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| --- | --- | --- |
| **Subject** | **Checklist** | **Comments/Notes** |
| **Clinical Dashboard** | * Edit Layout
* Daily Summary
* Manage CNA Assignment (POC)
* Manage Med Pass Status
* Stop & Watch (InterACT)
* Clinical Alerts
* Order Alerts
* Integrated Pharmacy Alerts
* ADT in the last (3-7 days)
* Unreviewed Laboratory Results
* Immunization Issues
* Antibiotic Medication Ordered
* Psychotropic Medication Ordered
* Orders on Hold > 30 Days or Requiring Reassessment
* All Conversations
* Care Plan Reviews
* Care Plan Goals Overdue
* Incomplete Care Plans
* High Priority Progress Notes
* Undocumented PRN orders
* Not Administered Med Passes
* Number of Active and On Hold Medication Schedules
* Order Signature
 |  |
| **Resident**  | * Photo
* Current Vitals
* Resident Header (Primary DX, Diet, Advanced Directives, Allergies, Special Instructions, admission/discharge dates)
 |  |
| **Resident Dashboard** | * Proceed to Care Plan RAPs & CAAs
* MDS Scores
* UDA Scores
* Vital Signs (Most Recent and Graphs)
* Diet
* Medication Listing
* Advanced Directives
* Scheduled Events
* Census Summary
* Administered PRN Medication Audit
* Not Administered PRN orders
 |  |
| **Resident Profile** | * Contacts
* Medical Professionals Assign PCP
* Medical Professionals add others
* External Facilities
* Admission Record (Face sheet)
* Transfer/Discharge Record
 |  |
| **Resident Census** | * Viewing History of Census Activity (room changes, transfers, discharges, readmits).
 |  |
| **Medical Diagnosis** | * View a diagnosis
* Add a diagnosis when ICD-10 code available
* Strike out a diagnosis
 |  |
| **Allergy** | * Add an allergy (drug, food, environmental, substance)
* Strike out an incorrect entry
* Resolve an allergy
 |  |
| **Immunizations** | * Immunization Documentation
* Historical/Consented etc.
* CVX Code
* Results
* Strike out/Edit an Incorrect Entry
 |  |
| **Orders** | * View orders (filters)
* Types of Orders (pharmacy, diet, lab, diagnostic, other)
* Order Template(s)
* Batch Order Set(s)
* Enter an order(s)
* Scheduling order(s)
* Update an order(s)
* Hold/Resume order(s)
* Discontinue order(s)
* Strike out an order(s)
* Setting Order Review Date
* Reports: Administration Record, Drug Information Sheets, Order Summary
 |  |
| **Weights/Vitals** | * View Vitals
* Record New Vital Entries
* Adding Baselines
* Exceptions/Warnings Clearing
* Graphs for reviewing Baseline Accuracy
 |  |
| **Results**Laboratory/Radiology Results | * View Results
* PN (Progress Note)
* Mark as Reviewed
* Un-Matching
 |  |
| **MDS** | * Review current and historical MDS
 |  |
| **Assessments** | * New
* Filter
* Next Assessment Due
* Discipline
* Edit an In Progress
* Save/Sign/Lock
* Strike Out/Close
* Editing/Adding/Cancelling Schedules
* Review Triggered UDA’s document
 |  |
| **Prog Note** | * UDA writes structured notes
* Should not be writing notes there
* View All
* Filters: date ranges, Custom etc.
 |  |
| **Care Plan** | * View the Care plan
* Activate a Care Plan
* View/Accept/Decline triggered Items
* Care Plan Filters
* Edit/Resolve/Cancel Focus, Goals, Interventions, and Tasks
* Write PN from within the Care Plan
* Custom Focus, Goals, and interventions when to use and why not to
* Care Plan Reviews
 |  |
| **Tasks** | * New Tasks
* Triggered Tasks
* Show/Resolved Cancelled
* Customizing/Scheduling
* Resolve/Cancel a Task
* Documentation History
* Print Kardex
 |  |
| **Misc** | * View and Upload documents
 |  |
| **Quick ADT** | * Admissions/Transfer/Discharge/Room Change
* Review Admission/Readmission Checklist document
* Review Discharge Reconciliation Checklist document
 |  |
| **UDA Portal** | Scheduled* Filters 0 Days, Unit, Floor
* Color coding, Black, Gray, Red
* Expand Filter

In Progress* Finding your in-progress UDAs to complete/sign/strike out

Completed* View completed UDA's

Managing the Portal* Ensuring Timely Documentation
* Reviewing due/overdue assessments for appropriate assessments, removing assessments that are not needed, and updating schedules as needed
 |  |
| **Order Portal** | Order Search* Filters

Orders in Queue* Incomplete Orders

Pending Orders* Confirm an Order

Pharmacy Orders* On Order Electronic
* Waiting to be Received
* Matching/Returning
* Exhaustible Supplies
* Inbound Pharmacy Orders- Resident Match

Orders Pending Signature* Reviewing for orders that need to be signed in order to communicate with provider

Order Reviews* Reviewing for order reviews that need to be signed in order to communicate with the provider

Active orders on Discharged Residents* Use to Audit Discharged Residents and discontinue orders that were left Active on Discharged residents
 |  |
| **MDS Portal** | 672* Refresh
* Editing Resident Responses in Question Total
* Red Background must be manually edited
* Add New Residents
* Remove Discharged Residents
* Printable View
* Reset all will replace all manual changes and replace with most recent MDS values
* Where to find Instructions for coding

802* Refresh Data
* Add New Residents
* Remove Discharged Residents
* Edit/Reset individual residents
* Printable View
* Reset All
* Color Legend
* Edit History
 |  |
| **Lab and RX Portal** | * Navigation
* Unreviewed Labs/Radiology
* Unmatched Labs/Radiology
 |  |
| **Weights & Vitals Portal** | * Filters
* Exceptions- How to review and address
 |  |
| **Communications** | * New
* View
 |  |
| **Quick Entries** | * Weights
* Vitals
* Immunizations
 |  |
| **eMAR** | * View eMAR/eTAR
* Portal
* Edit Assignment
* Change Date
* Color Coding Yellow, Red, Green
* Selecting Resident
* Filters including shift, prn, advanced (supp documentation), Supplies, Pending, Display
* Icons

Administering Medication/Treatments* Summary
* Administration Details
* Supplementary Documentation
* Follow Up
* Progress Note

Other Actions* Vitals
* Apply to all Administrations
* Reorder Order Supplies
 |  |
| **POC** | * View POC
* Dashboard
* Edit Assignment
* Change Date
* Color Coding, Yellow, Red, Green
* Selecting Residents
* Filters (shift, prn, etc.)
* Quick Entries
* New Alert (Stop & Watch, Change in Condition, and Custom)
* Kardex/Care Plan viewing
* Privacy Screen
* Resident Not Available- when to use and when not to
 |  |
| **Hospital Transfer** | * eInteract-Change in Condition/ Transfer Workflow
* High Risk Residents for re-hospitalizations
 |  |
| **Reports for Nursing Management** | * Resident List Report “New”
* Missing Entries
* Immunizations
* POC Documentation Compliance
* Care plan/Task Item Listing
* Medication Administration Audit
* Care Plan Report
* Intervention/Task Scheduling
* Order Listing Report
* Look Back Report
* Assessment Schedule Cancellations
* Assessment Scoring
* 24 Hour Summary
* Shift Report
* Midnight Census
* Daily Census
 |  |
| **EHR Support** | * Resources available- documents, solutions
* Submitting a ticket via email or the Freshdesk
* Calling the Hotline
* New User Request and Process
* After Hours Support
 |  |

**Employee Name & Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Employee Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Trainer Name and Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Trainer Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_