

Lesson 6: Managing ED Discharge Tasks

This lesson introduces the Sunrise Emergency Care functions that are common tasks completed as part of the emergency end of visit / discharge workflow.

Learning Objectives

After completing this lesson, you should be able to:

- Document the ED Physician Disposition note.
- Add, manage and submit prescriptions electronically using Prescription Writer.
- Print patient education materials using ExitCare.
- Print the Patient Discharge Summary.
- Understand the purpose and use of the Follow Up Board in the ED workflow.
- Understand the use of the Inactive Patients view in the Status Board.

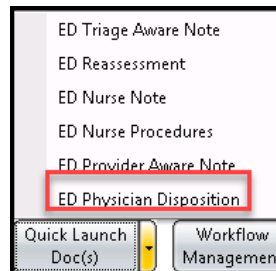
Documenting the ED Physician Disposition Note

The **ED Physician Disposition** note provides documentation of both the provider's discharge summary details and patient discharge instructions. All discharge documentation requirements for the physician workflow is incorporated into this single note.

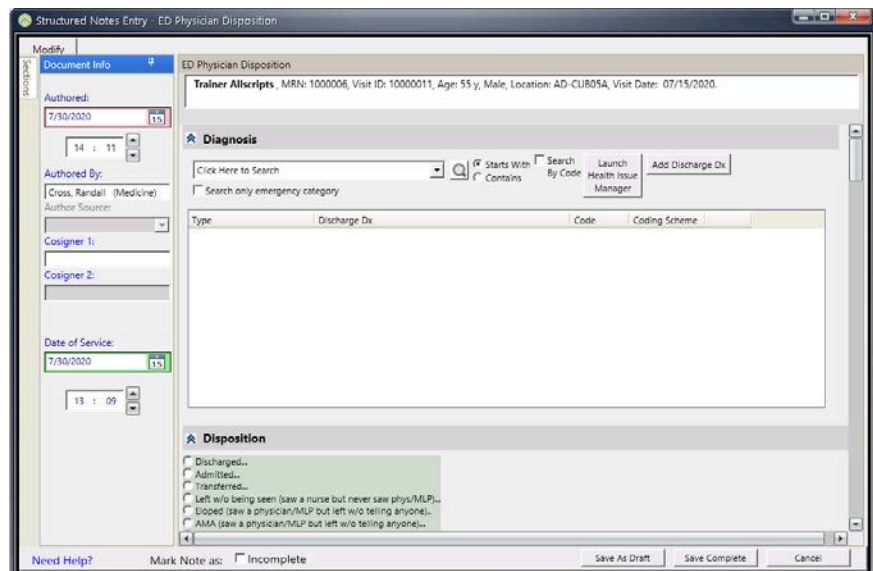
All of the discharge information documented in this note will auto-create the **Patient Discharge Summary** document that the Nurse (or Provider) will print, provide education and distribute to the patient.

TO DOCUMENT THE ED PHYSICIAN DISPOSITION NOTE:

1. At the bottom of the **Status Board**, click the **Quick Launch Doc(s)** drop-down and select **ED Physician Disposition**.

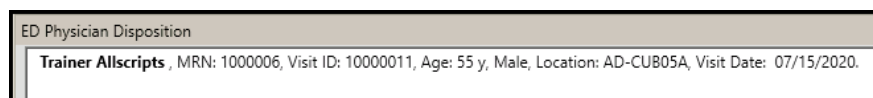


⇒ The *Structured Notes Entry – ED Physician Disposition* window appears.



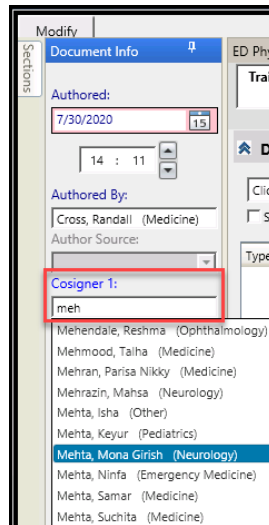
A screenshot of the 'Structured Notes Entry – ED Physician Disposition' window. The window title is 'Structured Notes Entry - ED Physician Disposition'. It features a 'Modify' tab and a 'Document Info' section with fields for 'Author' (7/30/2020), 'Author By' (Cross, Randall (Medicine)), 'Date of Service' (7/30/2020), and 'Time' (13:09). The main content area is titled 'ED Physician Disposition' and contains patient information: 'Trainer Allscripts, MRN: 1000006, Visit ID: 10000011, Age: 55 y, Male, Location: AD-CUB05A, Visit Date: 07/15/2020'. Below this is a 'Diagnosis' section with a search bar and a table with columns 'Type', 'Discharge Dx', 'Code', and 'Coding Scheme'. At the bottom is a 'Disposition' section with radio button options: 'Discharged...', 'Admitted...', 'Transferred...', 'Left w/o being seen (saw a nurse but never saw phys./MLP)...', 'Eloped (saw a physician/MLP but left w/o telling anyone)...', and 'AMA (saw a physician/MLP but left w/o telling anyone)...'. The 'Discharged...' option is selected. At the bottom of the window are buttons for 'Need Help?', 'Mark Note as: Incomplete', 'Save As Draft', 'Save Complete', and 'Cancel'.

- A summary of the patient's **Demographic** information appears at the top of the note.

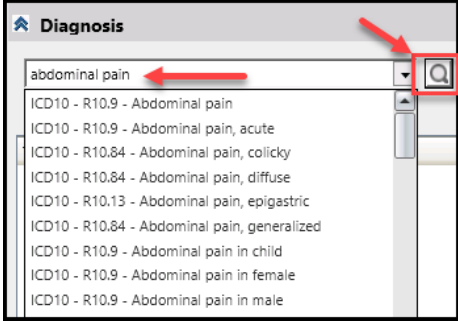


A screenshot of the top portion of the 'ED Physician Disposition' note. It shows the patient's demographic information: 'Trainer Allscripts, MRN: 1000006, Visit ID: 10000011, Age: 55 y, Male, Location: AD-CUB05A, Visit Date: 07/15/2020'.

- To **Request Co-Signature** for this documentation, in the **Document Info** section, in the **Cosigner 1** field, begin typing the last name of the co-signing provider. Select the appropriate provider name from the search results list.

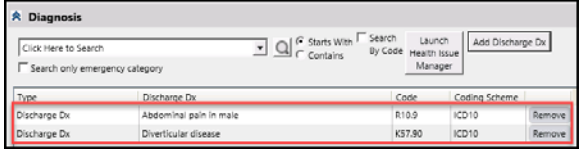


- Click the **Sections** tab to display the list of sections and ease of navigation in the note.
- Document appropriate **Sections** of the note per your emergency discharge protocol. The following table provides a detailed description of the sections in the note.

Section	Description
Diagnosis	<p>Capture the ED Discharge Diagnosis.</p> <p>To add the diagnosis: Use one of the following methods:</p> <p>Using the Quick Search Tool</p> <ol style="list-style-type: none"> In the Click Here to Search field, begin typing the diagnosis description name. Click the 'magnifying glass' icon.  <p>Note: You can refine the search by selecting options: Starts With, Contains or Search by Code.</p> <ol style="list-style-type: none"> Select the appropriate diagnosis code / description from the drop-down.

Section | **Description**

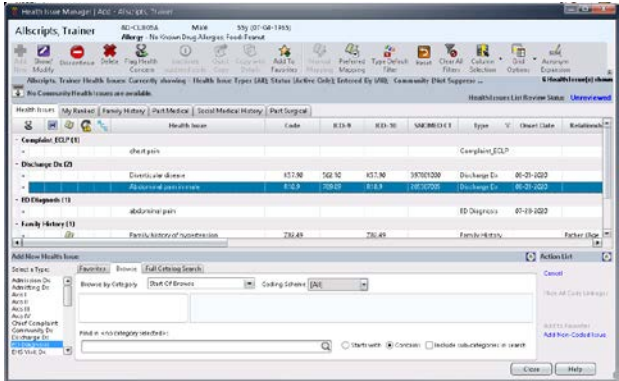
- Click the **Add Discharge Dx** button.
- Repeat the process to add additional diagnoses.
The added item(s) appears in the display list.



Note: To remove an entry, click the **Remove** button.

Using Health Issue Manager

- Click the **Launch Health Issue Manager** button. *The Problem Manager window appears.*



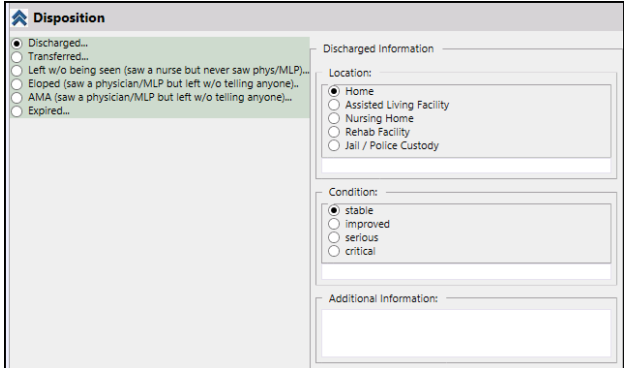
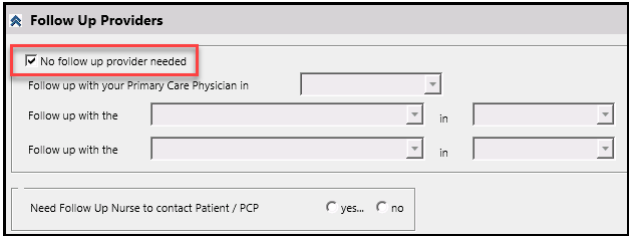
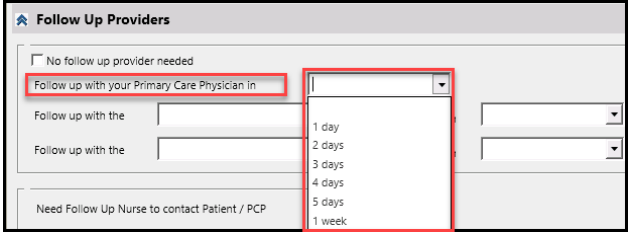
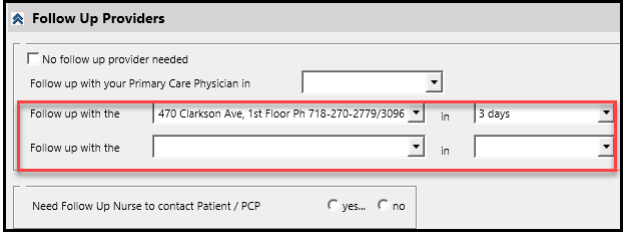
- In the **Add New Health Issue** area (bottom left panel), select the **Type = Discharge Dx**.
- Click the **Full Catalog Search** tab.
- In the free text search field, begin typing the diagnosis description name and press **Enter** (or click the 'magnifying glass' icon).
- In the search results list, click **Add** next to the diagnosis (problem) to add.



- Click **Close** to return to the note.
The entry appears in the display area.

Disposition | Capture the **Disposition** type.

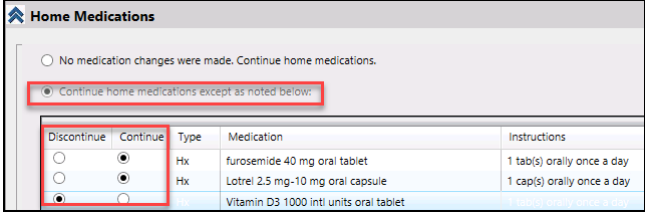
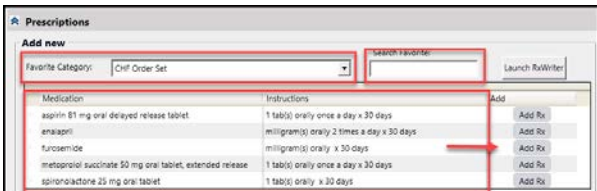
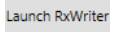
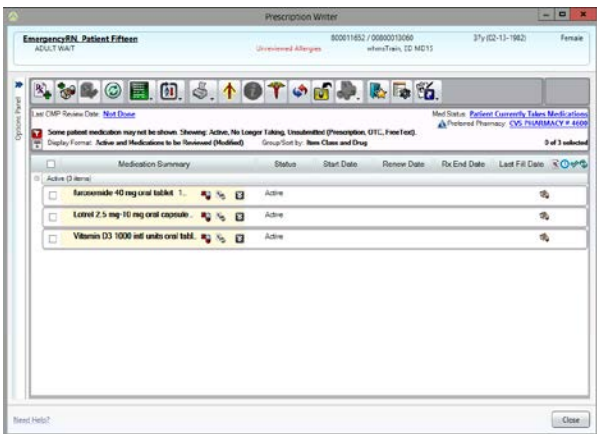

- Select the radio button next to the **Disposition** description.

Section	Description
	<p><i>The appropriate Discharged Information details appear.</i></p>  <p>2. Document the appropriate Discharged Information.</p>
Follow Up Providers	<p>Capture providers the patient will need to follow-up post ED visit.</p> <ul style="list-style-type: none"> • If no follow-up required: Select No follow up provided needed check box.  <ul style="list-style-type: none"> • To indicate follow-up with existing PCP: In the Follow up with your Primary Care Physician in drop-down, select the timeframe for follow-up.  <ul style="list-style-type: none"> • To indicate follow-up with a Specialty Practice: In the Follow up with the drop-down, select the Practice Location and then select the timeframe from the in drop-down.  <ul style="list-style-type: none"> • Indicate if Need Follow Up Nurse to contact Patient / PCP: A selection of yes... will display Follow Up Reason options.

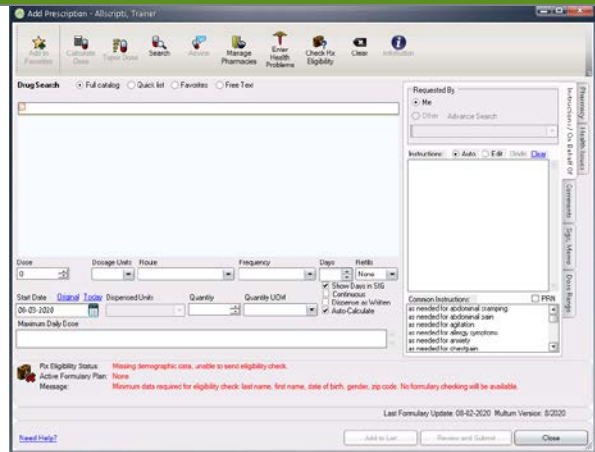
Section	Description																								
	<div data-bbox="829 279 1463 436" style="border: 1px solid gray; padding: 5px;"> <p>Need Follow Up Nurse to contact Patient / PCP <input checked="" type="radio"/> yes... <input type="radio"/> no</p> <p>Follow Up Reason</p> <p><input type="radio"/> Follow up on patient condition</p> <p><input type="radio"/> ensure follow up appointment made</p> <p><input type="radio"/> ensure prescriptions filled/review instructions</p> <p><input type="radio"/> contact PCP regarding patient</p> <p><input type="radio"/> Other (specify)...</p> </div> <ul style="list-style-type: none"> The Select Primary Care Providers section will display any PCP added during registration. Click Add to add a provider. <div data-bbox="829 516 1463 621" style="border: 1px solid gray; padding: 5px;"> <p>Select Primary Care Providers</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Phone Number</th> <th>Address</th> <th>Follow Up In</th> <th></th> </tr> </thead> <tbody> <tr> <td>Jackson, Rosemary</td> <td></td> <td></td> <td></td> <td style="text-align: right;">Add</td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> To add a Follow Up Provider, begin typing the last name of the provider in the Search Care Providers field, select from the search results, and then click Add. The entry appears in the Selected Follow Up Providers list. <div data-bbox="829 762 1463 898" style="border: 1px solid gray; padding: 5px;"> <p>Search Care Providers</p> <p> <input checked="" type="radio"/> Search by Name <input type="radio"/> Search by Discipline <input type="radio"/> Contains <input type="radio"/> Starts With <input type="button" value="Add"/> </p> <p>Selected Follow Up Providers</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Discipline</th> <th>Practice Name</th> <th>Phone Number</th> <th>Address</th> <th>Follow Up In</th> <th></th> </tr> </thead> <tbody> <tr> <td>JONES, CHRISTOPHER</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td style="text-align: right;">Remove</td> </tr> </tbody> </table> </div>	Name	Phone Number	Address	Follow Up In		Jackson, Rosemary				Add	Name	Discipline	Practice Name	Phone Number	Address	Follow Up In		JONES, CHRISTOPHER						Remove
Name	Phone Number	Address	Follow Up In																						
Jackson, Rosemary				Add																					
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JONES, CHRISTOPHER						Remove																			

| **Patient Education** | Add **Discharge Education Materials** from ExitCare to provide to the patient. - To auto-display and select from suggested titles based on the added ED Discharge Dx: - Click the **REFRESH Problems/Suggested Titles** button. *The **education titles appear in the Suggested Title list.*** **Patient Education** Please select another Language: Spanish **Suggested Title** | Title | | |-------|------------------| | | Add Title | - Click the **Add Title** button to add a document. - To manually add education documents via ExitCare: - Begin typing a description name (*for example, hypertension*) in the **Search by Title and Keyword** field. **Search By Title And Keyword** Starts With Contains hypertension | | |------------------------------------| | Hypertension During Pregnancy | | Hypertension | | Managing Your Hypertension | | Preventing Hypertension | | Preventing Cerebrovascular Disease | | Hypertension, Easy-to-Read | - Select the option from the search results list. - Click the **Add Title** button. *The added entries appear in the **Selected Titles** list.* |

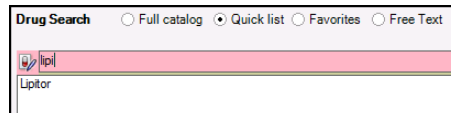
Section	Description															
	<div data-bbox="846 275 1461 403" data-label="Image"> <p>Selected Titles</p> <table border="1"> <thead> <tr> <th>Title</th> <th>Available In Other</th> <th>Add Other</th> <th>Edit Title</th> <th>Remove Title</th> </tr> </thead> <tbody> <tr> <td>Managing Your Hypertension</td> <td><input checked="" type="checkbox"/></td> <td>Add Other</td> <td>Edit</td> <td>Remove</td> </tr> </tbody> </table> <p>Preview All Titles</p> </div> <ul style="list-style-type: none"> To preview the added documents, click Preview All Titles. Add Other: Select to include the additional language from the Please select another Language drop-down at the top of the Patient Education section. <div data-bbox="987 611 1471 680" data-label="Image"> <p>Patient Education</p> <p>REFRESH Problems/Suggested Titles Please select another Language Spanish</p> </div> <ul style="list-style-type: none"> Edit: Select to open the Preview window and add custom text. Remove: Select to remove an added entry. <ul style="list-style-type: none"> Select the appropriate Education Log details. <div data-bbox="828 835 1466 919" data-label="Image"> <p>Education Log</p> <p>Given To: Patient Outcome: CVA:State warning signs of stroke</p> </div>	Title	Available In Other	Add Other	Edit Title	Remove Title	Managing Your Hypertension	<input checked="" type="checkbox"/>	Add Other	Edit	Remove					
Title	Available In Other	Add Other	Edit Title	Remove Title												
Managing Your Hypertension	<input checked="" type="checkbox"/>	Add Other	Edit	Remove												
Orders Reconciliation	<p>Displays the completion status of the Home Medication Collection and Discharge Orders Reconciliation.</p> <p>TBD Per SUNY ED Workflow: If required per your ED protocol to complete a Discharge Reconciliation on discharge from the ED, click the Launch Orders Reconciliation button to launch the Orders Reconciliation Manager module.</p> <div data-bbox="797 1194 1461 1421" data-label="Image"> <p>Orders Reconciliation</p> <p>Reconciliation Status</p> <p>Not Done Incomplete Complete Home Medication Collection STATUS</p> <p>Discharge Orders Reconciliation STATUS</p> <p>Launch Orders Reconciliation</p> </div>															
Home Medications	<p>Capture if the patient should Continue or Discontinue existing home medications on discharge.</p> <ul style="list-style-type: none"> To continue all medications with no changes: Select No medication changes were made. Continue home medications. The Continue selection will default for all medications. <div data-bbox="824 1614 1458 1810" data-label="Image"> <p>Home Medications</p> <p><input checked="" type="radio"/> No medication changes were made. Continue home medications.</p> <p><input type="radio"/> Continue home medications except as noted below:</p> <table border="1"> <thead> <tr> <th>Discontinue</th> <th>Continue</th> <th>Type</th> <th>Medication</th> <th>Instructions</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td><input checked="" type="radio"/></td> <td>Hx</td> <td>furosemide 40 mg oral tablet</td> <td>1 tab(s) orally once a day</td> </tr> <tr> <td><input type="radio"/></td> <td><input checked="" type="radio"/></td> <td>Hx</td> <td>Lotrel 2.5 mg-10 mg oral capsule</td> <td>1 cap(s) orally once a day</td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> To indicate specific medications to continue or discontinue: Select the appropriate Discontinue or Continue option for each 	Discontinue	Continue	Type	Medication	Instructions	<input type="radio"/>	<input checked="" type="radio"/>	Hx	furosemide 40 mg oral tablet	1 tab(s) orally once a day	<input type="radio"/>	<input checked="" type="radio"/>	Hx	Lotrel 2.5 mg-10 mg oral capsule	1 cap(s) orally once a day
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<input type="radio"/>	<input checked="" type="radio"/>	Hx	Lotrel 2.5 mg-10 mg oral capsule	1 cap(s) orally once a day												

Section	Description
	<p>individual medication. The Continue home medications except as noted below will select by default.</p>  <ul style="list-style-type: none"> • Medication Instructions: Free text field to add additional comments as needed.
Prescription Management	<p>Capture new patient prescriptions.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> • To add prescriptions from a favorites list: <ol style="list-style-type: none"> 1. Select a Favorite Category from the drop-down or begin typing the medication favorite description name in the Search Favorite field.  <ol style="list-style-type: none"> 2. Click the Add Rx button to add a medication. • To add prescriptions using Prescription Writer: <ol style="list-style-type: none"> 1. Click the Launch Rx Writer  button. <i>The Prescription Writer window opens with any existing home medications and prescriptions displayed.</i>  2. Click the Add New Prescription  toolbar button. <i>The Add Prescription window appears.</i>

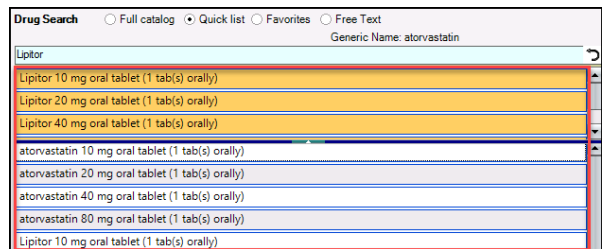
Section	Description
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3. Select the **Drug Search** method:
 - **Full Catalog:** Initiates a search on the full Multum drug catalog.
 - **Quick List:** Initiates a search on the most common prescribing doses.
 - **Favorites:** Initiates a search on a list of saved favorites.
 - **Free Text:** Provides ability to add a free text entry (for example, durable medical equipment).
4. In the **search field**, begin typing the description name of the medication.
5. Select from the search results match.

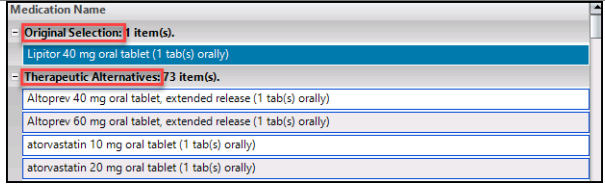


A detailed search results list of the medications (brand / generic) display.

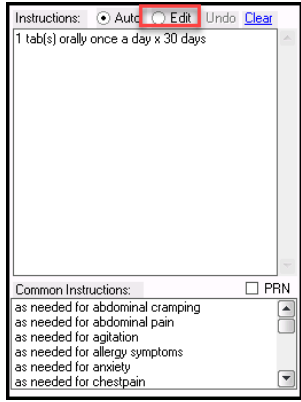


6. Select the prescription dose and form from the list.
The Original Selection and Therapeutic Alternatives medications appear.

Section	Description
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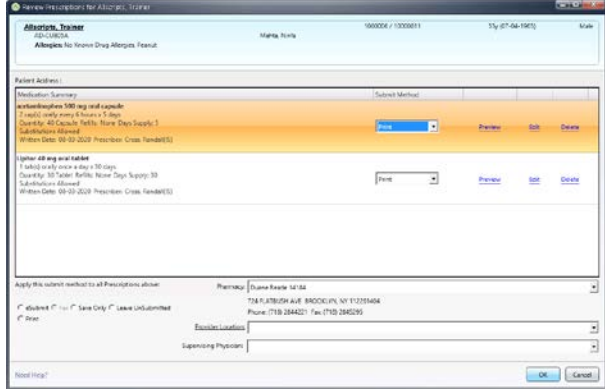


7. Enter or validate the prescription information at the bottom of the window: **Dose, Dosage Units, Route, Frequency,** and so on).
8. **Optional:** Select **Edit** to add or edit the prescription **Instructions** in the right panel.

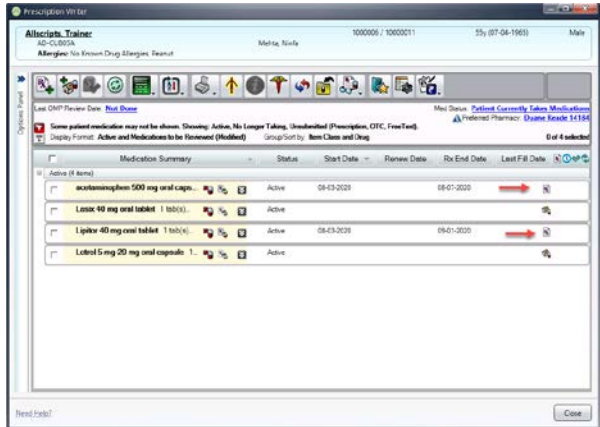
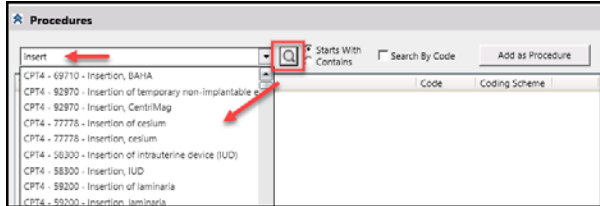


9. To save the prescription as unsubmitted and add another: Click the **Add to List** button.
10. To submit the prescription and continue: Click the **Review and Submit** button.

The Review Prescriptions window appears displaying the prescriptions pending submission.



- **Submit Method:** Will default to **eSubmit** for prescriptions that can be submitted electronically
- **Pharmacy:** If previously added, will default. **To add a pharmacy:** From the drop-down, select **Search for Pharmacy**.

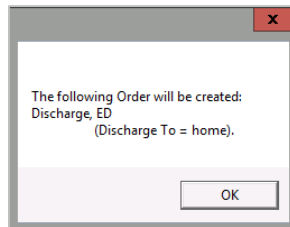
Section	Description
	<ul style="list-style-type: none"> ○ Provider Location: Will default based on the assigned location configured for the logged on Provider. ○ Supervising Physician: As required for Mid-Level Providers to select the assigned Supervising Physician. <p>11. For training purposes: Leave the Submit Method = Print and click OK.</p> <p><i>The Prescription Writer window reappears with the submitted prescriptions displayed.</i></p> <p>Note: Prescriptions are indicated with the Rx symbol.</p>  <p>12. Click Close to return to the note.</p>
Work/School Note	Capture details to create Return to Work/School Excuse .
Additional Instructions	Add additional free text notes as needed.
Procedures	<p>Capture procedures performed during the ED visit.</p> <ol style="list-style-type: none"> 1. In the Click Here to Search field, begin typing the description name of the procedure. 2. Click the 'magnifying glass' icon to initiate the search.  <ol style="list-style-type: none"> 3. Select the appropriate procedure code/description from the search results. 4. Click the Add as Procedure button.
Orders Performed in ED	<p>Displays the following per activity during the ED visit:</p> <ul style="list-style-type: none"> • Diagnostic Tests Performed • Lab Tests Performed • Meds Given in ED

Section	Description								
	<ul style="list-style-type: none"> • Results Pending <div style="border: 1px solid black; padding: 5px;"> <p>Orders Performed in ED</p> <table border="1"> <thead> <tr> <th>Diagnostic Tests Performed</th> <th>Lab Tests Performed</th> <th>Meds Given in ED</th> <th>Results Pending</th> </tr> </thead> <tbody> <tr> <td>MRI Abdomen with + without Contrast XR Chest 1 View</td> <td>Arterial Blood Gas Basic Coagulation Profile Basic Metabolic Panel CBC & Differential Culture, Wound Electrolyte Panel</td> <td></td> <td>Culture, Urine</td> </tr> </tbody> </table> </div>	Diagnostic Tests Performed	Lab Tests Performed	Meds Given in ED	Results Pending	MRI Abdomen with + without Contrast XR Chest 1 View	Arterial Blood Gas Basic Coagulation Profile Basic Metabolic Panel CBC & Differential Culture, Wound Electrolyte Panel		Culture, Urine
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MRI Abdomen with + without Contrast XR Chest 1 View	Arterial Blood Gas Basic Coagulation Profile Basic Metabolic Panel CBC & Differential Culture, Wound Electrolyte Panel		Culture, Urine						

4. Do one of the following:

- To save the note in **'Incomplete'** status (and complete charting later): Click the **Mark Note as: Incomplete** checkbox at the bottom of the window and click **Save As Draft**.
- To save your documentation in **'Complete'** status: Click **Save Complete**.


⇒ When saved **Complete**, the following message appears indicating the **Discharge Order** will be auto-created.



5. Click **OK**.


Using ExitCare

As outlined in the previous topic, the ED Provider can launch **ExitCare** within the **ED Disposition Note** to print education materials, however, ExitCare can also be launched from in Sunrise toolbar via the **Discharge**

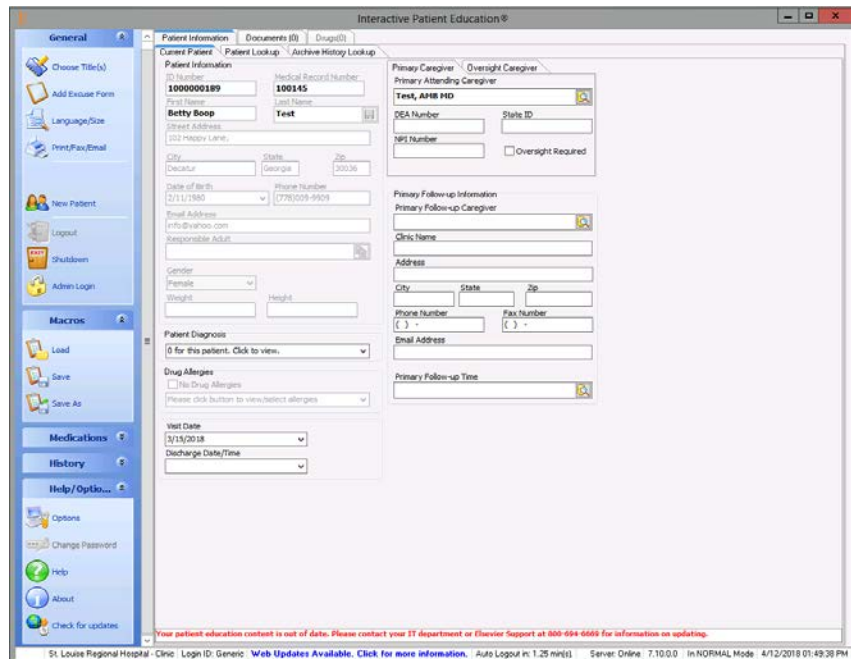
Instructions  toolbar button, in the event the Nurse needs to print materials for the patient.

Adding Patient Education Documents

TO ADD PATIENT EDUCATION DOCUMENTS:

1. Ensure the patient is in context in the Status Board.
2. On the Sunrise toolbar, click the **Discharge Instructions for Current Patient**  button.

⇒ The Interactive Patient Education window appears.



3. In the **General** action list (left panel), click **Choose Title(s)**.

⇒ The *Select Documents* window appears.

4. Search and select the document(s) to add, you can use one or more of the following methods:

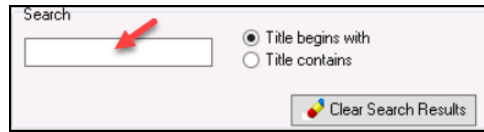
- **Document by Category** tab: Select documents from a list of all available documents (**All Documents**) or from a specific **Specialty Category**. Click the checkbox next to the document(s) you want to add.

Document by Category	Documents by Diagnosis	Documents by Age/Gender
Categories	<input type="checkbox"/>	<input type="checkbox"/>
All Documents	<input type="checkbox"/>	1st Degree Heart Block*
Cardiovascular	<input type="checkbox"/>	2nd Degree Heart Block*
Caregiving	<input type="checkbox"/>	3rd Degree Heart Block*
Dentistry	<input type="checkbox"/>	A fib, Easy-to-Read*
Dermatology	<input type="checkbox"/>	A fib*
Emergency Medicine	<input type="checkbox"/>	A Flutter*
Endocrinology	<input type="checkbox"/>	AA Blank DI
ENT	<input type="checkbox"/>	AAA Repair, Endograft*
Foms	<input type="checkbox"/>	AAA Repair, Open*
	<input checked="" type="checkbox"/>	AAA, Abdominal Aortic Aneurysm, Easy-to-Read*
	<input type="checkbox"/>	AAA, Abdominal Aortic Aneurysm*

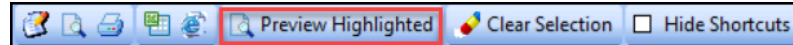
- **Documents by Age/Gender** tab: Select documents from a list of documents related to the patient's age and sex.

Document by Category	Documents by Diagnosis	Documents by Age/Gender	
Selected	Age	Gender	Document Name
<input type="checkbox"/>	Adult	Male	Acute Renal Disease, Easy-to-Read*
<input type="checkbox"/>	Adult	Male	Acute Renal Failure*
<input type="checkbox"/>	Adult	Male	Acute Renal Failure, Easy-to-Read*
<input checked="" type="checkbox"/>	Adult	Male	Acute Respiratory Distress Syndrome, Adult
<input type="checkbox"/>	Adult	Male	Acute Respiratory Distress*
<input type="checkbox"/>	Adult	Male	Acute Respiratory Failure*
<input type="checkbox"/>	Adult	Male	Acute Respiratory Failure, Adult

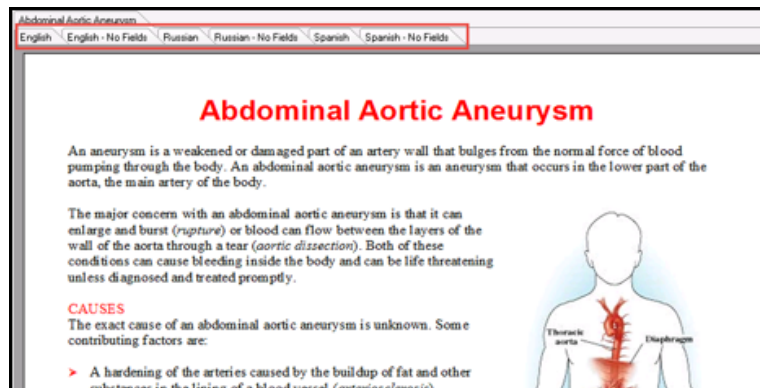
- **Document Search:** Use this feature to manually search for a document by description name (bottom left of window). In the **Search** field, type the full or partial description name of the document.



- To preview a document before adding, click the **Preview Highlighted**




⇒ The *Preview window* appears.

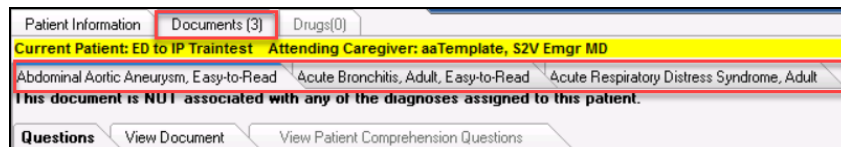


Note: The available **Languages** for the selected document appear as separate tabs that enable you to change the print language. All documents do not have the same type of available languages.

Note: Click **Close Preview** to close the preview window.

- When all documents have been selected, click the **Done**  button (bottom right corner).

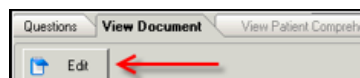
⇒ The main *ExitCare* window reappears displaying a separate tab at the top of the window for each selected document and a tab displaying the total number of documents added.



- To preview the document from this view, click the tab for the document to view and click the **View Document** tab.

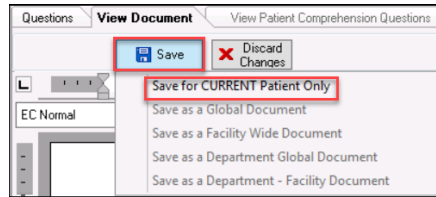
- To add custom text to the document:

- From the **View Document** mode, click the **Edit** button.



⇒ The document appears in Word format.

- b). Type custom text in the document as appropriate and click **Save > Save for CURRENT Patient Only**.



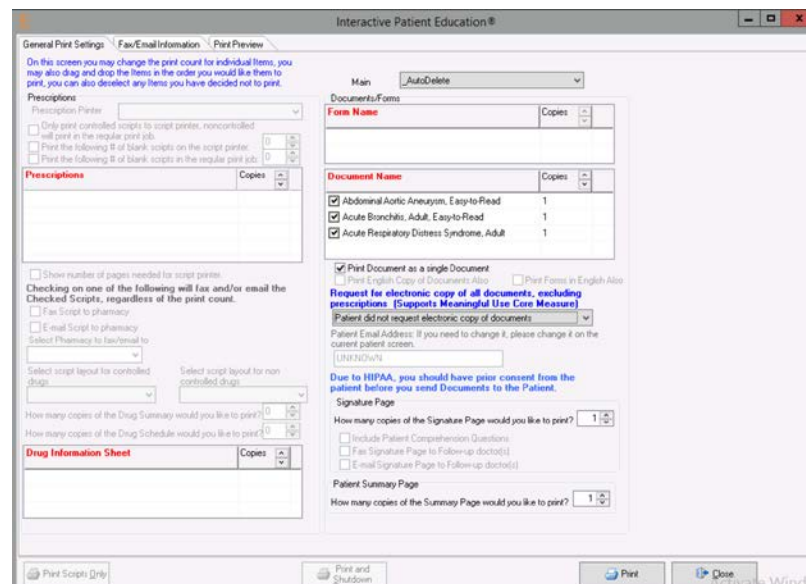
Note: The added text is only saved for the printed patient version; it is not saved to the Master document template.

Printing Patient Education Documents

TO PRINT PATIENT EDUCATION DOCUMENTS:

1. In the **General** action list (left panel), click **Print/Fax/Email**.

⇒ The *General Print Settings* window appears.

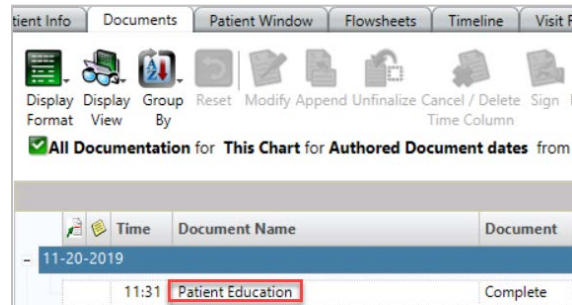


2. Confirm the print options:
3. Click **Print**.
4. To close the **ExitCare** window, in the **General** action list, click **Shutdown**.
5. Click **Yes** to confirm shutdown.

Viewing Education Documents from the Documents Tab

Patient Education documents printed from ExitCare appear on the **Documents** tab titled **Patient Education**.

Note: If you added and printed multiple documents in the same session launch of ExitCare, each document will be compiled under the same **Patient Education** entry on the Documents tab.



Double-click on the **Patient Education** document to view the document(s).

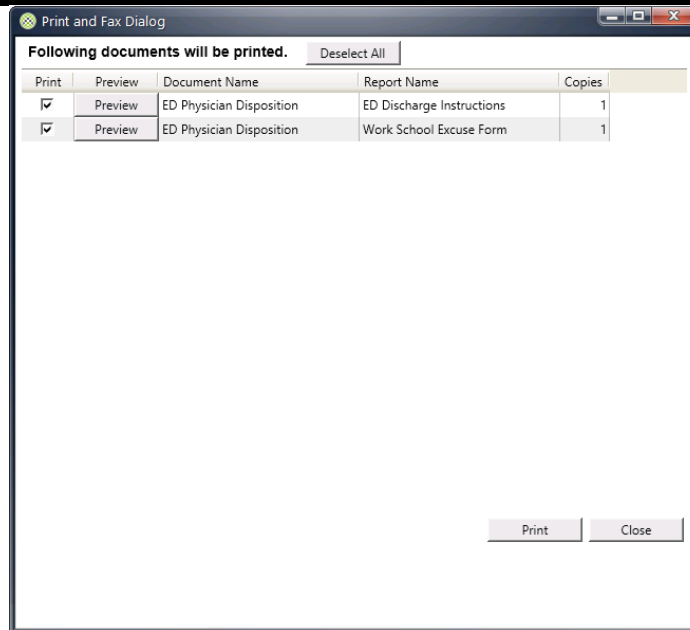
Printing the Patient Discharge Summary

Documentation from the **ED Physician Disposition** note automatically creates the **ED Patient Discharge Summary** that the Nurse (or Provider) prints to provide to the patient upon discharge.

The **ED Patient Discharge Summary** document is printed using the **Disposition Print Dialog** tool.

TO PRINT THE ED PATIENT DISCHARGE SUMMARY:

1. In the Sunrise toolbar, click the **Disposition Print Dialog**  button.
⇒ *The Print and Fax Dialog window appears.*



2. In the **Print** column, click the checkbox next to the documents to print.
3. **Optional:** Click **Preview** to view the document.
4. Click **Print** to print the document(s).

Discharging a Patient and Removing from the Status Board

When the ED discharge process is complete, the ED Registrar/Clerk completes the patient discharge task via the right-click **Discharge Patient** action from the **Status Board**.

When a patient is discharged from the ED, the discharge task does NOT automatically remove the patient from the Status Board view; an ED staff personnel must manually remove the patient from the Status Board view.

Important: It is recommended to not remove the patient from the Status Board until the patient has been 'physically' released from the ED. For example, a patient may be status as discharged, however, the patient may still be in the emergency department until clear to leave or awaiting transportation.

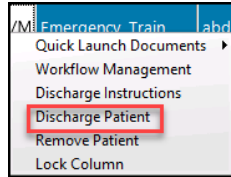
Discharging a Patient from the Status Board

TO DISCHARGE A PATIENT:

1. **ED Registration/Clerk:** Monitors the **Status Board (Registration View)** and see the patient status (**STS** column) is **PD (Pending discharge)** and cell shading **dark green**.

Location	LOS	Patient	Age	Visit Reason	Chief Complaint	STS	Inc Reg	REG Comp
AD-CUB5A	477:49	Albscripts, Trainer	55y		abdominal pain	PD		
AD-CUB01B	3029:23	BAPTISTE, SHARON	44y	SHORTNESS OF BR	abdominal pain	WTBS		
PEDS-WR	3338:55	CAMA, TONYA	69y	*		WTBS		

2. Right-click on the patient name and select **Discharge Patient**.



⇒ The Visit Discharge window appears.

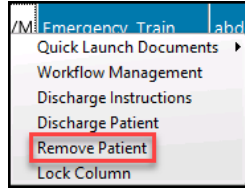
3. Complete the following **required** fields:

- **Actual Date**
- **Actual Time**
- **Disposition**

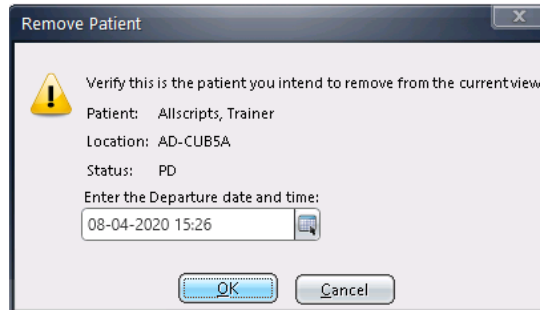
4. Click the **Discharge** button.

TO REMOVE A PATIENT FROM THE STATUS BOARD VIEW:

1. In the **Status Board**, right-click on the patient name and select **Remove Patient**.



⇒ The *Remove Patient* confirmation window appears.



2. Click **OK** to confirm.

⇒ The patient is removed from the active **Status Board** views and will appear in the **Inactive Patients** view of the **Status Board**, and will also appear on the **Follow Up Board** tab.

Using the Inactive Patients View

When a patient is removed from the active **Status Board** views, the patient is automatically moved to the **Inactive Patients** view as a ‘placeholder’.

MRN	Patient Name	Visit Status	Location	Removed Date/Time	Departure Date/Time
100284	Train, Emergent	DSC	Triage MDRX	06-Feb-2020 10:53	04-Feb-2020 10:53

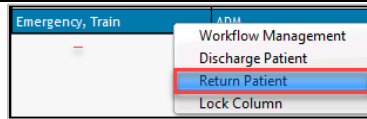
If you move a patient to the **Inactive Patients** view and then discharge the patient in the **Inactive Patients** view, the patient’s status automatically changes to **DSC(discharged)**, but the patient remains in the **Inactive Patients** view for the timeframe specified.

Note: The standard time period that patients remain on the **Inactive Patients** view is between 24 – 72 hours, as defined by your enterprise.

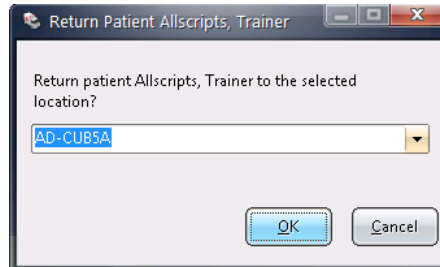
In the event a patient is accidentally moved to the **Inactive Patients** view, you can easily correct by returning the patient to an **Active** view.

TO RETURN INACTIVE PATIENTS TO AN ACTIVE PATIENT VIEW:

1. In the **Inactive Patients** view, right-click on a patient and select **Return Patient**.



⇒ The **Return Patient** window appears displaying the previously assigned location.



2. **Optional:** To select a different location, select from the drop-down.
3. Click **OK**.

Using the Follow Up Board

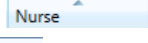

The **Follow Up Board** is a single screen for tracking and managing required patient follow-up tasks post-discharge of the emergency visit, for example:

- Documentation completion
- Lab results follow-up
- Patient Call Backs
- Completing signature requirements

Options	Pt. Age	Admit D/T	TB Removal D/T	Days on FUB	Diagnosis	ED Bed	Provider	Nurse	Dsp	Call Backs
	19	May 18 2020 13:06	Jun 17 2020 15:32	48		AD-CUB10				
	6	Jul 08 2020 14:23	Jul 15 2020 14:13	20		Triage				
	55	Jul 15 2020 17:29	Aug 04 2020 15:28	0	Aug 04 2020 15:22 Abdominal pain in male: Acid reflux	AD-CUB5A				Open

Patients appear on the **Follow Up Board** upon removal from the active **Status Board** view.

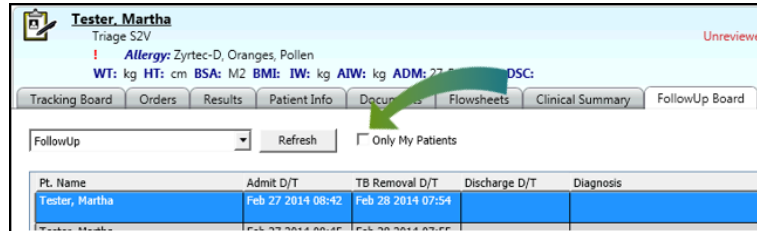
Navigating the Follow Up Board

- **Sort by Column:** Users can sort by column by clicking on the **Column Header**. It first sorts in **ascending** order  and a second click will change to **descending** order .
- **Move Columns:** Manually change the order of columns in the view via **click and drag** to the preferred location in the view.

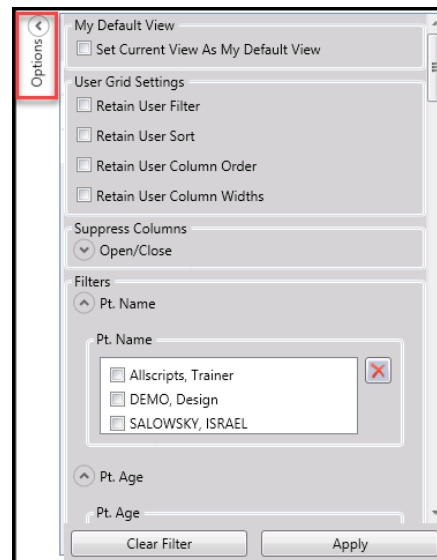
- **Only My Patients** filter: Allows the logged on user to filter the view to only the patients they were assigned as the ED MD.

Note: Only specific Care Provider Role Types are utilized.

- Even if a user is inactive as a care provider, the patient will still display when filtered.
- Once a user enables this filter, it is retained until disabled (even after logging off/on).



- **Options Panel:** Provides the ability to filter the view using selected criteria. Open/close the panel by clicking the **Options Expand/Collapse** arrow.



















- **My Default View:** Select **Save Current View As My Default View** to save the current view as your preferred default.
- **User Grid Settings:** Select the appropriate options to **Retain** your sort and/or filter options between logons.
- **Suppress Columns:** Select the **Open/Close** option to expand the drop-down to select columns to suppress (remove) from the view.
- **Filters:** Select data within each **Column Description** section to filter the view.


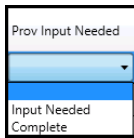
Select the preferred filter option(s) and then click the **Apply** button. Click **Clear Filter** to clear the filter selections. Scroll the list to see additional filter options.

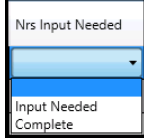
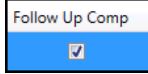
Note: Some **Filters** sections (for example, **Pt. Name**) will not appear for selection to filter until that respective data is available in the **Follow Up Board** view.

Understanding Follow Up Board Data Columns

The following table provides a description of the **Columns** in the **Follow Up Board** view.

Column	Description												
Pt. Name	Patient's name.												
Pt. Age	Patient's age.												
Admit D/T	Admit Date/Time.												
TB Removal D/T	Tracking Board Removal Date/Time												
Days on FUB	Total number of days on the Follow Up Board.												
Discharge D/T	Discharge Date/Time.												
Diagnosis	The ED Discharge Diagnosis.												
ED Bed	The ED Bed location.												
Provider	The last ED MD assigned on the Status Board.												
Nurse	The last Nurse assigned on the Status Board.												
Dsp	<p>Displays the icon badge associated with the patient's disposition.</p> <table border="1"> <thead> <tr> <th>DESCRIPTION</th> <th>ICON</th> </tr> </thead> <tbody> <tr> <td>Discharged</td> <td></td> </tr> <tr> <td>Admitted</td> <td></td> </tr> <tr> <td>Transferred</td> <td></td> </tr> <tr> <td>Expired</td> <td></td> </tr> <tr> <td>Eloped</td> <td></td> </tr> </tbody> </table>	DESCRIPTION	ICON	Discharged		Admitted		Transferred		Expired		Eloped	
DESCRIPTION	ICON												
Discharged													
Admitted													
Transferred													
Expired													
Eloped													
Call Backs	<p>If <u>configured</u>, when a patient is moved to the Follow Up Board, the Call Back icon badge  displays in the column cell.</p> <p>Note: TBD if SUNY will use the Call Back column feature.</p> <p>Standard Workflow if this column is used:</p> <ol style="list-style-type: none"> 1. Designated staff completes patient call back and documents details on ED Call Back Note. 												

Column	Description
	<ol style="list-style-type: none"> When the Call Back Note documentation is completed, the icon badge is removed
Call Back Rsn	Free text cell to manually enter the Call Back Reason . Note: TBD if SUNY will use the Call Back Rsn column feature.
Lab	Displays the Lab icon badge associated with the status of the patient's lab results (In Progress, Results Pending, Resulted). Note: Logic is included so that the lab icon does not display for patients who are admitted or expired. <u>Standard Workflow if this column is used:</u> <ol style="list-style-type: none"> If all results are <u>negative</u>: Provider documents 'Follow up complete' in the ED Lab Results Follow Up note. The icon is removed from the board. If any results are <u>positive</u>: Provider documents any required treatment in the ED Lab Results Follow-Up note and calls patient. When <u>follow-up is complete</u>: Provider documents 'Follow up complete' in the ED Lab Results Follow Up note. The icon is removed from the board.
To Sign	Displays a flag  icon indicating items (orders or documents) are pending signature.
Inc Prov Doc	Displays an icon badge indicating Incomplete Provider Documents .
Inc Nrs Doc	Displays an icon badge indicating Incomplete Nursing Documents .
Comments	Double-click in the cell to add general free text comments.
Prov Input Needed	Designated staff updates column to indicate status of Provider Input Needed for follow-up. Select option from the drop-down. 
Nrs Input Needed	Designated staff updates column to indicate status of Nursing Input Needed for follow-up. Select option from the drop-down.

Column	Description
	
<p>Follow Up Comp</p>	<p>As determined per workflow: When all follow-up is defined as 'complete', designated staff checks the box.</p>  <p>The patient is removed from the Follow Up Board when <u>both</u> of the following criteria are met:</p> <ul style="list-style-type: none"> ○ Follow Up Comp column checked ○ No activity for the patient on the Follow Up Board for the <u>enterprise defined</u> timeframe <p>Note: If something is changed on the Follow Up Board after the Follow Up Comp is checked, the timer resets.</p>

Lesson Review

Having completed this lesson, you should be able to:

- Document the ED Physician Disposition note.
- Add, manage and submit prescriptions electronically using Prescription Writer.
- Complete Nurse disposition documentation via the ED Nurse Note.
- Print patient education materials using ExitCare.
- Print the Patient Discharge Summary.
- Understand the purpose and use of the Follow Up Board in the ED workflow.
- Understand the use of the Inactive Patients view in the Status Board.