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| --- | --- |
| **Subject** | **Checklist** |
| **Basics** | **Logging In****Navigation****Home*** Facility Bulletin Board

**Clinical*** People: Resident List: All New, Current, Discharged
* Actions: Quick ADT Admissions, Discharges, and Transfers
* Care Management: Communications (View, New and Edit)
* Modules

**Reports**

|  |  |
| --- | --- |
| * 24 Hour Summary
 | * Admission Record (Face Sheet)
 |
| * Shift Report
 | * Transfer/Discharge Record \*New\*
 |
| * Progress Notes \*NEW\*
 | * Administration Record
 |
| * Midnight Census\*NEW\*
 | * Drug Information Sheets
 |
| * Daily Census
 | * Order Summary
 |

 |
| **Clinical Dashboard** | * Manage CNA Assignment (POC)
* Manage Med Pass Status
* Daily Summary
* ADT in the last (3-7 days)
* Stop & Watch eINTERACT
* Clinical Alerts
* Unreviewed Lab/RX Results
 |
| **Resident**  | * Resident Information and Resident Header
 |
| **Resident Profile** | * Contacts
* Medical Professionals
* External Facilities
 |
| **Resident Census** | * Viewing History of Census Activity
 |
| **Allergy** | * Add an allergy
 |
| **Immunizations** | * Entering a New Immunization Record and Immunization Results
* Strike out/Edit an Incorrect Entry
 |
| **Orders** | * View orders (filters)
* Order Template(s)
* Batch Order Set(s)
* Order Queue (Auto Populated and Incomplete orders)
* New Order Data Entry (order Categories, scheduling, etc.)
* Order Actions
* Other Batch Functions

**Order Portal*** Order Search
* Orders In queue
* Pending Orders
 |
| **Weights/Vitals** | * View Vital Entries and Record New Vital Entries
* Exceptions/Warnings/
 |
| **Results** | * View Laboratory/Radiology Results
* Mark as Reviewed
 |
| **Assessments***AKA:UDA’s***Includes:** Assessments, and Evaluations | * Triggered vs New
* Save/Sign/Lock
* Strike Out/Close
* In Progress or Errors

**UDA Portal** * Scheduled: Filters 0 Days, Unit, Floor, Color coding
* Finding your in-progress UDAs to complete/sign/strike out
* View list of completed UDA's
 |
| **Prog Note** | * Custom View (view all notes, filters)
 |
| **Care Plan** | * View the Care plan and Kardex
 |
| **Tasks** | * Adding Task New or previously Resolved/Cancelled
* Customizing/Scheduling
* Resolve/Cancel a Task
* Triggered Tasks
* Documentation History
 |
| **Misc:** | * View and Upload documents
 |
| **eMAR Overview** | * View and Navigate eMAR/eTAR
* Edit Assignment and Change Date, Selecting Resident and Filters
* Color Coding Yellow, Red, Green

Administering Medication/Treatments* Administration Workflow
* Required Follow Up

Other Actions* Vitals
* Apply to all Administrations
* Reorder Order Supplies
 |
| **POC Overview** | * View POC and Navigate
* Edit Assignment and Change Date
* Navigation: Selecting Residents, Color Coding, Filters and Quick Entries
* New Alert
* Kardex/Care Plan viewing
* Resident Not Available
* Dashboard Privacy Screen
 |
| **Additional Resources** | * PCC LN: New Admission Check List V3
* PCC: Discharge Chart Reconciliation Check List
* PCC UDA Triggers V 5
* PCC: Licensed Nurses (LN) Orientation Check List
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**Employee Name & Title:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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