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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:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_