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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 |

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

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