed. If there are no charge departments, an error message displays. This prompt allows entry of the department code if you know it. If you do not know the department code, enter a hyphen (**-**) to display a list of valid charge departments.

After you enter the charge department, the following prompt displays enabling entry of the SIM item:

Enter first letters'-' to list or code--

The SIM item can be accessed using the standard table lookup options described in the *General Information Volume* of the *STAR Patient Care Reference Guide*.

After you select or enter a SIM item, the following screen displays:

```
              General Hospital Schedule Initial Appointment Processor
                                                 Tue Sep 11, 1994 13:27 pm

Page:01              Treatments for PT 8010 GAIT TRAINING I
           Req Dt & Tm     Order#    Patient Name                     Loc
( 1)     04/18/96 1118A       27     ZIMMERMAN,HAROLD M.              ICU
( 2)     04/18/96 0518P       27     ZIMMERMAN,HAROLD M.              ICU
( 3)     04/18/96 1118P       27     ZIMMERMAN,HAROLD M.              ICU
( 4)     04/19/96 0518A       27     ZIMMERMAN,HAROLD M.              ICU
( 5)     04/19/96 1118A       27     ZIMMERMAN,HAROLD M.              ICU







Enter choice, (P)rint or (C)ancel--
                                    next page(/)
```

All orders for the selected department and SIM item display if the SIM item entered has an item type of Scheduled and an appointment link has not been made.

The selected department abbreviation displays where PT is in the example. The SIM item code and description for the selected item displays where 6016 and Evaluation are in the example.

If there are more orders awaiting evaluation than can fit on one screen, the standard paging options are available.

If you enter **P**, a hard copy of the display of orders awaiting an initial appointment prints on the requesting CRT's associated default printer as defined in the CRT Names table.

When you enter **C** to cancel, the system asks you to identify which order with the following prompt:

Enter choice for cancellation --

Enter the option number associated with the order you want to cancel. The system asks you to enter a code representing the reason you are cancelling this order:

Enter order cancellation reason code or '-' free form response --

Enter the reason code if you know it. If you do not know the reason code, enter a hyphen (**-**) to choose from the displayed list of order cancellation reason codes. If you want to enter a free form response, enter a hyphen (**-**) prior to typing the reason.

NOTE: If you enter a free form response on a patient with an assigned Critical Pathway, the system gives you the option to enter a variance with the following prompt:

Record a variance (Y/N) [N] --

Enter **Y** to record a variance. Enter **N** or press ENTER to continue with the cancellation.

After you enter the order cancellation reason, the system displays the following verification message:

Ordered Cancelled!

The treatment is removed from the list of treatments to link in the Link Orders to Appointment Processor.

The scheduling process is described later in this chapter, after the initial entry options are discussed.

Field Explanations

REQ DT & TM (DISPLAY ONLY)
The requested date and time entered at the time the order was placed displays.

ORD# (DISPLAY ONLY)
The order number assigned at the time the order was placed displays.

PATIENT NAME (DISPLAY ONLY)
The name of the patient displays.

Impact

After you accept this screen, the actual scheduling process begins.

Output

If you enter **P**, a hard copy of the orders waiting to be scheduled prints on the default printer associated with the requesting terminal as defined in the CRT Names table.

Scheduling Process

After you select the desired order through one of the methods described previously, all ordered items associated with that order number for the selected department that do not have appointments display with the selected entry highlighted. Orders display regardless of whether they were entered at the ordering location or added during evaluation. The originally ordered item displays first in the sequence because it is considered the primary order of the ordering set. This original order may have been canceled during the evaluation process, or may already have been scheduled.

Under the conditions described, the primary order (originally entered order) does not display.

```
          General Hospital Schedule Initial Appointment Processor
                                                 Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
90115-00001   DARN,SUSAN        F  05/07/58 1N1-4   ADAIR,FRANK CMED 10 I/P 21
Page:01                       Treatments in Order             ##=Current Choices
     Dept Code Description                    Req Dt & Tm
( 1) PT   6004 BEDSIDE VISIT                  02/12/09 212P
( 2) PT   6002 BANDAGING                      02/12/09 212P
( 3) PT   6000 ADJ. CANE/CRUTCH/WALKER        02/12/09 212P










Enter choices (eg. 1,3,5-9),`-`choices to remove or all(A)--
                         end selection(NL)
```

In this example, the originally entered order was for SIM #6004 Bedside Visit. The other two items were entered upon evaluation. At this point you can select the item or items you want to schedule for a single appointment. Each item can be scheduled individually or all items in one appointment as appropriate. After selecting the items, they are highlighted in flashing reverse dim video. If you want to delete one of the selected items, enter that item's option number preceded by hyphen (-) and that item is no longer highlighted. The item selected from the previous screen displays in reverse dim video automatically and need not be selected again.

If you select only one item and accept this screen, the scheduling process continues.

When you select several items, the following additional prompt displays with the previous screen remaining unchanged:

Enter SIM number for ordered item to be primary--

Enter the four-digit SIM code you would like to be considered primary. The only valid codes are those displayed. If you press ENTER, none of the items are considered primary. The primary item is the one that the scheduling system displays initially on all screens, with a plus sign (+) to remind you that other exams or treatments are scheduled simultaneously. The primary item is also the one the scheduling system accesses to display SIM item scheduling instructions and to determine and adjust the appointment times based on the entry in the SIM file. If no primary item is identified, the appointment time slots are not adjusted, and SIM item scheduling instructions are not used. Additionally, the description used for display and printing of the Visit Reason is Multiple.

By selecting multiple items through this screen, you are able to schedule several SIM items for the same appointment time. This cannot be done through the normal scheduling appointment processor.

If there are several items scheduled simultaneously, they all print on the schedule and can be displayed through the Add'l Items field of the detailed appointment screen.

Field Explanations

The traditional patient header line displays for the patient selected.

DEPT (DISPLAY ONLY)
The department for which the order was placed displays.

CODE (DISPLAY ONLY)
The SIM item number for the order displays.

DESCRIPTION (DISPLAY ONLY)
The SIM description displays.

REQ DT & TM (DISPLAY ONLY)
The requested date and time entered at the time the order was placed displays.

Impact

After you accept this screen, the following takes place:

- The option number(s) associated with the item(s) you want to schedule are highlighted, the primary item is identified, and the actual scheduling process begins.
- At this point the process is identical to that performed when an appointment is scheduled through the Appointment function.

After you select the item(s) to be scheduled, the following screen displays:

```
               General Hospital Evaluate Procedures Processor
                                                 Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
90115-00001   DRAN,SUSAN        F  05/07/58 1N1-4   ADAIR,FRANK   MED   I/P 21
 #   Day Date  Time  Type  Dpt Resource           Reason              Status
Page:01
( 1) Mon 02/16 900A  CONS  RT  THERAPIST,SUE Q    Multiple Orders      Pending
( 2) Mon 02/16 1030A CONS  RT  THERAPIST,SUE Q    CONSULTATION         Pending
( 3) Mon 02/16 1200N CONS  RHB THERAPIST,JOHN Q   6016+EVALUATION PT   Pending
( 4) Mon 02/16 500P  GEN   RHB THERAPIST,JOHN Q   6082 CERVICAL TRACTI Pending











Select the appointment to link or press NEW LINE for a new appointment--
```

You can select a displayed appointment with which to link the orders, or you can press ENTER for a new appointment.

The detailed appointment screen displays after you select an appointment. The prompt asks if you are sure you want to link the appointment with the selected treatments. If you enter **Y** for Yes, the treatments are linked with the selected appointment. If you enter **N** for No, you are returned to the list of appointments.

If an appointment is already linked to an order, it can be linked to additional items with the same order number, but cannot be linked to items with different order numbers.

If the patient does not have any existing appointments, the screen displays containing a message stating that no entries exist followed by a prompt prompting you to enter a resource. This enables selection of a resource for which you can schedule a new appointment. If you press ENTER or no appointments exist, the following screen displays:

```
            General Hospital Schedule Initial Appointment Processor
                                                Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
90115-00001   DRAN,SUSAN        F  05/07/58 1N1-4   ADAIR,FRANK CMED 10 I/P 21




















Enter Resource--
```

Enter the resource for the appointment you are scheduling. The resource code, departments, or an alphabetic entry followed by a hyphen (-) can be used to identify the resource. After you enter the resource, the resource's schedule for the order's requested date displays. If there is no appointment available for that particular day, either because the day is booked or because the resource is unavailable, the next available appointment date displays.

```
            General Hospital Schedule Initial Appointment Processor
THERAPIST: RHB,PT,4848 SMITH,JOHN Q             Tue Sep 11, 1994 03:27 pm
Types:   CONS 45,GEN 90
Date:    Wed Sep 12, 1994                       Requested:Wed Sep 12, 212P
Comment:
Time  Type Pt/Fd Comment
 900A GEN   1/ 0
1030A GEN   1/ 0
1200N GEN   1/ 0
 130P GEN   1/ 0
 300P CONS  2/ 0
 345P CONS  2/ 0
 430P CONS  2/ 0
 515P CONS  2/ 0








Select appt time, new date, view(V), modify(M) or calendar(C)--
```

Select the desired appointment slot, enter a new date, view the resource's calendar, view the detailed information relating to the resource's currently scheduled appointments, or modify the schedule. For more information regarding these particular functions, refer to the *Patient Scheduling Module* of the *STAR Patient Care Reference*

Guide. The only difference is that in the upper right hand corner of the screen, the originally requested date and time for the order to be performed is displayed for reference while scheduling the appointment.

If you select the appointment time, the scheduling system proceeds normally, displaying any appointment type reminders and prompting the selected date and time for acceptance.

```
            General Hospital Schedule Initial Appointment Processor
THERAPIST: RHB,PT,4848 SMITH,JOHN Q                Tue Sep 11, 1994 03:27 pm
Types:   CONS 45,GEN 90
Date:    Wed Sep 12, 1994                          Requested:Wed Sep 12, 212P
Comment:
Time  Type Pt/Fd Comment
 900A GEN   1/ 0
1030A GEN   1/ 0
1200N GEN   1/ 0
 130P GEN   1/ 0
 300P CONS  2/ 0
 345P CONS  2/ 0
 430P CONS  2/ 0
 515P CONS  2/ 0






Add GEN-GENERAL for 09/12/94 130P ? (Y/N) [Y]--  |
                          PATIENT SHOULD BE PREVIOUSLY BATHED
```

After this screen is accepted, the system displays scheduled appointments for the selected patient to check for conflicts with existing appointments. Only pending appointments for the system date and later display. This enables the care giver to inquire about other treatments the patient may be receiving and when they are scheduled to be performed. This is extremely helpful when trying to coordinate treatments for multiple departments.

If the patient has pending appointments, the following screen displays. If no future appointments exist, this screen is bypassed.

```
           General Hospital Schedule Initial Appointment Processor
THERAPIST: RHB,PT,4848 SMITH,JOHN  Appt: GEN--130P   Feb 24, 2009
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
90115-00001   DARN,SUSAN        F  05/07/58 1N1-4   ADAIR,FRANK CMED 10 I/P 21

        Pending/Wait List Appointments For This Patient
Date & Time         Resource                  Visit Reason      Status
Tue 15-300P     CARLOS,CAROL G  (9EA,CAR,17)  +2983 ARTHROGRAM   Pending
Tue 15-500P     CARLOS,CAROL G  (9EA,CAR,17)  +Multiple          Pending









Proceed with making appointment? (Y/N) [Y]--
```

Refer to the *Patient Scheduling Module* of the *STAR Patient Care Reference Guide* for detailed field explanations.

If a plus sign (+) displays prior to the Visit Reason field, it indicates that the SIM item displayed as the visit reason is not the only treatment being performed in that appointment. If the plus sign (+) precedes Multiple, it indicates that more than one treatment is being performed in the appointment, but a primary item was not selected. The multiple item(s) can be displayed by accessing the Add'l Items field in the appointment detail for that appointment.

If conflicts exist and you want to change the appointment date or time, enter N for No and you are returned to the resource's schedule date display. If there are no changes as a result of viewing the patient's additional scheduled appointments, this screen is accepted. The following screen is displayed, prompting you to enter detailed appointment information:

```
                 General Hospital Appointments Processor
             Scheduled Appointment Screen      Tue Feb 24, 2009 02:25 pm
 No          Name              Sex    BD    Room    Physician    SVC ICD Status
90115-00001   DARN,SUSAN        F  05/07/58       ADAIR,FRANK C MED 10 I/P 21
 1 Resource                            2 Visit Type  3 Appointment
   SMITH,JOHN Q                          GEN           Wed 02/18/09 01:30pm
 4 New Visit    5 Account       6 Ord #   7 Length      8 Service Department
   No            90115-00001     6         30            REHABILITATION
 9 Visit Reason                10 Comment
   BEDSIDE VISIT
11 Add'l Items     12 Referring Source        13 Referring Physician
   Yes                PHYSICIAN                  ADAIR,FRANK C
14 Transport       15 Priority          16 Display            17 Chart
   WHEEL              Medical              View Reason            Yes
18 Additional Comment #1               19 Additional Comment #2





Accept this screen? (Y/N) [Y]--
```

The Appointment Detail screen displays. All applicable information from the selected order automatically displays to reduce redundant entry of data. This includes the New Visit, Account, Ord #, Length, Service Department, Visit Reason, Add'l Items, Referring Physician, and Transport fields.

The screen can be accepted with appropriate additional information. Upon acceptance, the order is considered scheduled.

Field Explanations

1. RESOURCE (DISPLAY ONLY)
This is the name of the resource being scheduled. This is entered by the system based on the previous selection.

2. VISIT TYPE (DISPLAY ONLY)
This is the type of visit selected from the resource schedule. This is entered by the system.

3. APPOINTMENT (DISPLAY ONLY)
This is the day of the week, date and time of the appointment being scheduled. This is entered by the system based on the previous selections.

4. NEW VISIT (DISPLAY ONLY)
This field displays No when an appointment is scheduled through Clinical Management.

5. ACCOUNT (DISPLAY ONLY)
This is the account number associated with the order that is being scheduled.

6. ORD # (DISPLAY ONLY)
This field displays the order number to which the appointment is linked when scheduled through Clinical Management.

7. LENGTH (3-N-R)
If a SIM item displays in the Visit Reason field, the length is based on the appointment length identified for that SIM item in the Service Item Master. If a length is not specified for the SIM item or the Visit Reason field does not contain a SIM item, the length is based on the appointment type selected on the resource's schedule. This field can be accessed and changed.

If the length is changed (automatically or manually), and the required time is greater than the length of the original appointment type selected, the system *collapses* remaining open appointment slots until enough time is taken. This collapsing only occurs if the Insert field in the Scheduling Parameters for the resource is set to No. If this field is set to Yes, the system does not perform the collapse.

8. SERVICE DEPARTMENT (3-A-R)
This field displays the SIM department associated with the order being scheduled.

9. VISIT REASON (DISPLAY ONLY)
The visit reason for the appointment displays. If only one SIM item is being scheduled, that one item displays as the visit reason. If several SIM items were selected to be scheduled the visit reason contains the primary SIM item if one was identified. If a primary item was not identified, the visit reason contains Multiple.

If the visit reason contains a SIM item and SIM Item Scheduling Instructions have been identified, they display when the Comment field is accessed.

10. COMMENT (45-C-O)
This is a freeform field. Any comment entered here displays and prints on resource schedules and reschedule lists. If the Visit Reason field contains a SIM item and scheduling instructions are built for that item, they display upon selection of this field. The comment can be entered at the bottom of the displayed screen.

11. ADD'L ITEMS (DISPLAY ONLY)
This field contains the additional SIM items scheduled. This field displays No when additional items do not exist. If this field is accessed and there are no additional items, the system displays the following error message:

Additional SIM Items do NOT exist!

and redisplays the detail screen. If additional items exist, the items display when the field is accessed.

If multiple items are being scheduled in this one appointment and a primary SIM item is identified, this field only contains the remaining items. However, if a primary item was not identified, this field contains all items being scheduled.

12. REFERRING SOURCE (TABLE LOOKUP-O)
Enter the code that describes the referring source. The table can be overridden by entering a hyphen (-) followed by a freeform entry. This enables you to enter a referring source that is not on the table.

This field is used when generating the Monthly Referral report. For more information on this report, refer to the *Patient Scheduling Module* of the *STAR Patient Care Reference Guide*.

13. REFERRING PHYSICIAN (TABLE LOOKUP)
This field displays the ordering physician associated with the order being scheduled. If this physician is not the referring physician, it can be accessed and changed. The physician code can be entered if it is known. If it is not known, a partial description can be entered followed by a hyphen (-). The physician can then be selected from the displayed list. If the physician is not on the table, a hyphen can be entered prior to the freeform description. An equal sign (=) can be entered to default to the patient's attending physician associated with this visit.

This field is typically not required, but may be if the Req Ref Phy field in the Scheduling Parameters is set to require the referring physician.

14. TRANSPORT (TABLE LOOKUP)
The transportation entered for the order automatically displays. Enter the transport code if you know it. If the code is not known, enter a portion of the description followed by a hyphen (-) to display a listing of valid codes for selection. If the transportation method is not on the table, freeform text can be entered by preceding the text with a hyphen.

If an entry is made, the patient displays on the Transportation Schedule Census for the date of the appointment. If the appointment is made for today's date, a Transportation Notice prints on the printer identified in the Resource Department table. If the Trans Notice field is blank, a notice is not generated.

15. PRIORITY (TABLE LOOKUP)
This field enables additional flagging of appointments. For example, the department or clinic may want to flag appointments that have been overbooked or rescheduled from the past. It is recommended that this field be left blank for routine appointments.

16. DISPLAY (TABLE LOOKUP)
This field controls the security on the display of appointment information for departments that do not have the ability to schedule for your department. The resource's name and/or reason for the visit can be restricted (see Resource Maintenance for summary displays). The default from the Resource's Scheduling parameters displays, but can be overridden for this specific appointment by going back into the field and entering another selection.

17. CHART (1-A-R)
Enter **Y** or **N** to indicate if the patient's chart needs to be requested for Medical Records for this appointment. Entering Y causes the appointment to print on the Chart Pull List

and the Outguide Cards in Medical Records. The initial value of this field is the value of the default Requestor field in Resource Maintenance, but it can be adjusted if necessary. The default is pulled from the Resource Scheduling parameters.

18. & 19. ADDITIONAL COMMENTS (36-C-O)
These two fields are freeform. This space is provided for two additional comments pertaining to this appointment. This information prints on resource schedules, and is retained for detail viewing in the Patient Appointment and Revise Appointment processor.

On this screen, Fields 1-9, 11, 13, 14, 16 and 17 are entered by the system based on the appointment selected, resource defaults, and order selected. The other fields on this screen are optional. Each scheduling department should decide what information procedurally needs to be collected. High-volume areas may decide to exit and accept this screen after Field 9 is entered.

Impact

After you accept this screen, the following takes place:

- The appointment process is complete. The order is considered scheduled.
- The patient appointment information entered in the system can now be accessed through the patient, resource, department or nurse station functions available throughout the system.
- The scheduled appointment is reflected on all display screens and reports and conflict checking reflects the changes.
- The appointment scheduled is considered filled, and the link to the patients order information is made. As a result, the Resource Schedule printouts reflect the order information.
- The Order Inquiry Summary screen displays a status of Scheduled for each item that is selected to be performed during this appointment.
- Each ordered item is removed from the displays of ordered items needing an initial appointment scheduled. Any item not selected above, yet associated with the order number still displays so that additional appointments can be made for those items.
- Once an appointment is made, additional appointments can be made through the Copy Appointment function. The link to Order Management information required for the additional information to print on the resource schedule is performed, and the additional items linked to the appointment are carried forward.

- If for some reason this appointment should be canceled or requires revisions, the normal Patient Scheduling functions must be used.

Output

- If the Referral Source field was completed, this patient appointment information displays on the Monthly Referral report.
- If the Transportation field was completed, this appointment information displays on the Transportation Schedule Census. If the appointment is being made for the same day, an on-line Transportation Notice prints on the department's designated printer as identified in the Resource Department table.
- If the Chart Request field is Yes, this appointment information displays on the Chart Pull List and Outguide List when they are prepared. If the appointment is being made on the same day, a Stat Chart Pull Notice prints in Medical Records on-line.
- An on-line Audit Copy Notice prints as determined by the parameters set up in the Resource Department table. If the appointment is being scheduled for today's date, an Appointment Notice prints as determined by the parameters set up on the Resource Department table.

Upon completion of each appointment, the following prompt displays to allow entry of more appointments.

Additional Appointments (Y/N)--

If you enter **Y**, you are returned to the list of treatments linked to the order number you just scheduled if there are any that remain unscheduled. The ordered items that were just scheduled no longer display, as they are removed from this file after the final accept question is entered.

If you press ENTER at this display of treatments associated with the order, or enter **N** for No, you are returned to the display of orders requiring initial appointments and those just scheduled do not display. If you press ENTER at this point, the patient selection prompt displays enabling you to select another patient. If any of these screens have no entries, a message displays to that effect and the next screen in the process displays.

As long as unscheduled orders exist for the selected patient, same order number or not, they can be selected for scheduling and the process is repeated.

SCHEDULE STATUS

The Schedule Status function is used to review the overall status of each schedule for a given department and date as well as the status of the individual orders within each schedule.

Upon selection, the facility is determined. If this terminal can access more than one facility, a list of valid facilities displays for selection. If this terminal can only access one facility, that facility is assumed and the facility screen is bypassed. Once the facility is determined, the following prompt displays enabling entry of the charge department:

Enter charge department ('-' to list)--

The prompt enables entry of a valid charge department code if it is known. If you do not know the code, enter a hyphen (-) to view a list of the valid charge departments set up in the CRT Names table for this terminal. If no charge departments have been established for this terminal, an error message displays and the process is aborted. If only one charge department exists, this prompt is bypassed. After the charge department is determined, the following prompt displays:

Enter date or '-' for list [04/27/94]--

Enter the schedule date if you know it. If you do not know the date, enter a hyphen (-) to view the schedule dates. If you press ENTER, the system defaults to today's date. After you enter or select a date, the following screen displays:

```
                   General Hospital Schedule Status Processor
                                                  Tue Apr 30, 1996 08:03 am

04/08/96   Unprocessed   In Progress   Complete  Audited
Page:01Resources              Workload  #Trmts  #Pts  Status      Charges
( 1) ADAIR,FRANK K                10.0       1     1  Complete         No
( 2) PHYSICAL THRPST A            60.0       2     1  In Progress      No















Enter choice--
```

The screen displays the resources for the selected department that have schedules on the date specified. Each listed resource may display differently based on the overall status of the entire schedule.

Each order within a resource's schedule has an order status. While each schedule has an overall status, this screen displays information regarding the entire schedule (overall status). The possible overall statuses are Unprocessed, In Progress, Complete and Audited. An explanation of each follows:

Unprocessed (Blank)
This status indicates that no work has been done on the resource's schedule. This does not indicate that treatments have not been performed; rather that none of the orders on the schedule have had a status updated. The legend and all resources with this overall status display as bright reverse video.

In Progress (I)
This status indicates that at least one of the orders on the resource's schedule has had their status updated, but that there are still orders not yet updated. The legend and all resources with this overall status display in normal video.

Complete (C)
This status indicates that all orders on the resource's schedule have had their status updated. This does not indicate that all charges have been input. This is determined by viewing the charge status that displays when viewing the orders on the resource's schedule. The legend and all resources with this overall status display in dim reverse video.

Audited (A)
This status indicates that all orders on the resource's schedule have had their status updated, the schedule has been reviewed, and the audit has been accepted through this processor.

Field Explanations

RESOURCES (DISPLAY ONLY)
This field contains the resource's name associated with the displayed schedule.

WORKLOAD (DISPLAY ONLY)
This field displays the total Workload for the resource's schedule.

 # TRMTS (DISPLAY ONLY)
This field displays the total treatments on the resource's schedule.

 # PTS (DISPLAY ONLY)
This field displays the total number of patients on the resource's schedule.

STATUS (DISPLAY ONLY)
This field displays the overall status of the resource's schedule. It is blank if the status of the resource's schedule is Unprocessed. This field contains I if the status is In Progress, C if the status is complete, and A if the status is audited.

If a specific resource is selected by entering the associated option number, the appointments contained in the schedule display in the same format as used for the Manual Schedule Processor.

The status code indicates whether the order is complete, canceled, and so on, as entered for each individual order (if entered previously). A Y or N indicates whether any associated charges have been entered. In order to indcate Y, charges must have been entered through the Manual Schedule Processor.

If the schedule has been processed and an appointment/order does not have a charge associated with it but it was performed, it should be researched further to determine whether the patient was deliberately not charged for the treatment, whether the charges were entered through the Patient Care Charge Processing function, or whether it was an oversight, and charges still need to be entered.

If more than one page of resources or orders assigned to a schedule exist, then the typical paging options exist. Whenreviewing the status of the orders within a schedule, you have the option to print a hard copy on the CRT's associated default printer.

At the screen prompt *Enter choice--*, select one, several, or all of the displayed resources. After you have made your selections, one of two prompts is displayed, depending on whether your facility is set up to enable you to complete End of Day Processing through Clinical Management (by setting the End of Day field to Yes in the Resource Master Table).

End of Day processing is a feature of STAR Patient Scheduling. By choosing to perform the audit and End of Day processing at this prompt, you avoid having to perform these functions separately in Patient Scheduling from the Audit Schedule function and End of Day function. For more information, refer to the *Patient Scheduling Module* of the *STAR Patient Care Reference Guide*.

- If your facility is not set up to complete End of Day Processing through Clinical Management, then after you have made your selections, this prompt is displayed:

  Audit complete schedule? (Y/N)

  Enter **Y** for Yes if you want the system to perform an audit for the selected schedule(s). Enter **N** for No if you do not.

- If your facility is set up to complete End of Day Processing through Clinical Management, then after you have made your selections, this prompt is displayed:

  (A)udit and run End of Day, or audit this (S)chedule WITHOUT running EOD?--

You can choose to have the system perform a normal audit, to perform both an audit and complete End of Day processing, or to perform neither an audit nor complete End of Day processing.

- Press ENTER if you do not want the system perform an audit or complete End of Day processing for the selected resource schedule(s).

- Enter **S** if you want the system to perform only the audit for the selected resource schedule(s). Once the audit has been performed, you cannot reselect the schedule(s) to complete End of Day processing. If you later decide you want to complete End of Day processing for the schedule(s), you must select the End of Day option in the Patient Scheduling module.

- -Enter **A** if you want the system to perform an audit *and* complete End of Day processing for the selected resource schedule(s). The values used to perform End of Day processing are defaulted from the Resource Master Information table (see Appendix A: Tables). You can edit those values only through End of Day processing in the STAR Patient Scheduling module.

NOTE: If End of Day processing for the selected resource schedule(s) has already been performed through the End of Day function in Patient Scheduling, the **A** option is not available.

If you selected **A** to perform both the audit and End of Day processing, the system displays this prompt:

Set PENDING appts to NO SHOW? (Y/N) [Y]

Enter **Y** for Yes if you want the system to change the status of pending appointments to No Show during End of Day processing. Enter **N** for No if you do not.

After you have answered Yes or No to the prompt, the system performs the audit and End of Day processing. All End of Day processing is done in the background. You do not have to answer appointment questions in the foreground.

Once End of Day processing is complete, the Schedule Status screen is redisplayed with an End of Day (EOD) field next to the Status Field. If End of Day Processing has been completed for a resource, EOD is displayed in the field, as shown in this example:

```
                 General Hospital Schedule Status Processor
                                                     Thu Jun 13, 1996 2:30 pm


06/13/96   Unprocessed   In Progress   Complete  Audited
Page:01Resources               Workload  #Trmts  #Pts  Status    EOD    Charges
( 1) PHYSICAL THRPST A (ALL)-X     60.0      1     1   Complete  EOD       No












Enter choice--
```

Chapter 4 - WORKLIST PROCESSING

WORKLIST FUNCTIONS

This section contains an explanation of the screens and processes associated with the Worklist functions of Clinical Management.

These functions provide a worklist for departments that do not schedule procedures at a specified date and time. Treatments or procedures that are scheduled receive their associated worklist schedule by printing the resource's schedule of appointments.

Worklist processing is typically used by a Therapy department or by any department that makes rounds. The worklist processors are designed to minimize the time spent organizing orders prior to assignment of a resource and the actual time spent assigning resources. Orders are sorted according to the shift the order(s) is to be performed.

If you select the Worklist Processing option, the following menu displays:

```
                General Hospital Worklist Processing Processor
                                                  Wed Jul 14, 1994 04:08 pm
Worklist Processing Input Options

             Option No.  Option
             ----------------------------------------
                 1       Review/Assign Orders

                 2       Audit/Transfer Worklist

                 3       Documentation
                 4       Display/Print Patient Notes

                 5       Display/Print Worklist
                 6       Incomplete Worklist Report

                 7       Cancel/Discontinue Orders
                 8       Departmental Patient Information



Enter option number--
```

The functions that allow "assignment of treatments" or "procedures to resources" are:

- <u>Review/Assign Orders</u> - Assigns evaluated orders automatically or manually for the first time. It is also used to review and adjust the resource's assigned workload prior to considering it final and prior to printing the actual worklists for a given day and shift assignment.

- <u>Audit/Transfer Worklist</u> - Allows automatic or manual reassignment of one or multiple orders for a given resource.

Other functions associated with worklist processing are:

- <u>Documentation</u> - Allows entry/revision of evaluation/progress notes after performing a treatment.

- Display/Print Patient Notes - Allows display/printing of selected notes. Revisions and initial evaluations can be viewed from this functionality. Refer to the Chapter 6: Documentation for additional information.

- Display/Print Worklist - Displays on-line or prints approved worklists for a given shift and resource; either one or multiple patients per page.

- Incomplete Worklist Report - Produces a list of all the worklists that are not complete and provides their statuses.

- Cancel/Discontinue Orders - Allows the selection of a specific order to be updated, canceled, or discontinued.

- Departmental Patient Information - Allows the entry of a date range to search each Clinical Management Queue for information associated with the previously selected patient. A print option is available for hard copies.

Worklist processing and the associated screens are explained in detail in this section.

REVIEW/ASSIGN ORDERS

Orders with an Item Type of Worklist display under the Review/Assign Orders processor to allow for assignment of the order to a resource. Only items that have never been assigned to a resource for that shift display in this function. Orders remain in this file until assigned to a resource.

If an order's frequency requires it to be performed on several shifts as defined in the SIM Department table, it displays as unassigned work once for each shift starting with the date and shift appropriate for the requested date and time. Each shift must be assigned separately. However, you can enable the optional Direct Assignment feature if you want related future occurrences to be automatically assigned to the same resource to which the initial occurrence is assigned. For more information, see “Direct Assignment” on page 4-15.

This function should be performed as close to the actual beginning shift time as possible so it can reflect as many unassigned orders as possible and the most accurate patient location. Occurrences received when a department is closed are displayed on the Unassigned Orders list for the first shift when the department reopens.

If this terminal can access more than one facility, a screen displays enabling selection of a facility. If this terminal can only access one facility, that facility is assumed and the facility screen is bypassed. Once the facility is determined, the following prompt displays, enabling entry of the department:

Enter charge department (`-` to list)--

Enter the department code if you know it, or press hyphen (-) and ENTER to view a list of SIM departments for this terminal as defined in the Charge Departments field in the CRT Names table. If only one department is set up in the CRT Names table, that department is assumed and the previous prompt is bypassed. If no departments have been set up, an error message displays. This screen is bypassed if no subdepartments have been defined.

```
                General Hospital Review/Assign Orders Processor
                                             Wed Sep 19, 1994 04:08 pm

Page:01             Sub-Departments for PHYSICAL THERAPY       ##=Current Choices
( 1) Occupational Therapy
( 2) Speech Therapy











Enter choices (eg. 1,3,5-9),`-`choices to remove or all(A)--
                                end selection(NL)
```

Select the option number of the subdepartment(s) that you want to process or enter A for All. If you do not want to process a specific subdepartment, press ENTER to default to the master SIM department. In this example, the master is Physical Therapy.

After you select the department/subdepartment, the following prompt displays:

(V)iew existing worklists or (A)ssign orders [A]--

If you enter **V** to View existing worklists, the system displays a date/shift prompt. Once you've selected the date and shift, the system takes you through a series of screens for auditing and transferring worklists. For more information, see Audit/Transfer Worklist in this section of the Clinical Management document. If you enter **A** for Assign orders, the following screen displays:

```
                  General Hospital Review/Assign Orders Processor
                                                   Tue Apr 30, 1996 11:17 am
Page:01                    Available Date(s) / Shift(s)
( 1) 04/11/96  2
( 2) 04/12/96  1
( 3) 04/12/96  2
( 4) 04/13/96  1
( 5) 04/13/96  2











Enter choice or NL for [04/14/96 1]--
                                   next page(/)
```

The dates and shifts displayed are specific to the selected department as defined in the SIM Department tables. If any orders remain on previous dates, a date/shift displays for selection. These areoutstanding orders that have notyet been processed. These orders should be addressed before proceeding with the current dates evaluations and assignments. If no previous dates are displayed, then all orders received prior to this date have been processed appropriately.

Assignment of orders is done on a shift basis, not daily. Depending on the order's start date, start time, frequency and duration, one order may be displayed under several dates and shifts waiting for assignment.

When determining which dates and shifts an order displays under, the order's start date and start time is used todetermine the corresponding shift. The frequency is then used to determine which shift(s), how many times per shift and how many days are skipped between shifts. The duration is used to stop the assignment of orders past the duration date. For more information regarding order frequency, see “Appendix A - TABLES” for a discussion of the Frequency field on the Order/Requisition Information Page.

Any work assigned to a resource after their worklist is approved and printed needs to be manually communicated to the resource. They are not aware of the new order until the worklist is reprinted.

After a date/shift have been defined, the following screen is displayed with a list of all available orders that have been placed with a requested date and time equal to the selected date/shift, or have been removed from worklist during midnight processing and returned to this processor for reassignment.

```
                    General Hospital Review/Assign Orders Processor
                                                  Sun Mar 10, 1996 04:06 pm
RESPIRATORY THERAPY 03/28/96 Shift 1
<E> = Evaluation required
Page:01                                                ##=Current Choices
     Patient Name             Room/Bed       Account No     Sex/Age
 No      Item Description      Freq      Priority  Ord Physician   Ord#  Wkld
( 1) PAK,JUSTIN               1E 2106-02     A9601900006    M / 10M
         SLEEP APNEA STUDY     QD        ROUTINE   BOND,JAMES       73    105
( 2) PAK,JUSTIN               1E 2106-02     A9601900006    M / 10M
     <E> AEROSOL TREATMENT     QD        TIMED     BOND,JAMES       72    110
( 3) HARRIS,TOM               ICU ICU-11     A9426900001    M / 96Y
         IPPB TREATMENT        AL'SQ2    ROUTINE   SILVA,DAVID      638   420
( 4) HARRIS,TOM               ICU ICU-11     A9426900001    M / 96Y
         BEDSIDE SPIROMETRY    Q2H       ROUTINE   SILVA,DAVID      637   10
( 5) HARRIS,TOM               ICU ICU-11     A9426900001    M / 96Y
     <E> AEROSOL TREATMENT     BID       TIMED     SILVA,DAVID      640   10
( 6) HUTCH,BECKY              NSY NSY-09     A9608500009    F / 17M
         OXYGEN                QD        ROUTINE   *JOHN ENGLE      11    105
( 7) HUTCH,BECKY              NSY NSY-09     A9608500009    F / 17M
         OXYGEN                QD        ROUTINE   *JOHN ENGLE      10    105

Enter choice, choices (i.e 1,3-5), (A)ll, or (P)rint [A]--
                        end selection(NL)  next page(/)
```

The Department Description displays in the top left corner of the screen followed by the date and shift selected.

After you select the desired order or orders, the following promptdisplays enabling you to either view the orders or assign the orders manually or automatically:

View (D)etail, (M)anually assign or (A)utomatically assign orders [A]--
[## orders selected]

where ## is the number of orders to be processed.

The prompt gives you the following options:

- View detail - Refer to the information on the **D** option below for more information.
- Manually assign - Refer to “Manual Worklist Assignment” on page 4-13 for more information.
- Automatically assign - Refer to “Automatic Worklist Assignment” on page 4-10 for more information

If one or more of the items you select require evaluation, the order detail screen displays with the following prompt:

Accept (E)valuation, (A)dd orders, or (C)ancel [E]--
View more (I)nformation, (O)ccurences, patient's (S)chedule, or (M)edical page

Each item to be evaluated is displayed until all items are available to be assigned. For information on the evaluation process, see Chapter 2: Order Evaluation.

Once you have completed your evaluation, the Order Detail screen redisplays. Select the orders you want to assign.

If you enter **D**, the detail of each selected order displays with the following prompt:

(C)ancel this order, or (A)dd new orders--
View additional order (I)nformation or (O)ccurences--

If you do not want to cancel the displayed order, press ENTER to view the next selected order detail. Enter **C** to cancel the displayed order. The system asks you to enter a code representing the reason you are cancelling this order:

Enter order cancellation reason code, '-' to list, or '-' free form response --

Enter the reason code if you know it. If you do not know the reason code, enter a hyphen (**-**) to choose from the displayed list of order cancellation reason codes. If you want to enter a free form response, enter a hyphen (**-**) before typing the reason.

NOTE: If you enter a free form response on a patient with an assigned Critical Pathway, you are prompted to enter a variance as follows:

Record a variance (Y/N) [N] --

NOTE: Enter **Y** to record a variance. Enter **N** or press ENTER to continue with the cancellation.

Once you have entered the reason for the cancellation, the system displays a list of occurrences for this parent order and prompts for the cancellation of the entire order or only selected occurrences:

```
              General Hospital Review/Assign Orders Processor
                                                 Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD     Room    Physician     SVC ICD Status
9609300007    LANE,THOMAS       M  02/02/67 CCU-03  SILVA,MICHELEMED 10 I/P 29

Page:01             All occurrences for Parent Order Number 16  ##=Current Choices
           Ord# Dept   Description                  Req Dt/Tm      Freq  Dpt Status
( 1)         31    RT  AEROSOL TREATMENT            02/17 1613P    Q2H     Performed
( 2)         31    RT  AEROSOL TREATMENT            02/17 1813P    Q2H     Assigned
( 3)         31    RT  AEROSOL TREATMENT            02/17 2013P    Q2H     Assigned
( 4)         31    RT  AEROSOL TREATMENT            02/17 2213P    Q2H     Assigned








Select occurrences to cancel or `A`ll (including parent)--
                              end selection(NL)
```

Select an occurrence to cancel or enter **A** to cancel All occurrences as well as the parent order. For each occurrence you select, the system displays the following message and removes it from the Review/Assign Processor:

Order for RT Aerosol requested for 3/16/96 0700 canceled

If you cancel all occurrences, the cancellation message is displayed for each occurrence followed by the cancellation message for the parent order:

Parent Order Canceled

Once the parent order is canceled, the order is removed from the Review/Assign Processor and you return to the assignment prompt.

Enter **A** at the cancel prompt to add a new parent order. The system displays the order screen. For information regarding entering new orders, see “Chapter 1 - CLINICAL MANAGEMENT ORDER ENTRY FLOW”.

Enter **I** at the cancel prompt to view additional information on the parent order. Enter **O** for more information on the occurrences associated with this parent order. For further on the screens that display, see *Order Management/Charge Processing, Volume I* of the *STAR Patient Care Reference Guide*.

Automatic Worklist Assignment

If you enter **A**, the selected orders are automatically assigned to one or multiple resources. Orders that are automatically assigned cannot override the Preferred Station Group and Resource Type (Primary/Secondary) parameters.

For information regarding field explanations on the Order Inquiry Detail screen that displays upon selection of an order, refer to *Order Management/Charge Processing Volume 1* of the *STAR Patient Care Reference Guide*.

When you select automatic processing, the available resources display for selection. Only resources using Clinical Management for the selected SIM department on the selected shift as defined in the Module Usage, SIM Dept, and Valid Shifts fields in the Resource Master display for selection. The resource code, name, type, preferred station group, and total workload value, total number of orders (counting one done several times as one for each treatment), and total number of patients associated with their current worklist display for each possible available resource.

After you select the resource(s), the system evaluates the new orders and associated information, compares them to the existing assigned worklist and available resources, and assigns work accordingly. Because existing work is taken into account, it is suggested that the Review Assigned Worklist function be reviewed/processed before processing the Unassigned Work function. This is particularly wise if the resources used on a day/shift basis are not relatively constant. However, as a result of the increased workload assigned as a result of the new orders, it may be wise to process the Review Assigned Worklist function after all the unassigned work is assigned.

After you select the resource(s), the following prompt displays enabling you to indicate if resources should be overbooked:

Overbook resources even if maximum workload is reached? (Y/N) [N]--

NOTE: This prompt is not displayed if the resource workload is set to 999.9 in the Resource Master. For more information, see the discussion of the Resource Master in the *Patient Scheduling* volume of the *STAR Patient Care Reference Guide.*

If you enter **N** for No, or press ENTER to accept the default, the orders are assigned based on the assignment logic (described below). The system stops assigning orders after all the selected resources reach their maximum workload.

If you enter **Y** for Yes, the work is assigned based on the assignment logic (described below). However, the system does not stop assigning orders after all the selected resources reach their maximum workload. All possible orders with matching Resource Types/Station Groups are assigned. The overbooking logic assigns work to a matching resource with the least amount of work. For example, prior to the resources being overbooked, the system assigns an order to a resource matching the primary resource type before assigning work to the secondary resource type. After all the resources are overbooked, the order is assigned to the resource with the least workload value even if that resource has a secondary resource type rather than a primary resource type. Any remaining orders that are to be manually assigned are orders that do not match the resource type/station group criteria.

ASSIGNMENT LOGIC

The system checks to see if the patient is already being seen by one of the selected resources in that department. If so, the resource type and station group checks are performed. If they match, the order is assigned to that resource. If not, the order is not assigned and the assignment process continues until another resource is located with matching criteria.

The selected resources with matching station groups and preferred primary/secondary resource types are reviewed. The resource with the least workload currently assigned is given the order. The system attempts to assign the order to a resource with a matching primary resource type first. If they are all booked, then resources with matching secondary resource types are checked.

If both primary and secondary resource types are full, orders are assigned based on your response to the previous prompt asking if resources should be overbooked.

Each selected order is processed in sequence. The system performs the calculations with each order and the results are based on the values at the time the order is processed. As orders are assigned, these values change.

When automatically assigning work to resources, the system considers the following:

1. Assigning a resource type to the order that is the preferred resource type for the SIM item (if entered) whenever possible. The resource must at least be a secondary resource type if resource types are specified in the SIM. If there are no resource types specified in the SIM, then this criteria is bypassed.

2. If active orders currently exist for that patient, the new orders are assigned to the existing assigned resource whenever possible.

3. Assigning work to a resource based on the patient's current location as it compares to the preferred Station Group if one is entered in the Resource Master. If none is entered, this criteria is bypassed.

4. Work is assigned to resources keeping in mind the total workload value associated with the order and the existing total workload value currently assigned to a resource. The Max Wkld field in the Resource Master determines the maximum amount of work to assign to each selected resource.

5. The automatic assignment logic spreads the work out evenly throughout each selected resource based on the Primary/Secondary Resource Type, Preferred Station Group, and the resource currently seeing the patient (if applicable).

6. Overbooking assigns all selected orders regardless of the total workload value per resource.

Keep in mind that the system continues to assign orders based on the criteria listed above until all selected orders are assigned.

There are instances when the system does not automatically assign the work. In these instances, the work must be manually assigned. If the station associated with the patient's current location is not contained in the resource's preferred station group established in the Resource Master, the automatic assignment is not performed. If the resource does not have a preferred station group identified, the check is ignored.

If you are not overbooking, any orders exceeding the selected resource's maximum workload are not automatically assigned. In any of these instances, the following message displays identifying that all orders could not be assigned:

System could not assign all orders; please manually assign. Press NL--

If you press ENTER, you are returned to the list of orders that could not be automatically assigned. These orders can then be selected for manual assignment.

Manual Worklist Assignment

If you enter **M**, the selected orders can be manually assigned to a single resource. These orders override the Preferred Station Group and Resource Type (Primary/ Secondary) parameters entered. Warning messages display, but you can still assign the orders.

After you enter M, the list of resources working on that shift for the department display. Each resource's description, resource type, and preferred station group is followed by the total workload assigned, total number of orders and patients.

The following prompt displays allowing selection of one of the displayed resources:

Enter choice--

Select one of the displayed resources. Each order that is assigned is removed from the list of selected orders. If you did not indicate to override the Preferred Station Group or Resource Type Parameters, any orders not assigned remain in the list of orders to be assigned. As each order is processed, the patient displays at the top ofthe screen.

Upon selection, the resource's preferred station group and resource type are checked to determine if there could be a conflict. The following messages are intended as reminders. With either of these messages, the manual assignment can continue.

- If the resource's resource type is not contained in the selected SIM item's Primary or Secondary Resource Type fields, the following message displays:

    Error: Resource's type not defined in SIM

- If the patient's current location is in a nursing station that is not contained in the resource's preferred STATION GROUP field, the following message displays:

  Error: Patient is not in preferred station group!

If you press ENTER, you are returned to the list of orders that could not be automatically assigned. These orders can then be selected for manual assignment.

The following prompt displays after each of these messages so the process can be aborted:

Continue with Smith,Sally? (Y/N)--

The description of the resource displays in the prompt. If you enter **Y** for Yes, the order is assigned to the selected resource. If you enter **N** for No, the order is not assigned and you are returned to the list of orders to be assigned.

After assignment of the selected order is complete, the order is removed from the unassigned work display and you can select additional orders to be processed.

Impact

After you accept this screen, the following takes place:

- Once orders have been assigned to a resource for a particular shift, they remain with that resource unless an adjustment is made using the Audit/ Transfer Worklist function.

- Although these orders remain assigned to a resource, they only display on days the treatment is to be performed. The system keeps track of the orders and when they should be performed by using the originally requested date time/ shift, the frequency associated with the order and it's definition, the duration of the order, the department's days of operation, and the valid days for the exam as defined in the SIM Department table. For example, if a procedure is to be performed every other day, and the requested date is Tuesday, the department is closed Saturday and Sunday, and the duration is two weeks. The order displays on the resource's worklist on Tuesday, Thursday, Monday, Wednesday, Friday and Tuesday.

- If an order is not performed for some reason (the patient is in surgery, for example), the order remains on the resource's worklist until it is completed, depending on the user's response when it is indicated that the treatment was not or could not be performed. For example, if the patient was in surgery on Thursday of the first week or was not feeling well enough for the treatment, the patient may be displayed on the worklist for Friday.

- When the actual worklist displays/prints, you see the same order several times if it has a frequency that requires several treatments within one shift.

- An item is removed from the worklist and given a status of canceled or discontinued as a result of the duration date entered upon the original order.

Direct Assignment

Direct Assignment is an optional feature that streamlines the worklist assignment process for multiple occurrences generated by the same parent order. It enables you to build future worklists dynamically, and bypass the Review/Assign Orders processor for certain orders.

When Direct Assignment is enabled for a department, during either a manual or automatic worklist assignment session, if an earlier occurrence generated by the same parent order has already been assigned to a resource, then the new occurrence is automatically assigned to the same resource for the appropriate date and shift.

Direct Assignment must be enabled first at the department level and then for individual resources for that department. In addition, the first occurrence generated by a parent order must be manually assigned to a Direct Assignment-enabled resource. To enable this feature, do the following:

- At the department level, set the Direct Assign field to Yes on the Clinical Management Information page of the SIM Departments table. See Appendix A: Tables for more information.

- For individual resources, set the Direct Assign field to Yes in the Resource Master table for each resource. See Appendix A: Tables for more information.

- For related occurrence orders, from within Review/Assign Orders, manually assign the initial occurrence for the parent order to a Direct Assignment-enabled resource for ALL shifts. The initial occurrence automatically displays on the Unassigned Orders list.

Here is an example of worklist processing with Direct Assignment enabled. Assume that a physician placed a physical therapy order for gait training to be performed once a day for four days. The order is processed as a parent order that generates four occurrences. As soon as the order is placed, the first occurrence is received in the physical therapy department. Because the occurrence has no previous “siblings,” it goes directly to the Unassigned Orders list. From within the Review/Assign Orders processor, someone in the department assigns it to resource PT ONE.

When the second occurrence (for the second day of gait training) arrives in the department, the system checks for previous sibling occurrences, finds that the first occurrence had been assigned to PT ONE, and directly assigns the new occurrence to the same resource for the second day’s worklist, if that occurrence has not already been assigned to another resource. This process repeats for the third and fourth occurrences.

The following conditions apply. Direct Assignment:

- Applies only to Worklist SIM item types, as defined in the I/P Item Type and O/P Item Type fields on the Clinical Management Information page of the Service Item Master for the department. It does not apply to Scheduled item types.

- Is shift specific. Assigning an occurrence for Shift 1 does not automatically assign a later occurrence for Shift 2, even if the resource is available for both shifts.

- Does not assign other orders placed during the same order session to the same resource, unless an occurrence for one of those orders has already been assigned.

- Does not assign occurrences to a worklist that is Complete or Audited; these occurrences move to the Unassigned Orders list.

- Does not alert resources that new work has been assigned to their worklists. This is only an issue if an occurrence is assigned for a given day after that day's worklist has been printed.

- Checks the Auto Approve field on the Clinical Management Information page of the SIM Departments table for the department. If the field is set to Yes, any new worklists created by Direct Assignment are automatically set to Unprocessed. If the field is set to No, the new worklists are set to Unapproved.

AUDIT/TRANSFER WORKLIST

The Audit/Transfer Worklist processor is used to review the current assignment of orders to individual resources, transfer work between resources, and approve worklists. When reviewing current work assignments, you can see at a glance where work is currently assigned, particularly in the case of automatic assignment. When transferring work between resources, orders can be transferred individually, or entire worklists can be transferred to one resource or multiple resources manually or automatically. Any orders transferred affect all worklists on future dates and shifts past the selected date and shift. The transfer is not temporary. If the order is to be reassigned to the original resource, it must be transferred again.

The prompts that display in the Audit/Transfer processor are affected by the option selected for the Auto Approve field on the Clinical Management Table Maintenance processor. The Auto Approve parameter allows each department to determine whether the resource's worklists must be approved prior to updating statuses.

To access the Auto Approve parameter, select Tables, Clinical Management Table Maintenance, SIM Departments. Enter the department code and go to the Clinical Management set up page and select Auto Approve Worklists.

If the Auto Approve field is Yes, all worklists are approved automatically. The system does not display the Approve Worklist prompt within the Audit/Transfer Worklist function. If the Auto Approve field is No, each worklist for that department must be approved before the therapist can status the treatments contained on the worklist.

Since the audit/transfer function allows adjustments to assigned work and approval of work for each employee, it is recommended that access to this function be limited to personnel responsible for work assignments.

Upon selection, the facility is determined. If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the prompt asking you for the facility is bypassed. Once the facility is determined, the following prompt displays to allow entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if you know it. If you do not know the code, enter a hyphen (-) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed. Once the charge department is determined, the following prompt displays to allow entry of the date and shift of the worklist you want to access:

Enter date and shift or `-` to list [09/20/96 1]--

Separate date and shift using a blank space

Enter the date and shift if known, with a space between the two. If you do not know the date and shift, enter a hyphen (-) to view a list of dates and shifts that have worklists established. This list includes all worklists that have not been audited. If you press ENTER, the system defaults to the current date and shift.

The screen options in the Audit/Transfer Worklist function vary depending on the selection for the Auto Approve parameter. When the Auto Approve parameter is set to No, the following screen is displayed when you select Audit/Transfer Worklist:

```
             General Hospital Audit/Transfer Worklist Processor
                                                   Mon Mar 22, 1999 10:25 am

03/22/99 Shift 1  Unapproved  Unprocessed   In Progress   Complete  Audited
Page:01       Resources              Workload  #Trmts  #Pts  Status
( 1) PHYSICAL THRPST A (ALL)-X     60.0      1      1   Unapproved
( 2) PHYSICAL THRPY ASST (ALL)     60.0      1      1   Unapproved















Enter choice, or Approve (W)orklists--
```

From this screen you can select a specific worklist to review and approve or approve all worklists.

If you enter **W** to approve all of the worklists collectively, the following prompt is displayed:

Approve selected (W)orklists or `-` choices to remove [W]--
end selection(NL)

The selection numbers for all of the worklists are highlighted. Accept the default (W) to approve all of the worklists, or enter a hyphen (-) and the selection number to deselect certain ones that you do not want to approve at this time. Worklists with highlight selection numbers are approved when the prompt is accepted. Deselected worklists remain in the Unapproved status.

Once the worklists are approved, you return to the worklist selection screen. If the Auto Approve parameter is set to Yes, the following screen is displayed when you select the Audit/Transfer Worklist function:

```
              General Hospital Audit/Transfer Worklist Processor
                                                  Mon Feb 15, 1999 08:52 am

09/10/98 Shift 2  Unapproved  Unprocessed   In Progress   Complete  Audited
Page:01       Resources               Workload  #Trmts  #Pts  Status
( 1) RT AST THPST SHFT 1 (ALL)    105.0      1     1   Unprocessed

Enter choice--
```

All worklists are automatically approved. From this screen you can select a specific worklist to review order information, transfer items or audit when completed.

Department Shift Processing

When processing departmental shifts (1,2,3), the system allows viewing of resource worklists and individual orders, transferring between resources and approving of worklists.

After the date and shift are determined as described previously, the following screen displays:

```
                General Hospital Review/Assign Orders Processor
                                                  Tue Mar 23, 1999 12:08 pm
PHYSICAL THERAPY 03/21/99 Shift 1
03/21/99 Shift 1  Unapproved  Unprocessed   In Progress   Complete  Audited
Page:01       Resources               Workload  #Trmts  #Pts  Status
( 1) PHYSICAL THRPST A (ALL)-X    120.0      2     1   Unprocessed

Enter choice--
```

Each resource who has a worklist on the date and shift selected is displayed. Resources that are displayed in bright reverse video indicate worklists that have already been approved. Resources remain on this display until audited through the Worklist Status processor. The resource description is displayed followed by the total workload, total number of treatments, total number of patients, worklist status and charge indicator.

When you select a resource, the following screen displays:

```
                General Hospital Review/Assign Orders Processor
                                                   Tue Mar 23, 1999 12:08 pm
PHYSICAL THERAPY 03/21/99 Shift 1
PHYSICAL THRPST A (ALL)-X  Unprocessed
Page:01
     Patient Name             Room/Bed       Account No     Sex/Age    Status
 No      Item Description      Freq      Priority  Ord Physician   Ord#  Wkld
( 1) SAS,TRAFICACC            OPA 117-01     A9723100004    F / 44Y
         ELECTRICAL STIMULATI  QD        ROUTINE   ADAIR,FRANK K    30    120













Enter number for detail, (T)ransfer, or (D)isplay Stations--
```

Then the following prompt is displayed:

Enter number for detail, (T)ransfer, or (D)isplay Stations--

From this prompt you can view, add, cancel, or transfer orders, or display assigned workstations. The following topics discuss each of these options.

View Worklist Detail, Cancel or Add an Order

Each order on the resource's worklist for the selected date and shift is displayed on the following screen.

```
                General Hospital Review/Assign Orders Processor
                                                  Tue Mar 23, 1999 12:08 pm
PHYSICAL THERAPY 03/21/99 Shift 1
PHYSICAL THRPST A (ALL)-X  Unprocessed

Page:01         Worklist occurrences for Patient SAS,TRAFICACC
          Ord# Dept  Description                Req Dt/Tm     Freq  Dpt Status

( 1)        30  PT   ELECTRICAL STIMULATION---   03/21 0249P   QD      Assigned
( 2)        30  PT   ELECTRICAL STIMULATION---   03/20 0249P   QD      Assigned










Enter number for more detail, or view (P)arent information--
```

If the worklist contains more orders than can display on one page, the standard paging options are available. To view the detail, cancel a single order, or add a new order, enter the corresponding option number. The following Order Detail screen displays:

```
                General Hospital Review/Assign Orders Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
97-23100004   BOWERS,SHARON     F  03/23/55 117-01  BARGE,DENNIS MED 10 OPA 582
 1 Order No.  2 Department          3 Item
   30           PHYSICAL THERAPY      1210 ELECTRICAL STIMULATION----------X
 4 Type       5 Init  6 From CRT          7 Print Loc    8 Order Date/Time
   Order        SAS     1E 1 EAST CRT       Department     02/20/09 02:49pm
 9 Order Status                       10 Dept Status      11 Dpt Sched Dt/Tm
   Active                                Assigned
12 Priority   Request Date/Time/Shift   13 Transportation         14 Quantity
   ROUTINE    02/21/09   02:49P   1        AMBULATE                   1
15 Ordering Physician  PRI             16 Performing Physician
   32 ADAIR,FRANK K
17 Prompt Response / Message          18 Comment

19 Order Diagnosis                    20 Instructions


                    |                                    |
                    |                                    |
                    |                                    |
(C)ancel this occurrence, or (A)dd new orders--
```

If you do not want to cancel the displayed order, press ENTER to continue to view the next selected worklisted order detail. Enter **C** to cancel the displayed order. The system requires a reason for cancellation. The following prompt displays for entry of the cancellation reason:

Enter the cancellation reason code, `-` to list, or `-`free form reason--

NOTE: If you enter a free form response on a patient with an assigned Critical Pathway, the system gives you the option to enter a variance with the following prompt:

Record a variance (Y/N) [N] --

NOTE: Enter **Y** to record a variance. Enter **N** or press ENTER to continue with the cancellation.

After you enter the reason, the system displays the list of occurrences for this parent order and prompts for the cancellation of the entire order or only select occurrences. This following screen displays:

```
                 General Hospital Review/Assign Orders Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
98-36500001   TEST,VEST         M  11/11/11 2125-02 ADAIR,FRANK K    10 1E  86

Page:01           All occurrences for Parent Order Number 85  ##=Current Choices
          Ord# Dept  Description                Req Dt/Tm     Freq  Dpt Status

( 1)        85  PT   ELECTRICAL STIMULATION---   02/24 0947A   QD      Received









Select any other occurrences to cancel or `A`ll (including parent)--
                                 end select(NL)
```

Select the option number to cancel an individual occurrence or enter A for All to cancel each occurrence. For each occurrence selected, the system displays the message:

Order for ... cancelled

The occurrence is removed from the Audit/Transfer Worklist processor.

The cancellation messages for the occurrences selected are followed by the cancellation message for the parent order.

Parent Order Cancelled

Once the parent order is canceled, the order is removed from the Audit/Transfer Worklist processor and you are returned to the assignment prompt.

Enter **A** at the *(C)ancel this occurrence or (A)dd new orders* prompt to add a parent order. This option adds an entirely new parent order to the system. It does not add occurrences to the current order.

If cancellations are performed that are equal to the total number of treatments on the worklist, the worklist status is updated to Complete.

Impact

After the order is canceled, the following takes place:

- The order is canceled and deleted from all future worklists.
- If the order was canceled for a date in the future, the order is deleted from all future worklists and all previous worklists before the date of cancellation if the order does not have a status (for example, performed, unable to perform, etc.).
- If the order is assigned to resource A for shift 1 and resource B for shift 2, and is then canceled from Review Assigned Worklists for Resource A, the order is removed from both resources and both worklists.

For information regarding specific field explanations on the Order Inquiry Detail screen, refer to *Order Management/Charge Processing Volume 1* of the *STAR Patient Care Reference Guide.*

When you enter **M** to manually transfer an individual order on the worklist to another resource, the following prompt displays:

Enter number to manually transfer--

Select the order that you want to manually transfer to another resource. After you select the order, the following prompt displays allowing selection of the resource to which you want to transfer the order:

Enter resource`-`, code or `#`employee #--

Enter the resource code or employee number if you know it. If you do not know either code, enter the first characters of the resource's description followed by a hyphen (**-**). Whether displaying an alphabetic description list or entering a code directly, the resources that meet the entered criteria display. Each resource is followed by their resource type, station group, total assigned workload value, total number of assigned orders and total number of assigned patients. Only resources from the selected department using Clinical Management that are set up to work on the selected shift display for selection. The following prompt displays allowing selection of the resource to which you are transferring the order.

Enter choice--

Once the resource is entered, the system performs the same checks as performed with the Unassigned Orders processor. If the ordered item being transferred does not contain the same resource type as the resource to which you are transferring as a primary or secondary resource type, the following message displays:

Error: Resource's type not defined in SIM!

If the ordered SIM item does not have a primary or secondary resource type defined, this error is ignored.

If the current station of the patient whose order is being transferred is not within the preferred station group of the resource to which you are transferring, the following message displays:

Error: Patient is not in preferred station group!

If the selected resource does not have a preferred station group defined, this error is ignored.

Both messages are warning messages and can be overridden. After each message displays, the following prompt displays enabling you to transfer the order:

Continue with Smith, Sally (Y/N)--

The description of the resource to which you are transferring the order displays in the prompt. If you enter **Y** for Yes, the order is transferred from the original resource to the new resource. If you enter **N** for No, you are returned to the prompt allowing selection of an alternate resource. The order is transferred for all future worklists as well as the selected one.

Transferring an Entire Worklist

To transfer all or portions of a worklist (manually or automatically), enter **T**. The following prompt displays:

(M)anual transfer or (A)utomatic transfer of entire worklist--

All or portions of a worklist can be transferred to another resource automatically or manually. The automatic transferring process allows all orders on the worklist to be transferred to one or multiple resources. The manual transferring process allows all or portions of a worklist to be transferred to a single resource. This differs from the manual transfer option available during viewing in that it allows single orders to be transferred from one resource to another.

To transfer all orders or groupings of orders on the worklist manually, enter **M**. The following prompt displays enabling you to indicate whether you want all or portions of the worklist to be transferred:

Transfer (A)ll, or select by (P)atient, (N)ursing station or (I)tem--

If you enter **A** to transfer all orders, the following prompt displays for verification:

Are you sure you want to transfer all? (Y/N)--

If you enter **N** for No, you are returned to the previous prompt. If you enter **Y** for Yes, the prompt allowing selection of the resource displays. This selection process is discussed in more detail further in the process.

If you enter **P** for patient movement, the active name inquiry screen displays enabling you to identify the patient that is to be moved. After you select the patient, the system prompts you to enter the resource where the patient is to be moved.

If you enter **N** to transfer all orders with patients currently on a specific nursing station, a list of the nursing stations from the selected facility displays for selection. The following prompt displays:

Enter choice to transfer TO--

Select the nursing station from which you want to transfer orders for patients. The following prompt displays for verification:

Are you sure you want to transfer all 2N treatments? (Y/N)--

The selected station displays in the prompt. If you enter **N** for No, you are returned to the list of nursing stations for selection of another station. If you enter **Y** for Yes, the prompt enabling selection of the resource displays. This selection process is discussed in more detail further in the process.

If you enter **I** to transfer all orders for a specific treatment, the following prompt displays enabling entry of the SIM item you want to transfer:

Enter first letters`-` to list or code--

Enter the SIM item code if you know it. If you do not know the code, enter the first few characters of the description followed by a hyphen (-) to display an alphabetic listing of SIM items. Once the SIM item is determined, the following prompt displays for verification:

Are you sure you want to transfer all Aerosol Treatments? (Y/N)--

The description of the selected SIM item displays in the prompt. If you enter **N** for No, you are returned to the prompt enabling you to specify another SIM item. If you enter

Y for Yes, the prompt allowing selection of the resource displays. This selection process is discussed in more detail further in the process.

Regardless of whether or not you are transferring all orders, orders by nursing station, orders by patient, or orders by SIM item, once the types of orders to be transferred are determined, the following prompt displays allowing selection of the resource to which you want to transfer the orders:

Enter resource`-`, code or `#`employee #--

Enter the resource code or employee number if you know it. If neither is known, enter the first characters of the resource's description followed by a hyphen (-). Whether displaying an alphabetic description list or entering a code directly, the resources that meet the entered criteria display. Each resource description is followed by resource type, station group, total assigned workload value, total number of assigned orders and total number of assigned patients. Only resources from the selected department identified as able to work on the selected shift utilizing Clinical Management display for selection.

The following prompt displays allowing selection of the resource to which you want to transfer the orders.

Enter choice--

Once the resource is entered, the system performs the same checks as performed with the Unassigned Orders processor. If the orders being transferred do not contain the same resource type as the resource to which you are transferring as a primary or secondary resource type, the following message displays:

Error: Resource's type not defined in SIM!

If the ordered SIM items do not have a primary or secondary resource type defined, this error is ignored.

If the current station of the patient whose order is being transferred is not within the preferred station group of the resource to which you are transferring, the following message displays:

Error: Patient is not in preferred station group!

If the selected resource does not have a preferred station group defined, this error is ignored.

Both messages are warning messages and can be overridden. After each message displays, the following prompt displays allowing you to transfer the order:

Continue with Smith, Sally (Y/N)--

The description of the resource to which you are transferring the order displays in the prompt. If you enter **Y** for Yes, the order is transferred from the original resource to the new resource. If you enter **N** for No, you are returned to the prompt allowing selection of an alternate resource. The order(s) are transferred for all future worklists as well as for the selected one.

When transferring orders automatically, you can transfer all orders to one specific resource or spread the orders evenly between multiple resources. If you enter **A** to transfer all orders automatically, the following prompt displays for verification:

Are you sure you want to transfer entire worklist (Y/N)--

If you enter **N** for No, you are returned to the previous prompt. If you enter **Y** for Yes, the list of resources within the department displays for selection. Only resources for the selected department identified as being able to work the selected shift display. The description of each resource displays followed by their resource type, station group, total workload value, total number of orders and total number of patients.

You can select one or multiple resources. If one is selected, all orders from the original resource are transferred to that one resource. If multiple resources are selected, the work is assigned using the same logic as when automatically assigning orders using the Unassigned Orders processor. All orders are transferred for future worklists as well as the selected one.

NOTE: Direct Assignment is an optional feature that streamlines the worklist assignment process for multiple occurrences generated by the same parent order. When transferring work from one worksheet to another, the system checks the Direct Assign field in the Resource Master table for the destination resource. If the field is set to Yes, then all related future occurrences are also moved to that resource's future worklist. For more information, see "Direct Assignment" on page 4-15.

The same checks for preferred station groups and resource types are performed. All orders that pass these two checks are automatically assigned. The system displays the dates and shifts as it removes the orders from the worklist. Any orders that could not be assigned due to a resource type or station group mismatch must be transferred manually. The following message displays if all orders could not be automatically assigned:

System could not auto assign all orders; please manually assign. Press NL--

When you press ENTER, the orders that could not be automatically assign display for selection. The prompt that displays is the same as when viewing and transferring individual orders manually. Refer to the previous explanation on how to transfer orders manually for individual orders.

Approving the Worklist

To approve the worklist, enter **A**. The following prompt displays:

Are you sure you want to approve this worklist (Y/N)--

09/20/94 shift 1 for resource LADERFIELD,WILLIAM R

The date, shift, and name of the selected resource's worklist displays below the prompt. If you enter **N** for No, you are returned to the previous prompt. If you enter **Y** for Yes, the worklist is approved. The listing of resources for the selected date and shift redisplays for selection of another resource. The worklist you just approved now displays in bright reverse video.

Impact

After you accept the appropriate screens, the following takes place:

- When a resource's worklist is approved for this date and shift, it can be printed using the Print Worklist function.
- Approved worklists display in bright reverse video.
- When transferring orders, all existing future worklists beginning with the date and shift being processed are adjusted as well. Worklists prior to the selected date and shift are not adjusted.
- The system displays the order number, worklist date, and shift in the lower portion of the screen as it removes orders from the worklist.
- If orders are transferred from one resource to another, the transferred work remains with the new resource until it is adjusted using this same process.

Audit/Transfer Worklist

Use this function review the status of each worklist for a given date and shift and the status of the treatments within each worklist. This provides a quick means to review which treatments were performed, unperformed, canceled, or discontinued, as well as whether or not charges were input for each treatment. If a worklist has been completed, you can update the status to Audited. Worklists, individual treatments, or both, may also be transferred to different resources through this function.

Upon selection, the facility is determined. If this terminal can access more than one facility, a list of the valid facilities displays for selection. If this terminal can only access one facility, that facility is assumed and the facility screen is bypassed. Once the facility is determined, the following prompt displays enabling entry of the charge department:

Enter charge department (`-` to list)--

Enter the charge department code if you know it. If you do not know the code, enter a hyphen (-) to view a list of the valid charge departments set up in the CRT Names table for this terminal. If no charge departments have been established for this terminal, an error message displays and the process is aborted. If only one charge department exists, this prompt is bypassed. Once the charge department is determined, the following prompt displays enabling entry of the worklist date and shift:

Enter date and shift or `-` for list [09/21/94 2]--
Separate date and shift using a blank space

Enter the worklist date and shift if known, separated by a blank space. Enter the valid departmental shifts. If you do not know the date and shift, enter a hyphen (-) to view the worklist dates and shifts. If you press ENTER, the system defaults to today's date and the current shift.

Upon entry or selection of a date and shift, the following screen displays:

```
              General Hospital Audit/Transfer Worklist Processor
                                                 Mon Feb 15, 1999 08:52 am

09/10/98 Shift 2  Unapproved  Unprocessed   In Progress   Complete  Audited
Page:01       Resources               Workload  #Trmts  #Pts  Status
( 1) RT AST THPST SHFT 1 (ALL)    105.0      1     1   Unprocessed











Enter choice--
```

The screen displays the resources that have worklists on the given date and shift. Each listed resource may display differently based on the overall status of the entire worklist. The prompt allows selection of one of the displayed resources. If more than one page of resources exist, the standard paging options exist.

It is important to understand the different statuses that exist when discussing worklists. As discussed before, each treatment associated with an order has an individual treatment status. Each order on a worklist has an overall order status. In addition, each worklist has a worklist status. This screen displays information regarding the entire worklist. The possible worklist statuses are Unapproved, Unprocessed, In Progress, Complete and Audited. An explanation of each follows:

- Unapproved - This status displays for any worklist that has not yet been approved through the Review/Assign Worklist processor. Resources display in colors corresponding to the status legend. The status displays only if the Auto Approve field on the Clinical Management Information screen of the SIM Department table is set to No, thereby requiring worklist approval.

- Unprocessed - This status indicates that worklist has been approved, but none of the treatment statuses have been set. This does not indicate that the treatments have not been performed; simply that none of the orders on the schedule have had a status updated. The legend and all resources display as bright reverse video.

- In Progress - This status indicates that at least one of the orders on the worklist has had their status updated, but there are still orders that have not yet been updated. The legend and all resources display in normal video.

- Complete - This status indicates that all orders on the worklist have had their status updated. This does not indicate that all charges have been input. This must be determined by viewing the Charge Status displayed when viewing the orders on the resource's schedule. The legend and all resources display in dim reverse video.

- Audited - This status indicates that all orders on the worklist have had their status updated, the schedule has been reviewed, and the audit has been accepted through this processor. The legend and all resources display as underlined.

Field Explanations

RESOURCES (DISPLAY ONLY)
The resource's name associated with the worklist displays.

WORKLOAD (DISPLAY ONLY)
The total workload for the resource's worklist displays.

 # TREATMENTS (DISPLAY ONLY)
The total number of treatments on the resource's worklist displays.

 # PTS (DISPLAY ONLY)
The total number of patients on the resource's worklist displays.

STATUS (DISPLAY ONLY)
The worklist status for the resource's worklist displays. For additional information on the statuses displayed, refer to the discussion earlier in this chapter.

After you select the resource, the system displays a summary list of the orders contained on the worklist. The display format is the same as discussed during the Review Assigned Worklist processor. The Department Description, Date, Shift, Resource Description, Requested Time, Priority, SIM Code/Description, Workload Value, Charge Indicator, Account Number, Location, Patient Name, and Worklist Status display for each order.

If more than one page of orders exist than can fit on one page, the standard paging options are available. Each page is numbered 1-7 with 7 patients per page.

The prompt displayed depends upon the status of the entire worklist (Worklist Status). If the selected worklist has a status of Complete, the following prompt displays:

Select treatment, Complete workfile audit (C), Print (P) or NL to return [NL]--

If you select one of the displayed orders, you can view the treatment and charge status of each individual treatment or you can view the order inquiry detail. All fields are display only. The following prompt displays to allow viewing of order inquiry detail:

View order detail (Y/N) [N]--

If you enter **Y** for Yes, the department's Order Inquiry Detail screen displays. For specific field explanations on the Order Inquiry Detail screen, refer to *Order Management/Charge Processing Volume 1* of the *STAR Patient Care Reference Guide*.

You can enter **C** to indicate that the worklist has been audited. This sets the status of the Worklist to A for Audited. The system displays *Processing!*. This removes the worklist from all display listings in other Worklist Processing functions.

Enter **P** to print a summary listing of the orders contained in the displayed worklist on the default printer associated with the requesting terminal as defined in the CRT Names table. The system displays *Printing*.

You can press ENTER to return to the listing of resources on the selected departmental shift. If you are viewing a Rounds or Continual shift, you are returned to the prompt enabling entry of a date and shift.

If the selected worklist has any other status besides Complete, the following prompt displays:

Select treatment or NL to continue [NL]--

This prompt allows selection of a displayed order to view individual treatment and order inquiry detail as discussed previously. If you press ENTER, you are returned to the listing of resources on the selected departmental shift. If you are viewing a Rounds or Continual shift, you are returned to the prompt enabling entry of a date and shift.

Impact

If you indicate that the audit on the worklist is complete and set the status to Audited, the worklist no longer displays when accessing the following worklist functions: Review Assigned Worklist, Display Worklist, Print Worklist and Manual Worklist Processor.

Output

If you entered **P** to print a worklist with a Completed status, the summary listing prints on the default printer associated with the requesting terminal as defined in the CRT Names table.

DISPLAY/PRINT WORKLIST

The Display/Print Worklist function enables you to review and print a worklist for all or selected resources for a selected date or shift. It is the resource's actual working document, providing information the resource needs while performing assigned treatments or procedures. Only workliststhat have been approved through the Review Assigned Worklist processor can be printed. However, you can display any Worklist without approval.

NOTE: You can use the STAR Audit Service to audit user requests for this report. The Audit Service collects and stores information such as report request date and time, the name of the user requesting the report, and the criteria selected for the report. For more information, see the STAR Audit Service Reference Guide.

If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the prompt asking for the facility is bypassed.

If you have access to multiple charge departments, the following prompt displays you to enter the department:

Enter charge department (`-` to list)--

Enter the charge department code if you know it. If you do not know the code, enter a hyphen (**-**) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed.

After you determine the charge department, the system checks to see if the user is signed on with security and checks the Resource field in the Hospital Employee file to see if this person is a resource. If the person signed on is using security and is a resource, then the worklist for the resource code entered in the Hospital Employee file displays or prints. This person has access to the prompts and screens that enable printing of multiple worklists. The system goes directly to the prompt enabling entry of the date and shift to print.

If the person signed on is not using security or does not have a resource code defined in the Hospital Employee file, then the following prompt displays enabling selection of the worklists to print:

Print Worklists for (A)ll, or (S)elect resources [A]--

Enter **A** or press ENTER to print all worklists for a particular date and shift.

Enter **S** to display a list of the department's resources for selection. You can select one or multiple resources. The following is an example of the screen that displays when selecting one or multiple resources:

```
                  General Hospital Print Worklist Processor
                                                   Fri Apr 26, 1996 03:52 pm
Page:01                      04/18/96 Shift 1              ##=Current
Choices
     Resources               Workload  #Trmts  #Pts   Assigned Stations
( 1) ADAIR,FRANK K                1.0   1       1     PED
( 2) RT AST THPST SHFT 1 (ALL)
( 3) RT THRPT SHFT 1 (PROF)--X











Enter choices (e.g. 1,7,5-9) or '-'choices to remove--
                               end selection(NL)
```

Only resources set up in the Resource Master for the selected SIM department, using Clinical Management, display for selection. For each resource, the screen displays the resource's name, the current associated workload, assigned number of treatments, number of patients and assigned stations/units or wards. You can select individual resources, a range of resources, or a combination of both. You can also exclude a resource from printing by entering a hyphen (-) and the resource number.

Once the date and shift are determined, or after you have selected the resources for whom you want to print worklists, the following screen displays enabling entry of the data required to print the selected worklist(s).

```
                  General Hospital Print Worklist Processor
                                                  Fri Apr 26, 1996 03:52 pm

( 1)Order Detail             : Yes
( 2)Treatment/Procedure Times: Yes
( 3)Scheduled Orders         : Yes
( 4)Multiple Patients/Page   : Yes
( 5)Display or Print         : Print
( 6)Printer                  :













Enter field number or '/' starting field number--
```

The defaults on this screen are determined by selections made on the Report Parameters processor. You can override any of the selections for this printing or display of the worklist.

Field Explanations

ORDER DETAIL (1-A-R)
This field determines whether the worklist displays or print with comments or other instructions entered during the order process. If you enter **Y** for Yes, the worklist includes lines for Order Instructions, Order Comment, Prompt, and Prompt Response. If you select **N** for No, this information is not displayed or printed on the worklist.

TREATMENT/PROCEDURE TIMES (1-A-R)
This field determines whether the worklist displays or prints with times at which a procedure should be performed. Times are defined on the Frequency table in Order Management by each department. If you enter **Y** for Yes, thetimes print on the worklist two per line, with space provided for inserting patient data or other information. If you enter **N** for No, times are not displayed or printed on the worklist.

SCHEDULED ORDERS (1-A-R)
This field determines whether the worklist includes any scheduled procedures associated with a patient. This information helps resources plan patient visits around scheduled appointments for that day. If you enter **Y** for Yes, the worklist includes the appointment time and length, the reason for the appointment, the department, and resource. If you enter **N** for No, then the worklist does not included any information on scheduled procedures.

MULTIPLE PATIENTS/PAGE (1-A-R)
Enter **Y** for Yes to print or display multiple patients on a single worklist page. Enter **N** for No if you want the system to start each patient on a new worklist page.

DISPLAY OR PRINT (1-A-R)
Enter **D** to display the worklist on your monitor. Enter **P** to print the worklist. If you select D, you cannot access the Printer field.

PRINTER (TABLE LOOKUP)
If you select the option to print the worklist in the previous field, use this field to select the printer that produces the worklist. The field displays the default printer selected in the Patient Report Parameters. To select a different printer, enter the printer ID or enter a hyphen (-) to select the printer from a list of valid printers.

Output

After you accept this screen, the following prints or displays:

- The Resource Worklist prints on the selected printer. This report lists all treatments or modalities assigned to the entered resource(s) for the selected shift. Scheduled orders and order detail are included as indicated.

PATIENT NOTES PROCESSING

You can enter/revise evaluations/progress notes after performing a treatment. Refer to "Chapter 6 - DOCUMENTATION" for additional information.

DISPLAY/PRINT PATIENT NOTES

You can display/print selected notes. You can also view revisions and initial evaluations from this function. Refer to Chapter 6: Documentation for additional information.

Chapter 5 - CHARGING

INTRODUCTION

The Clinical Management Module of STAR Patient Care is integrated with the Order Management/Charge Processing Module. As a result, current charging and pricing structures are available when charging through Clinical Management functions.

There are features that streamline the charging process while also linking individual treatments to specific charges. Linking of specific treatments being performed to charges provides an on-line audit trail for ensuring that charges are input for treatments actually performed. In addition, a Midnight Processing report is provided to identify the treatments performed during the day that did not have charges input as a backup to the online audit.

Charge menus can now be defined in Table Maintenance and can be linked to individual SIM items in the Service Item Master (SIM). This allows grouping of typical charges associated with specific treatments (across departments if necessary) that display when entering charges through Clinical Management.

When these Charge menus display, you can select specific items or all items to charge to the patient. These items are then charged to the patient using the Charge Processing screen found in STAR Patient Care. Once all selected Charge menu items have been processed, you can select other items from valid charge departments as necessary.

Charges can be entered through the normal Charge processor found in STAR Patient Care, but these charges are not integrated with Clinical Management functions. For this reason, it is recommended that all patient charges related to treatments be performed using Clinical Management functions.

Charging is currently done as a by-product of updating the status through Documentation. To enter charges or to view previously entered charges, access the Documentation processor. See “Chapter 6 - DOCUMENTATION” for details on this process.

CHARGE PROCESSING

If the selected treatment does not have any charges already entered and a Charge menu has been defined, the Charge menu displays enabling selection of the desired items to be charged to the patient. If a Charge Menu has not been defined, this screen is bypassed. The following screen is an example of a Charge menu defined for crutch walking:

```
                  General Hospital Manual Schedule Processing
                                                Tue Feb 24, 2009 02:25 pm
  No          Name            Sex    BD    Room    Physician    SVC ICD Status
90115-00001   DAVIS,SUSAN       F  05/07/58 1N1-4   ADAIR,FRANK  MED 10 I/P 21

Page:01                   CRUTCH WALKING CHARGE MENU         ## Current Choices
( 1) CRUTCHES COMPLETE
( 2) CRUTCH TIPS
( 3) CRUTCH UNDERARM PADS
( 4) CRUTCH HANDGRIPS
( 5) CRUTCH ADJUSTMENT
( 6) GRP TREATMENT 15 MIN
( 7) BASIC CRUTCH WALKING
( 8) CONSULT 30 MIN



Enter choices (e.g. 1,7,5-7) or `-`choices to remove--
                                  end selection (NL)
```

Up to a maximum of 25 items can be defined and selected for each Charge menu. Select the option number(s) associated with the items that are to be charged separated by commas (,). Once selected, they are highlighted. If an error was made, enter a hyphen (-) prior to the option number to remove the highlighting and correct the error. After all items are selected and verified, press ENTER to enter charge detail for each selected item.

Field Explanations

The standard active patient header line displays at the top of the screen.

(SIM ITEM) CHARGE MENU (DISPLAY ONLY)
The description of the Charge menu as defined during Table Maintenance displays where CRUTCH WALKING CHARGE MENU is in the example.

CHARGE MENU ITEMS
Immediately below the charge menu description, the SIM items defined for the Charge menu in Table Maintenance display for selection.

If a Charge menu has not been defined for the selected treatment, the Charge Menu screen is bypassed. The following prompt displays enabling entry of the charge department:

Enter charge department (`-` to list) [PT]--

This default is set to the SIM department for the treatment to which you are adding these charges. You can enter an alternate department if you desire.

Enter the charge department code if you know it. If you do not know the code, enter a hyphen (-) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT table. If only one department is defined, that department is assumed and this prompt is bypassed.

After you select items from the displayed Charge menu or you enter the charge department when a menu does not exist, the following screen displays enabling entry of charge detail:

```
                  General Hospital Manual Schedule Processing
PHYSICAL THERAPY Charge                            Tue Feb 24, 2009 02:25 pm
  No          Name           Sex    BD    Room     Physician    SVC ICD Status
90115-00001   DAVIS,SUSAN     F  05/07/58 1N1-4   ADAIR,FRANK  MED 10 I/P 21

 1 Item  2 Description                             3 Charging Physician
   6086    CRUTCH/HAND GRIPS                          5236 ADAIR,FRANK
 4 Quantity/Minutes
   1
 5 Price          6 Date of Service                7 Serial Number
   15.90            02/15/09
 8 Charge Location                                 9 Initials
   O/P OUTPATIENT                                    BLB
Last:  1434-CREAM,SKIN NIVEA         EA  Qty:  1  Chg#:  34





Enter field number or '/' starting field number--
```

For detailed descriptions and explanations of the Charge screen, refer to Chapter 3: Laboratory Results in *Order Management/Charge Processing Volume II* of the *STAR Patient Care Reference Guide*.

If items were selected from a Charge menu, the first item on the list automatically displays followed by the item number. If no menu has been defined, the charge screen displays enabling entry of charges, or if you decide not to select from the menu, the system automatically displays the treatment in the Item field, if no other charges have been entered for this treatment. If you do not want to charge for this defaulted SIM item, access the Item field and select an alternate procedure. The date of service is automatically set to the selected worklist/schedule date, but can be adjusted. After entry of the Charging Physician, Quantity/Minutes, Price, Charge Location and Initials, the screen can be accepted. Since Charge menus can only display a given SIM item once, multiple quantities should be entered using the Quantity field in the Charge screen.

Once the screen is accepted, the last item entered displays below the Charge screen with the next selected item from the Charge menu displayed in the Item and Description fields. The Charging Physician, Date of Service, Charge Location and

Initials are retained from the last entry to expedite the charge entry process for subsequent items, but can be revised. Each charge entered is assigned a unique order number as with normal charge processing.

Once all items from the Charge menu have been processed, the prompt allowing entry of the charge department displays so that additional items not on the menu can be entered. Please refer to the earlier discussion on entry of the charge department.

After the charge department is determined, either automatically or through selection, the Charge screen displays enabling selection of the SIM item(s) that you want to process.

Press ENTER after all charges are entered. The following screen displays all charges entered for this treatment:

```
                  General Hospital Manual Schedule Processing
                                                  Tue Feb 24, 2009 02:25 pm
  No           Name             Sex    BD    Room    Physician    SVC ICD Status
90115-00001   DAVIS,SUSAN        F  05/07/58 1N1-4   ADAIR,FRANK  MED 10 I/P 21

Charges for : 1234 CRUTCH WALKING

No  Chg#  Dept Description                             Srv Date  Qty      Price
 1    34  CSR  CRUTCH TIPS                             02/15/09    1       2.75
 2    35  CSR  CRUTCH HAND GRIPS                       02/15/09    1       4.10









Enter option # to cancel, add charges (A), credit (D) or [return]--
```

This screen displays after you enter charges when you indicate you want to enter/access charge information. The prompt enables you to select a charge to cancel, or enter **A** to add more charges. If more charges exist than can display on one page, the standard paging options are available.

If you select one of the displayed charges/credits, the Charge Inquiry Detail screen displays enabling viewing of the charge/credit details. If the item you select is a credit/cancellation, the following prompt displays enabling you to view the charge detail:

Enter return(/)--

If the item you select is a charge, the following prompt displays enabling you to view and/or cancel the detail:

Enter return(/), or cancel(C)--

If you do not want to cancel the charge, press ENTER, or slash (/) followed by ENTER to return to the charge summary screen. If you want to cancel the charge, enter **C**. The system displays the charge number, description, quantity, price, and initials of the charge to be cancelled. You are prompted to accept the screen; the default response is Yes. If you enter Yes or press ENTER, the charge is cancelled and a credit is issued to the account using the same charge number as the original charge (for auditing purposes). You then return to the charge summary screen. If you enter No, you are returned to the charge summary screen.

If you enter **A** to add more charges, the Charge menu built for the selected treatment displays. If a charge menu does not exist, or if you do not select any items from the display and you press ENTER, the charge screen displays enabling entry of the item to be charged. From this point on, the process works in the same manner as described previously when you are adding charges for the first time. The only exception is that the treatment is not defaulted when adding additional charges. This process repeats until you stop entering charges.

If you enter **D** to add a credit, the following Credit screen displays enabling entry of credit data: (This screen processes in the same manner as when additional charges are being placed.)

```
                  General Hospital Manual Schedule Processing
CENTRAL SUPPLY Credit                                Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
90115-00001   DAVIS,SUSAN       F   05/07/58 1N1-4   ADAIR,FRANK  MED 10 I/P 21

 1 Item  2 Description                              3 Charging Physician
   1434    CRUTCH TIPS                             ->
 4 Quantity/Minutes

 5 Price           6 Date of Service                7 Serial Number

 8 Charge Location                                  9 Initials






Enter table code, `-`name to override, or `=` for physician--
```

The selected SIM item number and description display and cannot be revised. After all remaining data is entered and accepted, the credit is issued its own credit number and you are returned to the screen listing the charges and credits for this treatment.

For detailed descriptions and explanations of the Credit screen, refer to Chapter 3: Laboratory Results in *Order Management/Charge Processing Volume II* of the *STAR Patient Care Reference Guide*.

Impact

After you accept the Charge or Credit screens, the following takes place:

- All charges and credits entered are sent to the financial system.
- Charges are reflected in the Charge Inquiry and Order Inquiry functions.
- Charges entered against patients registered to a contract account are reflected on Order Inquiry and Contract Charge Inquiry and receive the appropriate charge account based on the Service Item Master.
- A unique charge number is assigned to each charge as an audit trail.

Output

Charges or credits entered print on the following reports:

- Charges are reflected in the Activity Journal Detail and Summary Reports.
- Charges are reflected in the interface transmission control report under the Charges section.
- Charges are reflected on the Department Log and Reconciliation Reports.
- Charges placed against patients registered to a contract account are reflected on the Contract Departmental Log, Contract Reconciliation Report, Daily Contract Activity Journal, and Daily Contract Activity Journal Summary Report under the *patient* of the contract name or identification number.

Chapter 6 - DOCUMENTATION

Illustrations

NOTES PRE-CANNED TEXT BUILD

A multi-page text processor enables you to build pre-canned freeform text that can be used during Documentation. It uses the STAR Word Processing/WordPerfect® Interface currently being used by Radiology, Pharmacy and Laboratory. If you want to invoke the Word Processing Interface, refer to the *STAR Navigator User's Guide* for instructions; otherwise, the Softkey Editor is automatically invoked. For more information regarding the Softkey Editor, refer to the *General Information Volume* of the *STAR Patient Care Reference Guide*.

Each department can identify text and group them into Pre-canned Text Groups. These groups can then be linked to specific SIM items on the Clinical Management Page of the SIM. When entering progress notes on a patient, the pre-canned text contained in the group defined for that SIMtem displays for selection of one ormultiple text or selection of a text not contained in that group.

Word Processing Interface Changes

To support the WEM Word Processing Interface, the standard implementation steps defined in the *STAR Navigator User's Guide* must be followed. In order to display patient demographics at the top of the screen within the word processor, a base form (CGFDEMO - Demographic Data Form for WP) must be defined and identified in the system. This base form is then linked to the SIM Department under McKesson Tables - SIM Departments. An example of the base form follows:

```
                                General Hospital

Department:  RESPIRATORY THERAPY                      Tue May 02, 1995 12:26 pm
000000039     LANE,THOMAS                           Sex: M  DOB: 06/07/64 Svc: MIC
Room:  MH 3306-02   Status: MH 775
Phys:  DOCTOR,ATTENDING                          Ord Phys: ADAMS,JAY M
Ord #: 741      Item: 2802 BEDSIDE SPIROMETRY
```

This form is used to set the heading downloaded in the Word Processing Interface. Each department can customize a version of this form with assistance from McKesson.

You are also required to define the Demographic Data Form field in the maintenance processor to specify which form to use. The Demographic Data Form field is used to identify the specific form associated with the heading downloaded into the Word Processing Interface. The Demographic Data Form field is on the first Clinical Management Information screen of the SIM Department. See “Appendix A - TABLES” for the field description.

CHARGE CALCULATION DURING DOCUMENTATION

The Clinical Management Information screen of the user-controlled SIM Department table contains the Notes parameter, which controls the calculation of charges during the Documentation process. The statuses include Notes, Notes & Charging, and Inactive. The ability to activate notes without charging enables your department to begin using notes and implement automatic charging at a later date. See "Appendix A - TABLES" for a field description of the Notes field.

Any changes to the Notes field impact whether notes are able to be entered on the patient or charges automatically generated as a by-product of the questions and/or responses entered.

SERVICE ITEM MASTER

In order to allow the department to specify the questions that should be asked and the pre-canned text that can be selected, several fields are included on the Clinical Management Page of the SIM. Five fields are specific to Documentation:

- Charge Code
- Paragraph Question
- Evaluation Formats
- Progress Note Formats
- Pre-canned Text Groups

See the Service Item Master Clinical Information Page in “Appendix A - TABLES” for field explanations.

DOCUMENTATION

After Nursing has entered a Clinical Management order, you have the ability to enter evaluation and progress notes. Evaluations and Progress Notes can be entered through the Documentation processor. Each of these functions allows access to the files defined to support notes processing. You also have the ability to automatically generate charges and workload as a by-product of the questions/responses given and charge based on treatment status and Notes responses.

The system also provides several mechanisms to view/print the patient's progress throughout the hospital. The Order Inquiry and Physician's Order Inquiry processors found in STAR Patient Care allow viewing/printing of the patient's progress information. You can print the information from these inquiry functions only after the note has been accepted as complete; otherwise, the information is not viewable or printable.

Notes Processing Flow for Question/Responses

The process for entering documentation varies based on whether notes have already been entered and whether they have already been marked as completed. In instances where the notes have already been entered, the system displays the screen used to enter notes with previously entered responses displayed. You can select these for revision. Fields that have yet to be completed display for entry. After the notes have been completed, the system allows you to enter revisions, but the previous format is retained. As a result, if a response is changed back to the original response, it does not store or display the information. New entries are flagged as revisions with an asterisk(*). If the selected treatment has had their notes completed, the following prompt displays to warn you that notes have already been entered:

Treatment 1 Notes already marked as complete...continue? (Y/N) [N]--
2802 BEDSIDE SPIROMETRY

If you enter **N** or press ENTER, you are returned to the prior prompt. If you enter **Y** for yes, the notes entered display for selection and subsequent revision.

If notes have never been entered for this treatment occurrence, the following screen displays to allow selection of the appropriate note defined in the SIM file for the treatment being accessed:

```
                    General Hospital Manual Schedule Processor
                                                Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD     Room    Physician    SVC ICD Status
92028-00006   DAVIS,SAMUEL L    M  02/02/60 1107-1  ADAIR,FRANK  MED 10 I/P 5
Department: Physical Therapy
Treatment : EVALUATION
                                Evaluations
( 1) Adult IP Evaluation
( 2) Adult OP Evaluation
( 3) Child IP Evaluation
( 4) Child OP Evaluation






Enter choice, NEW LINE for the default or (-) to select from the table--
```

The system lists the note formats linked to this treatment as defined in the Service Item Master. You can select one of the typical formats displayed, press ENTER to accept the default, or enter a hyphen (-) to view a list of the entries in the Evaluation/Progress Notes table. The default is the first listed code displayed on the screen (not from the table display). This item is highlighted when the screen displays. If this treatment does not have any formats defined, the following prompt displays instead of the previous one:

Enter note code or description`-` to list--

This prompt enables you to enter the note format code if it is known. If the code is not known, then you can enter a portion of the description followed by a hyphen (-) to view a partial listing beginning with the characters entered. If a hyphen (-) is entered, the entire listing is displayed. When entering evaluations, you should only have access to note formats defined in the Evaluation/Progress Notes table defined as Evaluations. The same holds true when entering progress notes and having access to only formats defined as Progress Notes. The system builds the list of questions to be responded to based on the question/groups contained in this note format. The message *Building Notes Format...Please wait!* displays while the list of questions are being defined.

If multiple treatments are selected and different notes are attached to each, questions are automatically combined into one note. Duplicate questions do not display on the combined note; however, if the questions exist for more than one item, the response is logged for each item.

If Evaluation/Progress Notes formats have not been defined, then the message *No Entries Defined!* displays. You can then bypass Question/Response Notes and go directly to Pre-canned/Freeform Text note processing. Refer to “Notes Processing

Flow for Freeform Text" on page 6-11 for more information.

Once built, the following screen displays to allow entry of the responses to the questions defined for this note format:

```
                    General Hospital Patient Notes Processor
                                                Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD     Room    Physician     SVC ICD Status
9307800001    LANE,THOMAS     M  06/07/64  3306-02  LANDERS,BRUCEMIC 10 MH 775
 1 Aerosol Treatment Comments                              / AEROSOL TREATMENT
   01|Patient states treatments are causing excessive coughing and nausea    |
   02|30 minutes after administration.  Chart was flagged with note to Dr.   |
   03|Howell requesting change in medication.  Treatments placed on hold.    |
 2 Question/Response                                        Date/Time    Init
   How did patient tolerate treatment?
               Pt tolerated tx well                         01/27/09 15:24P   A B
   Medication administered-
               Treatment given with 0.5cc Ventolin/2.0cc NaCl.01/27/09 15:25P   A B
   Duration of treatment-
               Until Meds Utilized                          01/27/09 15:25P   A B
   Treatment was delivered via-
               Mouthpiece/noseclips                         01/27/09 15:25P   A B
   Auscultation-
               Crackles in RUL, Diminished Bilat Bases      01/27/09 15:36P   A B
   Heart Rate=(Before/During/After)
               80/88/84                                     01/27/09 15:36P   A B

   F1          F2          F3      F4    F5          F6            F7    F10
   Delete Line  Insert Line  Center  Exit  Store Line  Restore Line  Pack  Help
```

Field Explanations

1. PARAGRAPH QUESTION (TABLE LOOKUP-C)
This field displays only if a paragraph question has been defined for this item in the SIM. Pre-canned text can be defined for the paragraph question. This text can be accessed and edited if necessary. If pre-canned text is not defined, you can enter three lines (70 characters per line) of freeform text. Providing space is available, the SIM description displays within the paragraph title.

2. QUESTIONS/RESPONSES (TABLE LOOKUP)
The first line in this field is used to display each question defined for this field. The factors defined in the files that also affect the questions to display are listed below:

- Initial - If the question should only display initially, then the question is only asked the first time the note is processed. Subsequent occurrences of this same treatment/account for the patient do not display the question. If the question is initial and evaluation, it displays/prints as an Initial Evaluation on the Display/Print routine. Questions designated as Initial Evaluation are highlighted in bright reverse. If an initial evaluation has already been created and you select another question flagged as an initial evaluation, the following prompt displays:

  Initial evaluation question previously created (date/shift/time)!

Questions designated as initial progress displays the following prompt:

Initial progress question previously created (date/shift/time)!

On a subsequent treatment, the initial question does not display. However, you can insert or add an initial question by entering a hyphen (-) and the initial question displays for you to select.

- Sexes - You can specify whether this question should pertain to females, males, or all patients.

- Required - You can specify by I/P, O/P, both, or none whether this question is required or not. If required, the question can not be skipped and can not be deleted.

- Internal - You can specify by I/P, O/P, both, or none whether this question is internal to the department. Questions flagged as being internal are not viewable or printable to outside departments. These questions are considered for internal department use only.

- Response Format - You can specify the response format type as Value(V), Table(T), Text(X), Paragraph(P), Date(D), Time(N), or Date/Time(B).

  If the response format is Table(T) when the question displays and you enter a hyphen (-), the possible responses display below. The question displays on line 1 to help you keep track of which question you are on.

- Text Length - You can specify up to 50 characters or use a set maximum of 210 characters for the text length when the question format type is *Text*. When a colon (:) is used in a text response, it is converted to a semicolon (;).

  NOTE: If you elect to use the210 format, the system only displays the first 50 characters on the screen of questions. The system displays a dim-reversed arrow directly after the last character to indicate that the additional data may be reviewed by accessing the applicable question.

  If you need to insert a word, and you elect to use the210 format, press the Shift key simultaneously with a right or left arrow key, and the system inserts or deletes one character, respectively. If an insert causes existing characters on a line to "drop off", the system does not add them to the proceeding line.

- Value Format - You can specify the format of the value to be entered as decimal, slash or neither. If decimal (temperature) is entered, then you can enter a value as a decimal. If decimal(D) is not entered, then the value entered is assumed to be a whole number. If slash is entered, then the system expects you to enter two values separated by a slash (blood pressure). If neither is entered, then you are only allowed to enter numeric values.

- Normal Ranges - If normal ranges are being checked, the low and high values entered are used to verify the value entered. If a slash mark is entered, then both low and high value fields are used. The first set of ranges is compared against the value prior to the slash mark and the second set of ranges is checked against the value after the slash mark. If a decimal is entered or neither format is used, then only the first set of low & high fields are checked.

- Charge - If a SIM code is linked to the response in the table format, then that charge is generated when that response is selected. This is in addition to the charge generated when the treatment is identified as being performed. If the account selected is now inactive, then charges are not generated. The following message displays after acceptance of the screen:

  Inactive account number, charges cannot be entered!

  These patients are displayed on the Charge Exception Report to identify that the system attempted to enter charges and could not because the account was inactive. If you have linked a response to a charge, the response displays *Chg* in parentheses next to it in the table display which ensures this is a chargeable response. All crediting is done manually.

  After you accept the screen, the system displays the message *Processing charges!* if charges are associated with the response.

- Workload - If a SIM code or workload element is linked to the response given, then the workload values attached to that SIM item are automatically logged when this response is given. This allows for additional entry of workload based on response. After you accept the screen, the system displays the message *Processing workload!* if workload is associated with the response:

- Skipped - In the Service Item Master, the department can link either questions or question groups to the item to display in the order built. If a group is linked, then all questions defined for the group display during notes processing. If a question is answered and it is part of a group, then a check is made to see if the response you gave causes remaining questions in the group to be skipped. Before skipping any question, a check is done to make sure it is not required for this patient (I/P or O/P). If it is not required, then it can be skipped.

- Table Response - If the question format is a Table, then a list of the valid responses displays for selection upon entry of the code or entry of a hyphen (-). If the valid response is not displayed for selection, you can enter a hyphen (-) and enter freeform text for your desired response. Please note that when freeform responses are used within a table response question, a comma (,) is converted to an apostrophe (') and a colon (:) is converted to a semicolon (;).

When you answer the first question displayed on the screen, the system automatically moves to the next question. The next question defined for this format displays for you to enter the response. This continues until all questions defined in this format have been responded to. The system displays the message *End of list!* when you have reached the last question. After you accept the screen, the system verifies that evaluation or progress notes are filed.

The system enables you to insert/delete questions displayed to allow modifications to the format. If you press the delete option and if the question is not required, the question associated with the response is deleted. If it is a required question, the deletion is not allowed and the following message displays:

Response required...Deletion not allowed!.

If you press the insert option, you can select from the Notes Question table.

After you accept the screen, the charges are generated and workload is recorded. After the documentation has been released, deletions are not allowed. The following message displays:

Documentation already released...Deletion not allowed!

Questions can be inserted or added to the end of thelist and responses can be entered after documentation has been released. Any change to previously entered responses is notated as an edit.

If notes have already been entered, the information displays in the same format. The difference is that you can select existing responses and make corrections. Once a correction is made, the new version of the question displays with the new response. The date/time and initials of the person that recorded the change are noted. The old version displays/prints preceded by a tilde (~) after the current updated version in the Display/Print Notes function. The correction does not adjust the status of the notes in the summary screens.

Once all questions have been answered, the freeform text entry flow can begin.

Impact

When all questions are answered and the screen is accepted, charges are generated. All displays of this information are updated.

Notes Processing Flow for Freeform Text

After you accept the question/response screen, the text entry process begins. The system checks the Pre-canned Text Group field in the SIM. If it has an entry, then the pre-canned formats defined for that group display for selection. If a group does not exist, then the same screen displays, without any text formats displayed.

The following is a example of the screen displayed when a group exists for this treatment:

```
                    General Hospital Documentation Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
92028-00006   DAVIS,SAMUEL L    M  02/02/60 1107-1  ADAIR,FRANK  MED 10 I/P 5
Department: Physical Therapy
Treatment : EVALUATION/TREAT                  Text Group: Evaluations
                             Pre-canned Text Formats
( 1) Adult IP Evaluation
( 2) Adult OP Evaluation
( 3) Child IP Evaluation
( 4) Child OP Evaluation









Enter choice(s) (1,3,5-7), or NL for other text codes/new report --
                                        end selection (NL)
```

The pre-canned text formats linked to this group as defined in the Notes Pre-canned Text Group table display for selection. You can select one or multiple pre-canned text formats. If multiple text formats are selected, they are combined into one report in the order they are displayed. You can enter NL for other text codes or to enter a new report. If you enter NL, the following prompt displays:

Enter Precanned Text code, description `-` to list--
(N)ew report, (NL)to continue or previous note (/P)

After selecting pre-canned text format(s), the system displays their code(s) and description(s) as shown in the following screen:

```
                    General Hospital Documentation Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No           Name             Sex    BD    Room    Physician    SVC ICD Status
92028-00006   DAVIS,SAMUEL L    M  02/02/60 1107-1  ADAIR,FRANK  MED 10 I/P 5
Department: Physical Therapy
Treatment : EVALUATION/TREAT                     Text Group: Evaluations

        Code     Description

        IPEVLA   Inpatient Adult Evaluation










Accept(Y) this text as is, (E)dit its contents or select (N)ew text? [Y]-- |
```

To use the pre-canned text verbatim, enter **Y** or press ENTER. To select another pre-canned text format, enter **N** and the system re-displays the previous screen allowing alternate selection(s). To accept these formats, but make modifications to the text, enter E and the system displays the message *Copying Document* before the Softkey Editor screen displays.

The following example screen displays when editing the selected text:

```
                   General Hospital Documentation Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No           Name             Sex    BD    Room    Physician    SVC ICD Status
92028-00006   DAVIS,SAMUEL L    M  02/02/60 1107-1  ADAIR,FRANK  MED 10 I/P 5
Trmt: Evaluation                    Entered: Davison,Samuel L   6/18/94 02:03pm

   •Information contained in this area is defined in the pre-canned text that•
   •was previously selected.  If multiple text formats were selected, they   •
   •display one after the other contained in this same report.  The standard •
   •options available with Softkey Editor are available here.                •
   •                                                                         •
   •                                                                         •
   •                                                                         •
   •                                                                         •
   •                                                                         •
   •                                                                         •
   •                                                                         •
   •                                                                         •
   •                                                                         •
   •                                                                         •
   •                                                                         •

 1Ins 2Ln  3Ins 4Scn 5Scn   6Ins 7Ins 8Ctr 9Del 1Del   1Mrk 1Mrk 1Fmt 1Pat 1End
  Srt  Fct  Doc  Fwd  Bck    Txt  Ln   Ln   Ln  0Wrd   1Ln  2Pge 3Scn 4Inq 5Edt
```

This same screen displays when you are creating a new report and not using any pre-canned text. The options are the same. The only difference is that text is not automatically displayed. If you previously accepted the text formats by entering **Y**, this screen is not displayed and it is bypassed. It assumes that you do not need to make any modifications and the text is accepted as is.

When you have completed all edits, press the F15 key to exit.

NOTE: If you do not have an F15 function key on your keyboard, use ALT+F5 to exit.

The system displays the copying document message again. The date/time and ID Code of the person entering the notes is recorded for display purposes. If you are set up to use the WEM Word Processing interface, that functionality is invoked for editing the document.

If you are selecting the text portion to revise information before completing the data, the same screen is used to display the text already entered with a few differences. Only 10 lines of text displays instead of 15 as shown in the editing process. A message *continued* displays below the text if more text exists than can be viewed on the screen. The following prompt is displayed to enable you to update or delete the information entered:

Enter new text code, description'-' to list, (E)dit [E]--
or (V)iew, remove report(~~), or create (N)ew report

You can press ENTER or enter **E** to edit the current information. You can enter **V** to view the report without making any modifications. If you enter **~~**, the current text is deleted. If you enter **N**, the current report is overlaid by a blank format for you to enter new information. If you select another pre-canned text format(s), it overlays the existing information. Information erased or overlaid can not be recaptured.

Releasing and Completing Documentation

After entry of the questions and freeform text entry, the following prompt displays to release the information:

Release documentation for this treatment? (Y/N)--

If you enter **Y**, then notes recording for this session is considered complete and information is available to other departments for viewing/printing. This also prevents further revisions to existing documentation. Any changes to be made once the information is marked as complete are recorded as revisions. The previous completed version is retained as well as the updated version. The old version displays/prints in the Display/Print routine prior to the revised version. The updated version reflects the date/time and initials of the person revising the information. The Notes Status for this occurrence is updated on summary screens to a status of Complete. Notes that are in progress have a status of *InP* for In Progress.

If a note has not been performed with an associated performance time, the following prompt displays:

Enter the time associated with this treatment [NOW] --

This prompt is only associated with Manual Worklist and Manual Schedule processors as the system must store a time in order to process the evaluation note.

If edits are made to a previously released note, the revision is automatically released upon accepting the screen.

Processors Allowing Notes Entry

DOCUMENTATION

This function allows notes entry by patient and groups of treatments. It enables you to group treatments together prior to entering notes as well as entering treatment-specific notes. This processor also allows youto charge on performance and notes responses.

After you identify the charge department, the following prompt displays enabling you to indicate if you want to access by patient, worklist, or schedule:

Select treatments by (P)atient, (W)orklist or (S)chedule--

If **W** or **S** is entered, the prompt allowing selection of the resource displays.

After the date/time are selected, the system displays a list of the patients contained on the worklist/schedule. The list of patients is sorted in alphabetical order.

When you enter **P**, the Patient Identification prompt displays. After you select the desired patient, the appropriate account number must be selected as well as the desired treatment and treatment date, shift/time.

If you are accessing the treatment by worklist (**W**) or schedule (**S**), The following screen displays to allow selection of the patient:

```
                    General Hospital Documentation Processor
                                                 Wed Jun 17, 1994 05:09 pm
PHYSICAL THERAPY 04/15/94 Shift 1
COLEMAN,MICHAEL G
No   Pat No       Stn  Rm-Bed   Patient Name
 1  A92160-00022  1N   1301-1   ABBOTT,CAROLE
 2  A92028-00005  1N   1105-1   DAVIS,SHARON L
 2  A92157-00001  CCU  CCU-01   DOUGLAS,HOWARD C

Enter choice--
```

Upon selection, the following screen displays enabling selection of the order. The orders contained on this worklist or schedule display for treatment selection. You can select single or multiple treatments contained in that order. All fields are display only.

The treatments with the same order number display enabling you to select the treatments contained in this order, as shown in the following screen:

```
                   General Hospital Documentation Processor
                                                 Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
9609300008    RIVERS,MARY       F  09/01/72 ICU-01  ADAIR,FRANK  MED 10 MH  81
ADAIR,FRANK K / RT
Page:01                       04/16/96  Shift 1              ##=Current Choices
     Ord# Description            Req Dt/Tm  Freq   Status Date  Time Evl Prg Chg
( 1)   20 AEROSOL TREATMENT      02/16 0700 TID                              No
( 2)   20 AEROSOL TREATMENT      02/16 1300 TID                              No
( 3)    9 BEDSIDE SPIROMETRY     02/16 0900 BID                              No

(U)pdate Statuses, enter (P)rogress Notes, enter (E)valuations, (UPEAC)--
                   (A)dd Orders or View/Modify (C)harges
```

The prompt enables selection of one or multiple treatments within the date/shift.

After you select the desired treatment(s), the prompt enables you to update statuses(U), enter progress notes(P), enter evaluations(E), add orders(A), or view/

modify charges(C). Treatments must have been performed in order to enter evaluation or progress notes.

Status Updating

When you enter **U**, for all specific treatments, the system begins the status update process. If a treatment is a worklisted item type and is being performed multiple times in the same shift, then it displays multiple times on the list. However, the order displays only once on the Worklist. This doesnot happen with Scheduled Item Types since they are not shift related, but appointment related.

After the Update Activity is selected, the next screen displayed allows entry of the status as well as if charges are to be generated:

```
                  General Hospital Documentation Processor
                                                 Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
07259000001   DAVIS,SHARON L    F  05/07/58 1105-1  ADAIR,FRANK  CAR 10 ICU 7
 1 Item  Req Time: 02/19/09 21:44        2 Freq    3 Order Detail
   2941 AEROSOL TREATMENT                 ONCE       Yes
 4 Status       5 Perf'd  6 Date/Time       7 By   8 Reason not Perf'd   9 Chg?
   Performed      Yes       02/19/09 0400P     SLD                          Yes









Enter field number of '/' starting field number--
```

This screen processes in a similar manner as when entering charges. Data is retained from one screen to the next until all selected treatments are processed. The first treatment is processed followed by the next. If a treatment is being done multiple times in a shift, it displays twice and is processed twice.

Field Explanations

1. ITEM (DISPLAY ONLY)

This field displays the item and description used in the treatment.

2. FREQ (DISPLAY ONLY)

This field displays the frequency associated with the treatment being processed. It is not carried forward from the prior treatment's entry like other fields on the screen. If a treatment is a worklisted item type and is being done multiple times in a shift, then the treatment is processed the number of times it is to be done in the shift. This logic is done on the previous screen when listing the treatments in a shift. This screen simply processes each item, even if it displays several times.

3. ORDER DETAIL (1-A-R)
This field is automatically set to No and is bypassed when the screen displays. This field does not automatically pull forward from the previous treatments entries. With each treatment entered, this field is reset to No. When accessed, the Order Inquiry Detail screen displays. The prompt allows you to press ENTER to return to the previous screen. The information displayed is the same one found when viewing Order Inquiry Details from the Manual Schedule or Manual Worklist processors.

4. STATUS (1-A-R)
This field is the first one accessed with each treatment. You can enter **P** for Performed, **D** for Discontinued, **U** for Unable to Perform, or **C** for Cancel to indicate the current status of the treatment. The following explains each option in detail:

- <u>Performed</u> - When you enter **P**, the Perf'd field is automatically set to *Yes* and is accessible only for Discontinued or Cancel. The system displays Performed in the field. The Time and Perf'd fields then become required. The Reason Not Perf'd field is not accessible. The Chg? field is automatically set to *Yes* if you are charging on performance but is accessible for edits. The acceptable values for this field are **Y** for Yes and **N** for No.

- <u>Discontinued</u> - When you enter **D**, the system displays Discontinue in the field. The Perf'd field is accessed and becomes required. You can enter **Y** for Yes to indicate if the treatment was performed even though it is being discontinued. If you enter **N**, the Reason Not Perf'd field is accessed and becomes required. If you enter **Y** in the Perf'd field, then the Chg? field is set to Yes if you are charging on performance. Setting the status to **D** automatically removes this treatment from subsequent worklists if it is a worklisted item type. If there are remaining occurrences of this same treatment in this worklist, then the remaining occurrences are removed from the list of treatments selected to be performed.

- <u>Unable to Perform</u> - When you enter **U**, the system displays Unable/Perform in the field. The Perf'd field is bypassed, automatically set to No and cannot be accessed. The Time and Perf'd By fields are bypassed and cannot be accessed. The Reason Not Perf'd field is accessed and becomes required. The Chg? field is set to No, but can be selected and edited.

- <u>Cancelled</u> - When you enter **C**, the system displays Cancelled in the field. The Perf'd field is bypassed, automatically set to No and cannot be accessed. The Time and Perf'd By fields are bypassed and cannot be accessed. The Reason Not Perf'd field is accessed and becomes required. The Chg? field is set to *No*, but can be selected and altered. Setting this status to **C** automatically removes this treatment from subsequent worklists if it is a worklisted item type. If there are remaining occurrences of this same treatment in this worklist, then the remaining occurrences are removed from the list of treatments selected to be performed.

NOTE: For any treatment that has an Oxygen Therapy code defined on the Clinical Management Information page of the Service Item Master, the entries you make in the Status field automatically update the Oxygen Therapy Census as appropriate:

- When you update the status to Performed, the patient who received the treatment is automatically added to the Oxygen Therapy Census.
- When you update the status to Cancelled or Discontinued, the patient who received the treatment is deleted from the Oxygen Therapy Census.
- When you update the status to Unable to Perform, the Oxygen Therapy Census is unaffected. That is, if this is the first treatment to be performed, the patient is not added to the Oxygen Therapy Census. If this is one of multiple treatments being delivered and the patient is currently on the Oxygen Therapy Census, marking this treatment as Unable to Perform does not remove the patient from the census.

NOTE: **Procedural note for Critical Access Hospitals using service time processing:** After a status is updated to Performed, Discontinued, Unable to Perform, or Canceled for the occurrence, no date and time edits are allowed. If the date and time is entered in error, the appropriate action must occur manually. If a charge was generated when the status was updated to Performed and the wrong date and/or time was entered, the charge must be credited. The credit should be entered with the incorrect date and time of service to offset the charge. If the Charge was generated by order entry or status update, use the "C" in Charge Inquiry to cancel, which actually credits the charge for the order. A new charge must be entered with the correct date and time of service as appropriate.

5. PERF'D (1-A-C)

This field enables you to indicate if the treatment was performed independently of the treatment's status. It is only accessible when the Status field is set to Discontinued or Completed. It is automatically set to Yes when the Status field is set to Performed. It is automatically set to No when the Status field is set to Unable to Perform.

6. TIME (SPECIAL FORMAT)

This field enables you to enter the date and time the treatment was performed. It is only accessible when the Perf'd field is set to *Yes* and then it becomes required.

7. PERF'D BY (TABLE LOOKUP-R)

This field allows entry of the employee thatperformed the treatment. You can access the employee table for selection of the employee that performed this treatment. It automatically is set to the employee signed on at the time the status is entered. The field can be edited if desired. The employee used in this field is the one that receives the workload credits. It is also the employee that displays as the performing employee on the printed documentation. The following prompt displays to allow entry of the performing employee:

Enter employee code, name'-' to list--

You can enter the employee code if it is known. If the code is not known, then a portion of the employee's name can be entered to select from a list of employees.

8. REASON NOT PERF'D (TABLE LOOKUP)

You can enter the reason the treatment was not performed in this field. It is only accessed when the Perf'd field is set to No and then it becomes required. You can enter the reason code if it is known. If the code is not known, you can enter a hyphen (-) select from the reason table.

9. CHG? (1-A-R)

This field is automatically set to Yes with each screen processed when the Perf'd field is set to *Yes* and you are charging on performance. When the Perf'd field is set to *No*, then this field is also set to No. You can edit this field; enter **Y** for Yes or **N** for No. When you enter **N**, then the charge is not generated even though the files may be set-up to do so. When you view the charge screen, the treatment, number, name, date, and shift display.

After you accept the screen, workload is recorded and charges are generated. If a treatment is not performed, it is carried over to the next day's worklist and future worklists adjusted accordingly (if applicable). The data entered for this treatment is retained to automatically display in the next treatment processed until all treatments have been processed. The summary status displayed in prior screens in this process as well as the ones displayed throughout the system are updated appropriately.

After all selected treatments are processed, the following prompt displays to allow entry of Progress Notes, Evaluations and View/Modify Charge Activity:

Enter (P)rogress Notes, (E)valuations or View/modify (C)harges--

- <u>Progress Notes</u> - If you enter **P** to enter progress notes, the process of entering progress notes begins. The only difference with entering **P** at this point and entering it at the display of the treatments is that the treatments' status you just updated are assumed to be the treatments on which to enter notes. Any treatments that are not performed (Perf'd field = No) are not processed.

  The SIM Department table is checked to ensure that the department Notes parameter is active. A message telling you that notes are not active displays if applicable. After you enter **P**, the listing of treatments remains to enable you to select the notes that you want to include in this session. After you select the appropriate progress note, the system begins the process of entering the note. The system allows you to select multiple treatments, combining them into one large note.

When you build progress notes, you can specify a Pre-canned Paragraph question, a Progress Note (groups of questions), and/or a Pre-canned Text group to assign to each SIM item. When you process multiple treatments, each treatment may or may not have totally different paragraph questions, different questions, and different pre-canned text groups. To accommodate for the multiple versions, the system displays the paragraph question and questions/ responses defined for the first treatment to allow entry of the progress notes. After you enter these notes, the next selected treatment is processed. This continues until all questions have been answered for all selected treatments.

As each question is accessed, a check is done to see if this question was previously answered for the same treatment. If the question is asked multiple times because of multiple treatments being processed, a message displays warning you that the question is a duplicate.

After you answer all questions/responses, you can select from the Pre-canned Text Groups defined for each of the treatments selected. All text formats defined in each group are displayed. If multiple text formats are selected, then they are combined into one report. This report is then considered linked to each of the treatments previously selected. If any of these treatments are selected through any online function/printout, then the notes are accessible and display. When you print the report, it only prints once, not for each treatment.

In Documentation, if entering the first treatment of a multiple treatment per shift item, the responses and status of the Progress or Evaluation are only for the first treatment. Treatments two, three, etc. are treated as separate occurrences within the shift and are treated as specific Prog/Eval Notes.

After you enter notes, the following prompt displays:

Release documentation for this treatment? (Y/N) --

Enter **N** to continue entering progress notes. When you enter **Y**, notes can be viewed online or printed. The evaluation or Progress Note field displays Cmp for completed, and charges are automatically captured if applicable.

- Evaluation **-** If you enter **E**, the same process occurs as with entering **P** for progress notes. The only difference is the files that are accessed are defined as evaluation notes.
- Charges **-** If you enter **C** to view/modify charge activity, the system displays the list of treatments again allowing selection. The screens displayed are the same as those described in “Chapter 5 - CHARGING” of this document. For a longer discussion of charge processing, see “Chapter 3 - SCHEDULING PROCESS” of *Order Management/Charge Processing Volume 2* of the *STAR Patient Care Reference Guide*.

Display/Print Patient Notes

The Display/Print Patient Notes processor allows viewing/printing of patient notes information based on the treatments the patient is receiving.

NOTE: You can use the STAR Audit Service to audit user requests for this report. The Audit Service collects and stores information such as report request date and time, the name of the user requesting the report, and the criteria selected for the report. For more information, see the STAR Audit Service Reference Guide.

After you select this function from the main menu, the Patient Identification and Patient Visit prompts display. After you select the desired patient and visit, the following screen displays enabling you to enter the information you want to view/print about this patient:

```
              General Hospital Display/Print Patient Notes Processor
                                                 Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
92028-00005   Davis,Donna L     F  05/07/58 1105-1  ADAIR,FRANK  MED 10 I/P 5

( 1) Department(s)   : All
( 2) Start Date      : 2/15/09
( 3) Start Time      : 9:00am
( 4) Stop Date       : 2/15/09
( 5) Stop Time       : 2:00pm
( 6) Note Status     : Complete
( 7) Note Types      : Evaluations & Progress Notes
( 8) Internal Notes  : Yes
( 9) Treatment Status: All
(10) Treatment(s)    : Select
(11) Display/Printer : Display




Accept this screen (Y/N) [Y]--
```

Field Explanations

1. DEPARTMENT(S) (TABLE LOOKUP-R)
This field enables you to select one or more ordering departments using Clinical Management. When you access this field, the system displays the list of ordering departments that have the Notes Status field in the user-controlled SIM Department table set to either Notes or Notes/Charging. If one department is selected, that department description displays. If more than one department is selected, the word *Multiple* displays. You can access this field to view the selected departments. You can also restrict the departments that are included on the patient's report.

2. START DATE (SPECIAL FORMAT-R)
Enter the date to start including treatments. The entered date reflects the date of the worklist or schedule, not the requested date. You can also enter **B** to indicate that you want to include all data from the beginning of this account number.

The following prompt displays when the field is accessed:

Enter new date to start including treatments or (B)eginning--

3. START TIME (SPECIAL FORMAT)
Enter the time to start including treatments. The time entered reflects the time the treatment was performed, not the requested date/time. This field does not have a default. If ENTER is pressed, then all times are considered available for the date entered in the Start Date field. The following prompt displays when you enter this field:

Enter time to start including treatments --

4. STOP DATE (SPECIAL FORMAT-R)
Enter the date to end selection(s) of treatment(s). The date entered reflects the date of the worklist or schedule, not the requested date. If you press ENTER, the current date is accepted. The following prompt displays when you access this field:

Enter date to stop including treatments [today]--

5. STOP TIME (SPECIAL FORMAT)
Enter the time to stop including treatments. The time entered reflects the time the treatment was performed, not the requested date/time. This field defaults to the current time. You cannot access this field if the Start Time field was not entered above. The following prompt displays when you enter this field:

Enter time to stop including treatments --

6. NOTE STATUS (1-A-R)
This field enables you to indicate whether you just want notes that are considered complete, incomplete, or both. The following prompt displays to allow you to specify the notes statuses to include:

Include notes that are (C)omplete, (I)ncomplete, (B)oth or (A)ll [A]--

The default is set to include all statuses: incomplete, complete, and blank. Treatments that have yet to have any notes processed have a blank status. Enter **C** to include only the notes with a completed status. Enter **I** to include notes considered incomplete, or enter **B** to display Both. Press ENTER or enter **A** for all statuses.

7. NOTE TYPES (1-A-R)
Indicate the type of note, Initial Evaluation, Evaluations, or Progress Notes, that you want to include on the report. You can print Initial evaluation, evaluations, and progress notes separately if desired. The following prompt displays when you enter this field:

Include (A)ll, (I)nitial Evaluation, (E)valuations, or (P)rogress notes [P]--

Enter **I** to indicate Initial Evaluation. Enter **E** to indicate Evaluations. Enter **P** or press ENTER to specify Progress Notes. Enter **A** to include all.

8. INTERNAL NOTES (1-A-R)

You can indicate if you want to include questions defined as internal to the department. In the Notes Question table, you can specify if the question is considered as internal or external to the department. This enables you to restrict or include this internal information for your department, not others. The following prompt displays when you enter this field:

Include internal questions for your department (Y/N) [Y]--

If you enter **Y** or press ENTER, then questions/responses contained in the patient's notes are included on the report if they are for your department. To departments contained in the Charge Departments field in the CRT Names table are considered to be your department. If the department(s) selected in the Department(s) field above, are contained in the Charge Departments field in the CRT Names table, then internal question types are included on the report. If the department is not in the Charge Department field of the CRT Names table, then only external question types are included for treatments in that department.

If you enter **N**, then questions and their responses contained in the patient's notes are not included if they are flagged as internal questions.

9. TREATMENT STATUSES (6-A-R)

You can indicate the treatment statuses that should be included on the report. The standard status codes (P, D, U, C, Y) can be entered. The following prompt displays to allow you to enter of the status codes to be included:

Enter the treatment statuses to include on the report [All] --
(P)erformed, (D)iscontinued, (U)nable to perform, (C)ancelled & Complete(Y)

Press ENTER to include all treatment statuses on the report.

10. TREATMENTS (TABLE)

You can include all treatments matching the criteria entered as well as selecting one or multiple treatments. The following prompt displays:

Select (I)ndividual treatments or (A)ll [A]--

If you enter **A** or press ENTER to include all treatments meeting the criteria entered on the screen for inclusion on the report. Enter **I** to select individual treatments. The word Select displays in the field and the system displays the treatments for this patient meeting the criteria entered. Essentially, the system is building the list of treatments that would be included upon entry of All, but displays them to allow selection of individual treatments. All treatments processed through Clinical Management are listed. Only treatments from the departments entered between the start and stop dates display for selection.

If you enter **I** in this field, the following screen displays:

```
             General Hospital Display/Print Patient Notes Processor
                                                 Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
94214000015   Davis,Donna L     F  05/02/57 2102-02 ADAIR,FRANK  MED 10 I/P 3
Departments: RESPIRATORY THERAPY            From : 02/02/09 thru 02/04/09

Page:02                                                       ##=Current Choices
     Date     Time    Dpt Treatment             Statuses:  Treatment  Eval  Prog
( 1) 02/02/09 12:09   RT  FLOW VOLUME LOOP                 Complete         InP
( 2) 02/02/09 1624    RT  BREATHING EXERCISES              Complete         Cmp
( 3) 02/03/09 0957    RT  IPPB TREATMENT                   Performed        InP









Enter choices (e.g. 1,7,5-9), '-'choices to remove or (A)ll--
                               end selection (NL)
```

The prompt enables selection of one or more treatments. The treatments display in performed date/time order, not requested date/time. They are not sorted in department order.

Field Explanations

DATE (DISPLAY ONLY)
This field displays the date the treatment was performed.

TIME (DISPLAY ONLY)
This field displays the time the treatment was performed.

DPT (DISPLAY ONLY)
This field displays the department associated with the treatment.

TREATMENT (DISPLAY ONLY)
This field displays the description of the treatment given. It is truncated to 25 characters.

TRMT STATUS (DISPLAY ONLY)
This field displays the status of the treatment as entered in the Patient Notes, Manual Schedule, or Manual Worklist processors.

NOTE STATUS (DISPLAY ONLY)
This field displays the status of the notes entered for this treatment as entered in the Patient Notes, Manual Schedule, or Manual Worklist processors.

11. DISPLAY/PRINTER (TABLE LOOKUP)
You can indicate if you want the information displayed or printed. The following prompt displays to allow you to indicate the printer to receive the hardcopy or (D) to display to the screen:

Enter spooler report name or (D)isplay [PT]--

You can enter a printer code if it is known. If the code is not known, you can enter a hyphen (**-**) to access the Reports Maintenance table. If you enter **D**, the information is displayed to the screen. If you press ENTER, the default printer associated with this terminal is used. The default displays in the prompt as in the example above [PT]. If you select a printer, the report is printed to that printer.

After you have completed all of the fields, the prompt Accept this screen (Y/N) [Y]-- displays to allow acceptance of the information. Enter **Y** to accept the information. If you are printing the information, the message *Compiling and Printing!* displays. If you are displaying the information, the message *Processing notes....Please wait!* displays until the information is displayed.

Impact

Upon acceptance of the screen, the information requested is printed/displayed based on the parameters entered.

Output

The format for the screen display and report format is the same. The only difference is that the report format can include more information on one page than the displayed format can. When displayed, the screen displays *Press NEW LINE to continue*-- at the bottom so that the report can be viewed on subsequent pages. The following is an example of the report:

Figure 6.1 Patient Evaluations and Progress Notes Report

```
Page 1                          General Hospital                        * Edited
04/27/95 1628                    DEPARTMENT NAME                        ~ Original
==================================================================================
3306-02 LANE,THOMAS R.                             MH   DOB: 05/07/64    30Y    Sex: M
Act: A93072000001     Unit: A687968461            Phys: Adair,Frank
Adm: 04/18/95 1330
==================================================================================
SIM Description                                         Performed: 04/27/95 1612 TRB
RT Initial Evaluation: Complete                        Pract Name: Rollins,David
04/27   If an Initial Paragraph Question is defined in the SIM, the question
1700    followed by three lines of pre-canned text or three blank lines for freeformed text.
Initial Eval Questions/Responses follow.
             INITIAL VALUE QUESTION--Available for decimal or slash(/) responses.
             INITIAL TABLE QUESTION--Available to display list of responses.
             INITIAL TEXT QUESTION--Available for entry of freeformed text.
             INITIAL DATE QUESTION--Available for date responses.
             INITIAL TIME QUESTION--Available for time responses.
             INITIAL DATE/TIME QUESTION--Available for Date/Time responses.
RT Progress Notes: Complete                            Pract Name: Rollins,David
04/27   If a Paragraph Question is defined in the SIM, the question followed by
1705    three lines of pre-canned text or three blank lines for freeformed text is displayed.
Progress Note Questions/Responses follow.
             PROGRESS NOTE QUESTION #1 / PROGRESS NOTE RESPONSE #1
             PROGRESS NOTE QUESTION #2 / PROGRESS NOTE RESPONSE #2
             PROGRESS NOTE QUESTION #3 / PROGRESS NOTE RESPONSE #3
             PROGRESS NOTE QUESTION #4 / PROGRESS NOTE RESPONSE #4
             *EDITED QUESTION / RESPONSE,~ORIGINAL RESPONSE (04/27/95 1708 Mills,Tom)
RT Evaluation: Complete                                Pract Name: Rollins,David
04/27     If an Evaluation Paragraph Question is defined in the SIM, the question
171       followed by three lines of pre-canned text or three blank lines for freeformed text.
Evaluation Questions/Responses follow.
           *EDITED EVALUATION QUESTION #1 / EDITED EVALUATION RESPONSE (04/27/95 1714),~Original
Evaluation Response #1
             EVALUATION QUESTION #2 / EVALUATION RESPONSE #2
             EVALUATION QUESTION #3 / EVALUATION RESPONSE #3
             EVALUATION QUESTION #4 / EVALUATION RESPONSE #4
RT Text: Complete                                      Pract Name: Rollins,David
04/27   New Report
1720   Text entry is available for pre-canned or freeformed reports.  This function is available
to transcriptionist from the main Clinical Management menu.  It can be accessed if someone is
actively entering Evaluation or Progress Notes.

            This is an example of a departmental note using Initial Evaluations, Progress Notes,
Evaluations and Departmental Text.
            Your note may contain one, all or any combination of the different types of notes.

             Each of the question types (value, table, text, date, time or date/time) may be
defined for Evaluation or Progress notes in
             any combination.  These questions can be defined as internal, required, skipped,
male/female only with high/low value limits.
            Charges and Workload data can be generated as a result of responses to table
questions.



All Patient Notes (External)
From 04/26/95 thru 04/27/95

                                    RESPIRATORY THERAPY
               End of Report
```

This report is pulling from Notes information entered through the Documentation processor. Notes entered as Initial Evaluation are printed first and are headed as INITIAL EVALUATION. The progress notes and evaluations entered through the Documentation processor are listed next. They are listed in the order the treatment is performed, not the requested date/time. They are also listed bythe date the treatment displays on the resource's worklist or schedule, not the requested date.

The report begins with the page #, system date/time of generation, facility name, department name and the legend for edited (*) and original (~) responses. The next three lines contain patient information followed by the patient note.

The first line contains the SIM description and performance date/time and initials of the employee who updated the status of the item. The following line identifies the department, note type, note status and full name of employee documenting note. The note entry date and time are displayed in the left column.

The note types and date range selected are displayed/printed in the lower left side of the page after the note is complete. The capitalized department name is centered at the bottom of the page with the *End of Report* message displayed/printed in the bottom right corner.

All edited responses are followed by the date/time and full name of the employee. Original responses are retained and are notated by a preceding tilde (~). Any questions that are set to skip or remain unanswered are not listed on the display or print.

Remaining information is display/printed based on information entered for the notes and is explained in the example report. If the requested information is not found, the system displays the following prompt:

Pt note information not found!

If a Freeform Text Report is linked to multiple treatments, the report is printed after all treatment questions/responses have been entered. The text report is considered a summary of these treatments and should not be treated individually.

Immediate/Batch Print Patient Notes

This function provides the capability to print patient notes immediately upon entry, as well as including a batch and Midnight Processing option. The Batch and Midnight Processing options enable you to print the note to a designated location or to print back to the appropriate nursing station. For the Midnight Processing option, all notes from the previous day are eligible for printing.

To use this function, you must first set up the printing parameters within the Departmental Management option. Select Department Management from the main Clinical Management menu. The following screen displays:

```
                   General Hospital Departmental Management Processor
                                                   Wed Jun 14, 2006 07:14 pm
Departmental Management Input Options

            Option No.  Option
            ----------------------------------------
                1       Frequently Charged Item Menu
                2       Frequently Ordered Item Menu

                3       Service Item Master
                4       Service Item Prompts
                5       Service Item Alternate Names
                6       Financial Item Master

                7       Resource Maintenance
                8       Inventory Request
                9       Departmental Table Maintenance
               10       Departmental Table Maintenance - View
               11       SQL User Menu
               12       Transfer Orders to Clin Management
               13       Print Patient Report Batches
               14       Patient Report Parameters
Enter option number--
```

To access the printing parameters, select Patient Report Parameters. If a service department has not been set up, the following prompt displays:

Enter service department ("-" to list)--

If the CRT has already been set up to access a specific department, the previous screen is bypassed. The following printer set-up screen for the department displays:

```
                 General Hospital Report Parameters Processor
                                                   Thu May 23, 1996 01:48 pm

Department: RT  RESPIRATORY THERAPY
                              Immediate Print Options
 1 Print on Release     2 I/P Default Report Name     3 O/P Default Report Name
   Active                 See Table                     Inactive
                              Batch Print Options
 4 Batch Print                       5 Print at Midnight Processing
   Active                              Yes
 6 I/P Batch Report Name             7 O/P Batch Report Name
   RT                                  RT
                           Worklist Default Options
 8 Order Detail         9 Treatment/Procedure Times  10 Scheduled Orders
   No                     No                            No
11 Patients/Page       12 Display or Print   13 Report Name
   Yes                    Display

14 Last edited by                   15 Last edited
   Liming,Alan                         04/03/96 1502

 Enter field number or '/' starting field number--
```

The screen is divided into three sections. Use the upper section to set up the Immediate Print Options. The middle section defines the printing parameters to be used for Batch Print Options, including Midnight Processing. You can use either print option, while keeping the other inactive. The bottom section determines the defaults that display on the Print Worklist processor.

Field Explanations

1. PRINT ON RELEASE (1-A-R)

This field determines whether printing of the patient note upon entry is Active or Inactive. If any character other then an A or an I is entered, the system flashes the error message: *Invalid option*. Upon accessing this field, the following prompt is displayed:

Immediate print option is (A)ctive or (I)nactive for Release Notes [A]--

When you enter **A,** printing of the patient note upon release is active. When you enter **I** in this field, the option to immediatelyprint a copy of the patient note is not activated. Refer to "Chapter 6 - DOCUMENTATION" for other methods of printing notes.

2. I/P DEFAULT REPORT NAME (SPECIAL FORMAT-R)

This field enables you to enter the printer port to be used as the inpatient default printer. The first time this screen is accessed, the prompt contains a default printer for the CRT you are signed on to. This option is used only as a default and can be overridden within the function.

This field is required when the Print on Release field is set to Active. If that field is set to Inactive, this field and the O/P Default Report Name field are bypassed. The system displays the following prompt to enter the report name:

Enter default report name for inhouse patients, or '-' to list [RT]--
(D)eactivate immediate print for inhouse patients, or use (T)able assignment

When you select the report name from theprompt, you can enter a report name directly (for example, **RT**), accept the default, or enter a hyphen (**-**) to perform a table lookup of eligible reports.

When you enter **D** to deactivate immediate print options for inpatients, the print option is not displayed in the prompt through Documentation for inpatients only.

When you enter **T** for Table Assignment, the system enables you to define a printer for each patient location in the Patient Care system. The following screen displays:

```
               General Hospital Report Parameters Processor
                                          Tue Jun 16  1994 10:20 am

Department: RT  RESPIRATORY THERAPY

Page:01                     Inhouse Patient location          ##=Current Choices
( 1) **Default**-                     (16) NIO-No Information O
( 2) 1E-1 EAST             1E
( 3) CCU-CORONARY CARE UN
( 4) ICU-INTENSIVE CARE U
( 5) LAA-LABORATORY NSA    HSP
( 6) LD-LABOR AND DELIVER  RT
( 7) MH-MENTAL HEALTH      RT
( 8) NCM-Pathways CM Not   THRT
( 9) NSY-NURSERY
(10) OB-OBSTETRICS
(11) OPA-OUTPATIENT/BED N  HSP
(12) PCM-Pathways CM Live  HSP
(13) PED-PEDIATRICS        HSP
(14) PTA-PATIENT CARE NSA  HSP
(15) -RADIOLOGY NSA     HSP

Enter choices (e.g 1-4,7,9) to assign a report--
                         end selection(NL)
```

You can select any number of patient locations from the table to direct to a specific printer. Once you select these locations, they are highlighted on the screen. The following prompt displays for input of the printer.

Enter report name to assign to this location, or `-` to list--

At this prompt, you can enter the report name or enter a hyphen (-) to select from the spooler file of report names. The selected report name displays next to the patient type.

After all patient locations have been set up, you must define a default printer. If a default printer has not been defined, the system flashes the following error message:

Enter Default printer to activate table!

You are returned to the screen to select the default option (Option 1). The following screen illustrates the default printer selection:

```
               General Hospital Report Parameters Processor
                                          Tue Jun 16  1994 10:20 am

Department: RT  RESPIRATORY THERAPY

Page:01              Inhouse Patient Types          ##=Current Choices
( 1) **Default**-                       (16) NIO-No Information O
( 2) 1E-1 EAST            1E
( 3) CCU-CORONARY CARE UN
( 4) ICU-INTENSIVE CARE U
( 5) LAA-LABORATORY NSA    HSP
( 6) LD-LABOR AND DELIVER  RT
( 7) MH-MENTAL HEALTH      RT
( 8) NCM-Pathways CM Not   THRT
( 9) NSY-NURSERY
(10) OB-OBSTETRICS
(11) OPA-OUTPATIENT/BED N  HSP
(12) PCM-Pathways CM Live  HSP
(13) PED-PEDIATRICS        HSP
(14) PTA-PATIENT CARE NSA  HSP
(15) -RADIOLOGY NSA     HSP

Enter choices (e.g 1-4,7,9) to assign a report--
                         end selection(NL)
```

This default option enables you to select a report name by direct entry or by entering a hyphen (-) for table look-up. The default printer is used in the function to print those patient notes which contain an in-house patient location that was not defined in this table.

3. O/P DEFAULT REPORT NAME (SPECIAL FORMAT-R)
This field enables you to enter the printer port to be used as the outpatient default printer. The first time you access this screen, the prompt contains a default printer for the CRT you are signed on to. This option is used only as a default and can be overridden within the application.

This field is required when the Print on Release field is set to Active. If that field is set to Inactive, this field and the I/P Default Report Name field are bypassed. The system displays the following prompt to enter the report name:

Enter default report name for noninhouse patients, or '-' to list [RT]--
(D)eactivate immediate print for these patients, or use (T)able assignment

See the field explanation for the I/P Default Report Name field for more information.

4. BATCH PRINT (1-A-R)
This field determines whether batch printing is active. If the field is set to Inactive, the Print at Midnight Processing, I/P Batch Report Name, and O/P Batch Report Name fields are by-passed. If the field is set to Active, you can print at your request or print automatically through Midnight Processing. The prompt for this field is:

Batch printing is (A)ctive or (I)nactive for this department[A]--

If you enter a character other than A or I, the system displays the following error message *Invalid option*.

NOTE: When you enter the Batch Print Options (Fields 4 through 7), this information enables batch print and Midnight Processing to automatically print copies of the patient notes to the designated locations. You can set up Batch Print Options separately from Immediate Print Options. Many of the screens are the same as those in Immediate Print Options, but are used only in the batch and Midnight Processing functions.

5. PRINT AT MIDNIGHT PROCESSING (1-A-R)
When batching is active, you can print the patient notes automatically during Midnight Processing. If this field is set to Yes, Report Batch(es) prints after midnight for all patients with documentation released between midnight and 11:59 P.M. the previous day. These batches are directed to the report names specified in the Batch Print Options section of this screen. This field is required when the Batch Print field is set to Active.

When you select this field, the system displays the following prompt:

Print batches automatically during Midnight Processing? (Y/N)--

When you enter **Y**, the Midnight Processing print function activates. When you enter **N**, the Midnight Processing print function is disabled, and batching occurs through the manual batch option within the Departmental Management screen option.

6. I/P BATCH REPORT NAME (SPECIAL FORMAT-R)
When you select this field, you are prompted to enter the printer port that is used as the inpatient default printer. Patient notes print on this printer during batch and Midnight Processing operations. This option is used only as a default and can be overridden within the application.

This field is required when the Batch Print field is set to Active. The system displays the following prompt:

Enter batch report name for inhouse patients, or '-' to list [RT]--
(D)eactivate immediate print for inhouse patients, or use (T)able assignment

When you select the report name from theprompt, you can enter a report name directly (for example, **RT**), accept the default, or enter a hyphen (-) to perform a table lookup of eligible reports.

When you enter **D** to deactivate immediate print options for inpatients, the print option is not displayed in the prompt through Documentation for inpatients only.

When you enter **T** for Table Assignment, the system enables you to define a printer for each patient location in the STAR Patient Care system. The following screen displays:

```
                  General Hospital Report Parameters Processor
                                                  Tue Jun 16  1994 10:20 am

Department: RT  RESPIRATORY THERAPY

Page:01                     Inhouse Patient Location          ##=Current Choices
( 1) **Default**-                     (16) NIO-No Information O
( 2) 1E-1 EAST             1E
( 3) CCU-CORONARY CARE UN
( 4) ICU-INTENSIVE CARE U
( 5) LAA-LABORATORY NSA    HSP
( 6) LD-LABOR AND DELIVER  RT
( 7) MH-MENTAL HEALTH      RT
( 8) NCM-Pathways CM Not   THRT
( 9) NSY-NURSERY
(10) OB-OBSTETRICS
(11) OPA-OUTPATIENT/BED N  HSP
(12) PCM-Pathways CM Live  HSP
(13) PED-PEDIATRICS        HSP
(14) PTA-PATIENT CARE NSA  HSP
15) -RADIOLOGY NSA     HSP


Enter choices (e.g 1-4,7,9) to assign a report--
                          end selection(NL)
```

You can select any number of patient locations from the table to direct to a specific printer. Once you select these locations, they are highlighted on the screen. The following prompt displays for input of the printer.

Enter report name to assign to this location, or `-` to list--

At this prompt, you can enter the report name or enter a hyphen (-) to select from the spooler file of report names. Once you enter the report name, it displays next to the patient type as illustrated on the following screen. You can update the table, if desired.

After all patient locations have been set up, you must define a default printer. If a default printer has not been defined, the system flashes an error message:

Enter Default printer to activate table!

You are returned to the screen to select the default option (Option 1). The following screen illustrates the default printer selection:

```
               General Hospital Report Parameters Processor
                                                   Tue Jun 16  1994 10:20 am

Department: RT  RESPIRATORY THERAPY

Page:01               Inhouse Patient Types          ##=Current Choices
( 1) **Default**-                    (16) NIO-No Information O
( 2) 1E-1 EAST            1E
( 3) CCU-CORONARY CARE UN
( 4) ICU-INTENSIVE CARE U
( 5) LAA-LABORATORY NSA    HSP
( 6) LD-LABOR AND DELIVER  RT
( 7) MH-MENTAL HEALTH      RT
( 8) NCM-Pathways CM Not   THRT
( 9) NSY-NURSERY
(10) OB-OBSTETRICS
(11) OPA-OUTPATIENT/BED N  HSP
(12) PCM-Pathways CM Live  HSP
(13) PED-PEDIATRICS        HSP
(14) PTA-PATIENT CARE NSA  HSP
(15) -RADIOLOGY NSA     HSP

Enter choices (e.g 1-4,7,9) to assign a report--
                         end selection(NL)
```

This default option enables you to select a report name by direct entry or by entering a hyphen (-) for table lookup. The default printer is used in the function to print those patient notes which contain an in-house patient type that was not defined in this table.

7. O/P BATCH REPORT NAME (SPECIAL FORMAT-R)
When you select this field, you are prompted to enter the printer port that is used as the outpatient default printer. Patient notes print on this printer during batch and Midnight Processing operations. This option is used only as a default and can be overridden within the application.

This field is required when Print Batch field is set to Active. The system displays the following prompt:

Enter batch report name for non-inhouse patients, or '-' to list [RT]--
(D)eactivate batch print for these patients, or use (T)able assignment

See the field explanation for the I/P Batch Report Name field for more information.

8. ORDER DETAIL (1-A-R)
This field determines whether the worklist displays or prints with comments or other instructions entered during the order process. Enter **Y** for Yes on the Print Worklist processor and include lines for Order Instructions, Order Comment, Prompt, and Prompt Response on the worklist. Enter **N** for No if you do not want this information to display or print on the worklist.

9. TREATMENT/PROCEDURE TIMES (1-A-R)
This field determines whether the worklist displays or prints with times at which a procedure should be performed. Times are defined on the Frequency table in Order Management by each department. Enter **Y** for Yes on the Print Worklist processor and include times on the worklist. The times print on the worklist two per line, with space provided for inserting patient data or other information. Enter **N** for No if you do not want times to display or print on the worklist.

10. SCHEDULED ORDERS (1-A-R)
This field determines whether the worklist includes any scheduled procedures associated with a patient. This information helps resources plan patient visits around scheduled appointments for that day. Enter **Y** for Yes on the Print Worklist processor and include the appointment time and length, the reason for the appointment, the department, and resource on the worklist. Enter **N** for No if you do not want the worklist to include any information on scheduled procedures.

11. PATIENTS/PAGE (1-A-R)
Enter **Y** for Yes on the Print Worklist processor and print or display multiple patients on a single worklist page. Enter **N** for No if you do not want the system to start each patient on a new worklist page.

12. DISPLAY OR PRINT (1-A-R)
Enter **D** to default the Print Worklist processor to display the worklist on your monitor. Enter **P** to print the worklist. If you select Display, you cannot access the Report Name field.

13. REPORT NAME (TABLE LOOKUP)
Enter the spooler report name to be displayed as the default in the Printer field on the Print Worklist processor. The default in the prompt that displays when you enter this field is determined by the CRT associated printer. Press ENTER to accept this default, enter another report name, or enter a hyphen (-) to select the name from a list of available report names.

14. LAST EDITED BY (DISPLAY ONLY)
This field updates automatically whenever a change or entry is made tothis table. The ID of the person signed onto the system is the ID that is logged in this field.

15. LAST EDITED (DISPLAY ONLY)
This field updates automatically whenever a change or entry is made tothis table. The date and time are displayed.

Print Patient Report Batches

This function provides the capability to sent patient notes to the desired location at your convenience. You can use the batch parameters discussed under Immediate/Batch Print Patient Notes to direct the patient notes in this option. You can also direct the output to a designated printer.

To use this function, select Department Management from the main Clinical Management menu. The following screen displays:

```
                  General Hospital Departmental Management Processor
                                                Wed Jun 14, 2006 07:14 pm
Departmental Management Input Options

            Option No.  Option
            ----------------------------------------
                 1       Frequently Charged Item Menu
                 2       Frequently Ordered Item Menu

                 3       Service Item Master
                 4       Service Item Prompts
                 5       Service Item Alternate Names
                 6       Financial Item Master

                 7       Resource Maintenance
                 8       Inventory Request
                 9       Departmental Table Maintenance
                10       Departmental Table Maintenance - View
                11       SQL User Menu
                12       Transfer Orders to Clin Management
                13       Print Patient Report Batches
                14       Patient Report Parameters
Enter option number--
```

To access this printing option, select Print Patient Report Batches. The system displays the following screen:

```
           General Hospital Print Patient Report Batches Processor
                                              Tue Jun 16, 1994 10:20 am

 1 Department(s)

 2 Batch Starting Date/Time          3 Batch Ending Date/Time

 4 Destination Report Name(s)
   Use defined batch parameters


Page:01                 Departments with Batched Reports      ##=Current Choices
( 1) PHYSICAL THERAPY---X
( 2) RESPIRATORY THERAPY





Enter choices (e.g. 1,3,2-4), '-'choices to remove or (A)ll--
                                end selection(NL)
```

Field Explanations

1. DEPARTMENT (1-A-R)

This field enables you to select the departments for which the patient notes print. If you have multidepartment selection, you can print from one central location or from each individual department.

2. BATCH STARTING DATE/TIME (SPECIAL FORMAT-R)

The field is set to enable you to enter a date and time for the start date and time from which you want patient notes included. A default is built into the system of T-1 0000 (or yesterday at midnight). You can override this default with your entry, or you can press ENTER and accept the default value. When this field is selected the following prompt displays:

Enter batch starting date and time [T-1 0000]--

3. BATCH ENDING DATE/TIME (SPECIAL FORMAT-R)

The field is set to enable you to enter a date and time to signify the end date and time to which you want patient notes included A default is built into the system of T-1 2359 (or yesterday at midnight). You can override this default with your entry, or you can press ENTER and accept the default value. When this field is selected the following prompt displays:

Enter batch ending date and time [T-1 2359]--

4. DESTINATION REPORT NAME(S) (SPECIAL FORMAT-R)
This field enables you to enter a specific spooler report name for the patient note, or to use the parameters defined for your department. When you select this field, the system displays the following prompt:

Enter report name, `-` to list, or use existing batch (P)arameters [P]--

You can enter the specific spooler report name (for example, **RT**), a hyphen (-) to select from the spooler report name table, or accept the default of **P** for existing batch parameters. If you select the spooler report name, the report name displays in this field. If you enter **P**, then the message *Use defined batch parameters* displays.

When you accept the screen, the system displays the following message and returns you to the previous menu:

Batch Reports compiling and printing!

For Midnight Processing, the patient notes prints automatically for all treatments released for the previous day from 0000 hours to 2359. The reports are routed based on the parameters defined on the Parameter screen.

NOTE: If your department processes patients from more than one facility, you must set up the Batch Report Parameters screen for each facility. When you print report batches (either manually or through Midnight Processing), all patients, regardless of facility, print in accordance with these settings.

Patient Text Entry

This section contains an explanation of the screens and process associated with the Patient Text Entry function of Clinical Management.

This function provides a streamlined approach for transcriptionists to access the textual portion of Documentation without going through the many steps required in Documentation. It is designed to minimize the time needed to access the text portion of the Note. Often, only the charge department and date/shift are known; not the worklist and therapist. This function also enables the therapist to enter Progress or Evaluation Notes questions on a patient treatment at the same time a transcriptionist is entering Patient Text on the same patient treatment.

If you select the Patient Text Entry option from the main menu, the facility is determined.

If this terminal can access more than one facility, a screen displays prompting selection of a facility. If this terminal can only access one facility, that facility is assumed and the facility screen is bypassed. After the facility is determined, the following prompt displays for entry of the department:

Enter charge department ('-' to list)--

Enter the department code if you know it, or press hyphen (-) and ENTER to view a list of SIM departments for this terminal as defined in the Charge Departments field in the CRT Names table. If only one department is set up in the CRT Names table, that department is assumed and the previous prompt is bypassed. If no departments have been set up, an error message displays prior to aborting the process.

The following screen displays containing a list of the subdepartments that have been defined:

```
                    General Hospital Patient Text Entry Processor
Page:01                                            Wed Aug 10, 1994 09:52
( 1) OCCUPATIONAL THERAPY SUB
( 2) SPEECH THERAPY SUB DEPT




















Enter choices (eg. 1,3,5-9), '-'choices to remove or (A)ll--
                                end selection(NL)
```

This screen is bypassed if no subdepartments have been defined. Select the option number of the subdepartment(s) you want to process or enter A for all. If you do not want to process a specific subdepartment, press ENTER to default to the master SIM department. In this example, the master is Physical Therapy.

After you select the department/subdepartment, the Patient Identification prompt displays. After you select the desired patent, the following prompt displays for entry of the date that you want to process:

Enter date or '-' to list [08/10/94]--

Enter the date if you know it, or press ENTER to default to today's date. If you do not know the date, press hyphen (-) and ENTER to display the following screen. This screen contains a list of dates with evaluated orders that are highlighted if they have been assigned to a resource and unhighlighted if they have not been assigned yet.

```
               General Hospital Patient Text Entry Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
000007444200  QUAY,CAROL MAGILL F  05/23/78 4305-01 ADAIR,FRANK KMED 10 I/P 60
                                                              Approved  Unapproved
Page:01          Available Dates - Shift/Schedule
( 1) 01/19/09 1
( 2) 01/21/09 S
( 3) 01/22/09 S
( 4) 01/25/09 1
( 5) 02/01/09 2
( 6) 02/09/09 1
( 7) 02/13/09 1
( 8) 02/15/09 1




Enter choice--
```

The dates and shifts that display are specific to the selected department as defined in the SIM Department table.

After you select the desired date and shift, the following screen displays:

```
                  General Hospital Patient Text Entry Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD    Room    Physician    SVC ICD Status
9609300008    RIVERS,MARY       F  09/01/72 ICU-01  ADAIR,FRANK  MED 10 MH  81
ADAIR,FRANK K / RT
Page:01                     02/16/09  Shift 1              ##=Current Choices
     Ord# Description           Req Dt/Tm  Freq   Status Date  Time Evl Prg Chg
( 1)   20 AEROSOL TREATMENT      02/16 0700 TID                              No
( 2)   20 AEROSOL TREATMENT      02/16 1300 TID                              No
( 3)    9 BEDSIDE SPIROMETRY     02/16 0900 BID                              No









(U)pdate Statuses, enter (P)rogress Notes, enter (E)valuations, (UPEAC)--
                   (A)dd Orders or View/Modify (C)harges
```

If only one treatment exists, this screen is bypassed. If you select a treatment that does not have a status associated with it, the following error message displays:

Status update required before proceeding!

These options are available to the transcriptionist for information purposes only; for example, to notify them of upcoming transcription events for the day. They cannot be entered until they are statused in Documentation. Once a treatment has been statused and selected, the next screen displays. If any pre-canned text has been linked to the SIM item, it displays for selection as on the following screen:

```
               General Hospital Patient Text Entry Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No          Name            Sex    BD    Room    Physician    SVC ICD Status
9420000001    QUAY,CAROL MAGILL F  05/05/34 CCU-04  COLEMAN,MICHAMED 10 I/P 60
Department:RESPIRATORY THERAPY  Treatment 1:BREATHING EXERCISES
Text Group:02 SA02 CHECK.
Page:01                    Pre-canned Text Formats         ##=Current Choices
( 1) M1    - BRONCHIAL EXAM
( 2) M2    - BRONCHIAL EXAM WITH NO ABNORMALITIES
( 3) M3    - AEROSOL (SPECIAL PROCEDURES)
( 4) M4    - AEROSOL FOLLOW-UP








Enter choices (e.g. 1,7,5-9) or NL for other text codes/new report--
                               end selection(NL)
```

Enter the selection that has been linked to the SIM item, or press ENTER for a list of other text codes, or to enter a new report. If you select the pre-canned text associated with the SIM item, you are linked to the following screen:

```
               General Hospital Patient Text Entry Processor
                                                  Tue Feb 24, 2009 02:25 pm
  No          Name            Sex    BD    Room    Physician    SVC ICD Status
9420000001    QUAY,CAROL MAGILL F  05/05/34 CCU-04  COLEMAN,MICHAMED 10 I/P 60
Trmt 3:2941 AEROSOL TREATMENT         Entered:Hutchinson,Brenda  09/16/94 1426

  |BREATH SOUNDS ARE CLEAR AND NORMAL.                                      |
  |                                                                         |
  |                                                                         |
  |                                                                         |
  |                                                                         |
  |                                                                         |
  |                                                                         |
  |                                                                         |
   Continued                                                                |



Enter new text code, description`-` to list, (E)dit [E]--
              or (V)iew, remove report(~~) or create (N)ew report
```

This screen enables you to edit the text document, view the document, remove the report, or create a new document. You are linked to either the Soft Key Editor or to a word processor like WordPerfect depending on how your PC is set up.

If you did not select the text associated with the SIM item on the previous screen, the following prompt displays:

Enter text code, description`-` to list or create (N)ew report--
end selection(NL) or previous screen(/P)

Enter the text code, enter a hyphen (-) to list the available text options, or enter **N** to create a new report. If you press ENTER, you are returned to the Patient Visit selection screen while remaining in the Patient Text Entry Processor. If you enter **N** to create a new report, you are linked to either the Soft Key Editor or to a word processor like WordPerfect depending on how your PC is configured.

NOTE: Please refer to and follow the standard implementation steps located in the *STAR Navigator User's Guide,* and contact your WEM representative once the decision has been made to interface to a word processor or Soft Key Editor.

Any text created or edited through the Patient Text Entry is attached to the Progress Note for that treatment along with the status of the text. If a Progress Note is 'Cmp' Complete and is reentered through the Patient Text Entry option, the following warning message displays:

Treatment x Notes already marked as complete....continue? (Y/N) [N]--

where x is the treatment number. The SIM item number and the description display below the message. If you enter **Y** for Yes to edit the document, you proceed into the editor.

After you are finished with the text, the following message displays:

Release documentation for this treatment ? (Y/N)--

If you enter **Y** for Yes, the treatment becomes complete (Cmp). If you enter **N** for No, the treatment becomes (InP) In Progress.

Only one person can access the text for a patient treatment at a time. The following error message displays if two transcriptionists attempt to access the same patient text for a specific treatment:

Text in use!

The question/response portion of Documentation can be accessed at the same time the text is accessed through Patient Text Entry.

Inquiry Functions

Order Inquiry and Horizon^{WP}® Physician Portal allow access to STAR Radiology and STAR Laboratory results. Viewing of notes entered for the patient's progress for departments using Clinical Management is available in Horizon^{WP} Physician Portal. You can enter **R** in each of these functions when results exist for the selected order. For more information, see the Order Inquiry section of *Order Management/Charge Processing Volume 1* of the *STAR Patient Care Reference Guide.*

The system takes treatment occurrences and displays notes information entered based on the same criteria used when printing the patient notes. This method, however, does not allow you to select multiple departments and treatments. It assumes that you want to view notes information entered for this order and department. The date and time parameters used in the online printout are also not applicable since all notes entered for this order are displayed. This function also does not include Internal question types. It displays all types of notes, Evaluations and Progress Notes, and does not allow you to select the type. Only notes that are considered complete or released are included. If notes have not been completed/ released, the following message displays:

Detail is not available at this time!

Following is an example of this type of screen:

```
                    General Hospital Order Inquiry Processor
                                                      Tue Feb 24, 2009 02:25 pm
  No          Name             Sex    BD     Room    Physician    SVC ICD Status
000007444200  QUAY,CAROL MAGILL F   05/23/784305-01 ADAMS,GEORGE MED 10  I/P 17
Department:  RESPIRATORY THERAPY
Page:01                                                           ##Current Choices
      Date      Time  Treatment                   Statuses: Treatment     Eval  Prog
( 1) 01/25/09  0900A BREATHING EXERCISES                    Performed     InP   InP
( 2) 01/25/09  1016A BREATHING EXERCISES                    Performed           InP
( 3) 01/25/09  1038A BREATHING EXERCISES                    Performed           CmP
( 4) 01/25/09  1038A BREATHING EXERCISES                    Performed           InP









Enter choices (e.g. 1,7,5-9), '-'choices to remove or all(A)--
                               end selection(NL)
```

The format of the screen displayed is the same as generated from the online request process from this point All information that can fit on one screen displays allowing you to press ENTER for the following area of information. You can go to the next or previous page screens.

Purging

Midnight Processing contains a step to purge ordering and notes information for the patient based on the patient's discharge date and patient type. A parameter at the department level identifies the number of months after the patient's discharge that the information should be purged. The Midnight Processing step then purges all Clinical Management information for that patient including ordering and notes information. A purge is performed for resource worklists/schedules at the same time.

Notes Audit Reporting

Two reports provide you with auditing information relating to notes. These reports are run by Midnight Processing. The reports are: Notes Exception Report and Notes Completion Report.

NOTES EXCEPTION REPORT (CCMPNEX[AAA])

This report is generated for each department for which the Notes field is set to Active. It lists in date/shift and resource order the treatments that have been marked as being performed (Perf = Yes) but have not had their notes accepted as complete (released). This is a cumulative report. It contains all treatments, regardless of the performed date. The current Notes and Treatment Statuses are listed by the treatment and patient information. The following is an example of the report:

Figure 6.2 Notes Exception Report (CCMPNEX[AAA])

```
 6/19/94  2:03pm              General Hospital                     Page   1
                           Notes Exception Report
                              Physical Therapy

Date/Shift  Resource Description
            Stn Room/Bed  Patient Name       Incomplete Note Account #    Type
            Treatments                           Trmt Status Perf'd Dte/Tme/Init
•---------------------------•
 6/18/94 1  Resource Description                         Prog
            1N 9234-02    Patient Name--------------------X   92100-00020  I/P
            Treatment (SIM Desc)------------X    Incomplete   6/18/94 11:00am SLD

 6/18/94 R  Rounds
            Treatment (SIM Desc)------------X    Eval In Prog 6/18/94  8:00am TRD

                               End of Report
```

The report is sorted first in date/shift, followed by resource. For scheduled item types, the date is listed without the shift. The sort that follows is the same as found when displaying the resource's worklist/schedule. The resource's scheduled items are listed first followed by the treatments existing on the worklist.

NOTES COMPLETION REPORT (CCMPNCX[AAA])

This report is generated for each department that is active on Documentation. It lists in date/shift and resource order, the treatments that were marked as being performed (Perf = Yes) during the day and had their notes accepted as complete (released). The following is an example of the report:

Figure 6.3 Notes Completion Report (CCMPNCX[AAA])

```
 6/19/94  2:03pm              General Hospital                      Page   1
                           Notes Completion Report
                              Physical Therapy

Date/Shift  Resource Description
            Stn Room/Bed  Patient Name      Completed Notes  Account #    Type
            Treatments                         Trmt Status   Perf'd Dte/Tme/Init
•---------------------------•
 6/18/94 1  Resource Description               Eval/Prog
            1N 9234-02    Patient Name--------------------X   92100-00020  I/P
            Treatment (SIM Desc)------------X   Performed     6/18/94 11:00am SLD

 6/18/94 R  Rounds
            Treatment (SIM Desc)------------X   Complete      6/18/94  8:00am TRD

                               End of Report
```

The report is sorted first in date/shift, followed by resource. For scheduled item types, the date is listed without the shift. The sort that follows is the same as found when displaying the resource's worklist/schedule.

Chapter 7 - WORKLOAD PROCESSING

INTRODUCTION

Clinical Management provides mechanisms for the department to develop workload to reflect their unique organizational structure. Workload values can be defined and linked to each SIM item in the Service Item Master (SIM) and can be developed to include units for all activities associated with the treatment. This includes time spent with the patient as well as preparation, follow-up, and chart documentation.

The department controls all aspects of the workload recording process. The process of capturing workload can be turned on or off independently within each subdepartment or department. This enables necessary files to be built prior to actually going live.

Workload can be captured at both the department/subdepartment as well as at the individual employee level to suit the needs of each department. Capturing workload at the employee level requires much more detail and therefore requires a large amount of disk storage. This also depends upon the volume level of each individual department. For this reason, some departments may capture workload at the employee level while others need only capture it at the department/ subdepartment level.

Each department can specify the number of months in the past that workload data is to be retained on the system. Daily workload data can be retained for up to 18 months, however, the recommended time is three months. Monthly data can be kept up to three years. However, as is true with capturing workload statistics at the employee level, the amount of available disk storage should be considered when making these decisions.

Raw count workload data is stored by Workload Categories which are groupings of patient types/locations. The hospital defines the categories (inpatient, outpatient, series, etc.) through the Workload Category table. Each patient type and nursing station is then linked to one specific category. When workload is logged using the Documentation processor, the raw counts logged are stored by category based on the patient type or nursing location. Inpatient types assigned to a bed record workload using the category assigned to the patient's nursing station. Inpatients not assigned to a bed (ADV, PAT, and so on), as well as any other patient type, record workload using the category assigned to the corresponding patient type. These categories are the basis for many of the reporting mechanisms.

When defining workload units, the department develops a table of workload elements that describe the activities associated with the treatment. Workload elements are the elements used to identify the unit value associated with each type of departmental activity. They represent units of time that the specific activity takes to perform.

Elements can be developed at a basic level to simply represent blocks of time that a treatment normally takes, such as a 30 minute treatment. They can also be set up in detail to describe that each treatment is made up of preparation, actual patient treatment, follow-up and chart documentation time. Each individual department determines how detailed their workload is to be. It can also be set up basically in the beginning and expanded at a later date.

Each workload element can be set up to a maximum of five digits with three positions for a suffix indicator (#####.###). This enables the five-digit code to correspond to the technical, clerical and other steps associated with performing a procedure/treatment. The three-digit suffix could correspond to the method of treatment. For example, if a specific procedure can be performed in a hot tub as well as a whirlpool, the same five-digit code can be used to represent the treatment being performed, while two different suffix codes could be used to describe the method used—whirlpool or hot tub. The codes used are completely up to the department and use of suffixes is not required.

In addition to allowing the department to define workload elements that are linked to specific SIM items, setup elements can be established and linked to other workload elements. This allows for easy recording of any setup required when the specific activity occurs. If this is done, the setup workload value is calculated each time the procedure with the original element is performed.

For each SIM item, the department defines the workload elements to be used to calculate workload statistics. Up to five workload elements can be linked to one SIM item. Since each workload element may have a setup workload element associated with it, this means that in reality up to 10 workload elements and their associated values can be captured when a procedure is performed.

Workload values are captured by the system in two ways:

- Workload values can be manually entered using the Log Miscellaneous Workload function.
- Workload values are automatically captured as a by-product of updating the status of a treatment and indicating that the treatment was performed through the Documentation processor.

The Log Miscellaneous Workload function is used to identify and log employee activity not necessarily associated with the performance of patient associated treatments or procedures, and their required setup routines. It also can be used to enter workload elements that are typically automatically captured as a by-product of entering/updating the treatment's status.

Once workload has been assigned to SIM items, the system captures it automatically as a normal by-product when a treatment is indicated as being performed. This method of capture is done at this point rather than at the time of charge entry for several reasons, but primarily because the procedure or treatment may be performed regardless as to whether the patient should be charged.

This section describes the various Workload reports available for display or printing purposes, as well as functions to collect miscellaneous workload values and to revise workload previously collected. A workload error log is also described in this section and is used to identify any problems the system may have had while trying to calculate and log associated workload values.

Several of the reports are available in a summary as well as detail format that print independently. Summary and detail reports can display to the CRT as well as print. All detail reports can be sorted alphabetically by workload element name, or numerically by code. In a multifacility environment, workload reports are split by facility, and are available only at the facility where the elements were performed.

The Workload Processing functions are located on the departmental menu grouped together under the heading Workload Processing. After you select this function, the following submenu displays:

```
                General Hospital Workload Processing Processor
                                                  Thu Sep 27, 1994 10:19 am
Workload Processing Input Options

            Option No.  Option
            ----------------------------------------
                1       Log Miscellaneous Workload
                2       Manual Workload Adjustment

                3       Workload Summary by Sub Department/Shift
                4       Workload Detail by Sub Department/Element
                5       Workload Summary by Employee
                6       Workload Detail by Employee/Element
                7       Workload Summary by Group
                8       Workload Detail by Group/Element

                9       Workload Peak Analysis

               10       Workload Error Report
               11       Request Monthly Status Report

Enter option number--
```

All available options are explained in this section. Enter the option number associated with the desired function from this submenu.

LOG MISCELLANEOUS WORKLOAD

The Log Miscellaneous Workload function enables manual entry of workload data by SIM item or workload element. Use of this function requires that, after selection of the SIM item or element desired, the workload category be indicated. This function also collects the date and time of the counts being entered, as well as the Employee ID if statistics are gathered at the employee level.

Upon selection, the facility is determined. If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays enabling entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if known. If you do not know the code, enter a hyphen (**-**) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed. Once the charge department is determined, the following prompt displays enabling you to indicate if you want to enter workload by SIM item or workload element:

Enter workload for SIM Item (I) or workload element (E)--

- Select by SIM item - If you want to log workload associated with a specific SIM item, enter **I** and the following prompt displays:

  Enter first few letters`-` to list or code--

  Enter the SIM Item code if it is known. If you do not know the code, you can enter a portion of the description followed by a hyphen (**-**) to view a list of SIM items beginning with the entered data. Once the SIM item has been entered, each workload element associated with the selected SIM item displays one at a time in the data input screen described later until all workload elements have been processed.

- Select by workload element - If you want to log workload by element(s), enter **E**. If the selected charge department has subdepartments identified, the following screen displays enabling you to select the subdepartment/department from which you want to select elements:

```
            General Hospital Log Miscellaneous Workload Processor
                                                  Thu Sep 27, 1994 10:19 am

Page:01               Sub-Departments for PHYSICAL THERAPY
( 1) OCCUPATIONAL THERAPY
( 2) SPEECH THERAPY










 Enter choice or NL for Master [PT]--
```

You can select a displayed subdepartment if you want to access workload elements from that subdepartment or you can press ENTER to select workload elements defined at the master SIM department level. The master SIM Department code displays as the default in the prompt. If subdepartments have not been defined for the master department, this screen is bypassed.

After you determine the department or subdepartment, the following prompt displays to allow selection of the workload element(s) for the selected subdepartment/ department:

Enter workload element code-
(NNNNN or NNNNN.NNN)

Enter the workload element code if known. If you enter a five-digit code without the suffix, all elements with the same code but different suffixes display for selection. If you do not know the code, youcan enter a hyphen (-) to viewa list of valid codes. One or multiple items can be selected from the displayed list. If multiple elements are selected, they display one at a time in the data input screen described later until all selected items are processed.

After you select the workload element(s) by SIM item selection or by selecting the element(s) individually, the following screen displays:

```
            General Hospital Log Miscellaneous Workload Processor
                                              Thu Sep 27, 1994 10:19 am

  1 Workload Element                  2 Date          3 Time
    123-123 30 MIN TREATMENT            09/27/94        03:00 pm
  4 Patient                         5 Pat Type/Location    6 Workload Category
    DREW,ELIZABETH                    1E                  INPATIENT
  7 Raw Count                       8 Employee
    1                                 JONES,SALLY










Accept this screen? (Y/N)[Y]--
```

The first workload from the list of elements to be processed displays and cannot be revised. Once the first element is processed, the next element displays with all fields brought forward from the previous entry with the exception of the Raw Count field. This field requires re-entry with each element being processed. This process continues until all workload elements are processed. You are then returned to the prompt prompting you to indicate if you want to log workload by SIM item or by element.

Field Explanations

1. WORKLOAD ELEMENT (DISPLAY ONLY)
The workload element code and description previously selected display.

2. DATE (DATE-R)
Enter the date for which the workload is to be recorded. This field defaults to the current date. You cannot enter a date in the future or a date that has already had its associated workload purged.

3. TIME (TIME-R)
Enter the time for which workload is to be recorded. This field defaults to the current time. You cannot enter a time in the future.

4. PATIENT (SPECIAL FORMAT-O)
If the workload being entered was for a specific patient, the patient should be selected if their account is still active. This ensures that the correct categories are recorded based on the patient's current location and patient type. If the patient is entered, the Pat Type/Location and Workload Category fields are automatically completed based on the patient's current patient type and location. If bypassed, the system requires entry of the Pat Type/Location field.

5. PAT TYPE/LOCATION (SPECIAL FORMAT-R)
The workload category to receive the workload is calculated as a result of the entry in this field. Enter **P** to display the available patient types. Enter **L** to display the available patient locations (nursing stations). This field is automatically completed with the patient's patient type/location if a patient was entered in the previous field, but it can be adjusted.

6. WORKLOAD CATEGORY (DISPLAY ONLY)
This field is automatically completed with the appropriate Workload Category for the indicated patient type/location entered in the Pat Type/Location field and cannot be edited. If the workload category is incorrect, the patient type or location should be changed.

7. RAW COUNT (3-N-R)
Enter the number of raw counts to be recorded for the selected workload element. Any number between -999 to 999 can be entered. The default value is one. Negative numbers can be entered to adjust patient related statistics rather than using the workload adjustment function which just revises raw counts.

8. EMPLOYEE (TABLE LOOKUP-C)
This field is only accessed if the selected department is set up to capture Workload at the employee level as defined in the SIM Department table and then becomes required. If workload is being captured only at the department/subdepartment level, then this field is not accessed. Enter the employee's number if you know it. If you do not know the ID number, enter a portion of the employee's name followed by a hyphen (-) to view a list of employees whose last names begin with the data entered. Select the desired employee.

Impact

After you accept this screen, the following takes place:

- The selected Workload Category is updated with the number of raw counts and associated weighted values for the element on the entered date and time.

- The daily and monthly workload counts and weighted values are updated by the amount entered for the specified date and time.

- If multiple elements were selected originally, this screen redisplays showing additional elements and retaining field’s data except for Raw Count. Although these fields are initially entered, they can be revised as necessary with the exception of the Workload Element and Workload Category fields. The Raw Count field must be re-entered with each screen.

- After all elements are processed, you are returned to the prompt allowing entry of an **I** for SIM item selection or **E** for Element selection.

MANUAL WORKLOAD ADJUSTMENT

The Manual Workload Adjustment function can be used to add or subtract raw counts in the case of errors. Use of this function requires special considerations if the department captures workload at the employee level. The identity of the employee performing the element should be known in order to assign credit properly. If raw counts need to be shifted from one employee to another, you must make sure the data is added to one employee and subtracted from the other. This is necessary to make the employee totals within a subdepartment equal the totals for the entire subdepartment. If the employee cannot be determined, a default employee can be set up. Because of the implications of adjusting workload, this function is typically only accessed at a supervisory level.

Upon selection, the facility is determined. If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays to allow entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if known. If you do not know the code, enter a hyphen (-) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed. Once the charge department is determined, the following screen displays if the selected department has subdepartments defined. If subdepartments are not defined, this screen is bypassed.

```
                General Hospital Workload Adjustment Processor
                                                  Thu Sep 27, 1994 10:19 am

Page:01               Sub-Departments for PHYSICAL THERAPY
( 1) OCCUPATIONAL THERAPY
( 2) SPEECH THERAPY















 Enter choice or NL for Master [PT]--
```

You can select a displayed subdepartment if you want to adjust workload from that subdepartment or press ENTER to adjust workload from the master SIM department. When adjusting workload for the master SIM department, you are adjusting workload elements that are not defined for a specific subdepartment. The master SIM department code displays as the default in the prompt.

Once the department or subdepartment is determined, the following screen displays enabling selection of the date for which you want to adjust workload. Only dates with existing daily workload detail display for selection.

```
            General Hospital Manual Workload Adjustment Processor
                                                Thu Sep 27, 1994 02:09 pm

Page:01                           Workload Dates
( 1) 07/23/94
( 2) 07/24/94
( 3) 07/31/94
( 4) 08/02/94









Select date to adjust--
```

After you select a date, the following screen displays for entry of the remaining defining criteria that must be completed prior to the actual adjustment:

```
            General Hospital Manual Workload Adjustment Processor
                                                Thu Sep 27, 1994 02:09 pm

PHYSICAL THERAPY A                              Activity Date:  07/23/94
 1 Pat Type/Location     2 Workload Category   3 Workload Element
   I/P                     INPATIENTS            222 30 MIN TREATMENT
 4 Employee
   JONES,SALLY











Enter field number or '/' starting field number--
```

The description of the selected department/subdepartment displays in the top left portion of the screen.

Field Explanations

1. PAT TYPE/LOCATION (TABLE LOOKUP)
This field enables you to select the workload adjustment by patient type or by location. To select by patient type, enter **P** at the prompt to display the list of available patient types. To select by location, enter **L** at the prompt to display the list of available locations (nursing stations).

2. WORKLOAD CATEGORY (DISPLAY ONLY)
The workload category associated with the patient type/location previously selected displays and cannot be edited. If incorrect, the patient type or location should be changed.

3. WORKLOAD ELEMENT (TABLE LOOKUP)
Enter the workload element code if known. If you enter a five-digit code without the suffix, all elements with the same code but different suffixes display for selection. If you do not know the code, you can enter a hyphen (-) to view a list of valid codes. You can enter E to view workload elements that currently have workload recorded for the given date and department/subdepartment.

If an element code is entered that does not have existing workload for the date entered, the following error message displays:

No Entries Defined!

4. EMPLOYEE (TABLE LOOKUP)
This field is only accessed if the selected department is set up to capture Workload at the employee level as defined in the SIM Department table. If accessed, the field is required. Enter the employee's number if known. If you do not know the ID number, enter a portion of the employee's name followed by a hyphen (-) to view a list of employees whose last names begin with the data entered. Select the desired employee.

After you accept the previous screen, the following screen displays to actually adjust the workload:

```
              General Hospital Manual Workload Adjustment Processor
                                              Thu Sep 27, 1994 03:17 pm

PHYSICAL THERAPY                              Activity Date:  07/23/94
 1 Pat Type/Location     2 Workload Category   3 Workload Element
   I/P                     INPATIENTS            222 30 MIN TREATMENT
 4 Employee
   JONES,SALLY
    a.m.                 a.m.                 p.m.                 p.m
 1) 0000             13) 0600             25) 1200             37) 1800
 2) 0030             14) 0630             26) 1230             38) 1830
 3) 0100             15) 0700 2           27) 1300 2           39) 1900
 4) 0130             16) 0730 1           28) 1330 1           40) 1930
 5) 0200             17) 0800 1           29) 1400 1           41) 2000
 6) 0230             18) 0830 2           30) 1430 2           42) 2030
 7) 0300             19) 0900             31) 1500 1           43) 2100
 8) 0330             20) 0930 1           32) 1530 1           44) 2130
 9) 0400             21) 1000 1           33) 1600 1           45) 2200
10) 0430             22) 1030             34) 1630             46) 2230
11) 0500             23) 1100 1           35) 1700             47) 2300
12) 0530             24) 1130 1           36) 1730             48) 2330

Increment(I), decrement(D), or move(M) counts--
```

The workload displays raw counts, not weighted values. The prompt enables workload to be incremented, decremented or moved from one time period to another.

- Increment raw counts - If you enter *I* to increment counts, the following prompt displays:

  Enter time period to increment--

  Enter the option number displayed next to the desired time period. The following prompt displays:

  Enter additional count--

  Enter the number of raw counts to be added to the selected time period. The screen redisplays reflecting the adjustment. The Accept Question displays to accept the entry. If you enter **Y** for Yes, the adjustment is accepted. If you enter **N** for No, the adjustment is not accepted and the screen redisplays reflecting the original counts.

- Decrement raw counts **-** If you enter **D** to decrement counts, the following prompt displays:

  Enter time period to decrement--

  Enter the option number displayed next to the desired time period. If you select a time period that does not have any existing raw counts, the following error message *Count is zero!* displays.

After selecting a time period with existing raw counts, the following prompt displays:

Enter count to subtract--

Enter the number of raw counts to be subtracted from the selected time period. If you enter a number greater than the current number of raw counts, the following error message displays:

Error: Entry out of range!

After you enter a valid count, the screen redisplays reflecting the adjustment. The Accept Question displays to accept the entry. If you enter **Y** for Yes, the adjustment is accepted. If you enter **N** for No, the adjustment is not accepted and the screen redisplays reflecting the original counts.

- <u>Move raw counts</u> **-** If you enter **M** to move raw counts from one time period to another, the following prompt displays:

Enter time period to move/decrement--

Enter the option number of the time period from which you want to move raw counts (decrement). If a time period is selected that does not have any existing raw counts, the following error message *Count is zero!* displays.

After you select a time period with existing raw counts, the following prompt displays:

Enter count to move--

Enter the number of raw counts to be moved (decremented) from the selected time period. If you enter a number greater than the current number of raw counts, the following error message displays:

Error: Entry out of range!

After you enter a valid amount, the following prompt displays enabling entry of the time period to which the entered count is being moved (incremented):

Enter time period to increment--

Enter the time period to which the raw counts are to be moved (incremented). The screen redisplays reflecting the adjustment. The AcceptQuestion displays to accept the entry. If you enter **Y** for Yes, the adjustment is accepted. If you enter **N** for No, the adjustment is not accepted and the screen redisplays reflecting the original counts.

Impact

After you accept the screen, the following takes place:

- (Sub)department/employee totals are adjusted appropriately.
- Workload Reports printed after the adjustment are updated.
- Monthly and daily totals are updated.

WORKLOAD SUMMARY BY SUBDEPARTMENT/SHIFT

The Workload Summary by Subdepartment Report summarizes raw count and weighted value data for selected subdepartments based on the parameters entered. Workload statistics display or can be printed.

The statistics calculated show raw counts and weighted values by Workload Category and Subdepartment/Department for each selected shift within specific month(s) or a date range. The raw counts displayed/printed are identified by parentheses above the corresponding weighted value.

Upon selection, the facility is determined. If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays to allow entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if known. If you do not know the code, enter a hyphen (**-**) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed. Once the charge department is determined, the following screen displays:

```
      General Hospital Workload Summary by Sub Department/Shift Processor
                                                 Thu Sep 27, 1994 04:06 pm

PHYSICAL THERAPY
 1 Sub Department(s)      2 Month(s)               3 Start date   4 End Date
   ST,HRG,SB3,SB4,SB5                                08/01/94       08/31/94
 5 Hardcopy               6 Default Printer
   No                       Physical Therapy Census and Me
 7 Workload Categories
   Inpatients,Outpatients,Emergency Room  8 Shift(s)
   (1) Day                     Beginning 07:00am  Ending 03:00pm
   (2) Evening                 Beginning 03:00pm  Ending 11:00pm






Enter field number or '/' starting field number--
```

This screen enables entry of the criteria used to generate statistics based on Department/Subdepartment, Month(s) or Daily, Workload Categories and Shift(s). Once all necessary data has been entered, the statistics display or print at the designated location. Examples of the different formats generated are given after the field explanations for the input screen.

Field Explanations

1. SUB DEPARTMENT(S) (TABLE LOOKUP-R)
If subdepartments have been defined for the selected department, they display for selection. Up to five subdepartments can be defined and selected for one SIM department. The prompt enables selection of one or multiple subdepartments. The default contains the master SIM department code previously selected. If you press ENTER, statistics are generated for workload that is not linked to a specific subdepartment. If subdepartments have been defined, this field is required. If subdepartments have not been defined, this field is bypassed and cannot be accessed.

2. MONTH(S) (TABLE LOOKUP)
This field allows for selection of the month(s) that you want to report against. Past months with available workload data display for selection. One or multiple months can be selected for reporting. When reporting is done by months, the Start Date and End Date fields are bypassed and are not accessible. To report by date range, press ENTER to bypass the month(s) selection.

The workload statistics take on a different format when generating by month(s) verses daily (date range). When reporting by month(s), the system generates weekly averages for the entire month. Each day of the week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday) that the department is open is averaged separately so that the report shows statistics for an average Monday, Tuesday, etc. When the daily version is used, all open dates within that date range are totaled, not averaged.

The monthly version can generate eight reports; seven daily and one average for the entire month, where the daily version only generates one total for the dates selected.

3. START DATE (DATE)
Enter the start date for the desired daily report. Standard date entry routines can be used. Any date in the past with existing workload data can be entered. The default in the prompt is set to the first day of the previous month. This field isbypassed if a month was selected in the Month(S) field. If the Month(S) field is bypassed, this field is required.

4. END DATE (DATE-C)
Enter the end date for the desired daily report. Standard date entry routines can be used. Any date in the past, but not prior to the start date can be entered if workload data exists. The default in the prompt is set to the last day of the month entered in the Start Date field. This field is bypassed if an entry was made in the Month(s) field. If the Month(s) field is bypassed, this field is required.

Multiple days can be entered to receive a report showing totals for all days entered. This can be used to print summary reports by different pay periods, or a particular time period that is being monitored.

5. HARD COPY (1-A-R)
Statistical data can be displayed to the screen or printed to hard copy. The default is to print to hard copy. The format of the display and the printed version are the same. When displayed, one screen of data can be displayed at a time. When the report is printed, two screens of data are printed to each page.

6. PRINTER (TABLE LOOKUP)
This field is automatically set to the default printer associated with the requesting terminal when the screen displays. Since it is automatically set, the field is bypassed during normal field processing. It can be accessed and revised if the report needs to be generated on a different printer. If accessed, you can enter the printer code if known. If you do not know the code, enter a hyphen (-) to view a list of printers from the Spooler Reports table in STAR Patient Care. If the Hard Copy field is set to Yes, this field is required.

7. WORKLOAD CATEGORIES (TABLE LOOKUP)
The Workload Categories defined for the selected department displays for selection. You can select one or multiple categories from the table displayed. Even though you can define up to nine different categories per department, you can only select a maximum of six per report generation. As selections are made, they are highlighted. If a category is selected in error, you can enter a hyphen (-) prior to the option number to remove it. After all selections are made and verified, press ENTER.

8. SHIFT(S) (TABLE LOOKUP)
The valid departmental shifts defined in the SIM Department table display for selection. One or multiple shifts can be selected for reporting. Statistics are reported for each selected shift as well as a total for all shifts for the date(s) being reported. As selections are made, they are highlighted. If a shift is selected in error, you can enter a hyphen (-) prior to the option number to remove it. After all selections are made and verified, press ENTER.

Since statistics are reported separately for each shift, the number of shifts selected can double and triple the size of the report generated. For instance, if a department open seven days a week for three shifts generates the report monthly for all three shifts, they can expect to see 22 separate statistics displayed/printed; three for each day (seven days) plus one total for the month.

When calculating statistics by shift, the system assumes the ending time of the first shift is one minute prior to the start time of the next shift.

Impact

After you accept this screen, the following takes place:

- The message *Accumulating Statistics* displays if the report is to display.
- The message *Accumulating Statistics and Printing Report!* displays if a hard copy of a report is selected.

Output

After you accept this screen, if the Hard Copy field is set to Yes, the report generates on the printer designated in the Default Printer field. Hard copy reports contain the same information as the screen displays explained on the following pages. The only difference is that one screen of data displays, while two screens print to a page.

Daily Workload Summary Report by Subdepartment

This display format represents the Daily Workload Summary Report by Subdepartment. The Daily version of the report is given when a date range is entered in the Start Date and End Date fields discussed previously.

The example screens represent the maximum number of subdepartments and categories that can display/print per screen. This is done to fully represent space allocations. When the report is actually printed or displayed, it only includes the categories and subdepartments selected in the input screen discussed previously.

```
 Fri Sep 08, 1995 11:31 am                                              Page 1
                    Model Hospital A RESPIRATORY THERAPY (RT)
                  Workload Summary by Sub Department/Shift
                     Statistics for 08/01/96 to 09/08/96
RC  = Raw Count  WV= Weighted Value

Category             RT                PUL                    Total

INPATIENT
Day          RC       20                15                          35
0700-1300    WV      240.3             260.3                       500.6

Evening      RC      171                26                         197
1300-1900    WV     1025.8             230.4                      1316.2

Night        RC
1900-0700    WV

Total:       RC      191                41                         232
             WV     1266.1             490.7                      1756.8

Press NL--
```

The first page displays the date and time of generation, page number, facility name, SIM department description and report title. The beginning and ending dates entered in the Start Date and End Date fields display under the report title. The description of the first shift selected displays followed by the time span associated with that shift. This screen displays/prints for each shift selected. The shift description and time span displayed in the heading changes with each displayed/printed screen.

The data displayed/printed on the first page represents the totals for all dates between the start and end dates entered for the selected shift. If multiple shifts were selected, a separate screen displays/prints for each shift. For example, if three shifts were selected, the screen above would display/print three times (once for each shift) followed by a page of totals for all shifts.

Field Explanations

CATEGORY
Each selected category (maximum of six) is listed on the left side of the report. The category represents the groupings of patient types or locations. The figures displayed/ printed on each line represent the raw counts and weighted values for each subdepartment. The total for all subdepartments is listed to the right of the report.

DEPARTMENT/SUBDEPARTMENT(S)
The selected subdepartment(s) display across the top of the report. If no subdepartments were selected, the master SIM Department code is the only column printed and contains all workload data not linked to a specific subdepartment. If subdepartments were selected, each one is listed across the top of the report. The first column contains the master SIM department code, but should not be confused with the department totals listed to the right of the screen. The totals in the first column represent workload that is not linked to a specific subdepartment.

DEPT TOTAL
The raw counts and weighted values are totaled for each category for the selected shift at the right of the report.

SHIFT TOTAL
The raw counts and weighted values are totaled for each subdepartment for the selected shift at the bottom of the report.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. Once all shifts have been displayed, the totals for all selected categories and shifts by subdepartment are displayed.

The totals for all shifts for all categories are listed by subdepartment. If you press ENTER, you are returned to the workload submenu.

Monthly Workload Report by Subdepartment

The format for the Monthly Workload Reports by Subdepartment report is identical to that of the daily reports shown previously. However, the numbers on the monthly report reflect averages, where the numbers on the daily report reflect totals.

The daily report represents totals and consists of one part per shift - one for each shift for the dates entered, broken down by category and sub department. The monthly report represents averages and consists of eight parts - one for each day of the week and one for the entire month. The example provided represents average data for a typical Saturday.

As with the previous screen example, the maximum number of subdepartments and categories that can display/print per screen are listed to fully represent space allocations. When the report actually prints or displays, it only includes the categories and subdepartments selected in the input screen discussed previously.

The first page displayed when the report is generated displays the date and time of generation, page number, facility name, SIM department description and report title. The month selected displays under the report title. The day of the week, the first selected shift and time span associated with that shift displays below the month heading. This screen displays/prints for each shift selected for each day of the week the department is open. The day of the week, shift description and time span contained in the heading changes with each screen that is displayed/printed.

The data displayed/printed on the first page represents the averages by days of the week. The page displayed represents the first day in the week for the first shift selected. If multiple shifts were selected, a separate screen displays/ prints for each shift for each day of the week. For example, if three shifts were selected, the screen above displays/prints three times (once for each shift) for each day of the week (seven days). The last page of the report averages the entire month.

It is important to note that the statistics displaying for each day do not reflect the activity of a single day, but the averaged activity of all of those days in the month. For example, a report that displays the “Average Statistics for Saturday” does not reflect the activity of a single Saturday, but reflects the averaged activities of all Saturdays in the month.

The raw counts and weighted values displayed/printed are averages broken down by category and subdepartment. For specific field explanations, refer to the daily version of this report discussed previously.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. Once all shifts for that day of the week have displayed, the next day of the week is processed. After all days of the week and all selected shifts display, totals for all selected categories and shifts by subdepartment for the entire month are displayed.

The averages for all shifts for all categories are listed by subdepartment for the entire month. If you press ENTER, you are returned to the workload submenu.

WORKLOAD DETAIL BY SUBDEPARTMENT/ELEMENT

The Workload Detail by SubDepartment/Element Report contains detailed raw count and weighted value data by workload element for all or selected subdepartments, for all or selected SIM items based on the parameters entered. Workload statistics can be displayed or printed.

The statistics calculated show raw counts and weighted values by Workload Category for each selected shift within specific month(s) or date range. The raw counts are identified by parentheses () to the left of the slash mark (/). The weighted values are to the right of the slash mark (/).

The report is formatted so that the statistics displayed/printed on the left side of the page reflect data for each selected shift for each selected element (one to a page). The statistics displayed/printed on the right side of the page reflect total data for all shifts for all selected elements. This allows for easy comparisons of shift to daily totals.

In addition to enabling selection of subdepartment(s), month(s) or date range(s) and shift(s), you can select specific SIM item(s). Statistics for any workload elements linked to the selected SIM items are generated. Statistics for each element are reported separately by selected shift as described above. As with the Workload Summary by Subdepartment/Shift, selection of month(s) or a date range determines whether averages for each weekday or totals for the time period are reported.

Upon selection, the facility is determined. If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays to allow entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if known. If you do not know the code, enter a hyphen (**-**) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed. Once the charge department is determined, the following screen displays:

```
      General Hospital Workload Detail by Sub Department/Element Processor
                                              Thu Sep 27, 1994 04:06 am

PHYSICAL THERAPY
 1 Sub Department(s)      2 Month(s)               3 Start date   4 End Date
-> ST,HRG,SB3,SB4,SB5                                08/01/94       08/31/94
 5 Hardcopy               6 Default Printer                7 Sort Method
   Yes                      Physical Therapy Census and Me
 8 SIM Item(s)
   4216,9095,7000  9 Shift(s)
   (1) Day                         Beginning 07:00am  Ending 03:00pm
   (2) Evening                     Beginning 03:00pm  Ending 01:00pm







Accept this screen? (Y/N)[Y]--
```

This screen enables entry of the criteria used to generate statistics based on Department/Subdepartment, Month(s) or Daily, SIM Item and Shift(s). Once all necessary data has been entered, the statistics display or print at the designated location. Examples of the different formats generated are given after the field explanations for the input screen.

Field Explanations

1. SUB DEPARTMENT(S) (TABLE LOOKUP)

If subdepartments have been defined for the selected department, they display for selection. Up to a maximum of five subdepartments can be defined and selected for one SIM department. The prompt enables selection of one or multiple subdepartments. The default contains the master SIM department code previously selected. If you press ENTER, statistics are generated for workload not linked to a specific subdepartment. If subdepartments have been defined, this field is required. If subdepartments have not been defined, this field is bypassed and cannot be accessed.

2. MONTH(S) (TABLE LOOKUP)

This field allows for selection of the month(s) that you want to report against. Past months with available workload data display for selection. One or multiple months can be selected for reporting. When reporting is done by months, the Start Date and End Date fields are bypassed and are not accessible. To report by date range, press ENTER to bypass the month(s) selection.

Workload statistics take on a different format when generating by month(s) versus daily (date range). When reporting by month(s), the system generates weekly averages for the entire month. Each day of the week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday) that the department is open is averaged separately so that

the report shows statistics for an average Monday, Tuesday, etc. When the daily version is used, all open dates within that date range are totaled, not averaged.

You can see that the monthly version can generate eight reports; seven daily and one average for the entire month. The daily version only generates one total for the dates selected.

3. START DATE (DATE)
Enter the start date for the desired daily report. Standard date entry routines can be used. Any date in the past with existing workload data can be entered. The default in the prompt is set to the first day of the previous month. This field is bypassed if month(s) were selected in the Month(s) field. If the Month(s) field is bypassed, this field is required.

4. END DATE (DATE)
Enter the end date for the desired daily report. Standard date entry routines can be used. Any date in the past, but not prior to the start date can be entered if workload data exists. The default in the prompt is set to the last day of the month entered in the Start Date field. This field is bypassed if an entry was made in the Month(s) field. If the Month(s) field is bypassed, this field is required.

Multiple days can be entered to receive a report showing totals for all days entered. This can be used to print summary reports by different pay periods, or a particular time period that is being monitored.

5. HARDCOPY (1-A-R)
Statistical data can be displayed to the screen or printed to hard copy. The default is to print to hard copy. The format of the display and the printed version are the same. When displayed, one screen of data can be displayed at a time. When the report is printed, two screens of data are printed to each page.

6. PRINTER (TABLE LOOKUP)
This field is automatically set to the default printer associated with the requesting terminal when the screen displays. Since it is automatically set, the field is bypassed during normal field processing. It can be accessed and revised if the report needs to be generated on a different printer. If accessed, you can enter the printer code if known. If you do not know the code, enter a hyphen (**-**) to view a list of printers from the Spooler Reports table in STAR Patient Care. If the Hard Copy field is set to Yes, this field is required.

7. SORT METHOD (1-A-R)
When the report is generated, all workload elements for the selected SIM items entered in the SIM Item(s) field are included. A separate screen displays for each workload element being reported for each selected shift. This field determines whether the workload elements are sorted in code or description order. You can enter **C** or press ENTER for the report to be in code sequence. Enter **D** for the report to sequence by the element's description.

8. SIM ITEM(S) (TABLE LOOKUP)
One or multiple SIM item codes can be entered for report generation. If only one SIM item is being reported against, then the code can be entered in the prompt displayed. However, if the code is not known or you want to select multiple SIM items, you can enter a portion of the description followed by a hyphen (-). This displays a list of SIM items defined for the SIM department previously selected beginning with the characters entered. As items are selected from the displayed list they are highlighted. To remove an item selected in error, enter a hyphen (-) prior to the option number that you want to remove. Up to 25 SIM items can be selected to report against. If you select more than 25 items, the following error message displays:

Too many items selected!

9. SHIFT(S) (TABLE LOOKUP)
The valid departmental shifts as defined in the SIM Department table display for selection. One or multiple shifts can be selected for reporting. Statistics are reported for each selected shift as well as a total for all shifts for the date(s) being reported. As selections are made, they are highlighted. If a shift is selected in error, you can enter a hyphen (-) prior to the option number to remove it. After all selections are made and verified, press ENTER.

Since statistics are reported separately for each shift, the number of shifts selected can double and triple the size of the report generated. For instance, if a department that is open seven days a week for three shifts generates the report monthly for all three shifts, they can expect to see 22 separate statistics displayed/printed for each workload element linked to the selected SIM items; three for each day (seven days) plus one total for the month. If a SIM item was selected and had two workload elements linked to it, this report would display 44 pages and print 22.

When calculating statistics by shift, the system assumes the ending time of the first shift is one minute prior to the start time of the next shift.

Impact

After you accept this screen, the following takes place:

- The message *Accumulating Statistics* displays if the report is to display.
- The message *Accumulating Statistics and Printing Report!* displays if a hard copy of a report is selected.

Output

After you accept this screen, if the Hard Copy field is set to Yes, the report is generated on the printer designated in the Default Printer field. Hard copy reports contain the same information as the screen displays explained on the following pages. The only difference is that one screen of data displays, but two screens print to a page.

Daily Workload Detail Report by Subdepartment/Element

This display format represents the Daily Workload Detail Report by Subdepartment/ Element. The daily version of the report is given when a date range is entered in the Start Date and End Date fields as previously discussed.

The example screens given represent the maximum number of subdepartments and categories that can display/print per screen. This is done to fully represent space allocations. When the report actually prints or displays, it only includes the categories and subdepartments selected in the input screen discussed previously.

```
Mon Jun 24, 1996 04:14 pm                                              Page 1
                   General Hospital Respiratory Therapy (RT)
                    Workload Detail by Sub Department/Element
                      Statistics for 03/01/96 to 03/31/96
                              DAY: 07:00A to 19:00P
RC=Raw Count  WV=Weighted Value

Workload Element:  1 1 UNIT                                          WV=1.0

Element Totals and % of Selected Elements       All Selected Elements Totals

INPATIENT      RC       5           21.7%        INPATIENT      RC      23
               WV       5.0          1.8%                       WV     275.0
OUTPATIENT     RC                                OUTPATIENT     RC
               WV                                               WV
SERIES PT.     RC                                SERIES PT.     RC
               WV                                               WV
O/P IN BED     RC                                O/P IN BED     RC
               WV                                               WV
OTHER          RC                                OTHER          RC
               WV                                               WV

Press NL--
```

The first page displays the date and time of generation, page number, facility name, SIM department description and report title. The beginning and ending dates entered in the Start Date and End Date fields display under the report title. The description of the first shift selected displays followed by the time span associated with that shift. This screen displays/prints for each shift selected. The shift description and time span displayed in the heading changes with each displayed/printed screen.

The first workload element displays across the top of the screen. If the report is being generated in code order, the element code displays followed by the description. If the report is generated in description order, the element description displays first followed by the code. In either case, the associated workload unit value displays to the right of the element code and description after the Units.

The data on the first page represents the totals for all dates between the start and end dates entered for the selected shift. If multiple shifts were selected, a separate screen displays/prints for each shift. For example, if three shifts were selected, the previous screen would display/print three times (once for each shift) followed by a page of totals for all shifts.

Each screen displays two sets of statistics; Individual Element/Shift Totals and All Selected Element/Shift Totals. The left side of the screen, Individual Element/Shift Totals, displays/prints statistics separately for each selected shift and element. The right side of the screen, All Selected Element/Shift Totals, displays/prints statistical totals for all shifts combined for all selected elements.

Categories are not selected for reporting with the detail report. All workload categories defined for the department display/print. They list one after each other up to a maximum of nine. Workload raw counts (in parentheses) and weighted values for the time period entered display and print after each category. Raw counts and weighted values display/print for the selected shift displayed, as well as totals for the entire shift for all categories.

The workload value fields are blank if no information is available for that combination of category/subdepartment.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. After all shifts display for the current workload element, the next workload element displays for the first selected shift. This process continues until all selected shifts for all workload elements linked with the selected SIM items display/print.

After all elements and shifts have displayed, totals for all categories and shifts by subdepartment displayed. The totals for all shifts for all categories are listed by subdepartment. If you press ENTER, you are returned to the workload submenu.

Monthly Workload Report by Subdepartment

The format for the Monthly Workload Report by Subdepartment/Element is identical to that of the daily reports shown previously. However, the numbers on the monthly report reflect averages, where the numbers on the daily report reflect totals.

The daily report represents totals and consists of one part per shift; one for each shift for the dates entered broken down by category. The monthly report represents averages and consists of eight parts; one for each day of the week and one for the entire month.

The first page displays the date and time of generation, page number, facility name, SIM department description and report title. The month(s) selected display under the report title. The day of the week, the first selected shift and time span associated with that shift display below the month(s) heading. This screen displays/prints for each shift selected for each day of the week. The day of the week, shift description and time span contained in the head changes with each screen displayed/printed.

The data on the first page represents the averages by days of the week the department is open. The page displayed represents the first day in the week for the first shift selected. If multiple shifts were selected, a separate screen displays/prints for each shift for each day of the week. If the SIM item(s) selected have multiple workload element linked, a separate screen of data displays for each workload element for each shift. For example, if three shifts were selected and two workload elements were linked, the screen displays/prints three times (once for each shift) for each day of the week (seven days) for each workload element. The last page of the report averages the entire month for each workload element. Therefore, there would be a total of 44 pages displayed or 22 pages printed.

It is important to note that the statistics on the daily report do not reflect the activity of a single day, but the averaged activity of all of those days in the month. For example, if the report displays “Average Statistics for Saturday,” it does not reflect the activity of a single Saturday, but reflects the averaged activities of all Saturdays in the selected month(s).

The raw counts and weighted values displayed/printed are averages broken down by category. For detailed explanations on the data displayed, refer to the daily version of this report discussed previously.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. After all shifts for that day of the week for that workload element display, remaining workload elements display until all elements and shifts for that day have displayed/printed. After all data for the day displays/prints, the next day of the week is processed.

After all days of the week for all selected shifts for all linked workload elements display, totals for all categories and selected shifts by workload element for the entire month are displayed.

The averages for all shifts for all categories are listed for the entire month for each workload element. Once all selected elements display, you are returned to the workload submenu.

WORKLOAD SUMMARY BY EMPLOYEE

The Workload Summary by Employee Report summarizes raw count and weighted value data for selected resource types by subdepartment and shift. Employees and/or selected resource type(s) are listed with raw counts and weighted values for each subdepartment for each selected shift. The resource type of the employee is determined by checking the Resource field in the employee file to determine the resource code and then checking the Resource Type field in the Resource Master to determine the resource type. If an employee does not have a resource type assigned they can still be included on the report.

Statistics can be generated for multiple resource types to include all employees and/or selected resource types. Multiple month(s) or a date range can be entered to generate average statistics for the selected month(s) or daily totals for the given date range. Statistics can be generated for one or multiple shifts as well. The raw counts are identified by parentheses above the corresponding weighted value.

Upon selection, the facility is determined. If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays enabling entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if known. If you do not know the code, enter a hyphen (**-**) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed. If the selected department does not accumulate statistics at the employee level, the following message displays prior to returning you to the workload submenu:

Workload NOT captured by employee!

After the charge department is determined, the following screen displays:

```
            General Hospital Workload Summary by Employee Processor
                                                 Thu Sep 27, 1994 04:06 pm

PHYSICAL THERAPY
 1 Subdepartment(s)
   ST,HRG,SB3,SB4,SB5
 2 Month(s)              3 Start date        4 End Date
                           08/01/94            08/31/94
 5 Resource Type(s)
   THERAPIST
 6 Hardcopy              7 Default Printer
   No                      Physical Therapy Census and Me
 8 Shift(s)
     (1)  Day                     Beginning 07:00am   Ending 03:00pm
     (2)  Evening                 Beginning 03:00pm   Ending 01:00pm





Accept this screen? (Y/N) [Y]--
```

This screen enables entry of the criteria used to generate statistics based on Resource Type, Month(s) or Daily, Subdepartment and Shift(s). After all necessary data is entered, the statistics display or print at the designated location. Examples of the different formats generated are given after the field explanations for the input screen.

Field Explanations

1. SUB DEPARTMENT(S) (TABLE LOOKUP)

If subdepartments have been defined for the selected department, they display for selection. You can define and select up to five subdepartments for one SIM department. The prompt enables selection of one or multiple subdepartments. The default contains the master SIM department code previously selected. If you press ENTER, statistics are generated for workload not linked to any specific subdepartment. If subdepartments have been defined, this field is required. If subdepartments have not been defined, this field is bypassed and can not be accessed.

2. MONTH(S) (TABLE LOOKUP)

This field enables selection of the month(s) against which you want to report. Past months with available workload data display for selection. One or multiple months can be selected for reporting. When reporting is done by months, the Start Date and End Date fields are bypassed and are not accessible. To report by date range, press ENTER to bypass the month(s) selection.

Workload statistics take on a different format when generating by month(s) versus daily (date range). When reporting by month(s), the system generates weekly averages for the entire month. Each day of the week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday) that the department is open is averaged separately so that

the report shows statistics for an average Monday, Tuesday, and so on. When the daily version is used, all open dates within that date range are totaled, not averaged.

The monthly version can generate eight reports; seven daily and one average for the entire month, where the daily version only generates one total for the dates selected.

3. START DATE (DATE)
Enter the start date for the desired daily report. Standard date entry routines can be used. You can enter any date in the past with existing workload data. The default in the prompt is set to the first day of the previous month. This field is bypassed if a month was selected in the Month(s) field. If the Month(s) field is bypassed, this field is required.

4. END DATE (DATE)
Enter the end date for the desired daily report. Standard date entry routines can be used. Any date in the past, but not prior to the start date can be entered if workload data exists. The default in the prompt is set to the last available day of the month entered in the Start Date field. This field is bypassed if an entry was made in the Month(s) field. If the Month(s) field is bypassed, this field is required.

Multiple days can be entered to receive a report showing totals for all days entered. This can be used to print summary reports by different pay periods or a particular time period that is being monitored.

5. RESOURCE TYPE(S) (TABLE LOOKUP-R)
Enter the resource type associated with the employees for which you want to display/print raw counts and weighted values. The valid resource types display from the Resource Type table for selection. One or multiple items can be selected from the displayed list. When statistics are generated, employees are grouped by the resource types selected. This enables employees of the same type to be compared easily. After all employees are listed, statistics for the next resource type selected displays/prints.

6. HARD COPY (1-A-R)
Statistical data can be displayed to the screen or printed to hard copy. The default is to print to hard copy. The format of the display and the printed version are the same. When displayed, one screen of data can be displayed at a time. When the report is printed, two screens of data are printed to each page.

7. PRINTER (TABLE LOOKUP)
This field is automatically set to the default printer associated with the requesting terminal when the screen displays. Since it is automatically set, the field is bypassed during normal field processing. It can be accessed and revised if the report needs to be generated on a different printer. If accessed, you can enter the printer code if known. If you do not know the code, enter a hyphen (-) to view a list of printers from the Spooler Reports table in STAR Patient Care. If the Hard Copy field is set to Yes, this field is required.

8. SHIFT(S) (TABLE LOOKUP)
The valid departmental shifts defined in the SIM Department table display for selection. You can select one or multiple shifts for reporting. Statistics are reported for each selected shift as well as a total for all shifts for the date(s) being reported. As selections are made, they are highlighted. If a shift is selected in error, you can enter a hyphen (-) before the option number to remove it. After all selections are made and verified, press ENTER.

Since statistics are reported separately for each shift, the number of shifts selected can double and triple the size of the report generated. For instance, if a department that is open seven days a week for three shifts generates the report monthly for all three shifts, they can expect to see 22 separate statistics display/print; three for each day (seven days) plus one total for the month.

When calculating statistics by shift, the system assumes the ending time of the first shift is one minute prior to the start time of the next shift.

Impact

After you accept this screen, the following takes place:

- The message *Accumulating Statistics* displays if the report is to display.
- The message *Accumulating Statistics and Printing Report!* displays if a hard copy of a report is selected.

Output

After you accept this screen, if the Hard Copy field is set to Yes, the report is generated on the printer designated in the Default Printer field. Hard copy reports contain the same information as the screen displays explained on the following pages. The only difference is that one screen of data displays, but two screens print to a page.

Daily Workload Summary Report by Employee

This display format represents the Daily Workload Summary Report by Employee. The daily version of the report is given when a date range is entered in the Start Date and End Date fields as discussed previously.

The example screens shown represent the maximum number of resource types and/ or employees, subdepartments and shifts that can display/print per screen. This is done to fully represent space allocations. When the report actually prints or displays, it only includes the resource types, subdepartments and shifts selected in the input screen discussed above.

```
Sun Mar 03, 1996 12:17 pm                                          Page 1
                    General Hospital Respiratory Therapy (RT)
                         Workload Summary by Employee
                      Statistics for 06/01/95 to 12/31/95
                            DAY: 07:00am to 01:00pm
                                               RC=Raw Count  WV=Weighted Value
Employee
                     RT           SP           Z1           Z2          Z3          Z4
MAPLES, MARIE                         Resource Type: PHYSICIAN---------X
     RC            702           96          546          168         252          336         2100
     WC        10530.0    1440.0    8190.0    2520.0    3780.0    5040.0   31500.0

Shift Average
                   702           96          546          168         252          336         2100
               10530.0    1440.0    8190.0    2520.0    3780.0    5040.0   31500.0

Shift Total
                  702           96          546          168         252          336         2100
                 10530.0     1440.0     8190.0     2520.0     3780.0    5040.0     31500.0
```

The first page displayed when the report is generated displays the date and time of generation, page number, facility name, SIM department description, report title and resource type. The beginning and ending dates entered in the Start Date and End Date fields display under the report title. The description of the first shift selected displays followed by the time span associated with that shift.

This screen displays/prints for each selected resource type, and/or all employees for each selected shift. The resource type, shift description and time span dsplayed in the heading changes as appropriate with each displayed/printed screen. A separate page displays/prints for each resource type for each selected shift that contains data. If more employees exist for the resource type and shift than can display/print on one page, the remaining employees display/print below.

The data on the first page represents the totals for all dates between the start and end dates entered for the first selected resource type. All employees with that resource type are listed one below another for the first selected shift. For example, if three shifts were selected, the previous screen would display/print three times (once foreach shift) for each resource type selected.

Field Explanations

EMPLOYEE
The first employee with the selected resource type(s) displays/prints. The raw counts and weighted values are listed below each selected subdepartment with employee totals to the far right side of the screen. Up to a maximum of six columns display; five subdepartments and one column lists workload that is captured at the SIM department level and is not linked to a specific subdepartment.

DEPARTMENT/SUBDEPARTMENT(S)
The selected subdepartment(s) display across the top of the report. If no subdepartments were selected, the master SIM department code is the only column printed and contains all workload data not captured at the subdepartment level. If

subdepartments were selected, each one is listed across the top of the report. The first column contains the master SIM department code, but should not be confused with the department totals listed to the right of the screen. The totals in the first column represent workload that is captured at the master SIM department level, not at the specific subdepartment level.

EMP TOTAL
The raw counts and weighted values are totaled for each employee for all selected subdepartments for the currently displayed/printed shift at the right of the report.

SHIFT AVERAGE
The raw counts and weighted values for all employees for the current resource type and shift are averaged for each selected subdepartment. This enables each employee to be easily compared against the average for the shift.

SHIFT TOTAL
After all employees list for the currently displayed/printed resource type and shift, the raw counts and weighted values are totaled for each subdepartment at the bottom of the report.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. After all shifts for the current resource type display/print, the next selected resource type is processed. After all resource types and shifts display/print, totals for all selected resource types, all employees and all selected shifts by subdepartment are displayed. The totals for all shifts and employees are listed by resource type by subdepartment. If you press ENTER, you are returned to the workload submenu.

This example report represents the Daily Workload Summary Report By Employee. It includes all possibilities to represent the spacing allocation; however, when the report prints or displays, only those subdepartments selected in the definition screen shown previously display/print. There are a maximum of six columns displayed; five possible subdepartments and one for the master SIM department for workload not logged at the subdepartment level.

The Employee Workload Summary Report groups employees by resource type based on the Resource Type field of the Edit Employee Demographics function. For each resource type, the system provides individual employee statistics and overall department statistics by subdepartment and shift.

Each of the subdepartment's workload total counts and weighted values are represented by employee as appropriate. The counts are surrounded by parenthesis, and the workload weighted values display below the counts. These workload value fields are blank if no information is available for that combination of employee/ subdepartment.

If more than one resource type is selected, totals of all selected resource type's workload counts and weights display. Once all the selected resource types display, you are returned to the workload submenu.

Monthly Workload Report by Employee

The format for the Monthly Workload Reports by Employee report is identical to that of the daily reports shown previously. However, the numbers on the monthly report reflect averages, where the numbers on the daily report reflect totals.

The daily report represents totals and consists of one part per shift; one for each shift for the dates entered, broken down by employee and subdepartment. The monthly report represents averages and consists of eight parts per shift; one for each day of the week and one for the entire month.

As with the previous screen example, the maximum number of resource types, subdepartments and shifts that can display/print per screen are listed to fully represent space allocations. When the report actually prints or displays, it only includes the resource types, subdepartments and shifts selected in the input screen discussed previously.

The first page displayed when the report is generated displays the date and time of generation, page number, facility name, SIM department description and report title. The Month(s) selected displays under the report title. The day of the week, the first selected shift and time span associated with that shift display below the month heading. This screen displays/prints for each shift selected for each day of the week. The day of the week, shift description, and time span contained in the heading changes with each screen displayed/printed.

The data displayed/printed on the first page represents the averages by days of the week. The page displayed represents the first day in the week for the first shift selected. If multiple shifts were selected, a separate screen displays/prints for each shift for each day of the week. For example, if three shifts were selected, the screen above would display/print three times (once for each shift) for each day of the week (seven days) for each resource type. The last page of the report averages the entire month for all selected shifts and employees by resource type.

It is important to note that the statistics on each day displayed/printed does not reflect the activity of a single day, but the averaged activity of all of those days in the month. For example, if the report displays “Average Statistics for Saturday,” it does not reflect the activity of a single Saturday, but reflects the averaged activities of all Saturdays in the month.

The raw counts and weighted values displayed/printed are averages broken down by employee and subdepartment for each selected resource type. For specific field explanations, refer to the daily version of this report discussed previously.

Press ENTER to display the next selected shift's data if multiple shifts were selected for the current resource type. After all shifts for that day display/print for the current resource type, the next day is processed. After all days of the week for all selected shifts for the current resource type display/print, the next resource type is processed.

After all resource types, shifts, days, and employees display/ print, the totals for the month for all selected shifts by subdepartment and resource type are displayed. The averages for all employees and shifts are listed by resource type and subdepartment for the entire month. Once totals display/print for all resource types, you are returned to the workload submenu.

WORKLOAD DETAIL BY EMPLOYEE/ELEMENT

The Workload Detail by Employee/Element Report contains detailed raw count and weighted value data by element for an employee for each subdepartment selected. The employee number is determined by the link between the hospital employee file and the Resource Master. Statistics are gathered accordingly because of the security sign-on of the employee. Workload statistics can be displayed or printed.

The statistics calculated show raw counts and weighted values by employee, workload element and subdepartment for each selected shift within specific month(s) or a date range. The raw counts are identified under the Count heading and the weighted values display/print below the Units heading.

Statistics for each workload element is reported by subdepartment for each selected employee for each selected shift. As with the Workload Summary by Subdepartment/ Shift, selection of month(s) or a date range determines whether averages for each weekday or totals for the time period are reported.

Upon selection, the facility is determined. If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays to allow entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if known. If you do not know the code, enter a hyphen (**-**) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed. If the selected department does not accumulate statistics at the employee level, the following error message displays prior to returning you to the workload submenu:

Workload NOT captured by employee!

The following screen displays after you identify the department and subdepartment, if necessary:

```
        General Hospital Workload Detail by Employee/Element Processor
                                                Thu Sep 27, 1994 04:06 pm

PHYSICAL THERAPY
 1 Employee Name(s)
   BROWN,JANE S
 2 Month(s)               3 Start date        4 End Date
   June                     08/01/94            08/31/94
 5 Hardcopy               6 Default Printer
   No                       Physical Therapy Census and Me
 7 Sub Department(s)
   ST,HRG,SB3,SB4,SB5
 8 Shift(s)
     (1)  Day                      Beginning 07:00am   Ending 03:00pm
     (2)  Evening                  Beginning 03:00pm   Ending 11:00pm





 Accept this screen? (Y/N) [Y]--
```

This screen enables entry of the criteria used to generate statistics based on Employee(s), Month(s) or Daily, Subdepartment(s) and Shift(s). After all necessary data is entered, the statistics display or print at the designated location. Examples of the different formats generated are given after the field explanations for the input screen.

Field Explanations

1. EMPLOYEE NAME(S) (TABLE LOOKUP)

If you are reporting statistics for one employee, you can enter that employee's System ID Number or their employee number preceded by an asterisk (*). The employee's name displays. If the employee's numbers are not known or you want to report statistics for several employees, you can enter a portion of the employee's name (beginning with the last) followed by a hyphen (-) to view and select from a list of employees. The prompt displayed enables selection of one or multiple displayed employees. As selections are made, they are highlighted in dim reverse video. Selections made in error can be removed by entering the option number preceded by a hyphen (-). The selected employee's names display as space allows. If you want to report statistics for all employees, enter **A**. If you enter **A**, an additional prompt displays enabling you to indicate if you want to include inactive employees.

2. MONTH(S) (TABLE LOOKUP)

This field enables selection of the month(s) against which you want to report. Past months with available workload data display for selection. One or multiple months can be selected for reporting. When reporting is done by months, the Start Date and End Date fields are bypassed and are not accessible. To report by date range, press ENTER to bypass the month(s) selection.

Workload statistics take on a different format when generating by month(s) versus daily (date range). When reporting by month(s), the system generates weekly averages for the entire month. Each day of the week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday) that the department is open is averaged separately so that the report shows statistics for an average Monday, Tuesday, etc. When the daily version is used, all open dates within that date range are totaled.

The monthly version can generate eight reports; seven daily and one average for the entire month for each selected shift, where the daily version only generates one total for the dates selected for each selected shift.

3. START DATE (DATE)
Enter the start date for the desired daily report. Standard date entry routines can be used. Any date in the past with existing workload data can be entered. The default in the prompt is set to the first day of the previous month. This field isbypassed if a month was selected in the Month(s) field. If the Month(s) field is bypassed, this field is required.

4. END DATE (DATE)
Enter the end date for the desired daily report. Standard date entry routines can be used. Any date in the past, but not prior to the start date can be entered if workload data exists. The default in the prompt is set to the last day of the month entered in the Start Date field. This field is bypassed if an entry was made in the Month(S) field. If the Month(s) field is bypassed, this field is required.

Multiple days can be entered to receive a report showing totals for all days entered. This can be used to print summary reports by different pay periods or a particular time period that is being monitored.

5. HARDCOPY (1-A-R)
Statistical data can be displayed to the screen or printed to hard copy. The default is to print to hard copy. The format of the display and the printed version are the same. When displayed, one screen of data can be displayed at a time. When the report is printed, two screens of data are printed to each page.

6. PRINTER (TABLE LOOKUP)
This field is automatically set to the default printer associated with the requesting terminal when the screen displays. Since it is automatically set, the field is bypassed during normal field processing. This field can be accessed and revised if the report needs to be generated on a different printer. If accessed, you can enter the printer code if known. If you do not know the code, enter a hyphen (-) to view a list of printers from the Spooler Reports table in STAR Patient Care. If the Hard Copy field is set to Yes, this field is required.

7. SUB DEPARTMENT(S) (TABLE LOOKUP)
If subdepartments have been defined for the selected department, they display for selection. Up to a maximum of five subdepartments can be defined and selected for one SIM department. The prompt enables selection of one or multiple subdepartments. The default contains the master SIM department code previously

selected. If you press ENTER, statistics are generated for workload not linked to any specific subdepartment. If subdepartments have been defined, this field is required. If subdepartments have not been defined, this field is bypassed and can not be accessed.

8. SHIFT(S) (TABLE LOOKUP)
The valid departmental shifts as defined in the SIM Department table display for selection. One or multiple shifts can be selected for reporting. Statistics are reported for each selected shift as well as a total for all shifts for the date(s) being reported. As selections are made, they are highlighted. If a shift is selected in error, you can enter a hyphen (-) prior to the option number to remove it. After all selections are made and verified, press ENTER.

Since statistics are reported separately for each shift, the number of shifts selected can double and triple the size of the report generated. For instance, if a department that is open seven days a week for three shifts generates the report monthly for all three shifts, they can expect to see 22 separate statistics displayed/printed; three for each day (seven days) plus one total for the month.

When calculating statistics by shift, the system assumes the ending time of the first shift is one minute prior to the start time of the next shift.

Impact

After you accept this screen, the following takes place:

- The message *Accumulating Statistics* displays if the report is to display.
- The message *Accumulating Statistics and Printing Report!* displays if a hard copy of a report is selected.

Output

After you accept this screen, if the Hard Copy field is set to Yes, the report generates on the printer designated in the Default Printer field. Hard copy reports contain the same information as the screen displays explained below. The only difference is that one screen displays where two pages of data print to a page.

Daily Workload Detail Report by Employee/Element

This display format represents the Daily Workload Detail Report by Employee/ Element. The daily version of the report is given when a date range is entered in the Start Date and End Date fields as previously discussed.

The example screens represent the maximum number of subdepartments and employees that can display/print per screen. This is done to fully represent space allocations. When the report actually prints or displays, it only includes the subdepartments and employees selected in the input screen discussed previously.

```
 Tue Mar 19,1996 07:18am
                 General Hospital Respiratory Therapy (RT)
              Workload Detail by Employee/Element - Lang,Alice
                            Statistics for June
               Average Statistics for Friday DAY: 0700 to 1400

Sub Dept.  Workload Element Code/Description    Raw Count  Weighted Value
RT           300.1   Therapist Treatment Time....x      500.0     999999.9
             987.6   Aerosol Treatment...........x        1.0          1.0
                          Sub Department Total          500.0    1000000.0

SSP          555     SOMEUNIT....................x       10.0        100.2
              10     PATIENT PREPARATION.........x       15.0        300.0
                          Sub Department Total           25.0        400.2

PFT          200.5   Patient Training.............x     1234.0     123456.8
             222.4   Documentation................x     4321.0     123456.8
                          Sub Department Total          5555.0     246913.6

Shift Total                                             5807.0     1247313.8

Press NL--
```

The first page displays the date and time of generation, page number, facility name, SIM department description and report title. The beginning and ending dates entered in the Start Date and End Date fields display under the report title. The description of the first shift selected displays followed by the time span associated with that shift. This screen displays/prints for each shift selected. The shift description and time span displayed in the heading changes with each displayed/printed screen.

Statistics for each selected employee display/print for each selected subdepartment with data to report. Each workload element defined for that subdepartment lists followed by the raw counts (COUNT) and weighted values (UNITS) for the displayed employee on the current shift. The total for the subdepartment and shift are listed below the COUNT and UNITS headers at the bottom of the screen.

The data displayed/printed on the first page represents the totals for all dates between the start and end dates entered for the selected shift. If multiple shifts were selected, a separate screen displays/prints for each shift. For example, if three shifts were selected, the previous screen would display/print three times (once for each shift) for each employee.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. After all shifts display for the current employee and subdepartment, the next employee displays for the first selected shift. This process continues until all selected shifts for all employees and subdepartments display.

After all employees, subdepartments and shifts display, totals for all employees, subdepartments and shifts are displayed. The screen displays the totals for all shifts for all employees, subdepartments and shifts. If you press ENTER, you are returned to the workload submenu.

Monthly Workload Report by Employee/Element

The format for the Monthly Workload Report by Employee/Element is identical to that of the daily report shown previously. However, the numbers on the monthly report reflect averages, where the numbers on the daily report reflect totals.

The daily report represents totals and consists of one part per shift; one for each shift for the dates entered. The monthly report represents averages and consists of eight parts per shift; one for each day of the week and one for the entire month.

The first page displays the date and time of generation, page number, facility name, SIM department description and report title. The month(s) selected displays under the report title. The day of the week, the first selected shift and time span associated with that shift display below the month(s) heading. This screen displays/prints for each shift selected for each day of the week. The day of the week, shift description and time span contained in the head changes with each screen displayed/printed.

The data displayed/printed on the first page represents the averages by days of the week. The page displayed represents the first day in the week for the first shift selected. If multiple shifts were selected, a separate screen displays/ prints for each shift for each day of the week. If multiple employees were selected, a separate screen of data displays for each employee for each shift. For example, if three shifts were selected and two workload elements were linked, the previous screen would display/ print three times (once for each shift) for each day of the week (seven days) for each employee. The last page of the report averages the entire month for each workload element. Therefore, there would be a total of 44 pages displayed and 22 pages printed for each employee.

It is important to note that the statistics on the daily report do not reflect the activity of a single day, but the averaged activity of all of those days in the month. For example, if the report displays “Average Statistics for Saturday,” it does not reflect the activity of a single Saturday, but reflects the averaged activities of all Saturdays in the selected month(s).

The raw counts and weighted values displayed/printed are averages broken by subdepartment and workload elements in thatsubdepartment for the current employee and shift. For detailed explanations on the data displayed, refer to the daily version of this report discussed previously.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. After all shifts for that day of the week for the current employee and subdepartment display, the next selected employee displays beginning with the first selected shift and subdepartment. After all days, subdepartments, workload elements and shifts display for the current employee, the next selected employee is processed.

After all days of the week for all selected employees, shifts and subdepartments display, totals for each employee for the entire month are displayed. The total averages for all subdepartments and shifts are listed for the entire month for each employee. After all employees are listed, you are returned to the workload submenu.

WORKLOAD SUMMARY BY GROUP

The Workload Summary by Group Report summarizes raw count and weighted value data for selected subdepartments by workload element groups based on the parameters entered.

When workload elements are defined, the department also has the capability of establishing groups in the Workload Group table for each SIM department. This enables the department to group similar workload elements so that they can be further studied and reported against.

The statistics calculated show raw counts and weighted values by Workload Group and Subdepartment/Department for each selected shift within specific month(s) or a date range. The raw counts are identified by parentheses above the corresponding weighted value.

Upon selection, the facility is determined. If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays to allow entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if known. If you do not know the code, enter a hyphen (-) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, then that department is assumed and this prompt is bypassed. Once the charge department is determined, the following screen displays:

```
              General Hospital Workload Summary by Group Processor
                                                  Thu Sep 27, 1994 04:06 pm

PHYSICAL THERAPY
 1 Sub Department(s)      2 Month(s)               3 Start date   4 End Date
   ST,HRG,SB3,SB4,SB5                                 08/01/94       08/31/94
 5 Hardcopy     6 Default Printer                  7 Element Group
   No             Physical Therapy Census and Me      Patient Treatments
 8 Workload Categories
   Inpatients,Outpatients,Series,Reh Inp,Reh Out, Emergency, Home Health, Other
 9 Shift(s)
     (1)  Day                    Beginning 07:00am   Ending 03:00pm
     (2)  Evening                Beginning 03:00pm   Ending 01:00pm





Accept this screen? (Y/N) [Y]--
```

This screen enables entry of the criteria used to generate statistics based on Subdepartment, Month(s) or Daily, Workload Group, Workload Categories and

Shift(s). After all necessary data is entered, the statistics display or print at the designated location. Examples of the different formats generated are given after the field explanations for the input screen.

1. SUB DEPARTMENT(S) (TABLE LOOKUP)

If subdepartments are defined for the selected department, they display for selection. Up to a maximum of five subdepartments can be defined and selected for one SIM department. The prompt enables selection of one or multiple subdepartments. The default contains the master SIM department code previously selected. If you press ENTER, statistics are generated for workload that is not linked to a specific subdepartment. If subdepartments have been defined, this field is required. If subdepartments have not been defined, this field is bypassed and cannot be accessed.

2. MONTH(S) (TABLE LOOKUP)

This field allows for selection of the month(s) against which you want to report. Past months with available workload data display for selection. One or multiple months can be selected for reporting. When reporting is done by months, the Start Date and End Date fields are bypassed and are not accessible. To report by date range, press ENTER to bypass the month(s) selection.

The workload statistics take on a different format when generating by month(s) versus daily (date range). When reporting by month(s), the system generates weekly averages for the entire month. Each day of the week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday) that the department is open is averaged separately so that the report shows statistics for an average Monday, Tuesday, etc. When the daily version is used, all open dates within that date range are totaled.

The monthly version can generate eight reports; seven daily for each shift and one average for the entire month. The daily version only generates one for each shift and one for the total.

3. START DATE (DATE)

Enter the start date for the desired daily report. Standard date entry routines can be used. Any date in the past with existing workload data can be entered. The default in the prompt is set to the first day of the previous month. This field isbypassed if a month was selected in the Month(s) field. If the Month(s) field is bypassed, this field is required.

4. END DATE (DATE)

Enter the end date for the desired daily report. Standard date entry routines can be used. Any date in the past, but not prior to the start date can be entered if workload data exists. The default in the prompt is set to the last day of the month entered in the Start Date field. This field is bypassed if an entry was made in the Month(s) field. If the Month(s) field is bypassed, this field is required.

Multiple days can be entered to receive a report showing totals for all days entered. This can be used to print summary reports by different pay periods, or a particular time period that is being monitored.

5. HARDCOPY (1-A-R)
Statistical data can be displayed to the screen or printed to hard copy. The default is to print to hard copy. The format of the display and the printed version are the same. When displayed, one screen of data can be displayed at a time. When the report is printed, two screens of data are printed to each page.

6. PRINTER (TABLE LOOKUP)
This field is automatically set to the default printer associated with the requesting terminal when the screen displays. Since it is automatically set, the field is bypassed during normal field processing. This field can be accessed and revised if the report needs to be generated on a different printer. If accessed, you can enter the printer code if known. If you do not know the code, enter a hyphen (-) to view a list of printers from the Spooler Reports table in STAR Patient Care. If the Hard Copy field is set to Yes, this field is required.

7. ELEMENT GROUP (TABLE LOOKUP)
The Workload Element Group code can be entered if it is known. If you do not know the code, enter a hyphen (-) to display a list of workload element groups. The prompt enables selection of one of the displayed element groups.

8. WORKLOAD CATEGORIES (TABLE LOOKUP)
The Workload Categories defined for the selected department display for selection. You can select one or multiple categories from the table displayed. Even though you can define up to nine different categories per department, you can only select a maximum of six per report generation. As selections are made, they are highlighted. If a group is selected in error, you can enter a hyphen (-) prior to the option number to remove it. After all selections are made and verified, press ENTER.

9. SHIFT(S) (TABLE LOOKUP)
The valid departmental shifts defined in the SIM Department table display for selection. One or multiple shifts can be selected for reporting. Statistics are reported for each selected shift as well as a total for all shifts for the date(s) being reported. As selections are made, they are highlighted. If a shift is selected in error, you can enter a hyphen (-) prior to the option number to remove it. After all selections are made and verified, press ENTER.

Since statistics are reported separately for each shift, the number of shifts selected can double and triple the size of the report generated. For instance, if a department which is opened seven days a week for three shifts generates the report monthly for all three shifts, they can expect to see 22 separate statistics displayed/printed; three for each day (seven days) plus one total for the month.

When calculating statistics by shift, the system assumes the ending time of the first shift is one minute before the start time of the next shift.

Impact

After you accept this screen, the following takes place:

- The message *Accumulating Statistics* displays if the report is to display.
- The message *Accumulating Statistics and Printing Report!* displays if a hard copy of a report is selected.

Output

After you accept this screen, if the Hard Copy field is set to Yes, the report generates on the printer designated in the Default Printer field. Hard copy reports contain the same information as the screen displays explained below. The only difference is that one page of data displays to a screen, and two screens of data print on one page.

Daily Workload Summary Report By Group

This display format represents the Daily Workload Summary Report by Group. The daily version of the report is given when a date range is entered in the Start Date and End Date fields as discussed previously.

The example screens given represent the maximum number of subdepartments and categories that can display/print per screen. This is done to fully represent space allocations. When the report actually prints or displays, it only includes the categories and subdepartments selected in the input screen discussed previously.

```
 Fri Sep 08, 1996 11:31 am                                              Page 1
                    General Hospital Respiratory Therapy (RT)
                  Workload Summary by Group- Patient Treatment
                      Statistics for 08/01/96 to 09/08/96
RC= Raw Count  WV= Weighted Value

Category             RT                 PUL                     Total

INPATIENT
Day         RC       20                  15                             35
0700-1300   WV      240.3               260.3                          500.6

Evening     RC      171                  26                            197
1300-1900   WV     1025.8               230.4                         1316.2

Night       RC
1900-0700   WV

Total:      RC      191                  41                            232
            WV     1266.1               490.7                         1756.8
```

The first page displays the date and time of generation, page number, facility name, SIM department description, report title and the selected Workload Group. The beginning and ending dates entered in the Start Date and End Date fields display under the report title. The description of the first shift selected displays followed by the time span associated with that shift. This screen displays/prints for each shift selected.

The shift description and time span displayed in the heading changes with each displayed/printed screen.

The data displayed/printed on the first page represents the totals for all dates between the start and end dates entered for the first selected shift. If multiple shifts were selected, a separate screen displays/prints for each shift. For example, if three shifts were selected, the screen above would display/print three times (once for each shift) followed by a page of totals for all shifts.

Field Explanations

CATEGORY
Each selected category (maximum of six) is listed on the left side of the report. The category represents the groupings of patient types or locations. The figures displayed/printed on each line represent the raw counts and weighted values for each subdepartment. The total for all subdepartments is then listed to the right of the report.

The raw counts are surrounded by parenthesis () and the workload weighted values are displayed below the raw counts. These workload value fields are blank if no information is available for that combination of category/subdepartment.

DEPARTMENT/SUBDEPARTMENT(S)
The selected subdepartment(s) display across the top of the report. If no subdepartments were selected, the master SIM department code is the only column printed and contains all workload data not linked to a subdepartment. If subdepartments were selected, each one is listed across the top of the report. The first column contains the master SIM department code, but should not be confused with the department totals listed to the right of the screen. The totals in the first column represent workload that is not linked to a specific subdepartment.

DEPT TOTAL
The raw counts and weighted values are totaled for each category for the selected shift at the right of the report.

SHIFT TOTAL
The raw counts and weighted values are totaled for each subdepartment for the selected shift at the bottom of the report.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. After all shifts display, totals for all selected categories and shifts by subdepartment are displayed. The totals for all shifts for all categories are listed by subdepartment. If you press ENTER, you are returned to the workload submenu.

Monthly Workload Report by Group

The format for the Monthly Workload Reports by Group is identical to that of the daily reports shown previously. However, the numbers on the monthly report reflect averages, where the numbers on the daily report reflect totals.

The daily report represents totals and consists of one part per shift; one for each shift for the dates entered, broken down by category and subdepartment. The monthly report represents averages and consists of eight parts; one for each day of the week and one for the entire month. The example provided represents average data for a typical Saturday.

As with the previous screen example, the maximum number of subdepartments and categories that can display/print per screen are listed to fully represent space allocations. When the report actually prints or displays, it only includes the categories and subdepartments selected in the input screen discussed previously.

The first page displayed when the report is generated displays the date and time of generation, page number, facility name, SIM department description, report title and workload group selected. The month selected displays under the report title. The day of the week, the first selected shift and time span associated with that shift displays below the month heading. This screen displays/prints for each shift selected for each day of the week the department is open. The day of the week, shift description and time span contained in the heading changes as each screen displays/prints.

The data displayed/printed on the first page represents the averages by days of the week. The page represents the first day in the week for the first shift selected. If multiple shifts were selected, a separate screen displays/prints for each shift for each day of the week. For example, if three shifts were selected, the screen above would display/print three times (once for each shift) for each day of the week (seven days). The last page of the report averages the entire month.

It is important to note that the statistics on each day's report do not reflect the activity of a single day, but the averaged activity of all of those days in the month. For example, if the report displays “Average Statistics for Saturday,” it does not reflect the activity of a single Saturday, but reflects the averaged activities of all Saturdays in the month.

The raw counts and weighted values displayed/printed are averages broken down by category and subdepartment. For specific field explanations, refer to the daily version of this report discussed previously.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. After all shifts for that day of the week display, the next day of the week is processed.

After all days of the week and all selected shifts display, totals for all selected categories and shifts by subdepartment for the entire month are displayed. The averages for all shifts for all categories are listed by subdepartment for the entire month. If you press ENTER, you are returned to the workload submenu.

WORKLOAD DETAIL BY GROUP/ELEMENT

The Workload Detail by Group/Element Report contains detailed raw count and weighted value data by workload element for all or selected subdepartments, for all or selected workload groups based on the parameters entered. Workload statistics can be displayed or printed.

The statistics calculated show raw counts and weighted values by Workload Category for each selected shift within specific month(s) or date range. The raw counts are identified by parentheses to the left of the slash (/). The weighted values are to the right of the slash (/).

The report is formatted so that the statistics displayed/printed on the left side of the page reflect data for each selected shift (one to a page). The statistics displayed/ printed on the right side of the page reflect total data for all shifts. This allows for easy comparisons of shift to daily totals.

In addition to allowing selection of subdepartment(s), month(s) or date range(s), and shift(s), you select a specific workload group. Statistics for any workload elements defined in the selected group generate. Statistics for each element are reported separately by selected shift as described previously. As with the Workload Summary by Group, selection of month(s) or a date range determines whether averages for each weekday or totals for the time period are reported.

Upon selection, the facility is determined. If this terminal can access more than one facility, as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays to allow entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if it is known. If you do not know the code, enter a hyphen (**-**) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed. The following screen displays after you identify the department/subdepartment if necessary:

```
             General Hospital Workload Detail by Group Processor
                                                 Thu Sep 27, 1994 04:06pm

Speech and Audiology
 1 Sub Department(s)      2 Month(s)            3 Start Date     4 End Date
   SP,ST,HRG,SB3,SB4,SB5                          08/01/94         08/31/94
 5 Hardcopy     6 Default Printer                                7 Sort Method
   No              Physical Therapy Census and ME                  Element Code
 8 Element Group
   Treatment Hours
 9 Shift(s)
     (1)  Day               Beginning 7:00 am   Ending 4:00 pm
     (2)  Evening           Beginning 7:00 pm   Ending 11:00pm





Accept this screen? (Y/N) [Y]--
```

This screen enables entry of the criteria used to generate statistics based on Department/Subdepartment, Month(s) or Daily, Workload Group and Shift(s). After all necessary data is entered, the statistics display or print at the designated location. Examples of the different formats generated are given after the field explanations for the input screen.

Field Explanations

1. SUB DEPARTMENT(S) (TABLE LOOKUP)
If subdepartments are defined for the selected department, they display for selection. Up to a maximum of five subdepartments can be defined and selected for one SIM department. The prompt enables selection of one or multiple subdepartments. The default contains the master SIM department code previously selected. If you press ENTER, statistics are generated for workload not linked to a specific subdepartment. If subdepartments have been defined, this field is required. If subdepartments have not been defined, this field is bypassed and can not be accessed.

2. MONTH(S) (TABLE LOOKUP)
This field enables for selection of the month(s) against which you want to report. Past months with available workload data display for selection. One or multiple months can be selected for reporting. When reporting is done by months, the Start Date and End Date fields are bypassed and are not accessible. To report by date range, press ENTER to bypass the month(s) selection.

Workload statistics take on a different format when generating by month(s) versus daily (date range). When reporting by month(s), the system generates weekly averages for the entire month. Each day of the week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday) that the department is open is averaged separately so that

the report shows statistics for an average Monday, Tuesday, and so on. When the daily version is used, all open dates within that date range are totaled, not averaged.

The monthly version can generate eight reports; seven daily and one average for the entire month, where the daily version only generates one total for the dates selected.

3. START DATE (DATE)
Enter the start date for the desired daily report. Standard date entry routines can be used. Any date in the past with existing workload data can be entered. The default in the prompt is set to the first day of the previous month. This field is bypassed if month(s) were selected in the Month(s) field. If the Month(s) field is bypassed, this field is required.

4. END DATE (DATE)
Enter the end date for the desired daily report. Standard date entry routines can be used. Any date in the past, but not prior to the start date can be entered if workload data exists. The default in the prompt is set to the last day of the month entered in the Start Date field. This field is bypassed if an entry was made in the Month(s) field. If the Month(s) field is bypassed, this field is required.

Multiple days can be entered to receive a report showing totals for all days entered. This can be used to print summary reports by different pay periods, or a particular time period that is being monitored.

5. HARDCOPY (1-A-R)
Statistical data can be displayed to the screen or printed to hard copy. The default is to print to hard copy. The format of the display and the printed version are the same. When displayed, one screen of data can be displayed at a time. When the report is printed, two screens of data are printed to each page.

6. PRINTER (TABLE LOOKUP)
This field is automatically set to the default printer associated with the requesting terminal when the screen displays. Since it is automatically set, the field is bypassed during normal field processing. It can be accessed and revised if the report needs to be generated on a different printer. If accessed, you can enter the printer code if it is known. If you do not know the code, enter a hyphen (**-**) to view a list of printers from the Spooler Reports table in STAR Patient Care. If the Hard Copy field is set to Yes, this field is required.

7. SORT METHOD (1-A-R)
When the report is generated, all workload elements for the selected SIM items entered in the SIM Item(s) field are included. A separate screen displays for each workload element being reported for each selected shift. This field determines whether the workload elements are sorted in code or description order. Enter **C** or press ENTER for the report to be in Code sequence. Enter **D** for the report to sequence by the element's description.

8. ELEMENT GROUP (TABLE LOOKUP)
The workload element group code can be entered if it is known. If you do not know the code, enter a hyphen (-) to display a list of workload element groups. The prompt enables selection of one displayed element group.

9. SHIFT(S) (TABLE LOOKUP)
The valid departmental shifts as defined in the SIM Department table display for selection. One or multiple shifts can be selected for reporting. Statistics are reported for each selected shift as well as a total for all shifts for the date(s) being reported. As selections are made, they are highlighted. If a shift is selected in error, you can enter a hyphen (-) prior to the option number to remove it. After all selections are made and verified, press ENTER.

Since statistics are reported separately for each shift, the number of shifts selected can double and triple the size of the report generated. For instance, if a department that is open seven days a week for three shifts generates the report monthly for all three shifts, they can expect to see 22 separate statistics display/print for each workload element linked to the selected workload group; three for each day (seven days) plus one total for the month. If the selected workload group has two workload elements linked to it, then this report would display 44 pages and print 22.

When calculating statistics by shift, the system assumes the ending time of the first shift is one minute prior to the start time of the next shift.

Impact

After you accept this screen, the following takes place:

- The message *Accumulating Statistics* displays if the report is to display.
- The message *Accumulating Statistics and Printing Report!* displays if a hard copy of a report is selected.

Output

After you accept this screen, if the Hard Copy field is set to Yes, the report is generated on the printer designated in the Default Printer field. Hard copy reports contain the same information as the screen displays explained below. The only difference is that one screen displays, but two screens print to a page.

Daily Workload Detail Report By Group/Element

This display format represents the Daily Workload Detail Report by Group/Element. The daily version of the report is given when a date range is entered in the Start Date and End Date fields as discussed previously.

The example screens given represent the maximum number of subdepartments and categories that can display/print per screen. This is done to fully represent space allocations. When the report actually prints or displays, it only includes the categories and subdepartments selected in the input screen discussed previously.

```
Fri Sep 08, 1996 12:35 pm                                           Page 1
                      General Hospital Respiratory Therapy (RT)
                        Workload Detail by Group/Element - RT
                      Statistics for 07/01/95 to 07/31/95
                            Day: 07:00am to 15:00pm
R C= Raw Count     WV= Weighted Value

Workload Element: 1 1 Unit                                    WV = 1.0

         Shift Totals                    Selected Elements All Shifts

Inpatient         RC           80          Inpatient      RC           100
                  WV          120                         WV           200

Outpatient        RC           20          Outpatient     RC            60
                  WV           40                         WV           120

Series            RC           30          Series         RC            40
                  WV           70                         WV            80

Reh Inp           RC            0          Reh Inp        RC             0
                  WV            0                         WV             0

Shift totals:     RC          130    All Shift Totals:    RC           200
                  WV          23                          WV           400
```

The first page displays the date and time of generation, page number, facility name, SIM department description report title and element group code/description. The beginning and ending dates entered in the Start Date and End Date fields display under the Element Group. The description of the first shift selected displays followed by the time span associated with that shift. This screen displays/prints for each shift selected. The shift description and time span displayed in the heading changes with each displayed/printed screen.

The first workload element displays across the top of the screen. If the report is being generated in code order, the element code displays followed by the description. If the report is generated in description order, the element description displays followed by the code. In either case, the associated workload unit value displays to the right of the element code and description after Units.

The data on the first page represents the totals for all dates between the start and end dates entered for the selected shift. If multiple shifts were selected, a separate screen displays/prints for each shift. For example, if three shifts were selected, the screen above displays/prints three times (once for each shift) followed by a page of totals for all shifts.

Each screen displays two sets of statistics; Individual Element/Shift Totals and All Selected Element/Shift Totals. The left side of the screen, Individual Element/Shift Totals, displays/prints statistics separately for each selected shift and element. The right side of the screen, All Selected Element/Shift Totals, displays/prints statistical totals for all shifts combined for all selected elements.

Categories are not selected for reporting with the detail report. All workload categories defined for the department display/print. They list one after each other up to a maximum of nine. Workload raw counts (in parentheses) and weighted values for the time period entered display and print after each category. Raw counts and weighted values display/print for the selected shift being displayed as well as totals for the entire shift for all categories.

The workload value fields are blank if no information is available for that combination of category/subdepartment.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. After all shifts display for the current workload element, the next workload element displays for the first selected shift. This process continues until all selected shifts for all workload elements linked with the selected Element Group display/print.

After all elements and shifts display, totals for all categories and shifts by subdepartment are displayed. The totals for all shifts for all categories are listed by subdepartment. If you press ENTER, you are returned to the workload submenu.

Monthly Workload Report By Group/Element

The format for the Monthly Workload Report by Group/Element is identical to that of the daily reports shown previously. However, the numbers on the monthly report reflect averages, where the numbers on the daily report reflect totals.

The daily report represents totals and consists of one part per shift; one for each shift for the dates entered, broken down by category. The monthly report represents averages and consists of eight parts - one for each day of the week and one for the entire month.

The first page displays the date and time of generation, page number, facility name, SIM department code, report title and element group code/description. The month(s) selected displays under the element group. The day of the week, the first selected shift and time span associated with that shift display below the month(s) heading. This screen displays/prints for each shift selected for each day of the week. The day of the week, shift description and time span contained in the heading changes with each screen displayed/printed.

The data on the first page represents the averages by days of the week the department is open. The page represents the first day in the week for the first shift selected. If multiple shifts were selected, a separate screen displays/prints for each shift for each day of the week. A separate screen of data displays for each workload element defined in the selected workload group for each shift. For example, if three shifts were selected and two workload elements were linked, the previous screen would display/

print three times (once for each shift) for each day of the week (seven days) for each workload element. The last page of the report averages the entire month for each workload element. Therefore, there would be a total of 44 pages displayed or 22 pages printed.

It is important to note that the statistics on the daily report do not reflect the activity of a single day, but the averaged activity of all of those days in the month. For example, if the report displays “Average Statistics for Saturday,” it does not reflect the activity of a single Saturday, but reflects the averaged activities of all Saturdays in the selected month(s).

The raw counts and weighted values displayed/printed are averages broken down by category. For detailed explanations on the data displayed, refer to the daily version of this report discussed previously.

The prompt enables you to press ENTER to display the next selected shift's data if multiple shifts were selected. After all shifts for that day of the week for that workload element display, remaining workload elements display until all elements and shifts for that day display/print. After all data for the day displays/prints, the next day of the week is processed.

After all days of the week for all selected shifts for all linked workload elements display, totals for all categories and selected shifts by workload element for the entire month are displayed. The averages for all shifts for all categories are listed for the entire month for each workload element. Once all selected elements display, you are returned to the workload submenu.

WORKLOAD PEAK ANALYSIS

The Workload Peak Analysis report summarizes raw counts and weighted value data for selected subdepartments by hour based on the parameters entered. This is the only workload report that can be used to display statistics for the current day. Workload statistics can be displayed or printed.

The statistics calculated show raw counts and weighted values by Workload Category and Subdepartment/Department within specific month(s) or date range. The raw counts are identified by parentheses above the corresponding weighted value.

Upon selection, the facility is determined. If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays to allow entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if it is known. If you do not know the code, enter a hyphen (-) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and the prompt bypassed. Once the charge department is determined, the following screen displays:

```
              General Hospital Workload Peak Analysis Processor
                                           Thu Sep 27, 1994 04:06 pm

PHYSICAL THERAPY
 1 Sub Department(s)      2 Month(s)               3 Start date   4 End Date
   PT1                                               08/01/94       08/31/94
 5 Hardcopy               6 Default Printer
   No                       Physical Therapy Census and Me
 7 Workload Categories
   CLINIC
   INPATIENTS,OUTPATIENTS,SERIES,REH INP








Enter field number or '/' starting field number--
```

This screen enables entry of the criteria used to generate statistics based on Department/Subdepartment, Month(s) or Daily and Workload Categories. After all necessary data is entered, the statistics display or print at the designated location. Examples of the different formats generated are given after the field explanations for the input screen.

Field Explanations

1. SUB DEPARTMENT(S) (TABLE LOOKUP)

If subdepartments have been defined for the selected department, they display for selection. Up to a maximum of five subdepartments can be defined and selected for one SIM department. The prompt enables selection of one or multiple subdepartments. The default contains the master SIM department code previously selected. If you press ENTER, statistics are generated for workload that is not linked to a specific subdepartment. If subdepartments have been defined, this field is required. If subdepartments have not been defined, this field is bypassed and cannot be accessed.

2. MONTH(S) (TABLE LOOKUP)

This field enables selection of the month(s) against which you want to report. Past months with available workload data display for selection. One or multiple months can be selected for reporting. When reporting is done by months, the Start Date and End Date fields are bypassed and are not accessible. To report by date range, press ENTER to bypass the month(s) selection.

The workload statistics take on a different format when generating by month(s) verses daily (date range). When reporting by month(s), the system generates weekly averages for the entire month. Each day of the week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday) that the department is open is averaged separately so that the report shows statistics for an average Monday, Tuesday, and so on. When the daily version is used, each day within that date range is reported separately.

The monthly version can generate eight reports; seven daily and one average for the entire month, where the daily version only generates one for each of the dates selected.

3. START DATE (DATE)

Enter the start date for the desired daily report. Standard date entry routines can be used. The current date or any date in the past with existing workload data can be entered. The default in the prompt is set to the first day of the current month. This field is bypassed if a month(s) was selected in the Month(s) field. If the Month(s) field is bypassed, this field is required.

4. END DATE (DATE)

Enter the end date for the desired daily report. Standard date entry routines can be used. The current date or any date in the past, but not prior to the start date can be entered if workload data exists. The default in the prompt is set to the last day of the month entered in the Start Date field if a prior month was entered. If the current month was entered, the default contains today's date. This field is bypassed if an entry was made in the Month(s) field. If the Month(s) field is bypassed, this field is required.

5. HARDCOPY (1-A-R)
Statistical data can be displayed to the screen or printed to hard copy. The default is to print to hard copy. The format of the display and the printed version are the same. When displayed, one screen of data can be displayed at a time. When the report is printed, two screens of data are printed to each page.

6. PRINTER (TABLE LOOKUP)
This field is automatically set to the default printer associated with the requesting terminal when the screen displays. Since it is automatically set, the field is bypassed during normal field processing. It can be accessed and revised if the report needs to be generated on a different printer. If accessed, you can enter the printer code if it is known. If you do not know the code, enter a hyphen (-) to view a list of printers from the Spooler Reports table. If the Hard Copy field is set to Yes, this field is required.

7. WORKLOAD CATEGORIES (TABLE LOOKUP)
The Workload Categories defined for the selected department display for selection. You can select one or multiple (up to nine) categories from the table displayed. The format of the report only allows for a maximum of five categories to be listed across. If more than five are selected, the remaining four categories display/ print on the following report. After all categories are listed, the totals for all categories for each time period display/print. If one to four categories are selected, statistics for all four display on one page followed by totals for each time period. If five to nine categories are selected, statistics for the first five display on the first page followed by statistics for the remaining four and time period totals below. Up to a maximum of seven time periods display to one page. When more than seven periods contain workload totals, multiple pages are used until all time periods display/print.

As selections are made, they are highlighted. If a category is selected in error, you can enter a hyphen (-) prior to the option number to remove it. After all selections are made and verified, press ENTER.

Impact

After you accept this screen, the following takes place:

- The message *Accumulating Statistics* displays if the report is to display.
- The message *Accumulating Statistics and Printing Report!* displays if a hard copy of a report is selected.

Output

After you accept this screen, if the Hard Copy field is set to Yes, the report generates on the printer designated in the Default Printer field. Hard copy reports contain the same information as the screen displays explained below. The only difference is that one screen of data displays at a time, but two screens of data print to a page.

Daily Peak Workload Analysis Report By Sub Department

This display format represents the Daily Workload Peak Analysis Report. The daily version of the report is given when a date range is entered in the Start Date and End Date fields as discussed previously.

```
Sat Jun 29, 1996 08:18 am                                             Page 1
                     General Hospital Respiratory Therapy (RT)
                           Workload Peak Analysis - RT
                              Statistics for March
                          Average Statistics for Monday

Category       FOLLOW-UP    INPATIENT    O/P IN BED   OTHER       OUTPATIENT

15:00-16:00                   ( 1.0)
                              11.5
18:00-19:00                   ( 2.2)
                              33.8
Day              ( 0.0)       ( 3.2)       ( 0.0)       ( 0.0)       ( 0.0)
  Total          0.0          45.2         0.0          0.0          0.0
```

The first page displays the date and time of generation, page number, facility name, subdepartment code and report title. The beginning and ending dates entered in the Start Date and End Date fields display under the report title.

The data displayed/printed on the first page represents the totals for the first date with data in the range entered for the first selected subdepartment. Each subdepartment selected prints on a separate page as well as each date within the start and end dates entered. If multiple subdepartments were selected, a separate screen displays/prints for each. For example, if three subdepartments were selected, the screen above would display/print for each until all time spans for each date between the given range display/print.

Field Explanations

CATEGORY

Each selected category is listed across the top of the report. Up to a maximum of five categories can display/print to a page. If more than five were selected, then the remaining four print on the next page followed by totals for each time period. The category represents the groupings of patient types or locations. The figures displayed/printed on each line represent the raw counts and weighted values for each subdepartment. The total for the displayed categories are listed to the right of the report after all categories display.

DATE

Each date within the given date range display/print on a separate page. If multiple dates were entered, statistics for each date displays for each subdepartment selected. The raw counts and weighted values display next to the hour increments listed below the date. Only hours with data display.

DATE TOTAL
The raw counts and weighted values are totaled for each category for the selected date at the bottom of the screen.

SUB DEPT TOTAL
The raw counts and weighted values are totaled for each subdepartment for all selected dates at the end of the report after all dates have displayed.

The prompt enables you to press ENTER to display the next selected category data if more than five were selected. After all selected category's data displays, the date total displays. The next date within the date range displays when ENTER is pressed. Once all dates have been displayed for the current subdepartment, the system displays the Sub Dept Totals. Once ENTER is pressed, the next selected subdepartment is processed.

Monthly Peak Workload Analysis Report By Sub Department

The format for the Monthly Peak Workload Analysis Report by Sub Department is identical to that of the daily reports shown previously. However, the numbers on the monthly report reflect daily averages, where the numbers on the daily report reflect daily totals.

The daily report represents totals by date and consists of one part per subdepartment for the dates entered, broken down by category. The monthly report represents averages and consists of eight parts—one for each day of the week and one for the entire month.

The first page displayed when the report is generated displays the date and time of generation, page number, facility name, subdepartment and report title. The month(s) selected displays under the report title. The day of the week with data displays below the Month(s) selected. This screen displays/prints for each subdepartment selected for each day of the week. The day of the week and subdepartment contained in the heading changes with each screen displayed/printed.

The data displayed/printed on the first page represents the averages by days of the week. The page displayed represents the first day in the week for the first subdepartment selected. If multiple subdepartments were selected, a separate screen displays/prints for each shift for each day of the week. For example, if three subdepartments were selected, the previous screen would display/print three times for each day of the week (seven days).

It is important to note that the statistics for each day do not reflect the activity of a single day, but the averaged activity of all of those days in the month. For example, if the report displays “Average Statistics for Saturday,” it does not reflect the activity of a single Saturday, but reflects the averaged activities of all Saturdays in the month.

The raw counts and weighted values displayed/printed are averages broken down by category and date for each selected subdepartment. For specific field explanations, refer to the daily version of this report discussed previously.

The prompt enables you to press ENTER to display the next day's activity for the same subdepartment. If more than five categories were selected, the remaining four categories display/print prior to the next day's activity followed by totals for each time period. After all time spans for the current day's activity displays, the system displays totals for the day by category.

After all daily activity displays for the current subdepartment, the system displays total averages for the subdepartment for the selected month(s). If you press ENTER, the next subdepartment selected is processed. After all selected subdepartments are processed, you are returned to the workload submenu.

WORKLOAD ERROR

The Workload Error Report processor enables you to display or print a list of all workload errors generated when the system tries to log workload but is unable to due to a file setup problem. Errors can be generated as a by-product of workload being calculated while accessing the following processors: Manual Worklist, Manual Schedule, and Log Miscellaneous Workload.

Workload errors occur for several reasons. For example, the SIM item being performed does not have workload elements associated with it, or the associated elements have been deleted.

Workload errors are retained by the system for seven days. During this time they can be displayed/printed and are intended to be used to manually adjust missing workload in order to correct the errors. On the eighth day, the system purges the errors to a Midnight Processing report.

Upon selection, the facility is determined. If this terminal can access more than one facility, as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. After the facility is determined, the following prompt displays enabling entry of the department:

Enter charge department (`-` to list)--

Enter the charge department code if it is known. If you do not know the code, enter a hyphen (**-**) to view a list of the valid charge departments as defined in the Charge Departments field in the CRT Names table. If only one department is defined, that department is assumed and this prompt is bypassed. Once the charge department is determined, the following prompt displays to allow you to enter the date that you want to display or print:

Enter date to review [T]--

The standard date entry routines can be used to enter the date. If a date is entered that does not have any errors, the following error message displays prior to returning you to the workload submenu:

No Entries Defined

If a date is entered that does have errors, the list of departments with errors displays. The prompt enables selection of one of the displayed subdepartments. The following prompt displays enabling you to indicate if you want to display or print the errors:

Display or Print? (D/P) [D]--

If you display the errors, the message Processing displays prior to displaying the following screen:

```
Thu Sep 27, 1994 04:06 am                                            Page 1
                            General Hospital
                   Workload Error Report for PHYSICAL THERAPY
Workload NOT captured for   Workload       Employee              Error Date/Time
4216;EVALUATION             1000.2         DAVIS,SALLY           09/26/94 1023am
9005;SPEECH / HEARING COMP  1000.2         DAVIS,SALLY           09/26/94 1030am
4216;EVALUATION             1000.2         BARNETT,JANE          09/27/94 1035am
















Press NL--
```

The screen heading contains the description of the selected SIM department. Press ENTER to return.

Field Explanations

WORKLOAD NOT CAPTURED FOR (DISPLAY ONLY)
If workload was being calculated using a SIM item, the code and description display.

WORKLOAD (DISPLAY ONLY)
The workload element code that should have been used to capture workload displays.

EMPLOYEE (DISPLAY ONLY)
The employee name that would have been given credit for the workload had it been able to be processed displays. This employee should be used when reentering workload once files are corrected.

ERROR DATE/TIME (DISPLAY ONLY)
The date and time that the error was generated displays. This date and time should be used when reentering workload values when files are corrected.

Output

After you accept this screen, if you indicated that you wanted to print the listing, it is generated on the default printer associated with the requesting terminal as defined in the CRT Names table.

Chapter 8 - ONLINE REPORTS

Illustrations

LINK ORDERS TO APPOINTMENT LIST

The Link Orders to Appointment processor displays evaluated orders flagged as Scheduled items in the Service Item Master that not yet been scheduled. The orders waiting to be scheduled can be viewed by patient, by SIM item, or by department.

The screen displayed with each of these access methods can be printed. When this is done, the printed format looks the same as the display. It prints on the default printer associated with the requesting terminal as defined in the CRT Names table. An example of the report (as requested by patient) is provided. For additional information or examples of the other access methods, refer to Chapter 3: Scheduling Process in this document.

The report includes the following:

- Date/time report was printed
- The patient's name
- The SIM department code
- The SIM item code and description
- The requested date/time and order number of the order

Figure 8.1 Link Orders to Appointment List

```
09/27/94 1606                                                        Page 1
              General Hospital
              Treatments to Schedule for BENNETT,PATRICK

Dept Code Description                 Req Dt & Tm        Order #
PT   6016 EVALUATION                  09/28/94 100P        1
PT   6002 BANDAGING                   09/28/94 100P        1
PT   6008 CONTRAST BATH               09/28/94 100P        1
PT   6083 COMPREHENSIVE STROKE PROG   09/29/94 500P        8
```

SCHEDULE PROCEDURES LIST

The Schedule Procedures processor contains all orders that have had their initial appointment scheduled. It is used to schedule additional appointments for recurring or follow up treatments. The scheduled orders can be viewed by patient, by SIM item, or by department.

The screen displayed with each of these access methods can be printed. When this is done, the printed format looks the same as the display. It prints on the default printer associated with the requesting terminal as defined in the CRT Names table. An example of the report (as requested by patient) is provided. For additional information or examples of the other access methods, refer to Chapter 3: Schedule Process inthis document.

The report includes the following:

- Date/time report was printed
- The patient's name
- The SIM department code
- The SIM item code and description
- The requested date/time and order number of the order

Figure 8.2 Schedule Initial Appointment List

```
09/27/94 1606                                                         Page 1
              General Hospital
              Treatments to Schedule for BENNETT,PATRICK

Dept Code Description                   Req Dt & Tm        Order #
PT   6016 EVALUATION                    09/28/94 100P        1
PT   6002 BANDAGING                     09/28/94 100P        1
PT   6008 CONTRAST BATH                 09/28/94 100P        1
PT   6083 COMPREHENSIVE STROKE PROG     09/29/94 500P        8
```

WORKLIST

The Display/Print Worklist processor enables you to review and print a worklist for all or selected resources for a selected date or shift. It includes information needed while performing assigned treatments or procedures. It is the resource's actual working document. You determine the information to include on the worklist through selections on the Patient Report Parameters processor. Only worklists that have been approved through the Review Assigned Worklist processor can be printed. However, you can display any Worklist without approval. An example of this report is provided. For additional information, refer to the Display/Print Worklist function in Chapter 4: Worklist Processing in this document.

The report includes the following:

- Date/time report was printed
- Worklist date
- Resource name or rounds/continual

Patient Information, once per patient

- Nursing station, room and bed (or location)
- Patient name
- Patient type
- Sex
- Date of birth and age
- Account number
- Working diagnosis
- Attending Physician
- Previous admission date
- Unit number

The total number of treatments and patients listed prints at the end of the report.

Ordering Information (when present) for each order

- SIM code and description

- Frequency
- Duration
- Status
- Medications
- Requested date/time
- Ordering initials
- Treatment diagnosis/reason/precautions
- Last treatment date
- Order number
- Ordering physician

<u>Ordering information (if requested) for each order</u>

- Treatment text (Physician Order Info)
- Comment
- Prompt/prompt response

<u>Miscellaneous information printed once for each treatment in the shift</u>

- Hours contained in the requested shift so that actual time of treatment can be indicated
- Available status codes so that the appropriate option can be circled at the time of treatment
- Associated workload value of the treatment

<u>Scheduling information (if selected), per patient during the selected shift</u>

- Time
- Length
- Visit Reason
- Department

- Resource

The total workload per patient prints at the end of the patient's treatment information.

Figure 8.3 Worklist

```
Tue Jul 06, 2010 14:51                                                      Page 2
                              Model Hospital A
                        Worklist for RT ASST HELPER
                    RESPIRATORY THERAPY 07/06/10 Shift 1

PATIENT NAME             RM/BED    ACCOUNT#     SEX      B/D AGE
   DIAGNOSIS
 PROCEDURE                      ORD#   LAST TRMT     ORD PHYSICIAN
  FREQ       DURATION    START DT/TM       MEDICATION/PRECAUTION
********************************************************************************
RMB,TWO OBS              200-2     1010500020   M        06/09/67 43Y
   PSYCHOSIS
 AEROSOL TREATMENT              108                   SMITH,JENNIFER
  Q2H        6 OCCUR(S)  07/06 14:45
                                      Cmt:
                                      Pmt:
                                      Rsp:
1445________________________________

 BREATHING EXERCISES            108                   SMITH,JENNIFER
  Q2H        6 OCCUR(S)  07/06 14:45
                                      Cmt:
                                      Pmt:
                                      Rsp:
1445________________________________
Patient Schedule:  No Appointments
--------------------------------------------------------------------------------

End of Report
```

WORKLIST STATUS LIST

The Worklist Status processor is used to review the status of each worklist for a given date and shift and the status of the treatments within each worklist. It includes all worklists, regardless of their status. While viewing the orders contained in a specific worklist, you can print a hardcopy on the default printer associated with the requesting terminal as defined in the CRT Names table. An example of the report is provided. For additional information on this processor, refer to "Chapter 4 - WORKLIST PROCESSING".

The report includes the following:

- Date/time report was printed
- The department's description
- The date and shift of the worklist
- The resource's name (if applicable)
- The requested time and priority of the order
- The SIM item code and description
- The total workload value for the SIM Item
- The charge indicator
- The patient's account number, room/bed and name
- The status of the treatment
- The order frequency

Figure 8.4 Worklist Status List

```
               General Hospital Worklist Status Processor
                                                 Thu May 11, 1995 05:35 pm
RESPIRATORY THERAPY 05/10/95 Shift 1
ADAIR,FRANK C  Unprocessed
 No.   Time   Pri      SIM Code Description               Workload    Charges
       Account #     Loc Room/Bed  Patient Name           Frequency   Status
 1     1043A ROUTINE   1103 MDI W/AREOCHAMBER              2.0         No
       A9307800001   I/P  3306-02   LANE,THOMAS            Q4H        Perf
 2     1043A ROUTINE   2941 AEROSOL TREATMENT              2.0         No
       A9307800001   I/P  3306-02   LANE,THOMAS            Q4H        Unable
 3     0124P ROUTINE    500 IPPB TREATMENT                 2.0         No
       A9428000001   PTA   103-01   DEAN,ROBERT            Q4H        In Prog




Select treatment or NL to continue [NL]--   |
```

INCOMPLETE WORKLIST REPORT

The Incomplete Worklist Report is used to audit the system for any outstanding worklist orders that have not been processed via the Manual Worklist Processing or Documentation functions. It is suggested that this list be run prior to using any of the statistical or summary reports available on the system. The information is sorted by resource, displaying any dates and shifts for which activity has not been completed. The report only includes the worklists (resources/rounds/ continual) for the selected facility and department which have a current status of Unapproved, Unprocessed or In Progress.

The equivalent report for resource schedules is the Delinquent End of Day Report.

The report includes the following:

- Date/time report was printed
- Date range for the report
- Department name and code
- Resource code and name
- Dates and shifts of worklists that have not been processed
- Status of incomplete worklist

Figure 8.5 Incomplete Worklist Report

```
 Thu Sep 27, 1994 04:06pm        General Hospital A                       Page 1
                 Incomplete Worklist Report For PHYSICAL THERAPY
               09/01/94 to 09/27/94
--------------------------------------------------------------------------------
                Rounds
                   09/26/94   2Unprocessed
                   09/27/94   1Unapproved
                   09/27/94   2In Progress

         527    SMITH,JOHN Q
                   09/26/94   1In Progress
                   09/27/94   1Unprocessed

         482    ARMSTRONG,KEITH EDWARD
                   09/25/94   1In Progress

         327    MILLARD,SAMUAL F
                   09/27/94   1In Progress
End of Report
```

WORKLOAD SUMMARY BY SUBDEPARTMENT

This function is used to display or print workload statistics by date range or monthly by subdepartment and shift. It summarizes raw counts and weighted values for selected subdepartments based on the parameters entered; Department/Subdepartment(s), Month(s), or Start Date and End Date, Hardcopy and then the Default Printer, Workload Categories and Shift(s).

The report prints on the designated printer. The printed format is the same as the displayed format. The only difference is that the display shows on one screen at a time where the printed version contains two printed formats to one page. The example reports provided are the daily (date range) version. For additional information and/or the format of the monthly version, refer to "Chapter 7 - WORKLOAD PROCESSING".

The report includes the following:

- Date/time report was printed
- Department description
- Subdepartment code
- Month(s) or date range entered for reporting
- Day of the week being averaged if requested monthly
- Shift description and time span for each selected shift
- Workload categories selected
- Subdepartment(s) selected
- Workload raw counts and weighted values by category and subdepartment
- Workload raw count and weighted value department totals by category
- Workload raw count and weighted value subdepartment totals
- Workload raw count and weighted value subdepartment totals by shift
- Workload raw count and weighted value subdepartment totals for all shifts

Figure 8.6 Workload Summary by Sub Department

```
 Thu Sep 27, 1994 04:06pm                                             Page 1
                  General Hospital Physical Therapy
                Workload Summary by Sub Department/Shift
                   Statistics for 08/01/94 to 08/31/94
                       Day: 7:00 am to 3:00 pm
                                                                    Dept
Category      PT      ST       HRG      SB3      SB4      SB5       Total

Inpatient    (18)     (24)     (10)                                 (52)
             112.8    240.0    150.9                                503.7
Outpatient

Series

Emergency

Home Health

Rehab

Shift        (18)     (24)     (10)     (0.0)      (0.0)      (0.0)       (52)
Total        112.8    240.0    150.9                                      503.7
```

WORKLOAD DETAIL BY SUBDEPARTMENT/ELEMENT

This function displays or prints workload statistics by date range or monthly by subdepartment and shift. It contains raw counts and weighted values by workload element for all or selected subdepartments, for all or selected test codes based on the parameters entered: Department/Subdepartment(s), Month(s) or Start Date and End Date, Hard copy and then the Default Printer, Sort Method, SIM Item(s) and Shifts.

The report prints on the designated printer. The printed format is the same as the displayed format. The only difference is that the display shows on one screen at a time where the printed version contains two printed formats to one page. The example reports provided are the daily (date range) version. For additional information and/or the format of the monthly version, refer to “Chapter 7 - WORKLOAD PROCESSING”.

The report includes the following:

- Date/time report was printed
- Department description
- Subdepartment code
- Month(s) or date range entered for reporting
- Day of the week being averaged if requested monthly
- Shift description and time span for each selected shift
- Workload element(s) code and description
- Workload value for each element
- All workload categories defined for the department
- Workload raw counts and weighted values by category, shift and element
- Workload raw counts and weighted values by category and element for all shifts
- Workload raw count and weighted value totals by element, shift and subdepartment

Figure 8.7 Workload Detail by Sub Department/Element

```
Thu Sep 27, 1994 04:06pm                                        Page 1
               General Hospital Physical Therapy
               Workload Detail by Sub Department/Element - PT
               Statistics for 08/01/94 to 08/31/94
               Day: 7:00am to 3:00pm

 Workload Element: 12345.123     30 MIN TREATMENT       Units = 10.1

  Individual Element/Shift Totals        All Selected Elements/Shift Totals

Inpatient       (18)/181.80             Inpatient      (250)/2525
Outpatient                              Outpatient
Series                                  Series
Reh Inp                                 Reh Inp
Reh Out                                 Reh Out
Emergency                               Emergency
Hme Hlth                                Hme Hlth
Clinics                                 Clinics
Others                                  Others

  Total         (18)/181.80                            (250)/2525
```

WORKLOAD SUMMARY BY EMPLOYEE

This function displays or prints workload statistics by date range or monthly by subdepartment and shift. It summarizes raw counts and weighted values for selected resource types based on parameters entered: Resource Type, Month(s) or Start Date and End Date, Hardcopy and then the Default Printer, Department/Sub Department(s) and Shift(s).

The report prints on the designated printer. The printed format is the same as the displayed format. The only difference is that the display shows on one screen at a time where the printed version contains two printed formats to one page. The example reports provided are the daily (date range) version. For additional information and/or the format of the monthly version, refer to “Chapter 7 - WORKLOAD PROCESSING”.

The report includes the following:

- Date/time report was printed
- Department description
- Resource type description
- Month(s) or date range entered for reporting
- Day of the week being averaged if requested monthly
- Shift description and time span for each selected shift
- Employee name
- Subdepartment(s) selected
- Workload raw counts and weighted values by employee and subdepartment
- Workload raw count and weighted value employee totals by shift
- Workload raw count and weighted value subdepartment totals by shift
- Workload raw count and weighted value subdepartment averages by shift

Figure 8.8 Workload Summary by Employee

```
Thu Sep 27, 1994 04:06pm                                              Page 1
                GENERAL HOSPITAL A PHYSICAL THERAPY
              Workload Summary by Employee - THERAPIST
                 Statistics for 08/01/94 to 08/31/94
                      Day : 0700 am to 0300pm
                                                                  Emp
Employee     PT        ST        HRG       SB3      SB4      SB5        Total
BARNETT,DAVID          (12)                                             (12)
                       720.0                                            720.0
DAVIS,SALLY            (72)                                             (72)
                       4320.0                                           4320.0
Shift        ( 0.0)    ( 42.0)   ( 0.0)    ( 0.0)   (0.0)    (0.0)      ( 42.0)
  Average              2520.0                                           2520.0
Shift        (0)       (84)      (0)       (0)      (0)      (0)        (84)
 Total                 5040.0                                           5040.0
```

WORKLOAD DETAIL BY EMPLOYEE/ELEMENT

This function displays or prints workload statistics by date range or monthly by subdepartment and shift. It contains raw counts and weighted values by workload element for an employee for all or selected subdepartments based on the parameters entered: Employee Name(s), Month(s) or Start Date and End Date, Hardcopy and then the Default Printer, Department/Subdepartment(s) and Shifts.

The report prints on the designated printer. The printed format is the same as the displayed format. The only difference is that the display shows on one screen at a time where the printed version contains two printed formats to one page. The example reports provided are the daily (date range) version. For additional information and/or the format of the monthly version, refer to “Chapter 7 - WORKLOAD PROCESSING”.

The report includes the following:

- Date/time report was printed
- Department description
- Selected employee's name(s)
- Month(s) or date range entered for reporting
- Day of the week being averaged if requested monthly
- Shift description and time span for each selected shift
- Subdepartment(s) selected
- Workload element code and description
- Workload raw counts and weighted value totals by element and subdepartment
- Workload raw counts and weighted value totals by subdepartment
- Workload raw counts and weighted value totals by shift

Figure 8.9 Workload Detail by Employee/Element

```
Thu Sep 27, 1994 04:06pm                                                Page 1
              General Hospital PHYSICAL THERAPY
              Workload Detail by Employee/Element - Brown,Jane S
              Statistics for 08/01/94 to 08/31/94
              Day: 7:00 am to 4:00 pm

Sub Department                                         Count              Units

ST
   12345.123 Workload Element 1                        (2)                10.2

   12346.123 Workload Element 2                        (3)                 9.9

   12358     Workload Element 3                        (1)                10.2

   12358.123 Workload Element 4                        (3)                15.3

Sub Department Total                                   (9)                45.6
Shift Total                                            (9)                45.6
```

WORKLOAD SUMMARY BY GROUP

This function displays or prints workload statistics by date range or monthly by subdepartment and shift. It summarizes raw counts and weighted values for selected subdepartments by workload element groups based on parameters entered: Department/Subdepartment(s), Month(s) or Start Date and End Date, Hardcopy and the Default Printer, Element Group, Workload Categories and Shift(s).

The report prints on the designated printer. The printed format is the same as the displayed format. The only difference is that the display shows on one screen at a time where the printed version contains two printed formats to one page. The example reports provided are the daily (date range) version. For additional information and/or the format of the monthly version, refer to "Chapter 7 - WORKLOAD PROCESSING".

The report includes the following:

- Date/time report was printed
- Department description
- Workload Group description
- Month(s) or date range entered for reporting
- Day of the week being averaged if requested monthly
- Shift description and time span for each selected shift
- Workload categories selected
- Subdepartment(s) selected
- Workload raw counts and weighted values by category and subdepartment
- Workload raw count and weighted value department totals by category
- Workload raw count and weighted value subdepartment totals by shift
- Workload raw count and weighted value subdepartment totals for all shifts

Figure 8.10 Workload Summary by Group

```
              General Hospital PHYSICAL THERAPY
              Workload Summary by Group - Patient Treatments
              Statistics for 08/01/94 to 08/31/94
              Day: 7:00 am to 3:00 pm
                                                               Dept
Category      PT       ST       HRS      SB3      SB4      SB5      Total
Inpatient     (18)     (24)     (10)                                (52)
              112.8    240.0    150.9                               503.7
Outpatient

Series

Reh Inp

Reh Out

Emergency

Shift         (18)     (24)     (10)     (0)      (0)      (0)      (52)

Total         112.8    240.0    150.9                               503.7
```

WORKLOAD DETAIL BY GROUP/ELEMENT

This function displays or prints workload statistics by date range or monthly by subdepartment and shift. It contains raw counts and weighted values by workload element for all or selected subdepartments based on the parameters entered: Department/Subdepartment(s), Month(s) or Start Date and End Date, Hardcopy and then the Default Printer, Sort Method, Element Group and Shift(s).

The report prints on the designated printer. The printed format is the same as the displayed format. The only difference is that the display shows on one screen at a time where the printed version contains two printed formats to one page. The example reports provided are the daily (date range) version. For additional information and/or the format of the monthly version, refer to "Chapter 7 - WORKLOAD PROCESSING".

The report includes the following:

- Date/time report was printed
- Department description
- Subdepartment code
- Workload element group code and description
- Month(s) or date range entered for reporting
- Day of the week being averaged if requested monthly
- Shift description and time span for each selected shift
- Workload element(s) code and description
- Workload value for each element
- All workload categories
- Workload raw counts and weighted values by category, shift and element
- Workload raw counts and weighted values by category and element for all shifts
- Workload raw count and weighted value totals by element, shift and subdepartment

Figure 8.11 Workload Detail by Group/Element

```
 Thu Sep 27, 1994 04:06pm                                                 Page 1

               General Hospital PHYSICAL THERAPY
               Workload Detail by Group/Element Code - SPH PT
               Element Group #2 - Therapy Treatment Hours
               Statistics for 08/01/94 to 08/31/94
               Day: 7:00 am to 3:00 pm

 Workload Element: 12345.123   30 MIN TREATMENT          Units = 10.1

  Individual Elements/Shift Totals          All Selected Elements/Shift Totals
Inpatient       (18)/181.80              Inpatient      (250)/2525
Outpatient                               Outpatient
Series                                   Series
Reh Inp                                  Reh Inp
Reh Out                                  Reh Out
Emergency                                Emergency
Hme Hlth                                 Hme Hlth
Clinics                                  Clinics
Others                                   Others
 Total          (18)/181.80                             (250)/2525
```

WORKLOAD PEAK ANALYSIS REPORT

This function displays or prints workload statistics by date range or monthly on an hour by hour basis to view the times of peak activity. It summarizes raw counts and weighted values for selected subdepartments by hour based on the parameters entered: Department/Subdepartment(s), Month(s) or Start Date and End Date, Hardcopy and then the Default Printer and Workload Categories.

The report prints on the designated printer. The printed format is the same as the displayed format. The only difference is that the display shows on one screen at a time where the printed version contains two printed formats to one page. The example reports provided are the daily (date range) version. For additional information and/or the format of the monthly version, refer to “Chapter 7 - WORKLOAD PROCESSING”.

The report includes the following:

- Date/time report was printed
- Department description
- Subdepartment code
- Month(s) or date range entered for reporting
- Day of the week being averaged if requested monthly
- Workload categories selected
- Selected date if reporting daily (date range)
- Workload raw counts and weighted values by category and hour increments
- Workload raw count and weighted value category totals by date and subdepartment
- Workload raw count and weighted value subdepartment totals by shift

Figure 8.12 Workload Peak Analysis Report

```
Thu Sep 27, 1994 04:06pm                                                Page 1
              General Hospital PHYSICAL THERAPY
              Workload Peak Analysis - PT
              Statistics for 08/01/94 to 08/31/94
Category     Inpatient   Outpatient  Series      Reh Inp            Total

08/01/94
08:00-09:00     (18)        (24)       (10)                          (52)
                112.8       240.0      150.9                         503.7
09:00-10:00     (2)                                (3)               (5)
                30.0                               45.0              75.0
10:00-11:00     (7)                                                  (7)
                210.0                                                210.0
12:00-1:00      (6)         (4)                                      (10)
                120.0       60.0                                     180.0
1:00-2:00       (10)                               (20)              (30)
                150.0                              300.0             450.0
2:00-3:00       (10)        (5)                                      (15)
                600.0       75.0                                     675.0
Date            (100)       (62)       (20)        (46)              (228)
  Total         2325.6      690.0      301.8       690.0             4007.4

Thu Sep 27, 1994 04:06pm                                               Page 2
              General Hospital Physical Therapy
              Workload Peak Analysis - PT
              Statistics for 08/01/94 to 08/01/94
Category     Inpatient   Outpatient  Series      Reh Inp            Total

08/01/94
03:00-04:00     (18)        (24)       (10)                          (52)
                112.8       240.0      150.9                         503.7
04:00-05:00     (2)                                (3)               (5)
                30.0                               45.0              75.0
05:00-06:00     (7)                                                  (7)
                210.0                                                210.0
06:00-07:00     (10)                               (20)              (30)
                150.0                              300.0             450.0
07:00-08:00     (10)        (5)        (10)        (5)               (15)
                600.0       75.0                                     675.0
Date            (100)       (62)       (20)        (46)              (228)
  Total         2325.6      690.0      301.8       690.0             4007.4
Sub Dept        (60)        (68)       (44)        (56)              (228)
  Total         2325.6      690.0      301.8       690.0             4007.4
```

WORKLOAD ERROR REPORT

This function is used to view or print a list of workload errors generated when workload is not properly set up. This includes errors logged if problems are encountered while calculating workload values during the Manual Worklist Processor, Manual Schedule Processor or the Log Miscellaneous Workload function. It is used to identify areas where workload was not able to be calculated so that files can be corrected and existing workload data adjusted.

The report prints on the default printer associated with the requesting terminal as defined in the CRT Names table. For additional information, refer to “Chapter 7 - WORKLOAD PROCESSING”.

The report includes the following:

- Date/time report was printed
- Department description
- SIM item code and description (if available)
- Workload element code (if available)
- Employee's name (if signed on with security)
- Error date and time

Figure 8.13 Workload Error Report

```
Thu Sep 27, 1994 04:06pm                                              Page 1
              General Hospital
              Workload Error Report for PHYSICAL THERAPY
Workload NOT captured for   Workload       Employee              Error Date/Time
--------------------------------------------------------------------------------
4216;EVALUATION             1000.2         DAVIS,SALLY           09/26/94 1023am
9005;SPEECH / HEARING COMP  1000.2         DAVIS,SALLY           09/26/94 1030am
4216;EVALUATION             1000.2         BARNETT,JANE          09/26/94 1035am
```

Chapter 9 - MIDNIGHT PROCESSING

Illustrations

CHARGE EXCEPTION REPORT (CCMXX[AAA])

This report lists all inpatient and outpatient treatments or modalities that were performed but did not have any charges entered. It is used primarily to audit treatments that were performed to insure that charges were input. This assists in capturing charges in a timely manner that may never have been posted.

Items that were performed and or updated, and had no charges entered through the Manual Worklist or Manual Schedule Processors are reflected on the report. Treatments whose charges are entered using the base STAR Patient Care Charge processor instead of the Clinical Management processors are displayed in this report.

NOTE: The "X" in the report name indicates your facility.

SORT is by resource first and then patient within resource.

The following information is included on the report:

- Resource code and name

Per Treatment:

- Patient account number and name
- Station room/bed
- Patient type
- SIM item code and description
- Order number
- Treatment status
- Date and shift (if other than report date)

The total number of treatments are listed by patient.

Figure 9.1 Charge Exception Report (CCMXX[AAA])

```
Thu Sep 27, 1994 11:08am        General Hospital                      Page 1
                     Charge Exception Report for 09/26/94
                                Respiratory Care

Resource Code/Name

Account #     Name                                  Stn Room/Bed     Pt Type
         Code  Description                         Ord#   Status  Date/Shift
-----------------------------------------------------------------------------
123456  JOHN SMITH

12345-12345   JONES,ELIZABETH                        1N  1234-02       I/P
         3456 IPPB                                 123456   P      09/25/94 3

90210-00020   SMITH,SEAN PATRICK                     1N   312-02       I/P
         3456 IPPB                                    100   P      09/26/94 3

90210-00020   SMITH,SEAN PATRICK                     1N   312-02       I/P
         0231 AEROSOL THERAPY                         100   D      09/26/94 3

                                                 Total Treatments: 3
                                                   Total Patients: 2
```

TREATMENT EXCEPTION REPORT (CCMTX[AAA])

This report lists all inpatient and outpatient treatments or modalities that were not performed by the associated reason.

NOTE: The "X" in the report name indicates your facility.

SORT is by the reason code first and then by patient within reason.

The following information is included on the report:

- Reason for not treating the patient

Per Treatment:

- Patient account number and name
- Station room/bed
- Date and shift
- Patient type
- SIM item code and description
- Order number
- Resource name

The total number of treatments and patients listed prints at the end of the report.

Figure 9.2 Treatment Exception Report (CCMTX[AAA])

```
Thu Sep 27, 1994 1:08am        General Hospital                      Page 1
                   Treatment Exception Report for 09/26/94
                               Respiratory Care

Reason

Account #     Name                                     Stn Room/Bed   Date/Shft
Type  Code  Description                               Ord#   Resource Name
----------------------------------------------------------------------------
PATIENT NOT AVAILABLE

12345-12345   REDDING,SAMUAL ADAMS                      1N  9234-02   09/26/94 3
 I/P 3456 IPPB                                        123456 SMITH, JOHN

PATIENT CONDITION

90210-00020   DRAIN,MARGARET POLK                       3N  312-02    09/26/94 2
 I/P 3456 IPPB                                        100    ARMSTRONG,JACK

90210-00020   DRAIN,MARGARET POLK                       3N  312-02    09/26/94 2
 I/P 0231 AEROSOL THERAPY                             100    ARMSTRONG,JACK

                                                     Total Treatments: 3
                                                       Total Patients: 2
```

MONTHLY STATUS REPORT (CCMMX[AAA])

The Monthly Status report lists statistical totals for all inpatient and outpatient orders and treatment modalities for the specified month. It lists these totals for each resource and for the entire department. This report is not accurate if all worklists and schedules have not been processed through the Manual Worklist and Manual Schedule Processing functions prior to printing.

This report is requested through an online processor where you indicate the month you want to process. If you do not request that the report be generated for the department, it is not generated through Midnight Processing.

When accessing the function, indicate the department and month against which you want to report statistics. Only one month can be reported against per department per day. If you try to request a second report for the same month, an error message displays indicating that a report has already been requested for that department.

NOTE: The "X" in the report name indicates your facility.

SORT is by resource.

The following information is included on the report:

- Month and year for which statistics are printed
- Resource's code and name followed by the total number of treatments. This is calculated by adding the total number of treatments performed, the total number of treatments not performed (including those treatments that were discontinued or completed).
- Daily average and monthly total number of patients
- Daily average and monthly total number of treatment modalities:
  - Initiated
  - Performed
  - Completed
  - Discontinued
  - Not Performed
  - Canceled
- Daily average and monthly total workload value

These statistics are repeated for the entire department.

Figure 9.3 Monthly Status Report (CCMMX[AAA])

```
 Thu Sep 27, 1994 1:08am       General Hospital                      Page 1
               Monthly Status Resource Report for September 1994
                               RESPIRATORY CARE

 100    ARMSTRONG,JACK                   Total Treatments:   20

                                                                Daily Average
Monthly Total
          Total Patients                         8             160
          Total Orders                          15             300
          Treatments Initiated                   6             120
          Treatments Performed                  10             200
          Treatments Completed                   6             120
          Treatments Discontinued                2              40
          Missed Treatments                      1              20
          Treatments Cancelled                   1              20
          Workload                             480            9600

 200201 DEMPSEY,JANINE LOUISE            Total Treatments:   20

                                                                Daily Average
Monthly Total
          Total Patients                         8             160
          Total Orders                          15             300
          Treatments Initiated                   6             120
          Treatments Performed                  10             200
          Treatments Completed                   6             120
          Treatments Discontinued                2              40
          Missed Treatments                      1              20
          Treatments Cancelled                   1              20
          Workload                             480            9600

 RESPIRATORY THERAPY                     Total Treatments:   40

                                                                Daily Average
Monthly Total
          Total Patients                        16             320
          Total Orders                          30             600
          Treatments Initiated                  12             240
          Treatments Performed                  20             400
          Treatments Completed                  12             240
          Treatments Discontinued                4              80
          Missed Treatments                      2              40
          Treatments Cancelled                   2              40
          Workload                             960           19200
```

NEW PATIENT REPORT (CCMNX[AAA])

This report lists all inpatients and outpatients for which the department has received their first order during the associated visit (episode). It can be used as a worklist for the department to use for initial patient assessment or evaluation.

NOTE: The "X" in the report name indicates your facility.

SORT is by room and bed in walk order as defined by STAR Patient Care.

The following information is included on the report:

Per Treatment:

- Patient account number and name
- Station room/bed
- Patient type
- SIM item code and description
- Order number
- Corporate number
- Unit number

The total number of patients listed prints at the end of the report.

Figure 9.4 New Patient Report (CCMNX[AAA])

```
Thu Sep 27, 1994 1:08am        General Hospital                      Page 1
                        New Patient Report for 09/26/94
                               Respiratory Care

Account #     Name                                  Stn Room/Bed   Pt Type
      Code  Description                  Ord#    Corporate #   Unit #
-----------------------------------------------------------------------------
12345-12345   REDDING,SAMUAL ADAMS                   1N  9234-02   I/P
      3456   IPPB                        123456  000001787    00312034

90210-00020   DRAIN,MARGARET POLK                    3N   312-02   I/P
 I/P  3456   IPPB                        100     000001917    00317642

                                                  Total Patients: 2
```

ORDER ASSESSMENT REPORT (CCMEX[AAA])

This report lists all inpatient and outpatient treatments or modalities that meet the order assessment criteria entered in the report parameters of the SIM Department table.

The fields defined by each department in the SIM Department table that control patients displaying on this report are: I/P Hours, O/P Days, Resource Types and Resource Days. All inpatients receiving treatment display on this report after the number of hours indicated in the I/P Hours field. All outpatients display after the number of days in the O/P Days field. All patients receiving treatment from a resource that has a resource type contained in the Resource Types field display on this report after the number of days indicated in the Resource Days field. The resource type of each resource giving treatment is determined in the Resource Master.

This report can be used for many purposes depending on the parameter settings and hospital preferences. It is typically used to identify treatments that are to be discontinued or need approval for continuance because the physician's order expires after a certain number of hours/days of treatments. It is also used to identify treatments being performed by specific resource types that need to be reviewed after a certain number of days after continual treatment. For example, treatment modalities performed by assistants can be flagged for review and evaluation by therapists. This report assists departments with QA Studies and monitoring the quality of care as required by the State Licensure.

This report is divided into three distinct subsections, each separated by a page break. The three sections are:

- <u>Inpatients</u> - Sorted by Room and Bed (walk order), then patient
- <u>Outpatients</u> - Sorted by Patient Name
- <u>Resource Type</u> - Sorted by Resource, then patient

The example given is the Inpatient format. The same format is used for the Outpatient and Resource Type subsections.

NOTE: The "X" in the report name indicates your facility.

SORT is different based on the subsection being printed. This causes the beginning header line to vary slightly to reflect each subsection.

The following information is included on the report:

- Patient account number and name
- Station room/bed
- Patient type

- SIM item code and description
- Order number
- Current resource's name
- Ordering physician
- Attending physician
- Date that treatment/modality first began

The total number of treatments and patients listed prints at the bottom of each subsection.

Figure 9.5 Order Assessment Report (CCMEX[AAA])

```
                          General Hospital A
                   PHYSICAL THERAPY INPATIENTS 07/25/94
                   Order Assessment Report (CCMEAPT)


Patient Name                              Account No.     Stn Room/Bed     Pt Type
  Code  Description                            Ord#     Resource
    Ordering Physician                  Attending Physician              Start Date
-----------------------------------------------------------------------------------
LARSON,MARY E                             9328600001      1N  2102-01       I/P
  15   PT ORDER                                363
    ADAMS,HAROLD R                      COLEMAN,MICHAEL G

HUDSON,JASON B                            9425000001      ICU ICU-05        I/P
  1114 TENS TREATMENT                          92     Continual
    ADAMS,HAROLD R                      BABB,GARY H                      11/25/94

  1911 A F O -                                 77     PHYSICAL THRPY DPT (ALL)X
    BABB,GARY H                         BABB,GARY H                      11/16/94

LITTLE,JOHN                               9423000001      ICU ICU-06        I/P
  1210 ELECTRICAL STIMULATION                  139    PHYSICAL THRPST A  (ALL)-X
    ADAMS,HAROLD R                      LABONE,CASEY                     11/14/94

Total Orders: 4                          Total Patients: 3

End of Report
```

PATIENT FOLLOW UP REPORT (CCMFX[AAA])

This report lists all discharged inpatients and outpatients that were previously receiving treatment meeting the follow-up criteria as entered in the report parameters of the SIM Department table. It is intended to be used as automated identification of patients requiring follow-up after discharge. It can be used as a worklist for the actual follow-up process.

NOTE: The "X" in the report name indicates your facility.

SORT is alphabetical by patient within patient type and page breaks between patient types if more than one is specified.

All ordered items associated with the visit for the department print, one after the other.

If the patient type is a recurring (series) outpatient and visit history is retained after discharge, the account's visit history information (date, type and department) is also included.

The following information is included on the report:

<u>Per Patient</u>

- Patient account number and name
- Patient's two address lines, city state and ZIP Code
- Patient's home phone
- Patient's employer and occupation
- Employer's two address lines, city state and ZIP Code
- Work phone
- Unit number
- Birthdate and age
- Patient type
- Financial class
- Treatment discontinue date or discharge date
- Admitting and working diagnosis

Per Treatment

- SIM item code and description
- Resource's name at the time of discharge
- Visit history (if recurring outpatient)

The total number of patients listed prints at the bottom of the report.

Figure 9.6 Patient Follow Up Report (CCMFX[AAA])

```
 Thu Sep 27, 1994 1:08am        General Hospital                          Page 1
                         I/P Patient Follow Up Report for 09/26/94
Physical Therapy

 Account #    Name                                Employer
                     Address                               Address
 Unit #      City, St ZIP                        City, St ZIP
                     Phone                                 Phone
                     Birthdate/Age  PtType FC  Dis Dte    Occupation
 Admitting Diagnosis                  Working Diagnosis

 SIM Description                 Resource                 Physician
 --------------------------------------------------------------------------------

 91168-00006 JONES,ELIZABETH T                     JOHNSON MOTOR LINES
                     11 FRANKLIN STREET                    3412 STATE STREET
                     ATLANTA, GA   30033                   ATLANTA, GA 30333
                     (404) 343-1234                        (404) 233-3223
                     03/03/58 33Y   I/P    80  09/20/94   SALES MANAGER
 824.9 FX ANKLE NOS-OPEN               824.9 FX ANKLE NOS-OPEN


 EVALUATION                      SMITH,JOHN      ALMEN,HERBERT
 CRUTCH ADJUSTMENT               WILLIAMS,SALLY  ALMEN,HERBERT
 GAIT TRAINING                   SMITH,JOHN      ALMEN,HERBERT
 THERAPEUTIC EXERCISE            SMITH,JOHN      ALMEN,HERBERT

                                                        Total Patients:1
```

DISPOSABLE ITEM REPORT (FDPX[AAA])

This report is used to track, account for, and analyze the use of disposable items. It shows the charges/credits input during the day whose Item Type field in the Service Item Master is set to Disposable. Each listed SIM item is followed by each patient that received a charge/credit for that item during the day.

NOTE: The "X" in the report name indicates your facility.

SORT is by SIM item code and then patient account number within SIM item.

The following information is included in the report:

- SIM item code and description
- Patient account number and name
- Station, room and bed
- Order number
- Quantity
- Charge location

Figure 9.7 Disposable Item Report - Page 1 (FDPX[AAA])

```
Sat Apr 29, 1995 12:18 am       Model Hospital A                        Page 1
               RESPIRATORY THERAPY Disposable Item Detail for 04/28/95

Code  Item Description
 Patient #      Name                     Sta/Rm/Bed Order#   Qty  Charge Location
--------------------------------------------------------------------------------
0510 DISP IPPB CIRCUIT
 9327700005    CRAFT,KRIS                1E 2101-02000609     1      1 EAST
                             TOTAL                            1

1100 IT CANNULA/02 TUBING
 9327700005    CRAFT,KRIS                1E 2101-02000609     1      1 EAST
                             TOTAL                            1

2900 DISP I.S. UNIT
 9327700005    CRAFT,KRIS                1E 2101-02000609     1      1 EAST
                             TOTAL                            1

2936 OXYHOOD SET-UP
 9327700005    CRAFT,KRIS                1E 2101-02000609     1      1 EAST
```

Figure 9.8 Disposable Item Report - Page 2 (FDPX[AAA])

```
Sat Apr 29, 1995 12:18 am       Model Hospital A                          Page 2
          RESPIRATORY THERAPY Disposable Item Summary for 04/28/95
                                ---Inpatient---  ---Outpatient---  -----Total-----
 Item Description               Qty     Amount   Qty      Amount   Qty      Amount
----------------------------------------------------------------------------------
0510 DISP IPPB CIRCUIT            1       3.05   .0          .00    1         3.05
1100 IT CANNULA/02 TUBING         1       3.35   .0          .00    1         3.35
2900 DISP I.S. UNIT               1       9.80   .0          .00    1         9.80
2936 OXYHOOD SET-UP               1      28.80   .0          .00    1        28.80

     Total                        4      45.00   .0          .00    4        45.00

Item Types                            3
Total Items Processed                 4
Total dollar amount               45.00

End of Report
```

DEPARTMENTAL DAILY REPORT/SIM (CCMAX[AAA])

This report provides a daily summary of the department's orders by SIM item. It lists totals for each SIM item and then provides a departmental summary of all items. This helps in analyzing workload and patterns to be applied to a variety of uses.

NOTE: The "X" in the report name indicates your facility.

SORT is by procedure or SIM item code.

The following information is included on the report:

- SIM code and description

The following activity by SIM item:

- Number and workload value of orders assigned
- Number and workload value of orders discontinued
- Number and workload value of orders not performed by reason

The following activity for the department for all SIM items:

- Number and workload value of orders assigned
- Number and workload value of orders discontinued
- Number and workload value of orders not performed by reason

Figure 9.9 Departmental Daily Report/SIM (CCMAX[AAA])

```
Thu Jul 26, 2001 1:08am       General Hospital A                    Page 1
                Departmental Daily Activity Report/SIM for 07/25/01
                                                    Respiratory Care

Code Description

         Description/Type                Number               Workload
--------------------------------------------------------------------------------
3456 IPPB

         Orders Assigned:                    7                   105.0
         Orders Discontinued:               10                   150.0
         Unperformed Orders:                 5                    75.0
                       PATIENT NOT AVAILABLE                3
                       PATIENT CONDITION                    2

Department Totals:

         Total Orders Assigned:              7                   105.0
         Total Orders Discontinued:         10                   150.0
         Total Unperformed Orders:           5                    75.0
              Total PATIENT NOT AVAILABLE            3
              Total PATIENT CONDITION                2
```

MEDICARE THERAPY MEDICAL INFORMATION FORM (CCMCX[AAA])

This report lists one patient account per page and produces a form that can be used to submit required information to Medicare for recurring outpatients. One form prints for each recurring patient account that is being treated by this department.

These forms are generated once a month on the same day as specified in the report parameters defined by the department in the SIM Department table. The Medicare field in the SIM Department table is used to identify the day of the month (1-28) the forms should be printed.

All recurring patients, not specific to insurance type, receiving any treatments during the month being reported are displayed in this report.

Each form prints select patient data and includes prompts so that additional required data, not captured by the system but required to adhere to Medicare reimbursement requirements, can be manually entered prior to submission.

NOTE: The "X" in the report name indicates your facility.

SORT is by patient with a page break between patients.

The following information is included on each form:

- Patient name
- Age
- Unit number
- Admitting diagnosis
- Account number
- Working diagnosis
- Claim number (entered only on the insurance screen for Medicare for the primary insurance)
- Financial class
- Date of onset (prompt)
- Date of initial treatment
- SIM item description all treatments performed during the month for this visit (each item prints once)

- Four lines to enter the goals of treatment
- Four lines to enter the progress of patient during this billing period toward goal objective
- Type of therapy (department description)
- Billing date (date range for this report)
- Total number of treatments performed this billing period
- Total number of treatments performed
- Therapist name (resource)

Figure 9.10 Medicare Therapy Medical Information Form (CCMCX[AAA])

```
                   MEDICARE THERAPY MEDICAL INFORMATION FORM
                 Attach to UB-82 Billing for Therapy Services
                              General Hospital

Patient: ABERCROMBIE,BRIAN J                   Age: 23Y  Unit #: 90168-00001

Adm DX    : 824.9 FX ANKLE NOS-OPEN                     Acct #: 00312036
Working DX: 824.9 FX ANKLE NOS-OPEN                    Claim #: 916742
                                                            FC: M

Date of Onset: _______________

Date of Initial Therapy Treatment for this Condition: September 2, 1994

Types of Treatment During this Billing Period:
          GAIT TRAINING

Goal of Treatment(s): __________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Progress of Patient During this Billing Period Toward Goal Objective:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Type of Therapy                         : Physical Therapy
Billing Date                            : 09/01/94-09/01/94
Number of visits this billing period    : 8
Total number of visits                  : 8
Therapist                               : ARLINGTON,SALLY J
```

ORDER ORIGINATION REPORT (CCMOX[AAA])

The Order Origination report enables the department to discern at a glance the patterns and amount of exams ordered from each ordering location. It only reflects new orders. Repeated treatments for the same order are only included once.

NOTE: The "X" in the report name indicates your facility.

SORT by SIM Item code and then by ordering location (terminal).

The following information is included on the report:

- SIM code and description and total count
- CRT code followed by the total number of orders for the above SIM item
- Patient type code followed by the total number of orders for the above SIM item and ordering location (CRT)

Figure 9.11 Order Origination Report (CCMOX[AAA])

```
Thu Sep 27, 1994 1:08am        General Hospital                      Page 1
               Order Origination Analysis Report/SIM for 09/26/94
                               Respiratory Care

SIM Code  Description                                          Total
------------------------------------------------------------------------
0004      BEDSIDE SPIROMETRY                                    42
                               1N                                   10
                                              I/P          10
                               3N                                   15
                                              I/P          10
                                              OBG           5
                               4N                                   10
                                              I/P          10
                               ERN                                   7
                                         E/R        2
                                         ERH        5

0330      INTUBATION                                    10
                               1N                                    3
                                              I/P           3
                               ERN                                   7
                                              E/R           7
```

WORKLOAD ERROR REPORT (CCMWX[AAA])

This report lists workload errors generated when workload is not set up properly. This includes errors logged if problems are encountered while calculating workload values during the Manual Worklist Processor, Manual Schedule Processor or the Log Miscellaneous Workload function. It is used to identify areas where workload could not be calculated so that files can be corrected and existing workload data adjusted.

The online version of this report allows immediate printing of errors up to seven days back. Errors are purged after seven days even if they have not been printed through the online processor. For this reason, on the seventh day prior to being purged they are included on this midnight processing report to identify the errors that were purged.

NOTE: The "X" in the report name indicates your facility.

For additional information on workload errors, refer to the Workload Error Report in Chapter 7: Workload Processing in this document.

The following information is included on the report:

- Date/time report was printed
- Department description
- SIM item code and description
- Workload element code
- Employee's name
- Error date and time

Figure 9.12 Workload Error Report (CCMWX[AAA])

```
Thu Sep 27, 1994 1:08am        General Hospital                      Page 1
                    Workload Error Report for PHYSICAL THERAPY
 Workload NOT captured for    Workload      Employee          Error Date/Time
 -----------------------------------------------------------------------------
 4216 EVALUATION              1000.2        BARNS,DOUGLAS     09/19/94 1023am
 9005 PHYSICAL CAP EVA        1000.2        DAVIS,BARBARA     09/19/94 023am
 4216 EVALUATION              1000.2        DAVIS,BARBARA     09/19/94 1024am
 4216 EVALUATION              1000.2        JONES,DANIEL      09/19/94 1025am
```

NOTES EXCEPTION REPORT (CCMPNEX[AAA])

This report is generated for each department for which the Notes field is set to Active. It lists in date/shift and resource order the treatments that have been marked as being performed (Perf = Yes) but have not had their notes accepted as complete (released). This is a cumulative report. It contains all treatments, regardless of the performed date. The current Notes and Treatment Statuses are listed by the treatment and patient information. The following is an example of the report:

Figure 9.13 Notes Exception Report (CCMPNEX[AAA])

```
 6/19/94  2:03pm              General Hospital                     Page   1
                            Notes Exception Report
                               Physical Therapy

Date/Shift  Resource Description
            Stn Room/Bed  Patient Name       Incomplete Note Account #    Type
            Treatments                           Trmt Status Perf'd Dte/Tme/Init
•---------------------------•
 6/18/94 1  Resource Description                         Prog
            1N 9234-02    Patient Name--------------------X   92100-00020  I/P
            Treatment (SIM Desc)------------X    Incomplete   6/18/94 11:00am SLD

 6/18/94 R  Rounds
            Treatment (SIM Desc)------------X    Eval In Prog 6/18/94  8:00am TRD

                                End of Report
```

The report is sorted first in date/shift, followed by resource. For scheduled item types, the date is listed without the shift. The sort that follows is the same as found when displaying the resource's worklist/schedule. The resource's scheduled items are listed first followed by the treatments existing on the worklist.

NOTES COMPLETION REPORT (CCMPNCX[AAA])

This report is generated for each department that is active on Documentation. It lists in date/shift and resource order, the treatments that were marked as being performed (Perf = Yes) during the day and had their notes accepted as complete (released). The following is an example of the report:

Figure 9.14 Notes Completion Report (CCMPNCX[AAA])

```
 6/19/94  2:03pm              General Hospital                      Page   1
                           Notes Completion Report
                              Physical Therapy

Date/Shift  Resource Description
            Stn Room/Bed  Patient Name      Completed Notes  Account #    Type
            Treatments                         Trmt Status   Perf'd Dte/Tme/Init
•---------------------------•
 6/18/94 1  Resource Description               Eval/Prog
            1N 9234-02    Patient Name--------------------X   92100-00020  I/P
            Treatment (SIM Desc)------------X   Performed     6/18/94 11:00am SLD

 6/18/94 R  Rounds
            Treatment (SIM Desc)------------X   Complete      6/18/94  8:00am TRD

                                  End of Report
```

The report is sorted first in date/shift, followed by resource. For scheduled item types, the date is listed without the shift. The sort that follows is the same as found when displaying the resource's worklist/schedule.

Appendix A - TABLES

Illustrations

INTRODUCTION

This section contains an explanation of the fields, tables, and files used by the Clinical Management Module of STAR Patient Care. It does not contain an explanation of the tables used by the Patient Scheduling Module that are also used by Clinical Management's Worklist Processing: Holidays, Physician/Resource Specialties, Resource Department Code and Resource Types. It also does not include any discussion on the remaining scheduling tables used when scheduling through Clinical Management: Appointment Priority, Appointment Types, Borrower File, Department Headers, Methods of Transportation, Reschedule Reason and Resource Master (Complete). Refer to the *Patient Scheduling Module* of the *STAR Patient Care Reference Guide* for information on these tables.

NOTES RESPONSES TABLE

The Notes Responses table allows your department to establish the most common responses for questions defined as Table types. When you define the questions, your department indicates the type of response (for example, table, text, paragraph, value, date, time, and date/time) that can be given to that question. When the response format to the question is a Table, valid choices are selected from the Notes Responses table.

You can access the Notes Responses table through Table Maintenance located in Data Processing, or through Departmental Table Maintenance found under the Departmental Management menu if it is defined in the CRT Names table. If you are accessing through Data Processing, a separate Notes Response table displays for each SIM department allowed to access Clinical Management. Select the desired department's Notes Response table. If you are accessing from a departmental menu, a list of the charge departments defined in the CRT Names table for this terminal displays. Select the appropriate department. If your terminal is set up to access only one charge department, the list of charge departments is bypassed and that department is assumed. After the department is determined, the following prompt displays:

Enter SIM Department code--

Enter the code if you know it. If you do not know the code, enter a hyphen (-) to view a list of the valid codes already defined. If the code you enter is not defined, an additional prompt displays enabling you to add the code. If you enter No, you are returned to the original prompt. If you enter Yes, the Notes Responses table screen displays enabling you to enter data.

After you select or enter a category code, the following screen displays:

```
                  General Hospital Table Maintenance Processor
                                                Thu Apr 08, 1994 01:36 pm
Notes Responses
Department: PHYSICAL THERAPY
( 1)Code         : AMAST
( 2)Description  : AMBULATE W/ASST---------------------------------X

( 3)Edit by      : Davison, Tracy
( 4)Edit date    : 01/15/94 1:17pm











Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
This field contains the response code you entered.

2. DESCRIPTION (50-C-R)
This field contains the descriptive name of the Notes Response. You can enter up to 50 alphanumeric characters in this field. The description of the response displays when linking responses to questions in the Notes Question table and when answering questions during notes processing.

3. EDIT BY (DISPLAY)
This field contains the name of the person who last edited the table display if an existing code entry was selected for revision. If a code is being added, the field is blank. The next time the code is accessed, it contains the name of the person that added or last revised the code.

4. EDIT DATE (DISPLAY)
This field contains the date the code was last edited if an existing code entry was selected for revision. If a code is being added, the field is blank. The next time the code is accessed, it contains the date that the code was added or last revised.

After these fields are completed, you can accept or edit the screen. If you accept the screen, the transaction is complete.

If you are accessing an existing code and do not make any changes to the screen, the following prompt displays enabling you to delete the entry:

Delete? (N)--

Enter **Y** for Yes to delete thecode from the table or press ENTER to bypass and return to the prompt enabling entry of another code. If you enter **Y**, the following prompt displays enabling you to delete the code or file it as deleted:

Enter delete(D) from file or file(F) as deleted [F]--

If you enter **D**, the code is removed from the file and cannot be reactivated at a later date without complete reentry. When you enter **D**, the system verifies if Documentation is active in the SIM Department table. If the Notes field has been set to Notes or Notes/Chrg, you are not able to delete. If the field is set to Inactive, the code is removed.

If you enter **F**, the code is retained in the table but is considered inactive. It can be reactivated later.

If you select an inactive item, the previous screen displays with the following prompt:

Enter delete(D) from file or activate(A)--

You can delete the code from the file or reactivate it. If deleted, the code is removed from the file and cannot be reactivated at a later date. If the code is reactivated, it becomes available for processing again.

If you press ENTER at the prompt enabling entry of the code, the following displays enabling you to print a list of the entries contained in the table:

Do you want a printed list? (Y/N)--

If you enter **N** or press ENTER, a printed list is not generated and you are returned to the list of tables. If you enter **Y** to print a list, the following prompt displays:

Enter code(C) sequence or alphabetic(A) [A]--

Enter **C** to sort the list in code order. If you enter **A** or press ENTER, the list is in alphabetic order. The following prompt displays enabling you to include entries filed as deleted:

Include entries filed as deleted? (Y/N) [N]--

If you enter **Y**, entries in the table considered inactive (filed as deleted) are included. If you enter **N** or press ENTER, only active entries are included. The list prints on the Date Processing High Speed Printer (HSP), and you are returned to the list of tables.

Impact

After you accept this screen, the following takes place:

- The response code entered is available to be linked to questions in the Notes Question table.
- The Edit Date and Edit By fields reflect the new date and individual associated with the change if they signed on with security.
- If the individual making the change was not signed on with security, only the Edit Date field reflects the new revision.
- The entry is edited, added, deleted, or marked as Filed or Deleted accordingly. The change is effective immediately.
- The table listing reflects any changes made.

Output

- The table listing prints on the Data Processing High Speed Printer (HSP) if requested.
- The report includes responses and responses that have questions linked to them.

The following is an example of the printed output:

Figure A.1 Notes Responses Table Report

```
05/02/95 09:31A                    General Hospital                      Page   1
                                    Notes Responses
                                  RESPIRATORY THERAPY
Code Description
   Questions with Response
-----------------------------------------------------------------------------------
 DEL1  Mouthpiece
 DEL2  Aerosol Mask
 DEL3  Trach Collar
 DUR1  Until Meds Utilized
 DUR2  5 Minutes
 DUR3  10 Minutes
 MED1  3.0ml Nacl
 MED2  0.25ml Ventolin/2.5ml NaCl
 MED3  0.50ml Ventolin/2.5ml NaCl

    End of Report
```

NOTES QUESTIONS TABLE

This table enables each department to define the questions that should be available to group in the Notes Question Group table or to link to Evaluations and/or Progress Notes.

You can access the Notes Questions table through Table Maintenance located in Data Processing or through Departmental Table Maintenance found under the Departmental Management menu if it is defined in the CRT Names table. If you are accessing the Notes Question table through Data Processing, a separate Notes Questions table displays for each SIM department allowed to access Clinical Management. Select the desired department's Notes Questions table. If you are accessing from a departmental menu, a list of the charge departments defined in the CRT Names table for this terminal displays. Select the appropriate department. If your terminal is set up to access only one charge department, the list of charge departments is bypassed and that department is assumed. After the department is determined, the following prompt displays:

Enter SIM Department code--

Enter the code if you know it. If you do not know the code, enter a hyphen (-) to view a list of the valid codes already defined. If the code you enter is not defined, an additional prompt displays enabling you to add the code. If you enter No, you are returned to the original prompt. If you enter Yes, the Notes Questions table screen displays enabling you to enter data.

The system then displays the following prompt:

Enter question code--

If entering a new code or copying from an existing one, the following screen displays to allow you to revise/build the parameters for this question:

```
                  General Hospital Table Maintenance Processor
                                                      Thu Apr 08, 1994 Notes Questions
Department: ANESTHESIA
 1 Code    2 Initial  3 Sexes      4 Required?          5 Internal?
   3         No         All         Yes
 6 Description
   How long was patient treated?
 7 Response Format  8 Text Length  9 Value Format
   Table
10 Normal Ranges   11 Low Value   12 High Value    13 Low Value  14 High Value

15 Edit By                        16 Edit Date
   Davison,Harold                    06/08/94 1002am









Accept this screen (Y/N)  [Y]--
```

If copying from an existing code, the data entered for the Copy From code displays to allow revision.

Field Explanations

1. CODE (DISPLAY ONLY)
The code previously entered/selected displays.

2. INITIAL (1-A-R)
This field enables you to indicate if this question should only be asked the first time this note is entered for this patient and account for this order. All subsequent shifts and treatments do not ask the question again. Only future orders or future visits display initial questions again. This allows for certain questions to be only asked once during processing of notes if desired. The following prompt displays:

Should this question only display the first time for patient? (Y/N) [N]--

If the question is flagged as an initial question and is further defined as an evaluation question, it displays/prints as an Initial Evaluation question in the Display/Print function.

3. SEXES (1-C-R)
This field enables you to indicate whether this question should display based on the sex of the patient. Enter **F** for Female patients, **M** for Male patients, or, if it is applicable for all patients, press ENTER for the default response of ALL. When a group of questions display for a patient, they are appropriate for the patient's sex. The following prompt displays:

Ask this question for Females(F), Males(M) or All(A) patients? [A]-- |

4. REQUIRED? (1-A-R)
This field enables you to indicate if a response is required for both inpatients, outpatients, or not required at all. Once selected, the following prompt displays enabling you to specify if a response is required for an inpatient or in-house outpatient type:

Require response for inpatients(I), outpatients(O), all(A), or [none]--
Inpatients option includes outpatients in beds.

Enter **I** for response required for inpatients only. Enter **O** for response required for outpatients. Enter **A** for response required for all patient types. Press ENTER for the default of not required for any patient type.

This data is defined at the question level but can be overridden at the group level. The values contained in these fields are the default value used when linking questions to groups.

5. INTERNAL (1-A-R)
This field enables you to specify for inpatients, outpatients, or both, if this question/ response is considered internal to the department. Internal questions do not print/ display from inquiry functions used outside the department (for example, Order & Results Inquiry). Once selected, the following prompt displays:

Is question internal for inpatients(I), outpatients(O), all(A), or [none]--

Inpatients options includes outpatients in beds

Enter **I** for inpatient or **O** for outpatients if this question/response should only be viewed for personnel with access to this department. Press ENTER to enable viewing/printing of this questions/response from outside departments for all patient types (not internal).

This data is defined at the question level but can be overridden at the group level. The values contained in these fields are the default values used when linking questions to groups. If you entered **I**, Inpatient displays. If you entered **O**, Outpatient displays. If you entered **A**, All displays. If you pressed ENTER, *Not Internal* displays.

6. DESCRIPTION (75-C-R)
This field displays the description of the question entered. You can enter up to 75 alphanumeric characters.

NOTE: With the exception of the paragraph questions, as the questions display during notes processing, they are displayed in sequence shown on the screen for that specific SIM item. For this reason, there should be some thought given to the order in which the responses are listed.

This is the description of the question description used when entering notes. The description is not upshifted, therefore upper and lower case letters can be used. This description cannot be edited after it has been accepted and your department is active on notes processing. If the Notes field on the Clinical Management Page of the SIM Department table is set to Notes or Notes/Chrg, updates are not allowed to the description. The following prompt displays:

Enter the question description--

7. RESPONSE FORMAT (1-A-R)

You can indicate the format of the response for this question. When you access this field, the following prompt displays:

Enter the response format type (V,T,X,P,D,N,B)--

Value(V), Table(T), Text(X), Paragraph(P), Date(D), Time(N) or Date/time(B)

- <u>Value</u> **-** If you enter **V** for Value, the system assumes that there may be a particular format to be used (decimal point and slash mark) as well as low and high values associated with a normal range. You can access the Value Format, Normal Ranges and both Low/High Value fields. You should use this format for numeric value. Use of normal ranges is not required. When using normal ranges, two fields are provided in the instance when a slash mark (/) is used in the format of the value. The first set of ranges is used for the first value entered before the slash (/) and the second set of ranges is used for the second value entered after the slash (/). This is typically used in verifying normal ranges for blood pressure, but it is not limited to this example.

- <u>Table</u> **-** If you enter **T** for Table, the appropriate table responses are identified. When you access this field, any previously defined responses display for revision. The system enables you to select an entry from the Notes Responses table or you can enter a hyphen (**-**) to indicate that you want to enter an option that is not contained in the table. Care should be given to the order entered. The order entered is the order in which the responses display for selection. The following prompt displays:

  Enter response code, first letters`-`, or `-`free form response--

  Enter the response code if you know it. If you do not know the code, you can enter a portion of the description followed by a hyphen (**-**) to view a partial listing. When you enter a hyphen (**-**), you can view the entire response listing for this SIM Department. You can also enter a hyphen (**-**) prior to a freeform entry to override the table selection and enter a freeform response not contained in the table. After you enter the response, the description displays. You also have the ability to link charges and workload (SIM Codes) to specific responses when using this option.

The following screen displays:

```
                General Hospital Table Maintenance Processor
GENERAL HOSPITAL A                                 Mon Jun 08, 1994 10:02 am
Department: ANESTHESIA
 1 Code    2 Initial  3 Sexes      4 Required?          5 Internal?
   3         No         All         Yes
 6 Description
   How long was patient treated?
 7 Response Format  8 Text Length  9 Value Format
   Table
10 Normal Ranges   11 Low Value   12 High Value    13 Low Value  14 High Value

15 Edit By                        16 Edit Date
   Davison,Harold                    06/08/94 1002am

                             Table Response Format
No.    Response Code/Description               Charge    Workload    Skip
1      AL01     TOLERATED WELL                 2990        2990       No
2      AL02     NO ADVERSE REACTIONS           2991        2991       No
3      ALO3     SEE COMMENTS                   2992        2992       No

Enter the response format type (V,T,X,P,D,N,B)--  |
Value(V), Table(T), Text(X), Paragraph(P), Date(D), Time(N) or Date/time(B)
    F1Prev Page F2Next Page F3 Insert  F4 Delete  F6 Reset  F7  Exit   ?
```

Field Explanations (Response Format, Table selected)

NUMBER (DISPLAY)

This field displays the code (line #) associated with the response next to it. The responses listed display in the order listed when processing notes. This field is automatically completed by the system. It can not be accessed. When items are inserted or deleted from the screen, the code number displayed automatically changes.

RESPONSE CODE/DESCRIPTION (TABLE LOOKUP)

This field enables entry of the response code linked to this question. It accesses the Notes Responses table defined for this department. You can enter the five alphanumeric characters for the code if it is known. If the code is not known, a portion of the description can be entered followed by a hyphen to view a listing of valid responses to select from. If the response is not on the table, a freeform override can be used by entering a hyphen (-) prior to the text being entered. Up to 20 characters can be entered. This item is not added to the table. The only limitation to the number of valid table entries is the five-character alphanumeric code. If a code is entered, the code and description display. If an override response is given, then the description displays with a hyphen (-) before it.

Once the department is active with Notes, the table codes and descriptions are locked and cannot be edited or revised. When deleting questions, *filed as deleted* is the only option after the department is active. This is to ensure that the long term storage of this data is not affected by adjustments or reusing of table codes and descriptions. Prior to being active, these codes can be deleted or adjusted.

The order of the responses listed is the order in which they display during Documentation. For this reason, care should be given in listing the order of the responses.

Questions should be table driven, values or dates as frequently as possible, and worded in such a fashion as to minimize the typing requirements of the clinicians. It may be useful to set up hospital wide accepted abbreviations that can be used to reduce keying time as much as possible.

CHARGE (TABLE LOOKUP)

This field enables you to enter a SIM Code from this department so that charges can automatically be generated based on a given response. The charge code can vary with each response, enabling the charge generated to change based on the response. It accesses the Service Item Master to enable selection. When accessed, the following prompt displays enabling selection/ entry of the SIM Code:

Enter first letters '-' or service item code--

The SIM Item code can be entered if it is known. If the code is not known, then a portion of the description can be entered followed by a hyphen (-) to view a listing of codes beginning with the characters entered. If a hyphen (-) is entered, the full listing of SIM items displays.

If this field is null, then charges are not generated when this response is given to this question during Documentation. If this field contains a SIM Item code, then that code and any linked panel items are charged. Charges are only generated automatically if the Notes field in the SIM Department table is set to C. Any other status does not generate charges. If you attempt to enter a SIM item in the Charge field and the Notes field is not set to C, the following message displays:

Response charging not activated!

WORKLOAD (TABLE)

This field allows you to enter a SIM code from this department so that workload can be automatically generated based on a response that is given. The SIM code entered for the workload to be calculated can vary with each response and is not linked to the charge you want to generate. This allows for automatic generation of workload based on the response. Workload that is linked to this item is automatically recorded in the same manner as when you indicate that a treatment was performed. It accesses the Service Item Master to allow selection. The selection process is the same as described above with entering a charge code.

SKIP (1-A-O)

This field allows you to indicate that when this response is given to this question, remaining questions in the group should be skipped. This option only works if using the Question Group table. It does not skip other questions that follow in other groups. It also skips all remaining questions in the group, not just the next or specific ones. For this reason, care should be given not only to the order that the questions display, but also which questions contain responses that could cause other questions to be skipped. When accessed, the following prompt displays:

Skip remaining questions in the group given this response (Y/N) [N]--

If you enter **Y** for Yes, then remaining questions in the group are skipped. If you enter **N** for No or press ENTER, then selection of this response does not cause any remaining questions in the group to be skipped.

- Text - If you select text, you must define the length of the freeform text response. Use this option when you wish to respond with free-text; you may limit the responses from 1-50 characters, or use a set maximum of 210 characters. When a colon (:) is used in a text response, it is converted to a semicolon (;).

  NOTE: If you elect to use the210 format, the system only displays the first 50 characters on the screen of questions. The system displays a dim-reversed arrow directly after the last character to indicate that the additional data may be reviewed by accessing the applicable question.

- Paragraph - If you select paragraph, the response area includes basic text editing techniques. When you access the field, you can enter three lines of text to use for automatic display when you enter notes for this question. You can only associate one Paragraph type of question with each SIM item. When you respond to this question during Documentation, you can enter up to three lines of 70 characters each of freeform information. The following example shows the screen that displays which enables you to enter the pre-canned text in the paragraph response format:

```
         1         2         3         4         5         6         7
   1234567890123456789012345678901234567890123456789012345678901234567890
01•                                                                      •
02•                                                                      •
03•                                                                      •
F1           F2           F3       F4     F5          F6            F7     F10
Delete Line  Insert Line  Center   Exit   Store Line  Restore Line  Pack   Help
```

- Date - If you set the format to Date, then you must enter a valid date when you respond to this question. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for information regarding date-entry techniques.

- Time - If you set the format to Time, then you must enter a valid time when you respond to this question. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for information regarding time-entry techniques.

- Date/Time - If you set the format to Date/Time, then you must enter a valid date and time when you respond to this question. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for information regarding date/time-entry techniques.

8. TEXT LENGTH (2-N-C)

You can enter freeform response of up to 210 characters. You can only access this if the Response Format field is set to Text. This field then becomes required. If any other format is entered, this field is not accessible. Enter a valid length from 1-50 or 210. The following prompt displays when you access this field:

Enter length of text response (1-50 or 210)--

9. VALUE FORMAT (1-A-C)

You can only access this field if the Response Format field is set to Value. This field then becomes required. If any other format is entered, this field is not accessible. This field is used to indicate if you should enter either a decimal point or slash mark as part of the response. The following prompt displays when you access this field:

Should the value contain a decimal(D) point, a slash(S) or neither [NL]--

Enter **D** to indicate if a decimal should be entered when the response is given during Documentation. Enter **S** to indicate if a slash should be entered when the response is given during Documentation. Press ENTER to allow the response field to accept entry of numeric digits without these special characters. The use of decimals or slash marks also affects the Low/High Value fields accessed. If you enter **D** and the Normal Ranges field is set to Yes, the first Low/High Value field is accessed. If you enter **S**, both Low/High Value fields are accessed which enables you to enter separate normal ranges for the value before the slash mark and the value after it.

10. NORMAL RANGES (1-A-C)

You can only access this field if the Response Format field is set to Value. This field then becomes required. If any other fomat is entered, this field is not accessible. This field is used to indicate if Normal Ranges are used to verify the data being entered during Documentation. The following prompt displays when you access this field:

Are normal ranges associated with the value (Y/N) [N]--

If there are normal ranges associated with this value, enter **Y** for Yes. If not, press ENTER or enter **N** for No. When you enter **N** you are not allowed access to the following Low/High Value fields.

11. LOW VALUE (7-N-C)
You can enter the low value for the normal range in this field. This field is only accessible if the Normal Ranges field is set to Yes. This field then becomes required. If the Value Format field is set to Decimal, the low range entered in this field is used against the value entered when you respond to this question. If the Value Format field is set to Slash, the low range entered in this field is compared to the value that you enter for the left side of the slash mark when you respond to this question. The following prompt displays when the field is accessed:

Enter low value for the normal range--

The format of the value you enter must follow the same format entered in the Value Format field. If the Value Format field is set to Decimal, the value entered here should allow the use of a decimal. If the Value Format field is set to Neither, then you can enter only numeric digits. This is the low end for the left side of the slash mark.

12. HIGH VALUE (7-N-C)
You can enter the high value for the normal range. This field is only accessible if the Normal Ranges field is set to Yes. This field then becomes required. If the Value Format field is set to Decimal, the high range entered in this field is used against the value entered when you respond to this question. If the Value Format field is set to Slash, the high range entered in this field is compared to the value that you enter for the left side of the slash mark when you respond to this question. The following prompt displays when the field is accessed:

Enter high value for the normal range--

The format of the value entered must follow the same format entered in the Value Format field. If the Value Format field is set to Decimal, the value entered here should allow the use of a decimal. If the Value Format field is set to Neither, then you can enter only numeric digits. The high value must be greater than the associated low value. This is the high end for the left side of the slash mark.

13. LOW VALUE (7-N-C)
This field is required if you entered a slash (/) in the Value Format field. This value represents the low end of the right side of the slash. When you access this field, the following prompt displays:

Enter new low value for the second value --

The format of the value entered must follow the same format entered in the Value Format field. Enter the low value for the right side of the slash. The low value in this field is compared to the value entered when you respond to this question. This is the low end for the right side of the slash.

14. HIGH VALUE (7-N-C)
This field is required if you entered a slash (/) in the Value Format field. This value represents the high end of the right side of the slash. When you access this field, the following prompt displays:

Enter new high value for the second value --

The format of the value entered must follow the same format entered in the Value Format field. The high value must be greater than the associated low value. This is the high end for the right side of the slash.

15. EDIT BY (DISPLAY)
This field displays the name of the person that last edited the table.

16 EDIT DATE (DISPLAY)
This field displays the date/time the last edit was made.

Impact

Upon completion of the screen, the following occurs:

- Any updates to existing questions are reflected when entering notes or linking questions to SIM items.
- Entries can be deleted from file or filed as deleted. Codes that are filed as deleted can be reactivated in the future. Codes that are deleted from the file can not be reactivated, they must be entered again.
- A listing can be printed using the standard print options found in table processing. It should include all fields contained in this table.

Output

When you exit the table, you are prompted with a question to allow you to print the contents of the table for the department currently being accessed. The following prompt displays:

Do you want a printed list? (Y/N) [N]--

Enter **Y** to receive a printed listing of the table on the printer associated with the requesting terminal. If you enter **N** or press ENTER, the listing is not printed. When you enter **Y**, the following prompt displays to allow you to indicate the sequence:

Enter code(C) sequence or alphabetic(A) [A]--

Enter **C** to sort the listing in code order or **A** to sort alphabetically by the description.

If you press ENTER, the listing is printed in alphabetic order. Once you specify the sequence, you are allowed to indicate if you want to include items filed as deleted. The following prompt displays:

Include entries filed as deleted? (Y/N) [N]--

If you enter **Y** for Yes, the items currently filed as deleted (inactive) are included on the report. If you press ENTER or enter **N**, then only active entries are included. Once you have completed this prompt, the message *Compiling and Printing* displays to indicate that the report is being generated. The following is an example of the printed output:

Figure A.2 Notes Questions Table Report

```
05/02/95 09:43A                       General Hospital                  Page   1
Notes Questions
RESPIRATORY THERAPY

Code     Format       Initial    Sexes     Required      Internal     Text Length
Value Format      Normal Ranges    Low/High Value     Low/High Value
Description
Responses                                  Charge      Workload       Skip
       Question Groups with Question
       Evaluations/Progress Notes with Question
--------------------------------------------------------------------------------
RRATE        Text       No       Both       All           Not Internal      18
Neither
Respiratory Rate-

HRATE        Text       No       Both       All           Not Internal      20
Neither
Heart Rate-

EQUIP        Table      No       Both     Not Required     Not Internal
Neither
Was Equipment Changed?
Y Yes                                     2415         1150            No
N No                                                                   No

DUR          Table      No       Both       All           Not Internal
Neither
Duration of Treatment-
 DUR1 Until All Meds Utilized             1258         1258            No
 DUR2 Five Minutes                        1458         1458            No
 DUR3 Ten Minutes                         1567         1837            No

TEMP         Value     Yes       Female   Required        Not Internal
Decimal(XXX.X)      96.5 - 100.1
Patient Temperature-

BP           Value      No        Both    Not Required     Not Internal
Slash                               90/150             40/90
Blood Pressure(/)-
                                        End of Report
```

Items filed as deleted are displayed in the printout with the standard inactive indicator. If a freeform entry is used, then the description of the freeform entry displays with an indicator identifying it as a override. Items entered with a code just include the description.

NOTES QUESTION GROUPS TABLE

This table enables your department to group questions into logical sets and link them to Evaluations/Progress Notes and/or SIM items. To access this table, select the Notes Question Groups table from the Table Maintenance function. If your terminal is set up to access multiple facilities, the prompt allowing selection of the facility displays. If only one facility is identified, then that facility is assumed. After selection of the facility, the following prompt displays:

Enter SIM Department code--

After you select a SIM department, questions for this department can be revised, deleted, activated and added.

- Revising a code **-** If an existing code is entered, the information screen displays to allow revision.

- Deleting a code **-** If an existing code is selected and no changes are made, the following prompt displays to allow deletion:

  Delete?--

  If you enter **N**, you are prompted to enter another code. When you enter **Y**, an additional prompt displays which enables you to delete the entry from the file or file as deleted:

  Enter delete(D) from file or file(F) as deleted [F]--

  Enter **F** or press ENTER and the message *Filed as deleted!* displays prior to redisplaying the prompt for entry of another code. Entries filed as deleted can be reactivated at a later date, but are not accessible through on-line functions.

  When you enter **D**, the system checks to see if the department is active on Documentation on the Clinical Management page of the SIM Department table. If the new field is set to Notes or Notes/Chrg, then entries can not be deleted, they can be inactivated. The message *Department Active on Notes - Deletion Not Allowed!* displays and you are returned previous prompt allowing the code to be filed as deleted. If the field is set to Inactive, then the deletion can take place. The following prompt displays for verification when deletions are allowed:

  Are you sure you want to delete this code ‘##’? (Y/N) [N]--

  If you enter **N**, the entry is not deleted and the prompt allowing entry of another code redisplays. When you enter **Y**, a check is done to ensure that the code is not linked to an existing Evaluation/Progress Note before allowing the deletion. If it is not linked, the entry is deleted and the message *Deleted!* displays before redisplaying the prompt allowing entry of another code. If it is linked to a SIM item, the deletion is not allowed and the message *Group linked to Note #99999 - Deletion not allowed!* before returning you to the prompt allowing entry of another code. Only the first occurrence of a linkage is reported back to you. McKesson recommends that you print the Evaluation/Progress Notes table before you delete any codes to verify that the code is not linked. This is not to be used as a maintenance aid, only to prevent errors from occurring.

- Activating/deleting codes filed as deleted **-** If a code is entered that is currently filed as deleted, the Code, Description, Edit by and Edit date fields display. The code can be deleted from the file or reactivated. The following prompt displays:

  Enter delete(D) from file or activate(A)--

  Enter **A** to activate an inactive code. The message *Activated!* displays before prompting you to enter another code. When you enter **D**, the following prompt displays for verification:

  Are you sure you want to delete this code '##'? (Y/N) [N]--

  If you enter **N**, the code is not deleted and you are prompted to enter another code. When you enter **Y**, the code is deleted and the message *Deleted!* displays prior to redisplaying the prompt for entry of another code.

- Adding a code **-** If a code is entered that does not exist, the following prompt displays:

  Add this code '##'? (Y/N) [Y]--

  If you enter **N**, the prompt allowing entry of another code redisplays. When you enter **Y** or press ENTER, the following prompt displays enabling you to enter the new code description:

  Enter description --

  You can enter up to 20 alphanumeric characters for the code description. If you do not know the code to enter, you can enter the first letters of the question group description, followed by a hyphen (-) for a list of question groups beginning with the characters entered to display. If you enter a hyphen (-), the system displays a list of all question groups entered. Select/enter the appropriate question group.

  After entry of the new code or selection of a question group, the following screen displays to allow you to revise/build the questions contained in this group:

```
                  General Hospital Table Maintenance Processor
GENERAL HOSPITAL A                                 Mon Jun 08, 1994 10:02 am
Department:  Physical Therapy
 1 Code    2 Group Description     3 Edit By             4 Edit Date
   EVAL1     Evaluation---------X    Davison,Harold        06/08/94 1002am
 5 No.  Question Code/Description
1       Patient Mobile?---------------------------------------------------X
2       Does the patient Smoke?
3       How often?
4       How many years?








Accept this screen (Y/N) [Y]--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The code of the question entered/selected displays.

2. GROUP DESCRIPTION (20-AN-R)
This field allows entry of the description of the group that displays when linking groups and/or questions to SIM items in Service Item Maintenance.

3. EDIT BY (DISPLAY)
This field displays the name of the person that last edited the table.

4. EDIT DATE (DISPLAY)
This field displays the date/time the last edit was made.

5. QUESTIONS (TABLE)
When a group of questions are linked to a SIM item, all of the questions in the group are asked in the order defined in this table. This field accesses the Notes Question table to select questions. The system displays a scrolling screen driver screen to give the department the ability to specify the order for the questions to display within this group. The following prompt displays to allow entry/selection of the question:

Enter first letter(s) '-' or question code--

The alphanumeric five-character question code can be entered if it is known. If the code is not known, then you can enter the first letters of the question followed by a hyphen (-) to view a listing of all questions for this department beginning with the characters entered. If a hyphen (-) is entered, the entire listing of questions defined for this department display for selection.

Impact

Upon completion of the screen, the following occurs:

- Any updates to existing groups are reflected when entering notes or linking questions to SIM items.
- Entries can be deleted from file or filed as deleted. Codes that are filed as deleted can be reactivated in the future. Codes that are deleted from the file can not be reactivated, they must be entered again.
- A listing can be printed using the standard print options found in table processing. It includes all fields contained in this table.

Output

When you exit the table, you are prompted with a question to allow you to print the contents of the table for the department currently being accessed. The following prompt displays:

Do you want a printed list? (Y/N) [N]--

If you enter **N** or press ENTER, the listing is not printed. When you enter **Y** to receive a printed list of the table on the printer associated with the requesting terminal, the following prompt displays to allow you to indicate the sequence:

Enter code(C) sequence or alphabetic(A) [A]--

Enter **C** to sort the listing in code order or enter **A** to sort alphabetically by the description. If you press ENTER, the listing is printed in alphabetic order. Once you specify the sequence, you are allowed to indicate if you want to include items filed as deleted. The following prompt displays:

Include entries filed as deleted? (Y/N) [N]--

If you enter **Y** for Yes, items currently filed as deleted (inactive) are included on the report. If you press ENTER or enter **N**, then only active entries are included. Once you have completed this prompt, the message *Compiling and Printing* displays to indicate that the report is being generated. The following is an example of the printed output:

Figure A.3 Notes Question Groups Table Report

```
6/16/94 0249pm                     General Hospital                Page   1
                               Notes Question Groups
                                   Physical Therapy

Code  Group Description
      Questions
              Evaluations/Progress Notes with Group
--------------------------------------------------------------------------------
ABC12 Evaluation Group--X
    11111 Question Description-------------------------------------------------X
    AAAAA Question Description 2-----------------------------------------------X

ASDLK Evaluation Group--2
    DA1D1 Question Description-3-----------------------------------------------X
    ADEAA Question Description 4-----------------------------------------------X

                                    End of Report
```

Items filed as deleted aredisplayed in the printout with the standard inactive indicator. Please note that the description of the question is 75 characters which do not easily fit on this listing. For this reason it is being truncated by 5 characters.

NOTES EVALUATIONS/PROGRESS NOTES TABLE

This table enables your department to define the questions that display when the option is chosen to enter patient evaluation or progress notes. Entries in this table can be linked to specific SIM items. Each SIM item identifies the Evaluations and Progress Notes that should be typically used when entering Progress Notes. Linking these to SIM items does not limit you from selecting alternate notes. It simply gives you a way to display the typical entries without having to know the code or search the entire table.

Notes are categorized into two types: Evaluations and Progress Notes. You enter both evaluation notes and progress notes from the Documentation processor.

First, you are prompted to identify the SIM department to access:

Enter SIM Department code--

The code can be entered if it is known. If the code is not known, a hyphen (-) can be entered to display a listing of the hospital's SIM Departments.

Once the department is entered, evaluations and progress notes defined for this department can be revised, deleted, activated, and added.

- Revising a code **-** If an existing code is entered, the information screen displays to allow revision.

- Deleting a code **-** If an existing code is selected and no changes are made, the following prompt displays to allow deletion:

  Delete?--

  If you enter **N**, the prompt allowing entry of another code redisplays. If you enter **Y** an additional prompt displays to allow deletion of the code from the file or file as deleted:

  Enter delete(D) from file or file(F) as deleted [F]--

  When you enter **F** or press ENTER, the message *Filed as deleted!* displays prior to redisplaying the prompt for entry of another code. Entries filed as deleted can be reactivated at a later date, but are not accessible through online functions.

  If you enter **D**, the system checks to see if the department is active on Documentation on the Clinical Management page of the SIM Department table. If the new field is set to Notes or Notes/Chrg, then entries can not be deleted, they can be inactivated. The message *Department Active on Notes - Deletion Not Allowed!* displays and you are returned previous prompt allowing the code to be filed as deleted. If the field is set to Inactive, then the deletion is allowed. The following prompt displays for verification when deletions are allowed:

Are you sure you want to delete this code '##' (Y/N) [N]--

If you enter **N**, the code is not deleted and the prompt allowing entry of another code redisplays. When you enter **Y**, a check is done to ensure that the code is not linked to an existing SIM item before allowing the deletion. If it is not linked, the entry is deleted and the message *Deleted!* displays prior to redisplaying the prompt allowing entry of another code. If it is linked to a SIM item, the deletion is not allowed and the message *Note linked to SIM Item #9999 - Deletion not allowed!* before returning you to the prompt allowing entry of another code. Only the first occurrence of a linkage to the SIM is reported back to you. McKesson recommends that you print the Clinical Management Notes portion of the SIM prior to deleting any code(s) to verify that it is not linked. This is not to be used as a maintenance aid, only to prevent errors from occurring.

- <u>Activating/deleting codes filed as deleted</u> **-** If a code is entered that is currently filed as deleted, the Code, Description, Edit by and Edit date fields display. The code can be deleted from the file or reactivated. The following prompt displays:

  Enter delete(D) from file or activate(A)--

  If you enter **A,** the entry is activated and the message *Activated!* displays before you are prompted you to enter another code. When you enter **D**, the following prompt displays for verification:

  Are you sure you want to delete this code '##'? (Y/N) [N]--

  If you enter **N**, the code is not deleted and you are prompted to enter another code. When you enter **Y**, the code is deleted and the message *Deleted!* displays prior to prompting you to enter another code.

- <u>Adding a code</u> **-** If a code is entered that does not exist, the following prompt displays:

  Add this code '##'? (Y/N) [Y]--

  If you enter **N**, the prompt allowing entry of another code redisplays. When you enter **Y** or press ENTER, the following prompt displays enabling you to enter the new code description:

  Enter description --

  You can enter up to 20 alphanumeric characters for the code description. If you do not know the code to enter, you can enter the first letters of the evaluation/ progress notes description, followed by a hyphen (**-**) for a list of evaluations/ progress notes beginning with the characters entered to display. If you enter a hyphen (**-**), the system displays a list of all codes entered. Select/enter the appropriate evaluation/progress note.

After entry of the new code or selection of an existing code, the following screen displays to allow you to revise/build the questions and/or groups contained in this group:

```
                  General Hospital Table Maintenance Processor
GENERAL HOSPITAL A                               Mon Jun 08, 1994 10:02 am
Department:  Physical Therapy
 1 Code    2 Description          3 Type   4 Edit By          5 Edit Date
    EVAL     Evaluation---------X    Eval     Davison,Harold     06/08/94 1002am
6 No.   Type   Code Description
  1     GROUP  Observation Group--X
  2     GROUP  Smoking Questions--x
  3     GROUP  Pregnancy Questions
  4     QUEST  When did problem first begin?---------------------x








Accept this screen (Y/N) [Y]--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The evaluation/progress note code previously entered displays.

2. DESCRIPTION (20-AN-R)
This field allows entry of the description of the evaluation or progress note. You can enter up to 20 alphanumeric characters for the description.

3. TYPE (1-A-R)
This field allows entry of the type of note; Evaluation or Progress Note. The following prompt displays to allow entry of the type:

Is this an Evaluation (E) or Progress Note (P) Type? --

This field is used to restrict the display of notes in the SIM and during notes entry. When linking Evaluations and Progress Notes to specific SIM items, the appropriate type of notes display for selection in each of the respective fields. When entering notes through Documentation, you are only allowed to select the appropriate type of note at the appropriate time. For instance, you are not allowed to enter Progress Notes from the Evaluation processor. Both Evaluations and Progress Notes can be entered in the Documentation processor, but at different points. This allows for separation of the data for printing and viewing purposes. If **P** is entered, Prog displays in the field. If **E** is entered, Eval displays.

4. EDIT BY (DISPLAY ONLY)
This field displays the name of the person that last edited the table.

5. EDIT DATE (DISPLAY ONLY)
This field displays the date/time the last edit was made.

6. QUESTIONS (TABLE LOOKUP)
This field allows you to link questions and/or question groups to this Evaluation or Progress Note. When accessed, the scrolling screen driver is used to enter the questions and groups of questions that should display when entering notes for the patient.

The scrolling screen driver fields are listed below:

NO. (DISPLAY ONLY)
The number is automatically assigned when a question or group is added.

TYPE (1-A-R)
This field allows you to specify whether you are adding a group or a question. The following prompt displays:

Select Question Groups (G) or Individual Questions (Q) [G]--

If you enter **G**, GROUP displays in the field and you are allowed to select from the Question Group table to add a group to this Evaluation/Progress Note in the next field. If you enter **Q**, QUEST displays and you are allowed to select from the Notes Question table directly in the next field.

CODE (DISPLAY ONLY)
The scrolling screen driver assigned code displays and can not be accessed. This code is assigned when a question or group is added. The order defined indicates the order in which the questions are asked and eventually printed.

DESCRIPTION (TABLE)
This field enables you to select from either the Notes Group Question table or the Notes Question table based on the entry in the previous field. If you enter Q, the following prompt displays to allow selection from the Notes Question table:

Enter first letter(s) '-' or code--

Only 50 characters of the question display. If you enter **G**, the same prompt displays with the exception that question is replaced by group. This accesses the Notes Question Group table.

The alphanumeric five-character code of either the question or question group code can be entered if it is known. If the code is not known, then you can enter the first letters of the question or question group followed by a hyphen (-) to view a listing of all questions or question groups for this department beginning with the characters entered. If a hyphen (-) is entered, the entire listing of questions or question groups defined for this department display for selection.

Impact

Upon completion of the screen, the following occurs:

- Any updates to existing notes are reflected when entering notes or in linking them to SIM items.
- Codes can be deleted from file or filed as deleted. Codes that are filed as deleted can be reactivated in the future. Codes that are deleted from the file can not be reactivated, they must be entered again.
- A listing can be printed using the standard print options found in table processing. It includes all fields contained in this table.

Output

When you exit the table, you are prompted with a question to allow you to print the contents of the table for the department currently being accessed. The following prompt displays:

Do you want a printed list? (Y/N) [N]--

If you enter **N** or press ENTER, the list is not printed. Enter **Y** to receive a printed list of the table on the printer associated with the requesting terminal. When you enter **Y**, the following prompt displays to allow you to indicate the sequence:

Enter code(C) sequence or alphabetic(A) [A]--

Enter **C** to sort the listing in code order or enter **A** to sort alphabetically by the description. If you press ENTER, the listing is printed in alphabetic order. Once you specify the sequence, you are allowed to indicate if you want to include items filed as deleted. The following prompt displays:

Include entries filed as deleted? (Y/N) [N]--

If you enter **Y** for Yes, the items currently filed as deleted (inactive) are included on the report. If you press ENTER or enter **N**, then only active entries are included. Once you have completed this prompt, the message *Compiling and Printing* displays to indicate that the report is being generated. The following is an example of the printed output:

Figure A.4 Notes Evaluations/Progress Notes Table Report

```
6/16/94 0249pm                    General Hospital                      Page   1
                              Evaluation/Progress Notes
                                  Physical Therapy

Code  Description                            Note Type
      Type    Questions/Groups Code & Description
                   Evaluations/Progress Notes with Group
--------------------------------------------------------------------------------
ABC12 Evaluation Notes---X                   Evaluation
      GROUP   11111 Group Description--X
      QUEST   AAAAA Question Description-------------------------------------X
ASDLK Progress Notes-----X                   Progress
      DA1D1   12212 Group Description--X
      ADEAA   3422A Question Description-------------------------------------X


               End of Report
```

Items filed as deleted are displayed on the printout with the standard inactive indicator.

NOTES PRE-CANNED TEXT CODE TABLE

This table enables your department to define and print pre-canned text that are later linked to pre-canned text groups or directly to SIM items.

To access this table, select the Notes-Pre-canned Text table from the Table Maintenance function. After selection of the facility, the following prompt displays:

Enter SIM department code --

The SIM Department code can be entered if it is known. If the SIM Department code is not known, an alpha list can be displayed by entering a hyphen (**-**). The list reflects valid departments for this terminal as defined in the SIM Department field in the CRT Names table.

After selection of the department, the following prompt displays to allow entry/update of pre-canned text or printing:

Add/Edit(E) or print(P) pre-canned? [E]--

Adding a Pre-canned Text

To add a pre-canned text, press ENTER or enter **E**. The following prompt displays to allow you to identify the desired text:

Enter precanned code or '-' for list --

The system prompts you to add the code; enter from two to five alphanumeric characters. If you enter a text code that does not exist, you are prompted to add the code.

When you press ENTER to add the code, the following screen displays for entry of the description:

```
                    General Hospital Table Maintenance Processor
                                                   Thu Jun 11, 1994 09:28 am
Department: Physical Therapy

( 1)Code         : C33
( 2)Description  : Normal Evaluation

( 3)Created by   : Banker,John
( 4)Creation date: 05/13/94 1653











Accept this screen? (Y/N) [Y]--
```

Field Explanations

DEPARTMENT (DISPLAY ONLY)
This field displays the description of the selected department in dim reverse color and can not be edited.

1. CODE (DISPLAY ONLY)
This field displays the code which represents the pre-canned group. The system automatically fills this field with your entry from the previous screen.

2. DESCRIPTION (50-AN-R)
This field displays the descriptive text representing the pre-canned text. When you add text, this field is blank and is required.

3. CREATED BY (DISPLAY ONLY)
This field identifies the individual responsible for creating this information. The system automatically captures this information when the screen's contents are changed and accepted.

4. CREATION DATE (DISPLAY ONLY)
This field identifies the creation date and time for this information. The system automatically captures this information when the screen's contents are changed and accepted.

When you are adding a code, the system displays the verification prompt. After you accept the screen, the system displays the message *Filed!* to identify a change is being recorded. The system then prompts you to edit (add) the text.

Editing a Pre-canned Text

After selecting the text to edit from the Pre-canned Text Code table, the system prompts you to edit the description or text. Press ENTER to edit the text. Enter **D** to edit the description and the system displays the code, description, and editing information. Please see the previous screen. Note that only the Description field can be edited. Once you accept the screen information and the message *Filed!* is displayed, the system prompts you to edit the text. At this point, press ENTER to edit the text, or enter **N** to return to the initial prompt.

If McKesson's WEM has been purchased and your terminal is set up to enable its use, the STAR Navigator Word Processing Interface is automatically invoked as soon as you add and/or edit the pre-canned text information. Refer to the Word Processing Interface section in the *STAR Navigator User's Guide* for further details; otherwise, the Softkey Editor is accessed. Refer to the Softkey Editor section in the *General Information* volume of the *STAR Patient Care Reference Guide* for further information.

If you press ENTER to edit the pre-canned text information, the system displays the corresponding text. At this point, you can use the Softkey Editor utility. The following screen is an example of the Softkey Editor:

```
                General Hospital Table Maintenance Processor
                                                   Thu Jun 11, 1994 09:31 am

     •NORMAL PROGRESS: Patient is progressing on schedule.  No changes to   •
     •existing treatment. Range of motion is increased by expected          •
     •percentage.                                                           •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •
     •                                                                      •

  1Ins 2Ln  3Ins 4Scn 5Scn   6Ins 7Ins 8Ctr 9Del 1Del 1Mrk 1Mrk  1Fmt 1    1End
   Srt  Fct  Doc  Fwd  Bck    Txt  Ln   Ln   Ln  0Wrd 1Ln  2Pge  3Scn 4PDR 5Edt
```

Deleting a Pre-canned Text

After you select the pre-canned text for deletion, enter **D** to edit the description and press ENTER at the edit prompt. Then enter **Y** at the deletion prompt. Verify your choice. The system displays the message stating that the pre-canned text has been deleted from the system.

Printing a Pre-canned Text/Pre-canned Text Group

When printing a pre-canned text or group, the system displays the following prompt to determine which pre-canned text to print:

Print all(A), by text Group(G) or individual pre-canned (I)? [I]--

The system includes all defined pre-canned text when you enter **A** to print all. The system includes all pre-canned text within the specified group when you enter **G** to print groups. It includes only the selected pre-canned text when you press ENTER or enter **I**.

PRINTING GROUPS OF PRE-CANNED TEXT

The system displays the Pre-canned Text Groups defined for the department. You can select one of the groups displayed.

When you print either all pre-canned text or select groups, the system prompts you for the sorting method; By Title or Code. Press ENTER or enter **C** to sort by Code or enter **T** to print by Title.

PRINTING INDIVIDUAL PRE-CANNED TEXT

When you enter I to print individual pre-canned text, the following prompt displays to allow you to enter the text code that you want to print:

Enter pre-canned text code to print --

You can enter up to five alphanumeric characters if the code is known. If the code is not known, you can enter the first letters of the pre-canned text description, followed by a hyphen (-) to display a list of entries beginning with the characters entered. If you enter a hyphen (-), the system displays all pre-canned text defined for that department. The prompt allows selection of one or multiple entries. After entry/selection of the desired code(s), the system asks for the printer to receive the output. After entry of the printer, the message *Printing* displays.

Impact

Upon acceptance of the screen, any updates made to pre-canned text are made available to online functions accessing this information. Any requested table prints are generated on the printer indicated.

NOTES PRE-CANNED TEXT GROUPS TABLE

When entering freeform text during Documentation, you have the option of selecting from the Pre-canned Text defined for your department. Your department can identify a group of pre-canned text that is typically selected for Documentation. You are not limited access to all text, but you can display the most common text for selection based on the treatment (SIM item) being given.

To access the table of pre-canned text groups, select the Notes Pre-canned Text Groups table from within the Table Maintenance function:

Enter SIM department code --

The SIM Department code can be entered if it is known. If the SIM Department code is not known, an alpha listing can be displayed by entering a hyphen (-) and pressing ENTER. The list reflects valid departments for this terminal as defined in the SIM Department field in the CRT Names table.

Once the department is determined, the following prompt displays to allow additions/ revisions to the current listing:

Enter first letter(s) '-' or group code --

You can select a displayed option number to edit the description of the group. To add new groups enter up to five alphanumeric characters. The following prompt displays to allow additions:

Add group `xxxxx` ? (Y/N) [Y] --

where `xxxxx` represents up to five alphanumeric characters.

If selecting an existing group, or adding a new group, the following screen displays:

```
                  General Hospital Table Maintenance Processor
                                                      Thu Jun 11, 1994 01:48 pm
Department: Physical Therapy

( 1) Code          : AAA
( 2) Description   : Group Description

( 3) Edit by       :
( 4) Edit date     :










Accept this screen? (Y/N) [Y]--
```

Field Explanations

1. CODE (DISPLAY ONLY)
This field displays the code entered previously and cannot be updated.

2. DESCRIPTION (36-AN-R)
This field allows entry of the description of the pre-canned group.

3. EDIT BY (DISPLAY ONLY)
This field displays the name of the person that last edited this table.

4. EDIT DATE (DISPLAY ONLY)
This field displays the date of the last edit.

If you want to enter or revise the pre-canned text linked to group, enter A or select the option number. If pre-canned text is not already linked to the group, the following prompt displays:

Add pre-canneds to this group? (Y/N) [Y]--

If you enter **N**, you are returned to the prompt allowing entry of the group. Enter **Y** or press ENTER if you want to enter pre-canned text to this group, and the following prompt displays:

Enter pre-canned code to add or `-` to list --

The prompt allows entry of up to five alphanumeric characters or entry of a hyphen (**-**) to list the pre-canned text defined for that department. When selecting from a list, the prompt allows selection of one or multiple text. After entry or selection of pre-canned text, the message *Pre-canned code added!* displays before returning you to the screen displaying the list of groups defined.

If pre-canned text has already been linked to the selected group the following prompt displays to allow entry/update to the existing text defined for this group:

Enter option number to delete or add(A) pre-canned --

If the code already exists, but you do not make any edits, you are prompted to delete the code. The prompt displays as follows:

Delete? [N] --

If you enter **Y**, the text is removed from the group. If you enter **N** or press ENTER, the text remains in the group and the following screen displays:

```
         General Hospital Clinical Management Table Maintenance Processor
                                                  Fri Jun 25, 1994 12:31 pm
Notes Pre-canned Text Groups
Department: RESPIRATORY THERAPY

( 1) Code           SO8
( 2) Text Group     02 SAO2 CHECK

Page:01                   Precanned Text in Group `SO8`
( 1) ONE   - TEST ONE-----------------------------------------X









Enter option # to delete or add(A) precanned--
```

The prompt on this screen enables you to select a displayed code or enter **A** to add more pre-canned text. If you select an option number, the screen allowing you to remove the text from the group displays. If you enter **A** to add text, the following prompt displays to allow entry of the text code or a hyphen (-) to list:

Enter precanned code to add or '-' to list--

You can enter up to five alphanumeric characters or a hyphen (-) to list the pre-canned text defined for your department. When you select from the displayed list, you can select multiple entries of pre-canned text. After entry or selection of pre-canned text, the message *Precanned code added!* displays before returning you to the screen displaying the list of groups defined.

Impact

Upon acceptance, the adjustments made to the Pre-canned Text Groups are reflected in online displays of the group. The groups can then be linked to specific SIM items to be used in Documentation. Any table displays/printouts are updated.

Output

To print the contents of the pre-canned text groups, access the Notes - Pre-canned Text table. Printing for both tables is done from the Notes - Pre-canned Text table.

The following is an example of the printed output:

Figure A.5 Notes Pre-canned Text Groups Table Report

```
07/07/94 01:13pm               General Hospital                       Page   1
                     02 SA02 CHECK. - Group: S08- Pre-canned Text
                               RESPIRATORY THERAPY
-----------------------------------------------------------------------------------
Code: M1 - BRONCHIAL EXAM

THE EXAM REVEALED THE FOLLOWING PROBLEMS:

1.  BRONCHIAL SPASM

2.  AIRWAY OBSTRUCTED

3.  NO CHANGE SINCE LAST EXAM


-----------------------------------------------------------------------------------
Code: M2 - BRONCHIAL EXAM WITH NO ABNORMALITIES

EXAM WITHIN NORMAL LIMITS
```

SIM DEPARTMENTS TABLE

A third page of the current hospital-controlled SIM Departments table is used to enable each department to indicate their Clinical Management-specific parameters.

CN: The Canadian SIM Departments table is three pages long, with four Canadian-only fields on the third page. The Clinical Management-specific parameters are displayed on the fourth page.

The SIM Departments table can be accessed through the Table Maintenance function located in Data Processing or through Departmental Table Maintenance found under the Departmental Management menu if defined in the CRT Names table. After selection, the following prompt displays to enable entry of the SIM department code:

SIM Department--

Enter the code if you know it, or press hyphen (-) and ENTER to display and view a listing of all SIM department codes. This field does not restrict access based on CRT. For this reason, it is not recommended that access be given to departments. After you enter the department code, the following two screens display one after the other (whether or not Clinical Management is in the network):

```
                  General Hospital Table Maintenance Processor
                                                Mon Apr 28, 2003 10:38 am
SIM Departments
 1 Department Description   2 Days Valid    3 Hours Valid  4 Text Format
   Laboratory                 0               48             1 REQ TEXT 19x75
 5 Print Requisition        6 Print Reconciliation         7 Max Recurring
   All                        Yes                            24
 8 Print log    9 Dept Log Sort     10 Backdate Charges    11 Dpt Result Printer
   Both           Account Number      999 day(s)
12 Summary Name              13 Bill Form Bucket           14 Credit Auto Daily
   LABORATORY                   3 LABORATORY                 No
15 Sub Department(s)     16 Future Date Orders 17 Backdate Orders  18 RES-Q OR
   CHM,HEM                  14 day(s)             15 day(s)           No
19 Dup Search Window        20 Default Category            21 Order Details
   1 HR 0 MIN                  TESTS                         Yes
22 Demographic Data Form   23 Softkey Editor Line Length   24 Spaces for Tab
                              72                             5
25 Default FIM Code        26 CDM Maintained
                              Yes




Enter field number or '/' starting field number--
                       next(/) or previous screen(/P) [/]
```

```
                  General Hospital Table Maintenance Processor
                                                   Mon Jul 01, 2002 10:46 am
SIM Departments
 1 Default Once Frequency          2 Collapse Occurrences 3 Carry Freq Forward
   ONCE                              Yes                    Yes
 4 CMS Compliant          5 ABN Modifier      6 Duplicate HCPCS Modifier
   Both                     GA                  QR
 7 ABN Form Count                          8 Approved Diagnosis List
   2                                            Yes
 9 Restrict Indef Duration                    10 Free Form Diagnosis
   Yes                                          Yes









Enter field number or '/' starting field number--
                       next(/) or previous screen(/P) [/]
```

The fields on the two screens shown previously do not change with Clinical Management. After you accept or bypass the two screens shown above, an additional Clinical Management screen may display based on the following criteria:

- Active Product - To determine if Clinical Management is in the network and is active, a McKesson-controlled parameter is checked. If Clinical Management is not active, the second screen does not display.

- McKesson Dept - If Clinical Management is active, the McKesson Dept field in the McKesson-controlled SIM Department table is checked. If this field contains an entry, the second screen does not display. This field is completed when the department is either Radiology, Laboratory, Pharmacy or Dietary.

- Dept Type - If the McKesson Dept field is blank, the Dept Type field is checked. If the department is a non-SIM department, the second screen does not display. Typical base departments currently set up as non-SIM departments are ADLs (A) and Treatments (T). If the department is a SIM Department type, the second Clinical Management screen displays.

The following screen is displayed for you to enter the department's Clinical Management parameters:

```
               General Hospital Table Maintenance Processor
                                                   Tue Mar 02, 1999 11:53 am
SIM Departments
                     Clinical Management Information
 1 Department          2 Status    3 Notes       4 Item Type Def  5 Dept Days
   RESPIRATORY THERAPY   Active      Notes/Chrg    Worklist         SMTWRFA
 6 Hours Open          7 Meal/Break              8 Shift 1       9 Start Time
   07:00am/07:00am                                 DAY              07:00am
10 Shift 2     11 Start Time   12 Shift 3        13 Start Time   14 Lead Time
   EVENING        03:00pm         NIGHT             11:00pm         99
15 Holidays    16 Auto Approve 17 Direct Assign  18 Pri/Sec Resource Types
   Yes            No              Yes               EQUIPMENT---------X,TECHNI
19 Workload Capture            20 Wkload Purge  21 I/P Purge    22 O/P Purge
   by Dept/SubDept/Employee       3 months          3 months        3 months
23 Medicare    24 Disch Days   25 Patient Types
   1              1               I/P,OPS,SER
26 I/P Hours   27 O/P Days     28 Resource Type for Assessment 29 Resource Days
   72/72          1/2             PHYSICIAN---------X,EQUIPM      3
30 Show PRN's   31 Remove Orders


Enter field number or '/' starting field number--
                       next(/) or previous screen(/P) [/]
```

The fields on this screen are entered as the first step in the build process for each department upon installation of the Clinical Management Module. If the code is being added, the prompt that displays allows entry of the first field. If the code is being revised, the prompt enables selection of the field(s) to be revised.

Field Explanations

1. DEPARTMENT (DISPLAY ONLY)

The description of the selected SIM department is displayed.

2. STATUS (1-A-C)

Enter **Y** for Yes or **N** for No to indicate if the department is Live on Clinical Management. Set this field to No while departmental tables/files are being built in preparation for Live on Clinical Management. After all tables/files are built and verified, set this field to Yes to indicate that the department is ready to begin processing orders through Clinical Management.

If you enter **Y** for Yes, Active displays. If you enter **N** for No, Inactive displays.

This field is required if Clinical Management is an active module of STAR Patient Care. The default response is No.

3. NOTES (1-A-O)

This field allows your department to specify if the Notes parameter is active and if charging should be automatically calculated as a by-product of the questions/ responses entered in Documentation. When this field is accessed, the following prompt displays:

Active on Notes (N), Notes & Auto Charging (C) or Inactive with Both (I)--

When you enter **N**, the system displays Notes in the field and online Documentation can now begin using the files already defined. At this point your department can no longer delete any entry in a Notes Processing Table or change the description. Existing codes can only be inactivated (filed as deleted), not deleted. This option allows your department to phase in automatic charging once you are comfortable with the Documentation process.

When you enter **C**, the system displays Notes/Chrg in the field and online Documentation can begin and any SIM Charge Codes defined are automatically generated based on responses given to questions in Notes Processing.

When you enter **I**, the system displays Inactive in the field and indicates that notes and automatic charges are not processed even if files are defined. This allows your department to build files without allowing access to online Documentation functions.

4. ITEM TYPE DEF (1-A-R)
This field is accessed by the Service Item Master (SIM) when defining Clinical Management information. The Service Type field on the Clinical Management Information screen of the Service ItemMaster (under Service Item Maintenance) uses the entry found in the Item Type Def field as the default in the prompt. The default can be overridden by any of the valid service item types.

Enter the most common service item type for the department to help in the process of defining parameters at the SIM level for Clinical Management.

The prompt allows entry of the valid service item types defined in the system; Disposable (D), Scheduled (S), Worklist (W) or Standard (T). The default is set to Standard (T).

Select one of the following:

- **D** Disposable Service Item Types are used to identify disposable central supply or store items that need to be tracked for reporting purposes. Orders for these items are not processed through Clinical Management and do not display under the Evaluation processor. They process through Order Management as if Clinical Management was not in the network.

- **S** Scheduled Service Item Types are used to identify the procedures/ treatments that are scheduled to specific resource(s) at specific dates and times. Orders for this item type display in the Evaluation processor and can suspend normal Order Management processing. These orders must be evaluated and then scheduled. Once scheduled, they are displayed on the appropriate resource's schedule as found in the Patient Scheduling Module.

- **W** Worklist Service Item Types are used to identify the procedures/ treatments that are performed for specific dates and shifts, but not a specific time during the shift. These are typically services where treatment is rendered at the patient's location, such as with many Respiratory Services or any treatment provided during rounds. Orders for this item type display in the Evaluation processor and Order Management processes as normal. Once evaluated, they must be assigned to a resource or to the Rounds (**R**) or Continual (**C**) shifts. Once assigned, they are displayed on the appropriate worklist for treatment to be provided.

- **T** Standard Service Item Types are used to identify the procedures/ treatments provided by the department that should not be processed through Clinical Management. The order does not display under the Evaluation processor and Order Management processes as normal.

5. DEPT DAYS (7-A-R)

Enter the days of the week the department is open. This field is used during the following processes:

- Ordering **-** The system does not prevent orders from being placed when the department is not open. To prevent the occurrences from generating during non-business hours, the frequencies, scheduled days, and order priorities, with cutoff times, need to be set up appropriately for the department's business hours.

  When placing an order, the order process verifies the order Start Date against the Dept Days field as defined for the department, the SIM item, or both. If the order is being placed for a day that is not defined as a day the department is open, the order process alerts the user with the following warning message:

  Request Date is invalid for this dept! Press NL. Valid days(s) - Mon, Thu

  The user is then prompted with the following message:

  Accept order? (Y/N) [N] - -

  Enter **Y** for Yes to accept the order. If you enter **N** for No, the order screen displays again. The user can then either change the Start Date/Time or not accept the order.

  NOTE: This validation only applies to the original Start Date and Time of the parent order and does not validate against the second and subsequent occurrences that may be created for the order.

- <u>Assigning Worklists</u> **-** When assigning work to resources/rounds/continual shifts, the system ensures that the department is open on that date prior to assigning work. Work is assigned to unopened days if the requested date indicates to do so.

- Lead Time - When the system is determining the amount of lead time available prior to the requested date/time, the days the department is open are checked. Closed days are not counted as hours available prior to the requested date/ time.

The following letters can be entered to indicate the days the department is open; Sunday (**S**), Monday (**M**), Tuesday (**T**), Wednesday (**W**), Thursday (**R**), Friday (**F**), Saturday (A). If the department is open every day of the week, enter A for All or press ENTER to accept the default ALL.

6. HOURS OPEN (SPECIAL FORMAT-R)

Enter the hours the department opens and closes. This field is used during the following processes:

- Ordering - The system does not prevent orders from being placed when the department is not open. To prevent the occurrences from generating during non-business hours, the frequencies, scheduled days, and order priorities, with cutoff times, need to be set up appropriately for the department's business hours.

  When placing an order, the order process verifies the order Start Date against the Hours Open field as defined for the department, the SIM item, or both. If the order is being placed for a time that the department is not open, the order process alerts the user with the following warning message:

  Request Time is invalid for this dept! Press NL.

  The user is then prompted with the following message:

  Accept order? (Y/N) [N] - -

  Enter **Y** for Yes to accept the order. If you enter **N** for No, the order screen displays again. The user can then either change the Start Date/Time or not accept the order.

  NOTE: This validation only applies to the original Start Date and Time of the parent order and does not validate against the second and subsequent occurrences that may be created for the order.

- Lead Time - When the system is determining the amount of lead time available prior to the requested date/time, the hours the department is open are checked. Times when the department is not open are not counted as hours available prior to the requested date/time.

When accessed, the following prompt displays:

Enter time department opens--

Enter the time the department is considered open. Standard time entry routines can be used. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for details concerning the standard entries of times.

After entry of the open time, the following prompt displays:

Enter time department closes--

Enter the time the department is considered closed. Again, standard time entry routines can be used.

If the department is open 24 hours a day, enter the beginning and ending time as the same time (for example, 08:00am-08:00am).

After both times are entered, they display separated by a slash (/).

7. MEAL/BREAK (TIME-R)
Enter the time during the day the department is closed for a meal or break. This field is used during the following processes:

- Ordering - The system does not prevent orders from being placed when the department is not open. To prevent the occurrences from generating during non-business hours, the frequencies, scheduled days, and order priorities, with cutoff times, need to be set up appropriately for the department's business hours.

  When placing an order, the order process verifies the order Start Date against the Meal/Break field as defined for the department, the SIM item, or both. If the order is being placed for a time the department is closed for a meal or break, the order process alerts the user with the following warning message:

  Request Time is invalid for this dept! Press NL.

  The user is then prompted with the following message:

  Accept order? (Y/N) [N] - -

  Enter **Y** for Yes to accept the order. If you enter **N** for No, the order screen displays again. The user can then either change the Start Date/Time or not accept the order.

  NOTE: This validation only applies to the original Start Date and Time of the parent order and does not validate against the second and subsequent occurrences that may be created for the order.

- Lead Time - When the system is determining the amount of lead time available prior to the requested date/time, the times when the department is on a meal/

break are checked. Times when the department is not open are not counted as hours available prior to the requested date/time.

When accessed, the following prompt displays:

Enter the beginning meal/break time--

Enter the time the department begins its meal/break. Standard time-entry routines can be used. Refer to the *General Information Volume* of the *STAR Patient Care Reference Guide* for details concerning the standard entries of times.

After entry of the beginning time, the following prompt displays:

Enter the ending meal/break time--

Enter the ending time for the department's meal/break. Again, standard time entry routines can be used.

After both times are entered, they display separated by a slash (/).

If the department is not closed for a meal/break, press ENTER to bypass this field.

8. SHIFT 1 (10-C-R)

Enter the description associated with the first shift of the day. The default response is Day. Depending on the time the shift begins and ends, the result date and shift displays in Unassigned Orders. The following table displays the date and shift to locate an order being placed today (T) with a requested date and time of tomorrow (T1) 0300:

Shifts per 24 hours	Shift Times: Start - End	Shift Type	Requested Date /	Time	Unassigned Orders for Date /	Shift
ONE	0700 - 1500	8hr	T1	0300	T1	1
ONE	0700 - 1900	12hr	T1	0300	T1	1
TWO	0700 - 1900	12hr	T1	0300	T	2
	1900 - 0700	12hr	T1	0300		
THREE	0700 - 1500	8hr	T1	0300	T	3
	1500 - 2300	8hr	T1	0300		
	2300 - 0700	8hr	T1	0300		
TWO	0700 - 1500	8hr	T1	0300	T1	1
	1500 - 2000	5hr	T1	0300		
ONE	0700 - 0700	24hr	T1	0300	T	1

If an order is placed with a start time that is not within one of the defined shifts for the SIM, the following warning message is displayed:

Request Time is invalid for this item! Press NL.

The user then has the choice of accepting the order, not accepting the order, or changing the start time of the order.

9. START TIME (TIME-R)

Enter the starting time for the first shift of the day. This field is used to determine the beginning time of the first shift for the department. The ending time is one minute less than the beginning time of the next shift. This field is used to determine the shifts that worklisted items are assigned to based on where the requested date and time of the order falls.

10. SHIFT 2 (10-C-R)

Enter the description associated with the second shift of the day. The default response is Afternoon.

If a second shift is not applicable for this department, you can enter N/A or NA, and N/A displays in the field. All remaining shift fields are bypassed and cannot be accessed. If a second shift is not entered, all fields throughout Clinical Management enabling entry of a valid shift do not accept an entry of 2 or 3 for this department.

If an order is placed with a start time that is not within one of the defined shifts for the SIM, the following warning message is displayed:

Request Time is invalid for this item! Press NL.

The user then has the choice of accepting the order, not accepting the order, or changing the start time of the order.

11. START TIME (TIME-C)

If the Shift 2 field contains a description, the beginning time of the second shift of the day is required. This field is not accessible if N/A displays in the Shift 2 field.

This field is used to determine the beginning time of the second shift for the department. The ending time is one minute less than the beginning time of the next shift. This field is also used to determine the shifts that worklisted items are assigned to based on where the requested date and time of the order falls.

12. SHIFT 3 (10-C-R)

Enter the description associated with the third shift of the day. The default response is Night.

If a third shift is not applicable for this department, you can enter N/A or NA and N/A displays in the field. All remaining shift fields are bypassed and cannot be accessed. If a third shift is not entered, all fields throughout Clinical Management enabling entry of a valid shift do not accept entry of 3 for this department.

If an order is placed with a start time that is not within one of the defined shifts for the SIM, the following warning message is displayed:

Request Time is invalid for this item! Press NL.

The user then has the choice of accepting the order, not accepting the order, or changing the start time of the order.

13. START TIME (TIME-C)
If the Shift 3 field contains a description, the beginning time of the third shift of the day is required. This field is not accessible if N/A displays in the Shift 3 field.

This field is used to determine the beginning time of the third shift for the department. The ending time is one minute less than the beginning time of the first shift entered. This field is also used to determine the shifts that worklisted items are assigned to based on where the requested date and time of the order falls.

14. LEAD TIME (2-N-R)
Enter the number of hours (up to 99) needed to assure that any order placed for a SIM with a service type of Scheduled is evaluated and scheduled prior to the requested date and time. This field is used to determine whether ordered items with a Scheduled Item Type should be temporarily suspended in Order Management. This field (combined with the Department Days, Hours Open, Meal/Break fields and the Holiday table) is used to determine if there are enough open department hours prior to the requested date and time for the department to respond and schedule the procedure.

For more information on calculating the amount of time and use of the Lead Time field, refer to “Chapter 2 - ORDER EVALUATION PROCEDURES” and “Chapter 3 - SCHEDULING PROCESS”.

15. HOLIDAYS (1-A-R)
This field is used to determine if the department wants work to be assigned to dates that are considered observed holidays by the hospital in the Holiday table found under the Patient Scheduling Module. Enter **Y** for Yes if work should be assigned to worklists on observed holidays. Enter **N** for No or press ENTER to indicate that you do not want work to be assigned to worklists on observed holidays.

If an order is placed for a day that is an observed holiday and the department is defined to not assign worklists on holidays, the following warning message is displayed:

Request Date is a holiday! Press NL.

The user then has the choice of accepting the order, not accepting the order, or changing the requested date for the order.

16. AUTO APPROVE (3-A-R)
Enter whether the department wants to automatically approve worklists. This field enables you to bypass the manual approval of your resources and worklists. This field

is used by the Worklist processing functions that assign work to resources that required approval after treatments had been assigned.

17. DIRECT ASSIGN (1-A-R)
This field enables the Direct Assignment feature, which streamlines the worklist assignment process for multiple occurrences generated by the same parent order. If an earlier occurrence generated by the same parent order has already been assigned to a resource, then the new occurrence is automatically assigned to the same resource for the appropriate date and shift. For more information, see “Chapter 4 - WORKLIST PROCESSING”.

The prompt for this field is:

Allow direct assignment of occurrences to selected resources? (Y/N) [N]--

Enter **N** for No, or leave the field blank, if you want to assign each occurrence order individually at the beginning of each shift for the department. The default is No. If orders for the department generally have a frequency of Once, you may want to set this field to No, or leave it blank, because Direct Assignment does not apply.

Enter **Y** for Yes if you want to enable Direct Assignment. Clinical Management checks every occurrence order received into the department, and assign “sibling” occurrences to the same resource assigned to an “older sibling,” if one exists. The occurrence is automatically assigned to the appropriate date and shift.

18. PRI/SEC RESOURCE TYPES (TABLE LOOKUP-R)
Enter the types of resources within this department that are to be used when assigning patients and procedures using the Worklist Processing functions. The existing resource types defined in the table for the facilities valid for this department display for selection. One or multiple types can be selected up to a maximum of five for each department.

If you select a code for one facility that exists in multiple facilities, that code is selected for all facilities. You cannot select the same code for different facilities. When the table displays, the selected codes that exist in multiple facilities are highlighted. After you accept the selections, the code is only shown once. It is not stored for each facility. If a code is to be deleted, it must be deselected each time that it is highlighted. If a code remains highlighted, then it is not deleted.

This field is checked by the Clinical Management page of the SIM to only allow entry of primary and secondary resource types valid for the department. Complete this field prior to defining any Clinical Management parameters in the SIM.

Workload

The following fields are used to build and maintain the files required to accumulate workload for the individual departments using Clinical Management.

The actual process of linking the workloadelement(s) to a SIM item is performed in the Service Item Master, Clinical Management Information page. Refer to that portion of this section for additional information.

Before workload is captured, complete the Workload Capture and Daily Retention fields.

19. WORKLOAD CAPTURE (1-A-R)
Indicate whether workload information should be captured for this department and if so, the level. If you enter **N** for No, workload is not captured for this department and the Daily Retention field is bypassed. If you enter **Y** for Yes, the following prompt displays enabling you to specify the level to which workload should be captured:

Capture Workload by Employee? (Y/N) [N]--

If you enter **N** for No or press ENTER, workload is captured at the department/ subdepartment level. The screen displays Dept/SubDept in the field. If you enter **Y** for Yes, workload is captured at the employee level in addition to the department/ subdepartment level being captured. The screen displays Dept/SubDept/Employee in the field.

Please note that capturing workload at the employee level can negatively impact system performance as well as disk space.

20. WORKLOAD PURGE (1-A-C)
Indicate the number of months (up to 18) daily workload data should be retained. If you press ENTER, the default and recommended retention period of three is used. If the Workload Capture field is set to No, this field is bypassed and not accessible. If workload is being captured, this field is required.

Even though workload statistics are purged at the end of the retention period, monthly totals are retained for year-to-date information.

Please note that capturing workload for an extended period of time can negatively impact system performance as well as disk space.

21. I/P PURGE (2-N-R)
This field allows you to enter the number of months to retain order/notes data contained in Clinical Management. You can enter 1 to 99 months but the default is set to 3 months. This number is used by midnight processing to purge the patient's clinical management data after the specified number of months following the patient's discharge.

22. O/P PURGE (2-N-O)
This field indicates the number of months that outpatient information remains on the system.

Reports

The following fields are used by Midnight Processing for inclusion of patients on reports.

23. MEDICARE (2-N-O)
Indicate the numeric day of the month (1-28) for which you want Medicare Forms to be generated for each recurring patient seen by your department. This form is printed to help prepare necessary information for submission to Medicare. This report prints once a month on the same day of each month as indicated in the field. The forms are produced during Midnight Processing of the day entered. This means they are available to the department on the day after the day indicated. If you press ENTER, the field is set to zero and Medicare forms are not generated.

24. DISCH DAYS (2-N-O)
Indicate the number of days after discharge that patients with the patient types indicated in the Patient Types field should display on the Follow Up report for this department. You can enter up to 99 days past discharge. If you press ENTER, the field is set to zero. The report is not generated for this department.

25. PATIENT TYPES (TABLE LOOKUP-O)
Indicate the patient types for which discharged patients should display on the Follow Up report after the number of days indicated in the Disch Days field. The patient types defined for the facilities valid for this department in the Patient Type table display for selection. One or multiple patient types can be selected up to a maximum of 20. If you press ENTER, the field is left blank. Even if Disch Days were indicated, patients are not included because patient types were not selected.

If you select a code for one facility that exists in multiple facilities, that code is selected for all facilities. You cannot select the same code for different facilities. When the table displays, the selected codes that exist in multiple facilities are highlighted. After you accept the selections, the code is only shown once. It is not stored for each facility. If a code is to be deleted, it must be deselected each time that it is highlighted. If a code remains highlighted, then it is not deleted.

26. I/P HOURS (SPECIAL FORMAT-O)
Indicate the initial and subsequent number of hours (up to 999 each) that inpatients seen by your department should display on the Midnight Processing Order Assessment report.

The initial number of hours indicates when the patient should display on the report for the first time. The subsequent number of hours indicates the number of hours after the patient displays the first time that they should display again. Patients continuing to receive treatment continue to display on the report based on the subsequent number of hours after they display the first time.

This is helpful when monitoring physician orders that are close to expiration. For instance, if your physician orders expire after 72 hours, you may want to be notified prior to the 72 hours so you can contact the physician to either authorize or discontinue further treatment. If you need 24 hours notice prior to the actual expiration of the order to contact the physician and get approval, your initial/subsequent hours would be 48/72. The patient displays on the report for the first time after 48 hours and again every 72 hours. The patient continues to display until treatment is completed, cancelled, or discontinued. This allows 24 hours of lead time prior to each 72 hours that the order would expire.

If you press ENTER, the field is set to 000/000 and inpatients are not included on the Order Assessment report.

The patient does not display on the report at the exact hour. The report is generated at midnight processing, and all patients meeting the criteria during the previous day are included.

27. O/P DAYS (SPECIAL FORMAT-O)
Indicate the initial and subsequent number of days (up to 99 each) outpatients seen by your department should display on the Midnight Processing Order Assessment report. Processing of outpatient days works the same as processing of inpatient hours. The only difference is that one processes in hours and the other in days.

If you press ENTER, the field is set to 00/00 and outpatients are not included on the Order Assessment report.

28. RESOURCE TYPES FOR ASSESSMENT (TABLE LOOKUP-O)
Indicate the resource types that require follow-up by alternate department personnel for the treatments they perform. This is quite helpful to departments that need to review the process of an assistant's work by a therapist.

Treatments performed by resources with one of these resource types display on the Order Assessment report based on the number of continual days of treatment indicated in the Resource Days field. If you press ENTER, the field is left blank and treatments for specific resource types are not included on the Order Assessment report.

29. RESOURCE DAYS (2-N-O)
Indicate the number of days of continual treatment that treatments being performed by resources with resource types indicated in the Resource Types field should display on the Exception report. If you press ENTER, the field is set to zero and treatments are not included on the report for the selected resource types.

If you press ENTER at the prompt allowing entry of the code, the following prompt displays enabling you to print a listing of the entries contained in the table:

Do you want a printed list? (Y/N)--

If you enter **N** for No or press ENTER, a printed list is not generated and you are returned to the list of tables. If you enter **Y** for Yes to print a listing, the following prompt displays:

Enter code(C) sequence or alphabetic(A) [A]--

If you press ENTER, the list is in alphabetic order. It prints on the Data Processing High Speed Printer (HSP). You are returned to the listing of tables.

30. SHOW PRNS (1-A-O)
This field indicates whether PRN orders are displayed on the worklist. PRN orders display at the bottom of the worklist. The PRN order is displayed in the unassigned orders queue so that it can be assigned to a resource, but it cannot be statused. It requires that an occurrence is generated for statusing. Also the PRN order cannot be the only order in the unassigned orders queue or it is not displayed.

31. REMOVE ORDERS (1-A-O)
This field indicates whether orders in the unassigned orders queue are removed at the time of discharge. The default for this field is Yes. If Yes is entered, when the patient is discharged, all orders, both active and pending, complete, and they are removed form the unassigned orders queue. If No is entered, when the patient is discharged, only the pending orders are completed. If an active order is in the unassigned orders queue, it is not removed.

Impact

After you accept the screen, the following takes place:

- The response indicated in the Item Type Def field displays as the default value for the Service Type field on the Clinical Management Information page of the SIM.
- Any order placed after the Status is set to Active is processed through the Clinical Management Module according to their indicated service item type as defined in the SIM.
- Shifts and associated start times and resource types are available for linking to the appropriate SIM items and are used when adding ordered SIM items to the worklist processor.
- The indicated department days are available for use when placing orders for the display of warning messages, calculation of available lead time and assignment of work to worklists.
- The Hours Open, Meal/Break, and Lead Time fields are used when determining the appropriate processing for orders placed with a service type of Scheduled, as well as providing information to remind ordering personnel of the typical hours of operation when originally placing orders.
- If the Dept Status field is set to Inactive, the screen can be accepted and processed without all required fields. An additional prompt displays identifying the missing fields and asks if you want to accept anyway. However, if the Dept

Status field is set to Active, the screen redisplays enabling entry of the missing fields prior to acceptance.

- Workload capture begins based on the entry made in the Workload Capture and Daily Retention fields. Workload is either turned off or captured and deleted automatically at the department/subdepartment level or at the department/subdepartment and employee level depending upon the response.

- If workload was previously being captured and is now turned off (at the department or employee level), the system stops capturing workload from that point on, but the previously collected data is retained for inquiry purposes until purged.

- Workload capture at the employee level and/or for a long retention period can negatively impact system performance and disk utilization.

- The Midnight Processing Follow-Up report reflects any changes made to the Disch Days and Patient Types fields.

- The Midnight Processing Medicare Form report reflects any changes made to the Medicare field.

- The Midnight Processing Order Assessment report reflects any changes made to the I/P Hours, O/P Days, Resource Types, and Resource Days fields.

Output

The table listing prints on the Data Processing High Speed Printer (HSP) if requested.

SERVICE ITEM MASTER

The Clinical Management Module uses fields contained on two pages of the Service Item Master (SIM): Clinical Management Information and Order/ Requisition Information. Each screen is discussed in detail on the following pages.

You access the Service Item Master through Service Item Maintenance, which can be accessed from the Data Processing main menu or from the Department Management submenu. If you are accessing through Data Processing, you must enter the SIM department before you enter the SIM item code. If you are accessing from a departmental menu, a list of the charge departments defined in the CRT Names table for this terminal displays. Select the appropriate department.

If your terminal is set up to access onlyone department, the list of charge departments is bypassed and that department is assumed. After you determine the department, enter the SIM item code. For additional information on access and entry of service items, refer to Appendix A: Tables in *Order Management/Charge Processing Volume 2* of the *STAR Patient Care Reference Guide*.

Clinical Management Information Page

The Clinical Management Information page of the SIM contains the parameters defined for the module at the SIM item level. This information is a second level table; it requires other tables be completed prior to entering this information. Complete the following tables prior to adjusting SIM items; SIM Department table, O2 Therapy (Patient Care), Charge Menu, Resource Types, and Workload Elements.

To allow for the initial build and maintenance of the files/tables used by Clinical Management prior to going live, the fields contained in the SIM are not used to adjust order processing unless the Status field on the Clinical Management Information page in the SIM Department table is set to Active.

When adding a new SIM item, the Clinical Management Information page displays after the Order Requisition Information page based on the following criteria:

- Active Product - To determine if Clinical Management is in the network and is active, a McKesson-controlled parameter is checked. If Clinical Management is not active, the second screen does not display.

- McKesson Dept - If Clinical Management is active, the McKesson Dept field in the McKesson-controlled SIM Department table is checked. If this field contains an entry, the second screen does not display. This field is completed when the department is either Radiology, Laboratory, Pharmacy or Dietary.

- Dept Type - If the McKesson Dept field is blank, the Dept Type field is checked. If the department is a non-SIM department, the screen does not display. Typical base departments currently set up as non-SIM departments are ADLs

(A) and treatments (T). If the department is a SIM department type, the Clinical Management Information screen displays.

If you are revising an existing SIM item, the Clinical Management Information page is accessed from the submenu displayed after selection of the SIM item. Access to this screen is allowed based on the criteria listed previously. If you select the Clinical Management page and you do not meet the criteria, an error message displays. If you are allowed access, the following screen displays:

```
                General Hospital Service Item Master Processor
                                                 May 12, 1995 04:09 pm
Department                Description                              Status
RT RESPIRATORY THERAPY    2902 INCENTIVE SPIROMETRY TREATMENT      Act
 1 Effective Date       2 I/P Item Type      3 O/P Item Type     4 Oxygen Therapy
   05/12/95               Worklist             Scheduled           HUM  HUMIDIFIER
 5 Charge Menu          6 Evaluate?          7 Shifts            8 Times
   1 RESP THER            Both                 123
 9 Dept Days           10 Preferred Resource      11 Secondary Resource
   SMTWRFA                4 THERAPIST----            6 ASSISTANT THE
12 Workload
   100  200  300
13 Charge Code                              14 Paragraph Question
   2941 AEROSOL TREATMENT                      PARA1  Aerosol Treatment Comme
15 Evaluation Formats                       16 Progress Note Formats
    Yes                                         Yes
17 Pre-canned Text Group



Enter field number or '/' starting field number--
```

The SIM department description, SIM item code and description, and current status of the SIM item display and cannot be edited.

Field Explanations

1. EFFECTIVE DATE (DATE-R)

Enter the date the change(s) being entered become active. Each SIM item can only have one currently active version and one future version. The changes become active during midnight processing the morning of the effective date entered. If today's date is entered, the changes become effective upon acceptance of the screen for active service items. Service items that are not active take effect when the service item becomes active. This field cannot be accessed and changed if you are accessing a future version. If the effective date is established on a previous page, that date is automatically brought forward.

2. I/P SERVICE TYPE (1-A-R)

Enter the type of service to be used for inpatients that best describes this service item. This field reflects the manner in which care is given for this SIM item. It controls the processing that occurs within Clinical Management for all orders placed for inpatient patient types.

The prompt allows entry of the valid service item types defined in the system; Disposable(D), Scheduled (S), Worklist (W) or Standard (T). The default displayed in the prompt is based on the contents of the Serv Type Default field in the SIM Department table. Press ENTER if the default response is appropriate for this SIM item. If the default does not apply, enter the correct response. The valid options are:

- **D** Disposable Service Item Types are used to identify disposable central supply or store items that need to be tracked for reporting purposes. Orders for these items are not processed through Clinical Management and do not display under the Evaluation processor. They process through Order Management as if Clinical Management was not in the network.

  S Scheduled Service Item Types are used to identify the procedures/ treatments that are scheduled to specific resource(s) at specific dates and times. Orders for this item type display in the Evaluation processor and can suspend normal Order Management processing. These orders must be evaluated and then scheduled. Once scheduled, they display on the appropriate resource's schedule as found in the Patient Scheduling Module.

  If an ordered item has been flagged as scheduled and the test has been scheduled and documented, the patient and order are added to the oxygen therapy census. Worklisted items are not added to the oxygen therapy census.

- **W** Worklist Service Item Types are used to identify the procedures/ treatments that are performed for specific dates and shifts, but not a specific time during the shift. These are typically services where treatment is rendered at the patient's location, such as with many Respiratory Services or any treatment provided during rounds. Orders for this item type display in the Evaluation processor and Order Management processes as normal. Once evaluated, they must be assigned to a resource or to the Rounds (**R**) or Continual (**C**) shifts. Once assigned, they display on the appropriate worklist for treatment to be given.

- **T** Standard Service Item Types are used to identify the procedures/ treatments provided by the department that should not be processed through Clinical Management. The order does not display under the Evaluation processor and Order Management processes as normal.

If this field is blank, the item is treated as a standard service item type.

3. O/P SERVICE TYPE (1-A-R)

Enter the type of service to be used for outpatients that best describes this service item. This field reflects the manner in which care is given for this SIM item for outpatients. It controls the processing that occurs within Clinical Management for all orders placed for inpatient patient types.

The processing of this field is the same as the I/P Service Type field. The two different fields are provided for procedures in which care is given to inpatients differently than outpatients. A procedure performed for inpatients may be performed on a worklisted basis, but is scheduled for outpatients.

For information regarding the processing and valid options for this field, refer to the I/P Service Type field discussed previously. If this field is blank, it is treated as a standard service item type.

4. OXYGEN THERAPY (TABLE LOOKUP-O)
Indicate the type of oxygen therapy associated with this SIM item if applicable. This provides an automated Oxygen Therapy Census when Clinical Management is active for the department. Patients with orders for this SIM item are automatically displayed on the Oxygen Therapy Census when the order becomes active. The patient is automatically removed from the census when the therapy is considered complete, discontinued or cancelled within Clinical Management, or when the patient is discharged.

The prompt asks you to enter the oxygen therapy code if you know it. If you do not know the code, enter a hyphen (**-**) to display a list of the valid codes defined in the Oxygen Therapy table of STAR Patient Care. One of the displayed options can be selected. The patient displays on the Oxygen Therapy Census with the type entered for this item.

5. CHARGE MENU (TABLE LOOKUP-O)
Indicate the charge menu that displays when entering charges for this SIM item through the Manual Worklist or Manual Schedule Processors. Select one of the displayed charge menus defined in the Charge Menu table for the selected department, if appropriate. Upon selection, the code and description of the charge menu displays. For information on the table, refer to "CHARGE MENUS" on page A-106. For more information regarding how charge menus are used in the charging process, refer to "Chapter 5 - CHARGING".

6. EVALUATE (1-A-R)
This field indicates whether orders should be evaluated for inpatients, outpatients, both, or neither for SIM items with a Worklisted or Scheduled item type. This process works on the patient type rather than on the assignment of a bed.

Select one of the following options:

- Enter **I** for Inpatient. Orders for this item are displayed in the Evaluation Queue for inpatient orders only. All outpatient orders bypass Evaluation and display in either unassigned orders or Schedule Initial Appointment based on the item type.

- Enter **O** for Outpatient. Orders for this item are displayed in the Evaluation Queue for outpatient orders only. All Inpatient Orders bypass evaluation and display in Unassigned Orders or Schedule Initial Appointment based on the item type.

- Enter **B** for Both. Orders for this item display in the Evaluation Queue for both inpatients and outpatients. All orders are evaluated prior to assignment.

- Enter **N** or press ENTER for Neither, the default. Orders for this item never display in the Evaluation Queue, regardless of the patient type. All orders bypass evaluation and display in Unassigned Orders or Schedule Initial Appointment based on the item type.

If you leave this field blank, Neither is assumed; therefore, you only need to adjust SIM items that are to be evaluated prior to resource assignment.

7. SHIFTS (3-N-R)
Enter the shifts during which this procedure can be performed. This field is used during the following processes:

- Ordering - A warning message displays when the requested date and time you entered falls during a shift in which this SIM item cannot be performed. This alerts you to enter a correct requested date and time.

- Assigning Worklists - When assigning work to resources/rounds/continual shifts, the system ensures that the SIM item is only assigned to shifts valid for this item using the automatic assignment process.

The prompt enables entry of the shifts valid for the department as defined in the SIM Department table. The default contains the valid shifts that can be selected. If you press ENTER, the SIM item can be performed on all shifts the department has established. If all valid shifts are not appropriate, enter the number of the shift(s). If you enter a shift that is not valid for the department, an error message displays.

8. TIMES (TIME)
This field is used to restrict the requested time that is entered during ordering for departments using Clinical Management. This is used in instances when a treatment can only be done during a time span that may be smaller than a defined shift or that may cross over shifts. For instance, a specific procedure may only be allowed to be performed from 9 a.m. to noon because of resource or equipment availability. The department's defined times for shift one are 7 a.m. - 3 p.m. In this instance, you would use the times field instead of the shifts field to restrict the requested time to only be between 9 a.m. and noon.

If the Times field is used, warning messages display during order entry telling the user that the requested time entered is not valid for the selected item. These messages are warnings and can be bypassed if necessary.

This field is accessed only if the Shifts field is blank. If you made an entry in the Shifts field, this field is automatically bypassed. If you attempt to access this field and the Shifts field contains an entry, the following error message displays:

Cannot specify times when shifts are defined.

When you are allowed access to this field, the following two prompts display in sequence enabling entry of the starting and ending times. Neither prompt has a default value, and both allow standard time entry routines.

Enter starting time for the test to be ordered--

Enter ending time for the test to be ordered--

9. DEPARTMENT DAYS (7-A-O)
Enter the day(s) of the week this procedure can be performed. This field is used during the following processes:

- Ordering - A warning message displays when the requested date you entered is for a date on which this procedure cannot be performed. This alerts you to enter a correct requested date.

- Assigning Worklists - When assigning work to resources/rounds/continual shifts, the system ensures that the SIM item is only assigned to days on which this procedure can be performed using the automatic assignment process.

The prompt enables entry of the following letters to indicate the day(s) the procedure can be performed; Sunday (S), Monday (M), Tuesday (T), Wednesday (W), Thursday (R), Friday (F), Saturday (A). The default is set to the days the department is open as defined in the Dept Days field in the SIM Department table. Press ENTER to accept the default.

Typically, the default is used. However, exceptions can occur when a department has limited access to specific personnel/equipment or when the department is not fully functional over the weekend but is open.

10. PREFERRED RESOURCE (TABLE LOOKUP-O)
Enter the preferred resource type for this SIM item. This field is used when assigning work to resources during Worklist Assignment functions. During automatic assignment, this SIM item is assigned to the resource with this resource type, if available. If one is not available, the second resource type is used. When manually assigning work, this field warns you if you selected a resource that has a different resource type than what is indicated for the SIM item. If this field is blank, all resource types are considered valid.

The prompt asks you to enter the resource type code if you know it. If you do not know the code, enter a hyphen (-) to display a listing of resource types defined in the Resource Type table defined under Scheduling Table Maintenance. Upon selection, the code and description of the selected resource type display.

For additional information regarding the assignment of work to worklists, refer to the Unassigned Orders and Review Assigned Worklist processors in “Chapter 4 - WORKLIST PROCESSING”.

11. SECONDARY RESOURCE (TABLE LOOKUP)
Enter the secondary resource type for this SIM item. The processing of this field is the same as described previously in the Preferred Resource field. The only difference is that this resource type is used if work can not be assigned to the preferred (primary) resource type. For additional information, refer to the Preferred Resource field.

12. WORKLOAD (TABLE LOOKUP-O)
Enter the workload element(s) for this SIM item. This information is used when creating assigning orders to worklists based on the amount of time required, as well as when capturing workload for treatments performed for statistical reporting.

If you are adding workload elements for the first time, the following prompt displays enabling entry of the first workload element:

Enter workload element code-- |

(NNNNN or NNNNN.NNN)

Enter the code if you know it. If you enter a code without the suffix, all workload elements established with the same five-digit numbers display for selection. For instance, if three workload elements have been defined (1000, 1000.1 and 1000.11) and you enter 1000, all three elements display. However, if you enter 1000.1, you access that one code.

If you do not know the workload element code, enter a hyphen (-) to display a list of available workload elements.

If the SIM item being edited is associated with a subdepartment, you can enter and select from workload items defined for that subdepartment and all elements not defined at the subdepartment level. Elements defined for other subdepartments do not display for selection and cannot be entered.

A maximum of five workload elements can be linked to a single SIM item. If left blank, workload is not captured or used in assigning work for this SIM item.

13. CHARGE CODE (TABLE LOOKUP)
This field generates charges for the SIM item indicated in this field when this treatment is indicated as being performed. This is only used with Documentation. Treatments considered as performed are not limited to the Performed status given to a treatment. If the treatment status is updated to Discontinue or Complete, an additional question is asked to determine if the treatment was also performed.

When you enter **Y** for this question as well as setting the status to Performed, charges are generated for the treatment. If a Panel Charged item is entered in this field, then all linked charges contained in the Panel are charged and linked to this treatment. The Charge Status of the treatment should be updated to Yes when charges are automatically generated. The associated charges display.

When you access this field, the following prompt displays to allow entry/selection of the SIM Item:

Enter first letters to list '-' or code--

The SIM Item code can be entered if it is known. If the code is not known, then a portion of the description can be entered followed by a hyphen (-) to view a listing of codes beginning with the characters entered. If a hyphen (-) is entered, the full listing of SIM items displays.

If this field is null, then charges are not generated when the treatment is indicated as being performed (Performed/Discontinued/Completed as above). Charges are either generated upon order entry or as a by-product of Documentation. If this field contains a SIM Item code, then that code and any linked panel items are charged. This is done even if there are charges generated during Documentation as well. This enables your department to charge for the treatment automatically while generating other charges based on questions asked if desired.

14. PARAGRAPH QUESTION (TABLE LOOKUP-O)
This field enables you to select from the questions defined for this department that are identified as *Paragraph* type questions. When you access this field, the questions defined for the department display for selection. The questions are defined by the Notes Question Table but display as a Paragraph (P) type. The following prompt displays to allow selection of one of the displayed questions:

Select the paragraph question to display when entering notes--

You can select a displayed option or press ENTER to not allow access to this area of the Documentation screen. If an option is selected, it may or may not have pre-canned text defined. If it is defined, then the text automatically displays when processing the question/response portion of notes for this treatment. If pre-canned text is not defined, then the field can be accessed to enter freeform text information in 3 lines of 70 characters. The basic text processing capabilities are available.

15. EVALUATION FORMATS (TABLE LOOKUP)
This field enables your department to specify the format of questions to be asked when processing notes for this treatment. The format selected determines the questions/ responses that display when entering the notes. Formats can be defined as group or individual. This field allows entry of multiple formats that display for selection when entering notes from the Documentation processor. The first format listed is used as the default when entering notes. Others listed can be selected to process. You can select entries that have an *Evaluation* type from the Evaluation/Progress Notes table which displays automatically. Formats defined as *Paragraph* types do not display. If formats are selected, the Evaluation Formats field displays Yes. If no formats are defined, a blank field displays.

16. PROGRESS NOTE FORMATS (TABLE LOOKUP)
This field enables you to specify the formats to be used when entering Progress Notes for the patient. The format selected determines the questions/responses to be accessed when entering notes. Formats can be defined as group or individual. This field allows entry of multiple formats that display for selection when entering notes from the Documentation processor. The first format listed is used as the default when entering notes. Others listed can be selected to process. When you access this field a table of valid formats displays from which you can make your selection(s). If this field is left blank, then you can select from the Evaluation/Progress Notes table when you enter evaluation notes on the patient. You can only select entries in this table that have a Progress Note type. Formats defined as Paragraph questions are not displayed. If format(s) are selected, the field displays Yes. If no formats are defined, a blank field displays.

17. PRE-CANNED TEXT GROUPS (TABLE LOOKUP)
You can enter either a pre-canned text or a pre-canned text group in this field. This field is used as the default during Documentation. When you access this field, the system displays the groups defined for the department. The following prompt enables you to select a group or press ENTER to select from the Notes Pre-canned Text table:

Select a pre-canned text group(G) or individual(I) text --

You can enter **G** to select a displayed group or enter **I** to select a specific Pre-canned Text from the Notes Pre-canned Text table. If a group is selected, all Pre-canned Text defined for that group displays for selection when processing notes. If a single text is selected, then that one text displays for selection. In both instances, you can select alternate groups or individual text when you are processing notes. If this field is left blank, you are allowed to select from any pre-canned text defined for the department.

Impact

After you accept this screen, the following takes place:

- If the service type is Scheduled or Worklist, the orders display in the Evaluation processor for the department. After the order evaluation is complete, the item is available for scheduling or for resource assignment in a worklist fashion, depending on the item type. Other item types are not processed through Clinical Management. Items flagged as Disposable display on the Midnight Processing Disposable Item report for charges occurring during the day.

- If the Oxygen Therapy field is entered, the Oxygen Therapy Census reflects any patients with this SIM item as an active order as described previously.

- If an ordered item has been flagged as scheduled and the test has been scheduled and documented, the patient and order are added to the oxygen therapy census. Worklisted items are not added to the oxygen therapy census.

- The charge menu linked to this SIM item is used while charging items through the Manual Schedule and Manual Worklist processors.
- The shifts and days appropriate for this SIM item are used to remind ordering personnel of the days and shifts this item is performed, as well as being used when assigning orders to worklists.
- The Preferred and Secondary Resource fields are used when assigning work to worklists, automatically and manually, as described above.
- The workload elements are used when assigning orders to worklists as logging workload for statistical reports. The workload values are only logged once the procedure is marked as being performed.

Order/Requisition Information Page

The Order/Requisition Information page of the Service Item Master (SIM) contains many parameters defined for the Order Management Module at the SIM item level. The Order Management Frequency field is used quite heavily with Clinical Management Worklist Processing. This field accesses the Frequency table which contains many fields used only with Clinical Management. When the Clinical Management Module is implemented, the Frequency table is modified to include the necessary Clinical Management information. After all necessary frequencies are entered/revised, the SIM items within the department should be reviewed to ensure that they are reflecting the correct frequencies.

When the Order/Requisition Information page is accessed, the following screen displays:

```
                   General Hospital Service Item Master Processor
                                                Thu May 01, 2003 12:11 pm
Department              Description                             Status
LAB Laboratory          1000 ACETAMINOPHEN                      Act
 1 Effective Date  2 Order Suppress  3 Charge on Order     4 Charge Type
->                   Not Suppressed    No                    Time of Charge
 5 Separate Req    6 Req Count       7 Alternate Printer / Requisition
   No                1
 8 Print Req       9 Panel Master   10 Patient Care Requirement
   All
11 Prompt                                  12 Confirmation
                                              No
13 Applicable Specimen Sources             14 Default Source
   1                                          Blood
15 Restricted Priorities 16 Order Portable  17 Questions

18 Sub Dept  19 Frequency                          20 Restrict Indef Duration
   CHM          All                                   No
21 Custom Document                                       22 Hold Days

23 HCPCS Modifiers  24 Modality    25 Body Region
   26                  AU             ANKLE-L
Enter effective date [today]--
```

The SIM department description, SIM item code and description and current status of the SIM item display and cannot be edited. The Print Req field designates how requisitions print upon order and cancellation. The majority of the fields are used solely by Order Management. For this reason, only the Frequency field is discussed in this document. For additional information regarding other fields, refer to Appendix A: Tables in *Order Management/Charge Processing Volume 2* of the *STAR Patient Care Reference Guide*.

Field Explanations

19. FREQUENCY (TABLE LOOKUP)
Select the frequency or frequencies (up to five) valid for this SIM item. The frequencies defined for this department display for selection. If you do not select a frequency, all frequencies are considered valid and the field displays All.

This field is used by the following processes:

- Ordering - When an order is placed, the frequencies that can be entered or displayed for selection are based on this field.
- Assigning Worklists - When assigning work to resources, the frequency entered is used to determine the valid shifts, the number of times during a single shift, as well as the number of days skipped between treatments.

For additional information, refer to “FREQUENCIES TABLES” on page A-67 or the Unassigned Orders and Review Worklist Processors in Chapter 4: Worklist Processing.

Impact

After you accept this screen, any changes made to the Frequency field are reflected during the ordering and worklist assignment processors.

NOTE: The information contained on these two pages of the SIM can be printed using the Print Service Item Master function. All fields described on the screen are printed. The Clinical Management data is printed on a separate page. The Frequency entered on the Order/Requisition Information screen is printed on both the Order/Requisition page and the Clinical Management page.

DEPARTMENT STATUSES

This table enables the Clinical Management system to status orders through HL7 transactions throughout the enterprise. It is used to define the statuses that are passed back to the Order Management system from ancillary departments. Statuses are passed back from the department to nursing as the order is processed by the department (that is, as the order is assigned to a resource).

The Department Statuses table is defined at the department level, to enable each department to define the descriptions that are associated with the hard-coded statuses on the system. This enables nursing staff and the departments to communicate the status of each treatment more effectively.

Access this table through Table Maintenance, located in Data Processing, or through Departmental Table Maintenance under the Departmental Management menu, if defined in the CRT table. After you select the Department Statuses table from the list and select a department, the following prompt is displayed:

Enter Status Code or '-' to list--

Enter the code if you know it, or enter a hyphen (-) to perform a table lookup. After you select a Status code, the following screen is displayed:

```
        General Hospital Clinical Management Table Maintenance Processor
                                                  Wed Oct 29, 1997 02:47 pm
Department Statuses
Department: PHYSICAL THERAPY


( 1)Code                 : ASSIGNED
( 2)Description          : Assigned

( 3)Enterprise-Wide Desc: ASSIGNED
( 4)HL7 Order Status     : IP-In process
( 5)HL7 Result Status    : I-No results available
( 6)Autocancel           : No

( 7)Edit By              : Hobbs,Tom
( 8)Edit Date            : 03/04/96 1605

Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
This field cannot be edited. It is the hard-coded description for the status that the department sends back based on the action of the department.

2. DESCRIPTION (8-C-R)
This field enables you to define a department-specific description for the selected code. It can be different from the code and can reflect the terminology commonly used by your facility. The description in this field is displayed in the Dept Status field for any

occurrence order in the Order Review and Order Inquiry processors and is the description that is sent back from the department to the Order Management system.

3. ENTERPRISE WIDE DESCRIPTION (8-C-R)
This field is used to define the terminology that is transmitted to any system in the enterprise other than Order Management. This description can be modified to reflect facility terminology.

4. HL7 ORDER STATUS (TABLE LOOKUP)
This field controls the HL7 code that is sent back to all other systems when placing an order from the department. This should be mapped according to your HL7 interface specifications.

5. HL7 RESULTS STATUS (TABLE LOOKUP)
This field controls the HL7 code that is sent back to all other systems when resulting an order from the department. This should be mapped according to your HL7 interface specifications.

6. AUTOCANCEL (1-A-R)
This field determines if an order can be automatically canceled based on action taken on the Order Management system. The prompt for this field is:

Allow automatic cancellation of orders with this status? (Y/N)-- |

FREQUENCIES TABLES

The Frequencies table is used by Order Management and Clinical Management. In Order Management, the Frequencies field accessing this table is located on all therapy order screens. These screens include: Speech, Occupational, Respiratory and Physical Therapy. In Clinical Management, it is located for entry in the Evaluation screens used when adding SIM items to an order.

The entries in this table enable either the ordering personnel or departmental personnel to enter the appropriate frequency of the order being entered/accessed at the time.

The Order Management module uses only the Code and Description fields inthis table. Clinical Management uses all of the fields in the worklist processor to determine the placement of ordered SIM items on worklists for correct dates and shifts.

After you select the appropriate department's Frequencies table, the system prompts you to enter the Frequency Type table code. You can enter the code or press hyphen (-) and ENTER to display a list of codes from which you can select. There is one screen involved in this transaction. After you enter the code, the following screen displays:

```
                  General Hospital Table Maintenance Processor
                                                   Fri Apr 12, 1996 01:06 pm
 Frequencies Department: ADL's


( 1)Code                : PRN
( 2)Description         : AS NEEDED
( 3)Scheduled Days      : ALL DAYS OF WEEK
( 4)Times               : 07:00A,15:00P,23:00P


( 5)Allow time edits?   : Yes
( 6)Interval            :
( 7)Edit by             : Lemux,Alan
( 8)Edit Date           : 03/09/96 1858






Enter field number or '/' starting field number--
```

If you access a frequency that is linked to a priority in a Priorities or Order Priorities table, the following warning message is displayed before any edits to the frequency are made:

Warning! This Frequency Is Linked In The Priority Table! Continue (Y/N) [Y] --

Enter N for No to leave the frequency unchanged, or Y for Yes to change the frequency. You can demand print the Frequency Report to review the priorities that the frequency is linked with as the default order frequency.

Field Explanations

1. CODE (DISPLAY ONLY)
This field contains the code assigned to the frequency. The system displays the code on table lookups during order entry. The following prompt displays:

Enter frequency code--

2. DESCRIPTION (33-C-R)
This field contains a description of the frequency. The system displays this description on table lookups. The following prompt displays:

Enter description--

3. SCHEDULED DAYS (TABLE LOOKUP)
This field identifies the schedule description from the Specified Days table. The system uses this field as the default for the Schedule field in order entry. Enter the code of a specific schedule, or enter a hyphen (-) and choose the desired schedule from the displayed list. The following prompt displays:

Enter first letters '-' or schedule code--

NOTE: **NOTE:** You cannot select schedules that are of the Special Days specified-days type from the Schedule table. If you select a schedule of that type, an error message displays:

Error: Cannot default to this schedule

4. TIMES (76-C-O)
This field identifies the specific times at which the item should be administered. Enter the desired times using military time (24-hour clock), or standard time (12-hour clock), followed by A for am or P for pm. The following prompt displays:

Enter times--

You can enter up to 16 times, separated by a comma. If you enter more than 16, an error message displays:

Error: Invalid format for this field

The system uses this field as the default for the Times field in order entry. If you modify any fields on the screen, the following prompt displays:

Accept this screen? Y/N or (D)elete [Y]--

Enter **Y** or press ENTER to save changes and continue with the next screen. Enter **N** to return to the menu without saving the changes. Enter **D** to delete the frequency. If you access a frequency and none of the fields are modified, the following prompt displays:

Delete? Y/N [N]--

Enter **Y** to delete the frequency. Enter **N** or press ENTER to access Nurse Station Defaults.

NOTE: This field is exclusive to the Interval field and is required at the screen level if not filled in. If you do not fill in an interval and you do not fill in any times and the schedule is not a daily or PRN schedule, an error message displays:

Error: Times required if not a daily or PRN schedule

5. ALLOW TIME EDITS? (1-C-R)
This field specifies the ability to perform edits of the administration times field at the time of order entry. This field is decided at the frequency level and by department. If you enter **Y** for Yes, you can edit the Times field at the time of order entry. If you enter **N** for No, you cannot edit the Times field at the time of order entry. The following prompt displays:

Allow edit of the Time field (Y/N) [Y]--

6. INTERVAL (SPECIAL FORMAT-O)
This field specifies the interval between treatments/procedures. Enter the hours and minutes between treatments/procedures. If you do not specify any times, the system uses this field to determine how many occurrences to create. The system adds the interval to the time of the last occurrence to determine when to create the next occurrence. The following prompt displays:

Enter interval between procedures (hours:minutes)--

7. EDIT BY (DISPLAY ONLY)
The name of the last person to edit the table entry is automatically displayed by the system.

8. EDIT DATE (DISPLAY ONLY)
The system displays the date this table entry was last updated.

NOTE: When you modify a table entry, the Edit By and Edit Date fields change to reflect the current date and the name of the individual signed on with security at the time of the edit. If the individual making the change is not signed on with security, only the Edit Date field reflects the new revision.

After these fields are completed, you can accept or edit the screen. If you modify any fields on the screen, the following prompt displays:

Accept this screen? (Y/N/'D'elete) [Y]--

Enter **Y** or press ENTER to save changes and continue with the next screen. Enter **N** to modify the fields further. Enter **D** to delete the frequency.

If you access a frequency and none of the fields are modified, the following prompt displays:

Delete? (N)--

Enter **Y** to delete the frequency. Enter **N** or press ENTER to access the Station Locations table.

If you elect to delete the entry by entering **Y**, the system displays the following prompt, enabling you to delete the code or file it as deleted:

Enter delete(D) from file or file(F) as deleted [F]--

To completely delete the code, enter **D**. Codes that are deleted from the file cannot be reactivated; they must be entered again.

To file this code as deleted (inactivate), enter **F** or press ENTER. Entries filed as deleted can be reactivated at a later date, but are not accessible through on-line functions.

To reactivate a code previously "*filed as deleted*," enter the old code at the prompt:

Enter order cancellation reason--

When you enter a "*filed as deleted*" code, the system displays the following prompt:

Enter delete(D) from file or activate(A)--

To completely delete the code, enter **D**. To reactivate this code, enter **A**. The system displays the following message:

Activated!

If you elected to accept the screen by entering **N** at the *Delete? (N)--* prompt, the system displays a Station Locations table similar to the following:

```
                  General Hospital Table Maintenance Processor
                                                Wed Feb 07, 2001 10:31 am
Frequencies
Department: ADL's


Page:01                         Station Locations             ##=Current Choices
( 1) 1E-1 EAST          (15) OB-OBSTETRICS      (29) RX4-Pharmacy NS
( 2) 2N-2 NORTH         (16) OPA-OUTPATIENT/    (30) RXA-PHARMACY NS
( 3) 3T-THIRD TOWER     (17) OPB-Outpatient     (31) RXB-Pharmacy NS
( 4) ADM-ADMISSION S    (18) OPC-Outpatient     (32) RXC-Pharmacy NS
( 5) CCU-CORONARY CA    (19) PCB-Patient Car    (33) SFA-STAR FIN NS
( 6) ICU-INTENSIVE C    (20) PCC-Patient Car    (34) SFB-Star Financ
( 7) LAA-LABORATORY     (21) PED-PEDIATRICS     (35) SFC-Star Financ
( 8) LAB-LAB NURSING    (22) PTA-PATIENT CAR
( 9) LBB-Laboratory     (23) RAA-RADIOLOGY N
(10) LBC-Laboratory     (24) RAB-Radiology N
(11) LD-LABOR AND DE    (25) RAC-Radiology N
(12) MH-MENTAL HEALT    (26) RX1-Pharmacy NS
(13) NSA-LAB NSB        (27) RX2-Pharmacy NS
(14) NSY-NURSERY        (28) RX3-Pharmacy NS

Enter choices (e.g. 1,7,5-9) or '-'choices to remove--
                                 end select(NL)
```

This screen displays the Station Locations table, from which you can identify those locations which are to be exceptions to the Frequency rule. You can enter an option number, multiple numbers, or a range of numbers. After you identify the station exceptions, the following message is displayed for each of the station exceptions:

Enter override values for location ICU? (Y/N)

If you press ENTER or enter Y for Yes, the system displays the Frequency screen for the station. You can have differing requirements for the station exceptions. If you make changes, the system displays the *Filed!* message, then continues with the next station exception or redisplays the Nursing Station Exceptions screen.

If you enter N forNo, the system displays the *Delete? (N)* prompt. If you press ENTER or enter N, the system continues with the next station exception or redisplays the Nursing Station Exceptions screen.

Impact

After you accept this screen, the following takes place:

- The table entry is added, deleted, or revised as appropriate.
- The table listing reflects any changes made.
- The new table entry displays the next time a hyphen (-) or other lookup is performed on the associated order screen. The table lookup when a hyphen (-) is entered displays in code order.

The frequencies entered in this table display for selection when indicating the frequencies valid for each individual SIM item.

As you exit the screen, you can choose to print the Frequency Table Report. Following is an example of this report:

```
03/22/04 1120                                                         Page  51
                                Frequency Table
                         DPT: RT - RESPIRATORY THERAPY
                        Nurs Sched    SCH Daily                            Tim
Code      Description   Stn  Code     PRN Type   Int Dur     Days          Edt
------------------------------------------------------------------------------

Q3H       EVERY THREE HOURS
                        All  ALL                                           Yes
Q4H       EVERY FOUR HOURS
                        All  DAILY    SCH           1                      No
Q4HW/A    EVERY FOUR HOURS WHILE AWAKE
                        All  QD       SCH           1                      Yes
                             07:00am,11:00am,03:00pm,07:00pm,11:00pm
Q6H       EVERY 6 HOURS
                        All  DAILY    SCH           1                      Yes
            Priorities: TIMED
Q6HW/A    EVERY SIX HOURS WHILE AWAKE
                        All  ALL                                           Yes
                             07:00am,01:00pm,07:00pm
Q8H       EVERY EIGHT HOURS
                        All  QD       SCH           1                      Yes
                             07:00am,03:00pm,11:00pm
QD        DAILY
                        All  DAILY    SCH           1                      No
                             07:00am
QID       FOUR TIMES PER DAY
                        All  ALL                                           No
                             07:00am,01:00pm,05:00pm,09:00pm
            Priorities: NEW PRIORITY
QOD       EVERY OTHER DAY
                        All  QOD      SCH           2                      No
QQQ       QQQ
                        All  DAILY    SCH           1                      Yes
RT-ABG    ROUTINE ABG 4 STANDARD DEPT TIMES
                        All  QD       SCH           1                      No
            Priorities: RTN ABG X 4 PER DAY  ROUTINE
STAT      STAT
                        All  STAT     SCH           1 Ocs                  Yes
            Priorities: STAT  ASAP
TH        TOM'S TEST
                        All  OT       SCH           1                      Yes
                             01:00am,07:00am
            Priorities: PRE-OP
                        LD   OT       SCH           1                      No
                             02:00am
                        NSY  OT       SCH           1                      No
                             01:00am,02:00pm
TID       THREE TIMES PER DAY
                        All  QD       SCH           1                      Yes

                                      End of Report
```

ORDER CANCELLATION REASON

This table enables you to define the reasons used to cancel an order/treatment through the Documentation processor. When you use the Documentation processor to update the status of a treatment to indicate the treatment was not performed (Unperformed or Discontinued), entry of a cancellation reason is required. The same table is used for all departments capable of using Clinical Management. For this reason, this table is never split by facility.

The Order Cancellation Reason table can be accessed through Table Maintenance, located in Data Processing, or through Departmental Table Maintenance under the Departmental Management menu, if defined in the CRT table. After you select the Order Cancellation Reason table from the list and select a code, the following screen displays:

```
                  General Hospital Table Maintenance Processor
                                                   Thu Aug 05, 2010 11:01 am
Order Cancellation Reason
( 1)Code             : 2
( 2)Description      : ORDERED INCORRECT
( 3)Radiology Reason :

( 4)Edit by          : James,Sherry L
( 5)Edit date        : 04/02/10 04:13pm










Enter field number or '/' starting field number--
```

Field Explanations

1. CODE (DISPLAY ONLY)
The system displays the five-character alphanumeric Order Cancellation Reason code.

2. DESCRIPTION (19-C-R)
The system requires you to enter the reason for the cancellation of the order.

3. RADIOLOGY REASON (1-A-O)
This field allows you to restrict the STAR Radiology-only reasons from displaying in STAR Order Management, STAR Clinical Management, and STAR Laboratory when an order is canceled or rejected from these applications.

When this field is set to Yes, the cancellation reason is not displayed in STAR Order Management, STAR Clinical Management, or STAR Laboratory when a hyphen (-) is entered to access the table at the cancel prompt or specimen rejection reason prompt. In the cancel prompt, in addition to the hyphen (-) as an option, users canenter a code that is defined in the table or a hyphen (-) followed by free text.

If a user enters a reason code that is defined as a reason for Radiology only, the following error is displayed:

Error: Cancel Reason Code is for Radiology Only!

When you access this field, the system displays the following prompt:

Restrict view to STAR Radiology application only? (Y/N)-- |

Enter **Y** to restrict the view to STAR Radiology only.

4. EDIT BY (DISPLAY ONLY)
The name of the last person to edit the table entry is automatically displayed by the system.

5. EDIT DATE (DISPLAY ONLY)
The system displays the date this table entry was last updated.

NOTE: When you modify a table entry, the Edit By and Edit Date fields change to reflect the current date and the name of the individual signed on with security at the time of the edit. If the individual making the change is not signed on with security, only the Edit Date field reflects the new revision.

After these fields are completed, you can accept or edit the screen. If you accept the screen, the transaction is complete.

Impact

After you accept this screen, the following takes place:

- The table entry is added, deleted, or revised as appropriate.
- The table listing reflects any changes made.
- The Order Cancellation Reason table report includes the Radiology Reason field.
- Order Cancellation reasons with the Radiology Reason field defined as Yes are restricted from the display in the list of reasons when performing the order cancellation in STAR Order Management, STAR Clinical Management, and STAR Laboratory.

- Entries in the Order Cancellation table with the Radiology Reason field defined as No or left as null aredisplayed for selection when performing the order cancellation in STAR Order Management, STAR Clinical Management, and STAR Laboratory.

- All order cancellation reasons in this table are displayed for selection when performing the Exam Request cancel or CheckIn Cancellation from STAR Radiology.

WORKLOAD CATEGORIES

Workload Categories are groupings of patient types and/or nursing station locations used to store workload data for statistical reporting.

Each department defines their categories (inpatient, outpatient, series, etc.) through this table. A separate table, Workload Pt Type/Loc, links each patient type and nursing station to one of the defined workload categories. When workload is logged using the Documentation processor, the raw counts logged are stored by category based on the patient type and nursing location. These categories are the basis for many of the reporting mechanisms.

Some example categories that might be defined are: Inpatients, Outpatients, Rehab Inpatients, Rehab Outpatients, Emergency Room, Home Health, Clinics, Repeat/ Series Patients and Others.

The Workload Category table can be accessed through Table Maintenance located in Data Processing or through Departmental Table Maintenance found under the Departmental Management menu if defined in the CRT Names table. If you are accessing through Data Processing, a separate Workload Category table displays for each SIM department allowed to access Clinical Management. Select the desired department's Workload Category table. If you are accessing from a departmental menu, a list of the charge departments defined in the CRT Names table for this terminal displays. Select the appropriate department.

If your terminal is set up to access only one charge department, the list of charge departments is bypassed and that department is assumed. Since workload categories are directly linked to SIM departments, this table is never set up as split by facility. After the department is determined, the following prompt displays:

Enter workload category code--

Enter the code (1-9) if you know it. If you do not know the code, enter a hyphen (-) to view a list of the valid codes already defined. If the code you enter is not defined, an additional prompt displays enabling you to add the code. After you select or enter a category code, the following screen displays:

```
                  General Hospital Workload Category Processor
                                                      Thu Sep 27, 1994 04:06pm
Workload Categories, Physical Therapy
( 1) Code       :1
( 2) Description:INPATIENTS

( 3) Edit by    :Booth,Allison
( 4) Edit date  :03/23/94 03:15pm









Enter field number or '/' starting field number--
```

If the code is being added, the displayed prompt allows entry of the category description. If the code is being revised, the prompt allows selection of the description field for revision.

Field Explanations

1. CODE (DISPLAY ONLY)
The one-digit workload category code entered or selected displays and cannot be edited.

2. DESCRIPTION (12-AN-R)
Enter the 12-character alphanumeric description associated with this category code.

3. EDIT BY (DISPLAY ONLY)
The name of the last person to edit the table automatically displays if that person signed on with security.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date this table was last updated. After you complete all required fields on the screen, you can accept, edit, or delete the entire entry. If you accept the screen, the transaction is complete. If you enter N to not accept the screen, a prompt displays enabling selection of the field(s) to edit. If you enter D to delete, the system begins the deletion process described below. This option only displays in the prompt if you are accessing an existing code.

If you are accessing an existing code and do not make any changes to the screen, the following prompt displays enabling you to delete the entry:

Delete? (N)--

Enter **Y** for Yes to delete thecode from the table or press ENTER to bypass and return to the prompt allowing entry of another code. If you enter **Y**, the following prompt displays enabling you to delete the code or file it as deleted:

Enter delete(D) from file or file(F) as deleted [F]--

If you enter **D**, the code is removed from the file and cannot be reactivated at a later date without complete reentry.

If you enter **F**, the code is retained in the table but is considered inactive. It can be reactivated later.

If you select an inactive SIM item, the previous screen displays containing the following prompt:

Enter delete(D) from file or activate(A)--

You can delete the code from the file or reactivate. If deleted, the code is removed from the file and cannot be reactivated at a later date. If the code is reactivated, it becomes available for processing again.

If you press ENTER at the prompt allowing entry of the code, the following prompt displays enabling you to print a listing of the entries contained in the table:

Do you want a printed list? (Y/N)--

If you enter **N** or press ENTER, a printed list is not generated and you are returned to the list of tables. If you enter **Y** to print a listing, the following prompt displays enabling you to indicate the sequence; code or alphabetic by description.

Enter code(C) sequence or alphabetic(A) [A]--

If you press ENTER, the listing is in alphabetic order. The following prompt displays enabling you to include entries filed as deleted:

Include entries filed as deleted? (Y/N)--

If you enter **Y**, entries in the table considered inactive (filed as deleted) are included. If you enter **N** or press ENTER, only active entries are included. The listing prints on the Date Processing High Speed Printer (HSP). You are returned to the listing of tables.

Impact

After you accept this screen, the following takes place:

- The Edit Date and Edit By fields reflect the new date and individual associated with the change if they signed on with security.
- If the individual making the change was not signed on with security, only the Edit Date field reflects the new revision.
- The entry is edited, added, deleted, or marked as filed as deleted accordingly. The change is effective immediately.
- The table listing reflects any changes made.

Output

- The table listing prints on the Data Processing High Speed Printer (HSP) if requested.

WORKLOAD PT TYPE/LOC

The Workload Pt Type/Loc table is used to assign each patient type (I/P, ADV, O/P, CON, DIS, ER, etc.)and nursing station (1N, ICU, 3S, etc.) to one of the nine Workload Categories already defined. When workload is being logged using the Documentation processor, the patient's type or nursing station location determines the category in which workload is stored. The following examples are provided to clarify the workload category used based on the patient type or nursing station location:

- Inpatient Types In a Bed - Since the patient is in a bed, the workload category associated with the nursing station to which the patient's bed belongs is credited the workload.

- Inpatient Types Not In a Bed - These are inpatient types that have not yet been placed in a bed (ADV, PAT, and so on). Since they are not in a bed, the workload category associated with the patient type is credited the workload.

- Outpatient Types - Any outpatient or contract patient type (SER, O/P, E/R, CON, and so on) uses the workload category associated with the patient type to credit the workload.

- Outpatient Types In a Bed - Even though these patients are admitted to a bed, the nursing station is not used to credit workload. The workload category associated with the patient type is used so that outpatient statistics can be kept separate from those of inpatients. To keep outpatients in beds statistics separate from other outpatients, you can use a separate workload category linked to the outpatient in beds patient types.

Any patient type or location not assigned to a workload category does not capture workload statistics. You cannot assign a nursing station or a patient type to more than one workload category. Each SIM department using Clinical Management links their own workload categories to patient types and nursing stations.

The table can be accessed through Table Maintenance located in Data Processing or through Departmental Table Maintenance found under the Departmental Management menu if defined in the CRT Names table. If accessing through Data Processing, a separate table displays for each SIM department allowed to access Clinical Management. Select the desired department's Workload Pt Type/Loc table. If accessing from a departmental menu, a list of the charge departments defined in the CRT Names table for this terminal displays. Select the appropriate department. If your terminal is set up to access only one department, the list of charge departments is bypassed and that department is assumed. After you enter the department, the facility is determined.

If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. After the facility is determined, the following prompt displays:

Assign patient types (P), or Inhouse Locations(L)--

Enter **P** if you want to access patient types; **L** if you want to access nursing stations. If you enter **P**, all patient types defined for the selected facility display in alphabetic order. If you enter **L**, all nursing stations defined for the selected facility display in alphabetic order. Each patient type/nursing station currently linked to a workload category is followed by Assigned to and the description of the workload category. Patient types/nursing stations not currently linked to a workload category are followed by Unassigned (no workload captured) displayed in dim reverse video.

The following is an example of the screen that displays when patient types are being reviewed:

```
                  General Hospital A Table Maintenance Processor
                                                   Thu Sep 27, 1994 04:06 pm
Workload Pt Type/Loc, Physician Therapy
Page:01         Patient Types - Workload Category Cross Reference
( 1) ADM Assigned to INPATIENTS
( 2) ADV Assigned to INPATIENTS
( 3) CON Assigned to OUTPATIENTS
( 4) DIS Assigned to MISCELLANEOUS
( 5) E/R Assigned to EMERGENCY ROOM
( 6) ERT Unassigned (NO workload captured)
( 7) I/P Assigned to INPATIENTS
( 8) O/P Assigned to OUTPATIENTS
( 9) OPS Assigned to O/P IN BEDS
(10) PAT Assigned to INPATIENTS
(11) POP Assigned to OUTPATIENTS
(12) SDS Assigned to OUTPATIENTS
(13) SER Assigned to RECURRING



Enter choice--
                                    nest page (/)
```

When reviewing nursing station locations, the same screen is used with the exception that all nursing stations for the selected facility display instead of patient types.

Up to 17 patient types/nursing stations can display on one page. If more than 17 exist, the standard paging options are available. The prompt enables selection of the patient type or nursing station you want to edit. If you select a patient type or nursing station that is not already linked to a workload category, the following prompt displays enabling entry of the workload category:

Enter workload category code for "ERT" ('-' for table)--

The prompt contains the selected patient type or nursing station code between the quotes. In the previous example, the patient type ERT was selected. Enter the workload category code if you know it. If you do not know the code, enter a hyphen (-) to display a list of workload categories for the selected SIM department.

After you enter the workload category, the following prompt displays for verification:

Assign “ERT” to “EMERGENCY ROOM”? (Y/N) [Y]--

Enter **Y** to accept the entry. The system displays the Filed message prior to redisplaying the list of patient types/nursing stations. The selected patient type/nursing station reflects the new workload category assignment.

If a patient type or nursing station is selected that is already linked to a workload category, the following prompt displays to unassign the patient type or to enable entry of a new workload category.

Enter workload category code for “SDS” (‘-’ for table)--
(or unassign(U) SDS)

The prompt contains the selected patient type or nursing station code between the quotes as well as after the unassign (**U**) prompt. In the previous example, the patient type SDS was selected.

- Changing the workload category - If the workload category is being changed, enter the new code using the same entry routines discussed previously. After you enter the code, the Filed! message displays prior to returning you to the list of patient types/nursing stations. The selected patient type/nursing station reflects the new workload category assignment.

- Unlink a current workload assignment - To unlink (Unassign) a patient type/ nursing station from its current workload assignment, enter **U**. The following prompt displays for verification:

  Unassign SDS? (Y/N)--

  The selected patient type/nursing station code displays in the prompt. If you enter **N** for No, you are returned to the list of patient types/nursing stations. If you enter **Y** for Yes, the message Unassigned displays prior to redisplaying the list of patient types/nursing stations. The patient type/nursing station shows that it is unassigned.

Press ENTER to return to the prompt that enables entry of **P** for patient types or **L** for nursing station locations. If you press ENTER at this prompt, the following prompt displays enabling you to print a listing of the entries contained in the table:

Do you want a printed list? (Y/N)--

If you enter **N** or press ENTER, a printed list is not generated and you are returned to the list of tables. If you enter **Y** to print a listing, the following message displays prior to redisplaying the list of tables:

Compiling and Printing!

The listing prints on the Date Processing High Speed Printer (HSP).

Impact

After you accept this screen, the following takes place:

- The patient type is assigned to the workload category indicated and workload for that patient type is captured under the category assigned for inpatients *not* in beds and other outpatient types.
- The nursing station (location) is assigned to the workload category indicated and workload for that nursing station is captured under the category assigned for inpatients in beds.
- Any patient type/nursing station not assigned to a workload category does not capture workload statistics.
- The table listing reflects any changes made.

Output

The table listing prints on the Date Processing High Speed Printer (HSP) if requested.

WORKLOAD ELEMENTS

A workload element is a step that represents departmental activity. Workload elements can be assigned to a subdepartment if desired. Workload can be captured automatically as a by-product of treatments being updated using the Documentation processor or can be entered manually using the Log Miscellaneous Workload processor.

When defining workload units, the department develops a table of workload elements that describe the activities associated with treatments the department performs. These workload elements identify the unit value associated with each type of activity. They represent units of time it takes to perform a specific activity.

The Workload Element table is separate from the SIM to allow more flexibility when building your workload elements. You can enter one element and use it for many treatments. A single five-digit workload element can be entered several times, each with a separate method type indicated in the decimal places. This allows for flexible reporting. Additionally, a setup procedure can be linked to the primary workload element. If this is done, the setup time can be captured separately from the time it takes to perform the treatment.

This function is used to build the various workload elements for your department. For additional information regarding the options available for setup of workload elements, refer to the discussion at the beginning of “Chapter 7 - WORKLOAD PROCESSING”.

You can access the table through Table Maintenance located in Data Processing or through Departmental Table Maintenance found under the Departmental Management menu if defined in the CRT Names table. If you are accessing through Data Processing, a separate table displays for each SIM department allowed to access Clinical Management. Select the desired department's table. If accessing from a departmental menu, a list of the charge departments defined in the CRT Names table for this terminal displays. Select the appropriate department.

If your terminal is set up to only access one department, the list of charge departments is bypassed and that department is assumed. Since workload elements are linked directly to SIM departments, this table is never set up as split by facility. After the department is determined, the list of subdepartments defined for the department displays.

The following prompt enables selection of one of the displayed subdepartments, or you can press ENTER to accept the master SIM department:

Enter choice or NL for Master [PT]--

You can select one of the displayed subdepartments if the element being entered is to be used specifically for that subdepartment. If the workload element is to be used by multiple subdepartments, or if you don't want to define the element for a specific subdepartment, press ENTER to default to the master SIM department contained in the prompt. In the previous example, the master SIM department is PT.

If subdepartments are not defined for the department in the SIM Department table, the subdepartment listing is bypassed and the master SIM department is used for all elements defined. After you select the subdepartment or department, the following prompt displays enabling entry of the workload element code:

Enter workload element code -

(NNNNN or NNNNN.NNN)

Enter the workload element code in the format described previously if you know it. The first five digits are the element code. The last three digits, preceded by a period, are to be used for the different method types and are considered the suffix.

If a code is entered that has several other workload elements defined with the same five-digit number but have different suffixes, each element with the different suffix displays for selection. If you enter the element code followed by a suffix, that one code is accessed. If you do not know the code, enter a hyphen (-) to view a list of valid codes.

If the element being entered needs to have a setup element linked to it, define the setup workload element first. Since setup workload elements are typically the same for all subdepartments, they are not defined at the subdepartment level, but at the master SIM department level.

After you select or enter the element code, the following screen displays:

```
              General Hospital Table Maintenance Element Processor
                                                  Thu Sep 27, 1994 04:06pm
Workload Elements, Physical Therapy

  1 Element Code          2 Element Description            3 Unit Value
    13134                   Stroke Evaluation                30.0
  4 Setup Element Code    5 Setup Element Description      6 Setup Unit Value
    1000 Set Up             Patient Set Up                   10.0
  7 Edit by               8 Edit Date
    Doner,Kathy             03/21/94 1452









Enter field number or `/`starting field number--
```

If the code is being added, the displayed prompt allows entry of the description and remaining fields. If the code is being revised the first blank field is accessed. If all fields are completed, the prompt allows selection of the field(s) to be revised.

Field Explanations

1. ELEMENT CODE (DISPLAY ONLY)
The workload element code previously entered displays and cannot be revised.

2. PROCEDURE DESCRIPTION (30-AN-R)
Enter the description associated with this particular workload element.

3. UNIT VALUE (5-N-O)
Enter the time in minutes (up to 999.9) to the nearest tenth of a minute it takes to perform the activity being described by this workload element. The decimal point must be entered in order to enter a tenth of a minute. The system defaults to whole minutes if a decimal point is not entered. If a value is not entered, workload is not captured and cannot be used in assigning work to worklists.

4. SETUP ELEMENT CODE (9-N-O)
Enter the workload element code already defined as a setup element for this activity if you know the code. If you do not know the code, enter a hyphen (-) to view a list of elements already defined. The elements that display are the same as the elements discussed earlier with entry of the workload element to enter/edit. Leave this field blank if the workload element currently being entered is a setup code. You should not have setup elements linked to setup elements.

Only workload elements not linked to a specific subdepartment (as discussed previously) display for selection or can be entered. It is assumed that all setup items are not specific to a subdepartment.

5. PROCEDURE DESCRIPTION (DISPLAY ONLY)
The description associated with the setup element entered displays.

6. UNIT VALUE (DISPLAY ONLY)
The unit value associated with the setup element entered displays and cannot be updated.

7. EDIT BY (DISPLAY ONLY)
The name of the person to last edit the table automatically displays if that person signed on with security at the time of editing.

8. EDIT DATE (DISPLAY ONLY)
The system displays the date this table was last updated.

After all required fields on the screen are complete, you can accept, edit, or delete the entire entry. If you accept the screen, the transaction is complete. If you enter **N** to not accept the screen, the displayed prompt allows selection of the field(s) to edit. If you enter **D** to delete, the system begins the deletion process as described below. The delete option is only available when accessing an existing code.

If you are accessing an existing code and do not make any changes to the screen, the following prompt displays enabling you to delete the entry:

Delete? (N)--

Enter **Y** for Yes to delete thecode from the table or press ENTER to bypass and return to the prompt allowing entry of another code. If you enter **Y**, the following prompt displays enabling you to delete the code or file it as deleted:

Enter delete(D) from file or file(F) as deleted [F]--

If you enter **D**, the code is removed from the file and cannot be reactivated at a later date without complete reentry.

If you enter **F**, the code is retained in the table but is considered inactive. It can be reactivated later.

If you select an inactive item, the previous screen displays containing the following prompt:

Enter delete(D) from file or activate(A)--

You can delete the code from the file or reactivate it. If deleted, the code is removed from the file and cannot be reactivated at a later date. If the code is reactivated, it becomes available for processing again.

If you press ENTER at the prompt allowing entry of the code, the following prompt displays enabling you to print a listing of the entries contained in the table:

Do you want a printed list? (Y/N)--

If you enter **N** or press ENTER, a printed list is not generated and you are returned to the list of tables. If you enter **Y** to print a list, the following prompt displays:

Enter code(C) sequence or alphabetic(A) [A]--

If you press ENTER, the list is in alphabetic order. The following prompt displays enabling you to include entries filed as deleted:

Include entries filed as deleted? (Y/N)--

If you enter **Y**, entries in the table considered inactive (filed as deleted) are included. If you enter **N** or press ENTER, only active entries are included. The listing prints on the Data Processing High Speed Printer (HSP). You are returned to the listing of tables.

Impact

After you accept this screen, the following takes place:

- The Edit Date and Edit By fields reflect the new date and individual associated with the change if they signed on with security.
- If the individual making the change was not signed on with security, only the Edit Date field reflects the new revision.
- The entry is edited, added, deleted, or marked as Filed as Deleted accordingly. The change is effective immediately.
- The table listing reflects any changes made.
- The new table entry displays the next time a hyphen (-) or other lookup is performed for workload elements, as in the SIM Maintenance screens.
- The workload elements entered in this table can now be linked to a SIM item or ordered procedure/treatment in the SIM Maintenance function. These are then used to help distribute the workload in the Worklist Assignment functions as well as to capture and accumulate workload values for reporting purposes for worklist and scheduled treatments.

Output

The table listing prints on the Data Processing High Speed printer (HSP) if requested.

WORKLOAD ELEMENT GROUPS

In addition to workload statistics being calculated by Workload Category, they can also be generated by workload groupings. Two workload reports, the Workload Summary by Group and Workload Detail by Group/Element, generate statistics using the groupings defined in this table.

Using group assignments enables each department to gather statistics on similar treatments, such as water or heat treatments. For example, treatments involving Hubbard Tanks and Whirlpools can be grouped to capture statistics for water therapies. The groupings used are decided by each department and are not required.

The Workload Element Group table is used to define groups and link workload elements. Each workload element can only be assigned to one group and groups are defined for an entire department, not at the subdepartment level.

This table can be accessed through Table Maintenance located in Data Processing or through Departmental Table Maintenance found under the Departmental Management menu if defined in the CRT Names table. If you are accessing through Data Processing, a separate table displays for each SIM department allowed to access Clinical Management. Select the desired department's table. If you are accessing from a departmental menu, a list of the charge departments defined in the CRT Names table for this terminal displays. Select the appropriate department.

If your terminal is set up to access only one department, the list of charge departments is bypassed and that department is assumed. Since workload element groups are directly linked to SIM departments, this table is never set up as split by facility. After the department is determined, the following prompt displays:

Enter workload element group--

If you are revising an existing group, enter the six-digit numeric group code if you know it. If you do not know the code, enter a hyphen (-) to view a list of element groups already defined. If you are entering a new code, an additional prompt displays asking if you want to add that code.

After you enter the code, the following screen displays enabling entry/revision of related data:

```
                  General Hospital Table Maintenance Processor
                                                    Thu Sep 27, 1994 04:06pm

Workload Element Groups, Physical Therapy

1 Group                               2 Group Description
  3                                     SET-UP
3 Edit By                             4 Edit date
  Simons,Keith                          08/29/94 1742
5 Workload Elements
  12345.678    54321        87542.098     34572.987    98762.001     99999
  49821        94328.098







Enter field number or `/` starting field number--
```

If the code is being added, the displayed prompt allows entry of the description. If the code is being revised, the prompt allows selection of the field(s) to be revised if all fields have been completed. If all fields have not been completed, the first blank field is accessed.

Field Explanations

1. GROUP # (DISPLAY ONLY)
The six-digit group code previously entered displays and cannot be revised.

2. GROUP DESCRIPTION (30-AN-R)
Enter the description associated with this particular group of workload elements.

3. EDIT BY (DISPLAY ONLY)
The name of the person to last edit the table automatically displays if that person signed on with security at the time of editing.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date this table was last updated.

5. ELEMENTS (TABLE LOOKUP)
If you are adding workload elements for the first time, the subdepartments defined for the SIM department display for selection. If you want to select a workload element defined for a specific subdepartment, select the subdepartment. If you want to select a workload element defined at the master SIM department level, press ENTER.

The following prompt displays enabling selection of the workload element:

Enter elements separated by `,` or first letters `-` --

The prompt allows entry of one or multiple workload element codes as well as entry of a hyphen (-) to view a list of codes. Workload element codes can be entered with or without the suffix. If the suffix code is entered, it must be preceded by a decimal point. If you select a subdepartment, only the workload elements defined for that subdepartment can be entered or displayed. If you press ENTER for the master SIM department, workload elements defined at the master level can be entered or displayed.

If you enter multiple workload element codes, they must be separated by commas (,). If a five-digit code is entered without a suffix, and other element codes exist that have the same five-digit code but different suffixes, the entered code as well as all matching codes display for selection. For example, if 1000, 1000.1 and 1000.2 are defined workload elements and you enter 1000, all three elements display for selection. If you enter a code with the suffix, that one code is added.

If you do not know the workload element code(s), enter a hyphen (-) to display a list of workload elements defined for the selected subdepartment/department.

One or multiple workload elements can be selected from the listing displayed by entering the option number next to the desired item. Selected items are highlighted. To remove an item selected in error, enter a hyphen (-) prior to the option number to remove it. After all selections are made and verified, press ENTER.

The selected workload elements display six to a line one line after another. Any selected workload elements assigned to a subdepartment display the code followed by the subdepartment code. Items assigned at the master level do not display any department information after the code.

If a workload element is selected/entered that belongs to another group, an error message displays indicating the group to which the workload element is already assigned. If a nonexistent workload element is entered, an error message displays indicating that the workload element entered has not been defined.

If workload elements have already been defined when the field is accessed, the following prompt displays enabling codes to be added or deleted:

Add(A) or delete(D) elements? [A]--

If you enter **A** or press ENTER to add workload elements, the prompt allowing entry/ selection of the workload element(s) displays. The same entry routines described previously apply here as well. If you enter **D** to delete a code, the system allows entry of the option number next to the workload element to be deleted.

After all required fields on the screen are complete, you can accept, edit, or delete the entire entry. If you accept the screen, the transaction is complete. If you enter **N** to not accept the screen, the displayed prompt allows selection of the field(s) to edit. If you enter **D** to delete, the system begins the deletion process as described below. The deletion option is only available when accessing existing codes.

If you are accessing an existing code and do not make any changes to the screen, the following prompt displays enabling you to delete the entry:

Delete? (N)--

Enter **Y** for Yes to delete thecode from the table or press ENTER to bypass and return to the prompt allowing entry of another code. If you enter **Y**, the following prompt displays enabling you to delete the code or file it as deleted:

Enter delete(D) from file or file(F) as deleted [F]--

If you enter **D**, the code is removed from the file and cannot be reactivated at a later date without complete reentry.

If you enter **F**, the code is retained in the table but is considered inactive. It can be reactivated later.

If you select an inactive item, the previous screen displays containing the following prompt:

Enter delete(D) from file or activate(A)--

You can delete the code from the file or reactivate it. If deleted, the code is removed from the file and cannot be reactivated at a later date. If the code is reactivated, it becomes available for processing again.

If you press ENTER at the prompt allowing entry of the code, the following prompt displays enabling you to print a listing of the entries contained in the table:

Do you want a printed list? (Y/N)--

If you enter **N** or press ENTER, a printed list is not generated and you are returned to the list of tables. If you enter **Y** to print a list, the following prompt displays:

Enter code(C) sequence or alphabetic(A) [A]--

If you press ENTER, the list is in alphabetic order. The following prompt displays enabling you to include entries filed as deleted:

Include entries filed as deleted? (Y/N)--

If you enter **Y**, entries in the table considered inactive (filed as deleted) are included. If you enter **N** or press ENTER, only active entries are included. The listing prints on the Data Processing High Speed Printer (HSP). You are returned to the listing of tables.

Impact

After you accept this screen, the following takes place:

- The Edit Date and Edit By fields reflect the new date and individual associated with the change if they signed on with security.
- If the individual making the change was not signed on with security, only the Edit Date field reflects the new revision.
- The entry is edited, added, deleted, or marked as Filed as Deleted accordingly. The change is effective immediately.
- The workload elements are assigned to a group and statistics can be generated for this group.
- The table listing reflects any changes made.

Output

The table listing prints on the Data Processing High Speed Printer (HSP) if requested.

WORKLOAD ELEMENT/SIM X-REFERENCE

The Workload Element/SIM X-Reference processor enables you to display or print workload elements and the SIM items to which they are assigned.

This table can be accessed through Table Maintenance located in Data Processing or through Departmental Table Maintenance found under the Departmental Management menu if defined in the CRT Names table. After selection, a list of the charge departments defined in the CRT Names table for this terminal displays. Select the appropriate department. If your terminal is set up to access only one department, the list of charge departments is bypassed and that department is assumed. Since workload elements are directly linked to SIM departments, this table is never set up as split by facility. Once the department is determined, the subdepartments for the selected SIM department display for selection.

The prompt allows selection of one of the displayed subdepartments, or you can press ENTER to access workload elements defined at the master SIM department level. If a subdepartment is selected, the workload elements defined for that subdepartment can be accessed and displayed. If you press ENTER for the master SIM department, the workload elements not defined for a specific subdepartment can be accessed and displayed. After you select the subdepartment/department, the following prompt displays:

Print(P) or display(D) (P/D) [D]--

If you enter **P**, the following message displays and a hard copy of the listing prints on the default printer associated with the requesting terminal:

Compiling and Printing!

The listing contains all workload elements for the selected subdepartment or SIM department with the SIM items to which the element is linked. The printed format is the same as the display version discussed below.

If you enter **D** or press ENTER, you can view cross-reference data for one or multiple workload elements. The following prompt displays enabling entry of the workload elements to be included:

Enter workload element code--

[NNNNN, NNNNN.NNN or All(A)]

Enter the workload element code by using either the five-digit code or the five- digit code followed by the suffix if you know it. If you want to view the cross reference information for only one workload element, enter the code using the decimal point before the suffix (if it exists). If you entered the five-digit code without a suffix, all workload elements for the selected subdepartment/ department defined with the same five-digit code display. For example, if you have elements 1000.1, 1000.2 and 1000.3

defined, and you enter 1000, all three workload elements display. One or multiple workload elements can be selected from the displayed list.

If you do not know the workload element code, enter a hyphen (-) to view a list of all workload elements for the selected subdepartment/department. One or multiple workload elements can then be selected from the displayed list.

You can also display all workload elements by pressing ENTER or entering **A** for All. After all workload elements are defined, the following message *Processing!* displays

The following screen displays:

```
Thu Sep 27,1994 04:06pm                                               Page 1
              General Hospital Workload Element/SIM X-Reference
              SPEECH THERAPY
Elements                         SIM Items
-------------------------------------------------------------------------------
12345.897 Cognitive Eval        0987 Receptive Language Skills













Press NL--
```

The selected subdepartment or department displays at the top ofthe screen along with the page number and the date/time.

Each selected workload element code and description is listed followed by a list ofSIM item codes and descriptions to which the element is currently linked.

Field Explanations

ELEMENTS (DISPLAY ONLY)
This column contains the code and description of the selected workload element code(s) followed by their descriptions.

SIM ITEMS (DISPLAY ONLY)
Each service item in the selected SIM department that has the selected workload element assigned to it displays. All SIM item codes and descriptions display for the workload before the next selected workload element displays. The SIM item column is blank for any workload elements not linked to a SIM item.

The prompt asks you to press ENTER. If more than one page of cross-reference information exists, the next page displays. After all data has displayed, the following message displays:

End of Report

If you press ENTER, you are returned to the prompt allowing entry of the SIM department code described previously. Press ENTER to return to the listing of tables.

Output

If you entered **P** to print a hard copy of the cross-reference information, it prints on the default printer associated with the requesting terminal as defined in the CRT Names table.

RESOURCE MASTER

The Clinical Management Module uses the same resource file currently used by the Patient Scheduling and Chart Management modules. Each resource to be assigned orders or appointments scheduled through the Clinical Management Module using worklist processing must be defined as a resource in this table.

The Resource Master contains five pages: Resource Demographics, Scheduling Parameters, Appointment Types, Schedule Profiles, and Monthly Plans. Resources that are assigned work using the Worklisting Process within Clinical Management use only the Resource Demographics page of the Resource Master. Resources that are assigned work using the Scheduling Process within Clinical Management must complete all pages of the Resource Master the same as with the Scheduling Module.

Any resource using worklisting functions is set up as a Clinical Management resource, any resource using scheduling functions is set up as a Scheduling resource, and any resource using both worklisting and scheduling functions must be set up as both Profiling and Scheduling. For additional information, refer to the Module Usage field discussed in the following field explanations.

The Resource Master can be accessed through the STAR Patient Care Scheduling Table Maintenance located in Data Processing, the Scheduling Resource Maintenance submenu, the Departmental Management submenu or Departmental Table Maintenance if defined in the CRT Names table.

Upon selection, the facility is determined if the Resource Master is split by facility. If shared, or if this is a single facility institution, the facility selection is bypassed.

If this terminal can access more than one facility as defined in the CRT Names table, the valid facilities display for selection. If only one facility is defined, that facility is assumed and the Facility Question is bypassed. Once the facility is determined, the following prompt displays to allow entry of the resource:

Enter first letter(s)'-' or number--

If you are revising an existing code, you can enter the resource's code number if you know it. If you do not know the code, enter a portion of the resource's name (description) followed by a hyphen (-) to view a list of all resources beginning with the characters entered. Once the code is selected/entered, the Resource Master Demographic screen displays enabling revision of the displayed fields.

If entering a new resource code, an additional prompt displays asking if you want to add the code for verification. If you enter **Y** for Yes, the Resource Master Demographic screen displays enabling entry of the necessary data.

If the new code you entered is defined as a physician in the Physician table, a different prompt displays. It contains the name of the physician and asks if you want to make this physician a resource. If you enter **Y** for Yes, the Resource Master Demographic screen displays and the physician's information contained in the Physician table is automatically pulled forward to the Resource Master. Any updates made to information contained in the physician master are made using the Physician table.

The following is an example of the Resource Master Demographic screen displayed after selection/entry of the resource code:

```
            General Hospital Scheduling Table Maintenance Processor
                                              Tue Apr 08, 1997 06:33 pm

 1 Resource Number            2 Resource Name              3 Initials
   9150                         PHYSICAL THRPST A (ALL)-X     PTA
 4 Address 1                  5 Address 2
   121 E HOSPTIAL               ADDRESS TWO
 6 City                       7 State            8 ZIP Code
   ATLANTA                      GA                 33388-8444
 9 Office Phone              10 Module Usage    11 Specialties
   (123)123-1234                All                PT
12 Resource Type             13 Comment
   4 THERAPIST                   COMMENT
CLIN MANAGEMENT 14 Dept  15 Shifts  16 Max Wkld   17 Station Group
                   PT       12        999.9        ALL STATION GROUP
18 End of Day   19 Default Outcome of Attendance

20 Direct Assign




Enter field number or '/' starting field number--
```

Field Explanations

1. RESOURCE NUMBER (DISPLAY ONLY)
The resource code you selected displays. Resource codes can be up to six digits.

2. RESOURCE NAME (25-C-R)
The name that corresponds to the resource number you selected displays, or you can enter a new resource name. This field does not have to be a proper name. For example, you can enter Dialysis Machine 1. If the resource is a physician, the name automatically displays as entered in the Physician table and cannot be edited.

NOTE: The resource name is displayed, printed, and stored in uppercase, no matter what case it is entered in.

3. INITIALS (3-A-O)
If a name was entered in the Resource Name field, the initials automatically display. If a name was not entered, the initials can be entered. If the resource is a physician, the initials automatically display as entered in the Physician table and cannot be edited.

4. ADDRESS 1 (25-C-O)
Enter the address of the resource. If the resource is a physician, the office address automatically displays as entered in the Physician table and cannot be edited.

5. ADDRESS 2 (25-C-O)
Enter the second line of address for the resource if it applies. If the resource is a physician, the second line of office address is automatically displayed as entered in the Physician table and cannot be edited.

6. CITY (15-C-O)
Enter the resource's city. If the city's ZIP code is known and exists in the ZIP Code table, you can enter the ZIP code to automatically bring forward the city, state and ZIP from the table. If the ZIP code entered is not in the table, it moves to the ZIP code field and the cursor remains at the CITY field to allow entry of the freeform city. You can enter an equal sign (=) to automatically default to the system's default city, state and ZIP defined for the facility. If the resourceis a physician, the city automatically displays as entered in the Physician table and cannot be edited.

7. STATE (2-A-O)
Enter the resource's state in the standard two-character state abbreviation format. This entry is validated with the user-defined state table. You can enter an equal sign (=) to automatically default to the system's default state defined for the facility. If the resource is a physician, the state automatically displays as entered in the Physician table and cannot be edited.

8. ZIP CODE (9-N-O)
Enter the resource's ZIP code. The ZIP code entered can be five or nine digits. You can enter an equal sign (=) to automatically default to the system's default ZIP defined for the facility. If the resource is a physician, the ZIP code automatically displays as entered in the Physician table and cannot be edited.

9. OFFICE PHONE (SPECIAL FORMAT)
Enter the resource's area code and office phone number using the standard routines used to enter phone numbers. The area code and phone number can be entered without the parentheses ( ) and hyphen (-). The system automatically enters parentheses around the area code and inserts a hyphen (-) if they are not entered. If you do not enter an area code, the default defined in the system defaults is used. If the resource is a physician, the office phone automatically displays as entered in the Physician table and cannot be edited.

10. MODULE USAGE (5-A-R)
Enter the modules (Patient Scheduling, Chart Management, Clinical Management or All) that can access this resource. Resources identified as being used by Chart Management only cannot be accessed or seen in the Patient Scheduling or Clinical Management Modules. Resources identified as being used by Patient Scheduling only can never be set up as chart requestors (borrowers) within the Chart Management Module or used in worklist functions in Clinical Management. Resources identified as being used by Clinical Management only can never be used by the Patient Scheduling Module or Clinical Management Module to schedule appointments or request charts

within Chart Management. Resources identified as being used by All modules can be accessed and processed by all.

When processing Clinical Management worklisting functions, you only have access to the resources containing Prof in this field. When accessing Clinical Management scheduling functions, you only have access to the resources containing Sched in this field. Resources that need to be accessed by both the worklisting and scheduling functions should contain both Prof and Sched as indicated in the previous example screen.

If this field contains Sched or All, the remaining screens in the Resource Master display for entry of scheduling required information. If it does not contain Sched, only the Demographic screen displays.

11. SPECIALTIES (TABLE LOOKUP)
Enter the specialties of the resource. The listing of valid specialties defined for STAR Patient Care display for selection. This field is only accessible if the Module Usage field is set to contain Clinical Management, Scheduling or All. It is used by the Patient Scheduling Module to define Resource ID Codes, which define each resource's schedule. This field is optional but must be completed in order build the resource's schedules.

If the selected resource is a physician, this field automatically completes with the specialties defined in the Physician table. This field can be accessed and updated as needed by scheduling. Updates made to the Physician table are not reflected in the Resource Master. Physicians that are defined as resources must have specialty updates made in both places.

12. RESOURCE TYPE (TABLE LOOKUP)
Enter the resource type that describes this resource. Enter the code if you know it, or enter a portion of the description followed by a hyphen (-) to display a list of valid resource types. This field is only accessible if the Module Usage field is set to contain Profiling, Scheduling or All and is required.

This field is used by Clinical Management when assigning orders to worklists. Each ordered SIM item has a primary and secondary resource type defined. When assigning work, the resource type entered for the selected resource(s) is checked against the primary and secondary resource types for the ordered item. When performing automatic assignment of work, the system tries to assign the order to the primary resource type first. If not available, the secondary resource type is used.

If the resource type of the resource does not match the primary or secondary resource types defined for the ordered item, the order cannot be automatically assigned. It requires manual assignment which displays a warning message informing the user of the resource type mismatch.

The Patient Scheduling Module uses this field for several display/print routines so that the type of the resource displays/prints prior to the resource's name/description.

13. COMMENT (36-C-O)
Enter any comment information pertaining to this resource. This field is only accessible if the Module Usage field is set to contain Profiling, Scheduling or All.

Clinical Management

14. DEPT (TABLE LOOKUP)
Select the SIM department this resource is associated with from the displayed table listing. Only SIM departments using Clinical Management can be selected. If you select a department not using Clinical Management, the error message *Error: Not a Clinical Management Department!* displays. This is done by checking the Active field found on the second page of the SIM Department table. If this field contains Inactive or Active, the department is considered as using Clinical Management. If this field is blank, the department is not considered as using Clinical Management. This field is blank until someone accesses and enters data in the second page of the SIM Department table which is Clinical Management specific.

This field is only accessible if the Module Usage field is set to contain Clinical Management or All and becomes required.

15. SHIFTS (3-N-C)
Enter all shifts that this resource can work. The prompt allows entry of 1,2,3 or any combination. Only valid shifts defined for the SIM department entered in the Dept field can be entered. The prompt contains the shifts defined for the selected SIM department. If shifts have not been defined for the department, the default is set to shift 1. If for some reason the Dept field is bypassed and not entered, this field is not accessible. This field is only accessible if the Module Usage field is set to contain Clinical Management or All and becomes required.

This field is used by the Worklist Assignment function to display the resources that might be able to work the selected shift. Since these functions only display resources that have the selected shift contained as one of the Valid Shifts in the Resource Master, it is important that each shift that the resource could possibly work be entered. You should not enter just the one shift that the resource typically works.

16. MAX WKLD (5-C-O)
Enter the maximum workload up to 999.9 that can be assigned automatically to this resource. This field is accessed only when the Module Usage Field is set to contain Clinical Management or All. The following prompt displays:

> *Enter the max workload that can be auto assigned to this resource (999.9)--*

Enter the maximum workload with or without the decimal point. If you do not enter the decimal point, it is assumed and the value is considered a whole number. The value you enter should relate to minutes, with the value after the decimal point representing a tenth of a minute. The Review/Assign Orders processor uses this value to limit the amount of work that can be assigned automatically through the Unassigned Orders or Review Assigned Worklist processors.

If you enter 999.9, the Review/Assign Orders processor treats this resource as though there is no limit to the workload that can be assigned and therefore bypasses the resource limit check.

17. STATION GROUP (TABLE LOOKUP-O)
Enter the preferred station group for this resource. The list of station groups defined by STAR Patient Care displays for selection. One or multiple groups can be selected. This field is only accessible if the Module Usage field is set to contain Clinical Management or All.

This field is used by the Worklist Assignment functions when assigning orders to selected resources. The patient's nursing station for the order being assigned is checked and compared to the preferred station group of the selected resources. When performing automatic assignment of work, the system tries to assign the order to the resource that has that station in his/her preferred station group. If none of the resources has that station in their preferred station group, the order must be manually assigned or an alternate resource selected. The manual assignment process allows overrides to the preferred station groups, but displays a warning message when a mismatch occurs.

If this field is left blank, the resource is considered as not having a preference for specific nursing stations and all stations are considered valid for automatic assignment.

18. END OF DAY (1-A-R)
This field identifies if End of Day processing for this resource can be done through Clinical Management in the Schedule Status processor at the time the audit schedule is completed. The prompt for this field is:

Complete End of Day processing through Schedule Status option? (Y/N)--

Enter **Y** for Yes is you want to enable the system to perform the End of Day processing through the Audit Schedule option. Enter **N** for **No** if you want to require that End of Day processing be completed for this resources only through the Patient Scheduling module.

19. DEFAULT OUTCOME OF ATTENDANCE (1-N-R or TABLE LOOKUP)
This field enables you to enter a predefined outcome for the scheduled visit. The option you enter is the default for the attendance outcome response when End of Day processing is done through Clinical Management (in the Schedule Status processor at the time the audit schedule is completed). The following prompt displays:

Enter outcome of attendance --

Enter the code for the attendance outcome if you know it, or enter a hyphen (-) to select from a list of available outcomes (as defined in the Outcome of Attendance table under Table Maintenance). After you make your selection, the description for the attendance outcome is displayed in this field.

20. DIRECT ASSIGN (1-A-R)
This field enables the Direct Assignment functionality for this resource. Direct Assignment streamlines the worklist assignment process for multiple occurrences generated by the same parent order. If an earlier occurrence generated by the same parent order has already been assigned to a resource, then the new occurrence is automatically assigned to the same resource for the appropriate date and shift. For more information, see Direct Assignment in Chapter 4: Worklist Processing.

The prompt for this field is:

Allow direct assignment of occurrences to this resource? (Y/N) [N]--

- Enter **Y** for Yes if you want this resource to have sibling occurrences automatically assigned to it after an initial occurrence has been assigned to the resource.

  NOTE: When transferring work from one worksheet to another, the system checks this field for the destination resource. If it is set to Yes, then all related future occurrences are also moved to that resource's future worklist.

- Enter **N** for No, or press ENTER to accept the default, if you do not want later sibling occurrences to be assigned automatically to this resource after an initial occurrence is assigned to the resource.

After all required fields on the screen are complete, you have the option of accepting, editing or deleting the entire entry. If you accept the screen, the demographic screen is complete. If the Module Usage field contains Sched or All, the remaining Scheduling Resource Master screens display for entry of required data. Otherwise, the transaction is considered compete. If you enter **N** to not accept the screen, the prompt displayed allows selection of the field(s) to edit. If you enter **D** to delete, the system begins the deletion process described below. The deletion is only available when accessing existing codes.

If you are accessing an existing code and do not make any changes to the screen, the following transaction enables you to delete the entry:

Delete? (N)--

You can enter **Y** for Yes to delete the code from the table or press ENTER to bypass and return to the prompt enabling entry of another code. If you enter **Y** for Yes, the following prompt enables you to delete the code or file it as deleted:

Enter delete(D) from file or file(F) as deleted [F]--

If you enter **D** for delete, the code is removed from the file and cannot be reactivated at a later date without complete reentry.

If you enter **F** for file, the code is retained in the table but is considered inactive. It can later be reactivated.

If you selected an inactive item, the following prompt displays:

Enter delete(D) from file or activate(A)--

You can delete the code from the file or reactivate it. If deleted, the code is removed from the file and cannot be reactivated at a later date. If the code is reactivated, it becomes available for processing again.

If the selected resource is being used by the Patient Scheduling Module and has Resource ID Codes (Schedules) defined, the code cannot be deleted or filed as deleted prior to all other scheduling data being deleted first. To delete a scheduling resource, follow these steps:

1. Cancel all scheduled patient appointments for the resource, or reschedule them to another resource.
2. Delete all open schedule days for the resource.
3. Delete all monthly plans defined for the resource.
4. Delete all profiles defined for the resourced.
5. Delete all appointment types defined for the resource.
6. Delete all Resource ID codes.
7. Delete the resource.

Impact

After you accept this screen, the following takes place:

- Any display of the resource table in Scheduling, Clinical Management, or Chart Management displays only those resources valid for that module. Appropriate reports reflect this as well.
- If Clinical Management or All is indicated in the Module Usage field, the resource type and station group are used when performing worklist processing functions for this resource.
- If Scheduling or All is indicated in the Module Usage field, the resource is used when performing schedule processing functions within Clinical Management and the Patient Scheduling Module as well.

- When performing worklist functions, only resources set with the Module Usage field set to contain Clinical Management or All with valid shifts that match the shift being processed display for selection.
- The entry is edited, added, deleted, or marked as Filed as Deleted accordingly. The change is effective immediately.
- The printed Resource Master Maintenance reports reflect any changes made.

CHARGE MENUS

To provide a streamlined charge entry process for users of Clinical Management, SIM items can be grouped together into charge menus which are linked to SIM items. This enables grouping of typical charges associated with specific treatments (across departments if necessary) that display when entering charges through the Clinical Management Documentation processor.

When these Charge menus display, you can select any number or all of the items on the displayed menu to charge the patient. The items contained in these menus are typically charge items resident in the ordering department's SIM, but can be for other charge departments, if necessary. During this charge entry process these Charge menus can be used as well as allowing entry of other charges as needed.

The Charge Menu table can be accessed through the STAR Patient Care Table Maintenance located in Data Processing or the Departmental Table Maintenance found under the Departmental Management menu if defined in the CRT Names table. If accessing through Data Processing, a separate Charge Menu table displays for each SIM department allowed to access Clinical Management. Select the desired department's Charge Menu table. If accessing from a departmental menu, a list of the charge departments defined in the CRT Names table for this terminal displays. Select the appropriate department.

If your terminal is set up to only access one department, the list of charge departments is bypassed and that one department is assumed. Since charge menus are linked directly to SIM departments, this table is never set up as split by facility. Once the department is determined, the following prompt displays:

Enter charge menu code--

If revising an existing Charge menu, enter the code if known. If you do not know the code, enter a hyphen (-) to view a list of the Charge menus already defined. If entering a new code, you can enter up to four digits and an additional prompt displays asking if you want to add the charge menu. Each charge menu code is unique to the selected SIM department. After a charge menu code is entered or selected, the following screen displays:

```
                General Hospital Table Maintenance Processor
                                      Thu Sep 27, 1994 04:06 pm
    Charge Menus, Physical Therapy
    1 Code                  2 Description
      1234                    CRUTCH WALKING
    3 Edit by               4 Edit Date
      Hamilton,Merle          09/01/94 04:00P
    5 Charge Menu Items-Department          Service Item

                (1) CENTRAL SUPPLY          6728 CRUTCHES-COMPLETE
                (2) CENTRAL SUPPLY          6732 CRUTCH TIPS
                (3) CENTRAL SUPPLY          6744 CRUTCH UNDERARM PADS
                (4) CENTRAL SUPPLY          6754 CRUTCH HANDGRIPS
                (5) PHYSICAL THERAPY        8060 CRUTCH ADJUSTMENT
                (6) PHYSICAL THERAPY        8065 GRP TREATMENT 15 MIN
                (7) PHYSICAL THERAPY        5648 BASIC CRUTCH WALKING
                (8) PHYSICAL THERAPY        3225 CONSULT 30 MIN



 Enter field number or '/' starting field number--
```

If a code is being added, fields two through five are blank and must be entered. If a code is being revised, the prompt enables entry of the fields that you want to edit if all fields are completed. If not, the first blank field is accessed.

Field Explanations

1. CODE (DISPLAY ONLY)
The Charge Menu code previously selected or entered displays and cannot be edited. This is a four-digit numeric code assigned to each charge menu specific to each department.

2. DESCRIPTION (30-C-R)
Enter the description of the associated Charge menu. This identifies the Charge menu and is used as a screen heading during the actual charge process occurring in the Manual Schedule or Manual Worklist processors. Each charge menu description must be unique within the department. If you enter a description that has already been used, the message *Error: Description already used!* displays prior to redisplaying the prompt.

3. EDIT BY (DISPLAY ONLY)
The name of the person to last edit the table automatically displays if they signed on with security at the time of editing.

4. EDIT DATE (DISPLAY ONLY)
The system displays the date and time this table entry was last updated.

5. CHARGE MENU ITEMS-DEPARTMENT SERVICE ITEM (SPECIAL FORMAT-R)
If SIM items have been previously entered for this Charge menu, they display for review preceded by their associated SIM department. To add, delete or move any of the displayed SIM items, select this field. If adding a new code, this field is blank.

Once accessed, the following prompt displays enabling SIM items to be revised/ deleted, moved or added:

Enter option #, move(M) or add(A)--

- Revise or delete a SIM item - Enter the option number next to the desired SIM item you want to revise or delete from the selected charge menu. An additional line in the screen displays the selected SIM department and SIM item. The prompt enables selection of either the SIM Department or the SIM Item field.

  If the SIM Department field is accessed, you can enter the new SIM department code or enter a hyphen (-) to view a list of SIM departments. If the SIM department code is changed, the SIM Item field must be revised as well.

  If the SIM Item field is accessed, you can enter the new SIM item code if you know it, or you can enter a portion of the description followed by a hyphen (-) to view a list of items beginning with the characters entered.

  If you do not make any changes to either field, the following prompt displays enabling you to delete this SIM item from the selected Charge menu:

  Delete? (N)--

  If you enter **N** for No or press ENTER, the SIM item is not deleted and you are returned to the prompt that enables SIM items tobe selected, added or moved. If you enter **Y** for Yes, the selected SIM item is removed from the list of items and you are returned to the prompt that enables SIM items to be selected, added or moved.

- Moving SIM items - If you want to change the order of the SIM items displayed for the selected Charge menu, enter **M** to move. The following prompt displays:

  Enter from option # ('-' to option #) to move--

  If moving a single SIM item, enter the option number of that one SIM item. If you are moving a range of SIM items, enter the option number next to the first SIM item you want to move followed by the last option number you want to move, separated by a comma. For example, if you move options 2 through 4, enter 2,4. The following prompt displays:

  Enter option # to move '#,#' after (`B` for before first item)--

  The option number(s) selected to be moved in the previous prompt displays in the previous prompt. Enter the option number after which you want to move the selected entries. If you enter an option number, the selected entries are inserted after this selected item. If you want to move the selected entries to the beginning of the list, enter **B**. All selected entries are inserted before the first displayed option number.

The selected SIM items are moved and you are returned to the prompt that enables SIM items to be selected, added, or moved.

- Adding SIM items **-** If you want to add new SIM items, enter **A**. The following prompt displays enabling you to indicate where the item should be inserted:

  Insert number to insert before or end(E)--

  Enter the number before which you want to insert a new item. If you want to add an item to the end of the list or if you are adding the first item, enter **E**. An additional prompt displays below the current screen enabling you to enter the SIM department and SIM item code that are to be added. The following prompt displays:

  Enter charge/order department ('-' to list)--

  Enter the SIM department code if known. If you do not know the code, enter a hyphen (**-**) to view a list of the SIM departments. After entry/selection of the SIM department, the following prompt displays to enable entry of the SIM item code:

  Enter first letters '-' to list or code--

  Enter the SIM item code if known. If you do not know the code, enter a portion of the description followed by a hyphen (**-**) to view a list of items beginning with the characters entered. If the entered code already exists for this charge menu, the error message Error:Duplicate! displays prior to redisplaying the prompt. Once the SIM item is selected, the prompt asks you to accept the entry made. If you enter **Y** for Yes or press ENTER, the SIM item is added. If you enter **N** for No, the transaction enabling selection of a field to revise displays. Select the field you want to change. If the SIM department is changed, the SIM item code should be changed as well.

  There are no restrictions as to the SIM items that can be added to the Charge menu. The Charge screen used by STAR Patient Care displays during the actual charge process, accepting and processing any charge type as if it were entered in the normal Patient Care Charge screen.

  Professional fees and panel charges can be entered as well. To avoid duplicate charging, care should be taken to ensure that items contained in the Charge menu are not part of a Panel Charge as well.

Since SIM items display only once in each Charge menu, the Quantity field displaying in the Charge screen should be used to indicate quantities greater than one.

If more than one page of SIM items has been defined, the standard paging options are available.

Once you accept the screen, you are returned to the prompt that enables SIM items to be selected, added, or moved. Up to a maximum of 25 SIM items can be entered for each Charge menu.

After you press ENTER at the prompt that enables SIM items to be selected, added or moved, the addition line is erased and the original screen redisplays showing all revisions made. The prompt enables entry of a field number to revise. If you press ENTER, an additional prompt displays enabling you to accept the screen.

After all required fields on the screen are complete, you can accept, edit, or delete the entire entry. If you accept the screen, the transaction is complete. If you enter **N** to not accept the screen, the prompt enables selection of the field(s) to edit. If you enter **D** to delete, the system begins the following deletion process.

If you are accessing an existing code and do not make any changes to the screen, the following prompt displays enabling you to delete the entry:

Delete? (N)--

You can enter **Y** for Yes to delete the code from the table or press ENTER to bypass and return to the prompt enabling entry of another code. If you enter **Y** for Yes, the following prompt displays enabling you to delete the code or file it as deleted:

Enter delete(D) from file or file(F) as deleted [F]--

If you enter **D** for delete, the code is removed from the file and can not be reactivated at a later date without complete re-entry.

If you enter **F** for file, the code is retained in the table but is considered inactive. It can later be reactivated.

If you selected an inactive item, the following prompt displays:

Enter delete(D) from file or activate(A)--

You can delete the code from the file or reactivate it. If deleted, the code is removed from the file and cannot be reactivated at a later date. If the code is reactivated, it becomes available for processing again.

If you press ENTER at the prompt enabling entry of the code, the following prompt displays enabling you to print a listing of the entries contained in the table:

Do you want a printed list? (Y/N)--

If you enter **N** or press ENTER, a printed list is not generated and you are returned to the list of tables. If you enter **Y** to print a list, the following prompt displays:

Enter code(C) sequence or alphabetic(A) [A]--

After you enter the sequence, the following prompt displays enabling you to include entries filed as deleted:

Include entries filed as deleted? (Y/N)--

If you enter **Y** for Yes, entries in the table considered inactive (filed as deleted) are included. If you enter **N** or press ENTER, only active entries are included. The listing prints on the Data Processing High Speed Printer (HSP). You are returned to the listing of tables.

Impact

After you accept this screen, the following takes place:

- The Edit Date and Edit By fields reflect the new date and individual associated with the change if they signed on with security.
- If the individual making the change was not signed on with security, only the Edit Date field reflects the new revision.
- The entry is edited, added, deleted, or marked as Filed as Deleted accordingly. The change is effective immediately.
- The items that comprise the Charge menu reflect the changes made.
- The Charge menu is available for use as accepted. The menu can now be linked to a SIMitem through Service Item Maintenance to display during charge processing in Clinical Management. These menus are not accessed while using the normal STAR Patient Care Charge or Credit functions.
- The table listing reflects any changes made.

Output

The table listing prints on the Data Processing High Speed Printer (HSP) if requested.

Index

■ Reader Comment Form ■

We value your suggestions for improving our documentation. Please use this form to evaluate the *Clinical Management Module* of the *STAR Patient Care Reference Guide* for Release 17.0.

Topic	**Poor**	**Fair**	**Good**	**Excellent**
Organization of information	❑	❑	❑	❑
Accuracy of information	❑	❑	❑	❑
Completeness of information	❑	❑	❑	❑
Clarity of information	❑	❑	❑	❑
Amount of overview information	❑	❑	❑	❑
Explanation of processes	❑	❑	❑	❑

Are there parts of this manual that could be made more helpful to you? Please explain.

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