

pDoc (PWM) Physician Desktop Manual Meditech 5.67 November 2016

Important:

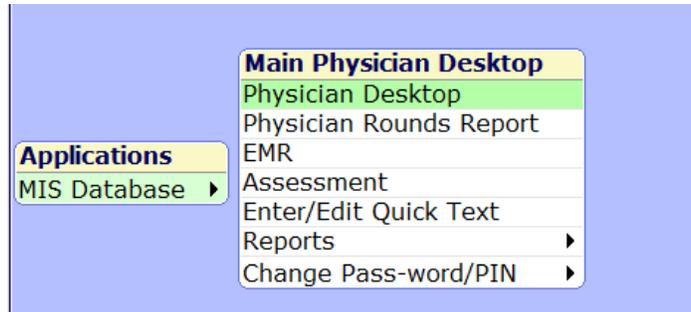
Currently pDoc is only implemented in Medicine Hat Regional Hospital

This guide has been designed to give you a basic overview of Physician Workload Management (PWM) navigation and troubleshooting tips and support options

Please note that Physician Documentation, through PWM, is only available in Medicine Hat Regional Hospital (LMHA). This document is not intended for support issues outside of LMHA or the PWM module.

Navigation

From your main menu Meditech menu launch the Physician Desktop. This desktop is part of the PWM module and will allow viewing patients, documenting and signing available templates, and navigating to the EMR. In the future there may be additional functionality available.



Physician Desktop Routine

From the Desktop, depending on your access, you can do the following:

- review results and order histories in EMR
- place orders through OE (future state in POM or AOM)
- enter notes and documentation (in Physician Documentation)
- electronically sign reports (future state includes discharge orders)
- Search EMR for any patient record
- View an up-to-date listing of Inpatients (Inpatient Rounding Routine)
- View scheduled outpatient appointments
- Link to the Emergency Department Tracker

You can also use the Desktop to:

- access the Preferences Dictionary to change your preferred settings
- cover for other providers (which updates the rounding list)
- view important task information at a glance. For example, normal results tasks have a white background, abnormal results tasks have a yellow background, and critical results tasks have a red background
- refresh the information appearing on the Desktop

Desktop View (results and notifications routine)

View test results (managed by user preference settings)
 View Admission, Discharge and Transfer (ADT) notifications
 Access physician documentation templates such as progress notes



Covering For: None

Last Updated: 15:36 Physician Care Manager - My List

Priority All Hospital Oncology Office

	Date	Time	Patient Name	Type	Priority
Results (23) *11 New					
<input type="checkbox"/>	10/8/16	1217	Pcm, Tim Train	Inpatient Results	Stat
<input type="checkbox"/>	1/6/16	0859	Udmri Harbar, Grant Stewart	Inpatient Results	Stat
<input type="checkbox"/>	2/5/16	1416	Ormpen, Brooks Train	Outpatient Results	Stat
<input type="checkbox"/>	30/3/16	1120	Udabs Psy Pricklymusic, Benjami	Inpatient Results	Stat
<input type="checkbox"/>	23/3/16	1130	Ambu, Edoc Seven	Outpatient Results	Stat
<input type="checkbox"/>	21/3/16	1130	Ambu, Edoc Nine	Outpatient Results	Stat
<input type="checkbox"/>	21/3/16	1101	Ambu, Edoc Ten	Outpatient Results	Stat
<input type="checkbox"/>	21/3/16	0921	Ambu, Edoc Eight	Outpatient Results	Stat
<input type="checkbox"/>	17/3/16	1501	Ambu, Edoc Fourteen	Outpatient Results	Stat
<input type="checkbox"/>	21/11/14	2052	Udee Big, Paul	Inpatient Results	Stat
<input type="checkbox"/>	5/11/14	1131	Udel Pyre, Pierce	Inpatient Results	Stat
<input type="checkbox"/>	10/10/14	1603	Udel Hale, Justin	Inpatient Results	Stat
ADT (41) *34 New					

View Detail Cover Cover Selections Return to All Tasks Sign Up Change Facility Send New Message Preferences Prev Page Next Page

Header Buttons:

- *Priority* – display stat results only
- *All* – see results for patients in multiple facilities (not currently set up outside LMHA)
- *Hospital* - see results for one facility only
- *Oncology* and *Office* – functionality is not used

Footer Buttons:

- *View Detail* – display results and notifications details plus acknowledge them
- *Cover/My List* – to switch between the list of patients for the providers you are covering and between the list of patients you are assigned as a provider.
- *Cover Selections* – manage (add/remove) providers you are covering for and update rounding list
- *Return to all tasks*
- *Sign up* – assign yourself as a provider (updates in ADM and the EMR)
- *Change Facility* – functionality not currently used
- *Send New Message* – functionality not currently used
- *Preferences* – manage various settings

Navigation Tips:

- Header displays list of physicians you are currently covering for
- + or – symbol will expand or condense the sections
- Clicking on the notepad symbol or on the result itself, will open the individual items to view the content
- To open a result or notification, click “View Detail” or double click on the item
- When viewing a task, click “acknowledge” to remove it from your list
- To go back to the main screen, click “List” footer button
- Use “Preferences” to manage your ADT messages and results notifications

Inpatient View

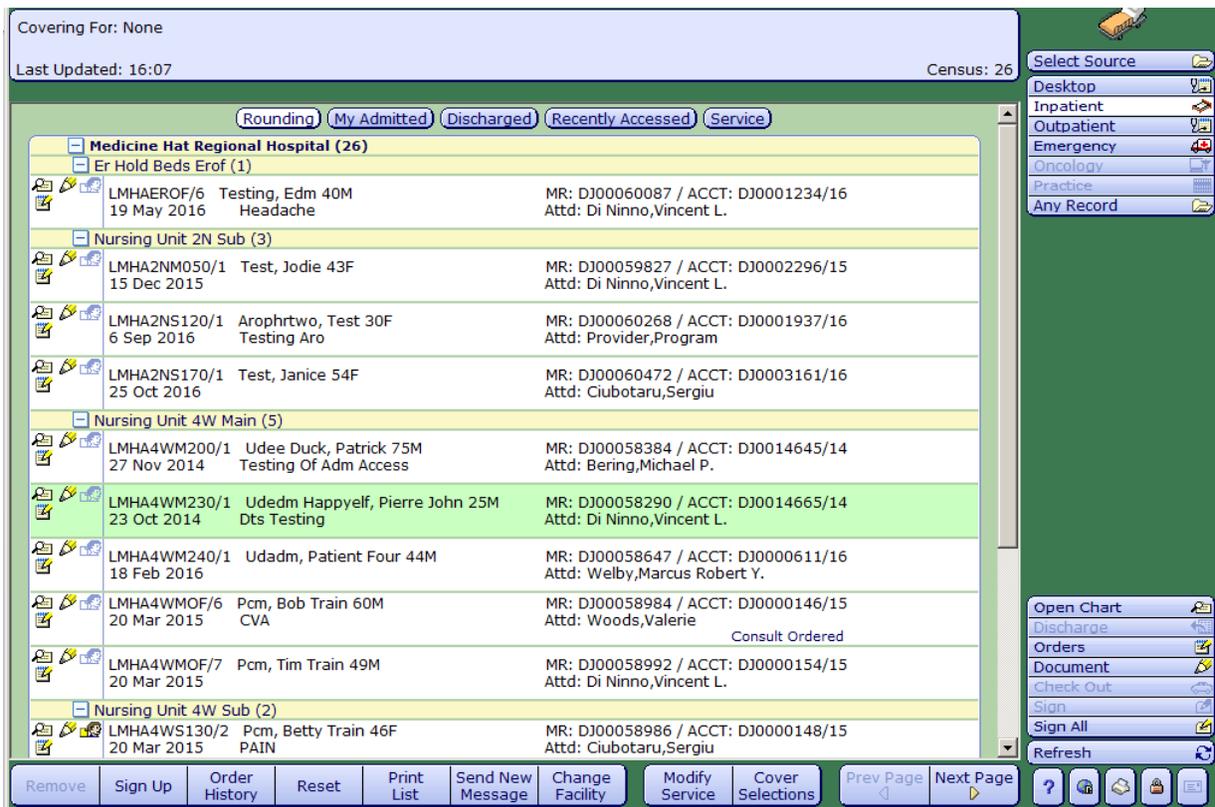
View patients that your provider name is associated with

View patients for providers you are covering

Access physician documentation templates such as progress notes

Commonly set up as the default view when opening the physician desktop





Covering For: None
 Last Updated: 16:07
 Census: 26

Medicine Hat Regional Hospital (26)

Er Hold Beds Erf (1)

LMHAEROF/6	Testing, Edm 40M	19 May 2016	Headache	MR: DJ00060087 / ACCT: DJ0001234/16	Attd: Di Ninno,Vincent L.
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Nursing Unit 2N Sub (3)

LMHA2NM050/1	Test, Jodie 43F	15 Dec 2015		MR: DJ00059827 / ACCT: DJ0002296/15	Attd: Di Ninno,Vincent L.
LMHA2NS120/1	Arophrtwo, Test 30F	6 Sep 2016	Testing Aro	MR: DJ00060268 / ACCT: DJ0001937/16	Attd: Provider,Program
LMHA2NS170/1	Test, Janice 54F	25 Oct 2016		MR: DJ00060472 / ACCT: DJ0003161/16	Attd: Ciubotaru,Sergiu

Nursing Unit 4W Main (5)

LMHA4WM200/1	Udee Duck, Patrick 75M	27 Nov 2014	Testing Of Adm Access	MR: DJ00058384 / ACCT: DJ0014645/14	Attd: Bering,Michael P.
LMHA4WM230/1	Udedm Happyelf, Pierre John 25M	23 Oct 2014	Dts Testing	MR: DJ00058290 / ACCT: DJ0014665/14	Attd: Di Ninno,Vincent L.
LMHA4WM240/1	Udadm, Patient Four 44M	18 Feb 2016		MR: DJ00058647 / ACCT: DJ0000611/16	Attd: Welby,Marcus Robert Y.
LMHA4WMOF/6	Pcm, Bob Train 60M	20 Mar 2015	CVA	MR: DJ00058984 / ACCT: DJ0000146/15	Attd: Woods,Valerie Consult Ordered
LMHA4WMOF/7	Pcm, Tim Train 49M	20 Mar 2015		MR: DJ00058992 / ACCT: DJ0000154/15	Attd: Di Ninno,Vincent L.

Nursing Unit 4W Sub (2)

LMHA4WS130/2	Pcm, Betty Train 46F	20 Mar 2015	PAIN	MR: DJ00058986 / ACCT: DJ0000148/15	Attd: Ciubotaru,Sergiu
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Header Buttons:

- *Rounding* – Inpatients associated with the provider if you are listed as Attending, Admitting or Family physician. In addition, you can add patients via “cover” or “add any record” searches
- *My Admitted* – Inpatients associated with the provider if you are listed as Attending, Admitting or Family physician. You cannot add patients to this list.
- *Discharged* – patients associated with the provider.
- *Recently accessed*
- *Service* – not currently used

Footer Buttons:

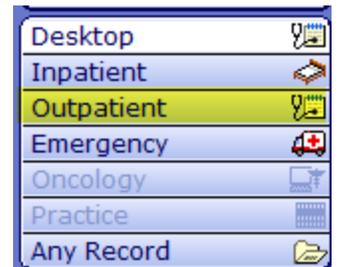
- *Remove* – remove patient you are covering from the rounding list
- *Sign up* – assign yourself as a provider (updates in ADM and the EMR)
- *Order History* – direct link to open EMR Order History
- *Reset* – refresh your list
- *Print List*
- *Send New Message* – functionality not currently used
- *Change Facility* – currently only set up for LMHA
- *Modify Service*
- *Cover Selections* - manage (add/remove) providers you are covering for and update rounding list

Navigation Tips:

- PrevPage and NextPage to navigate through the list
- Sorts by patient location
- To view a patient, left click on patient and they highlight in green then go to EMR, physician documentation templates or Order Entry
- To remove patients from “rounding list”, right click on the patients and they highlight in pink then click the “remove” button on the footer.
- To add patients to “rounding list”, use the process for modify cover selection, sign-up footer button or any record search (“add record to rounding” footer button appears)

Outpatient View

View Outpatient list for today’s date
Access physician documentation templates such as “Ambulatory Clinic Note”



Header Buttons:

- *Date* – to view patient information for another date in the future

Navigation Tips:

- *PrevPage* and *NextPage* to navigate through the list
- Can also search for a patient using the “Any Record” button

Emergency View

View EDM tracker (access based and supported by EDM module)



Oncology and Practice View

Functionality is not in use

Any Patient Record Search

Find patients currently admitted
Find patients who are discharged
Add patients to your Inpatient Rounding list

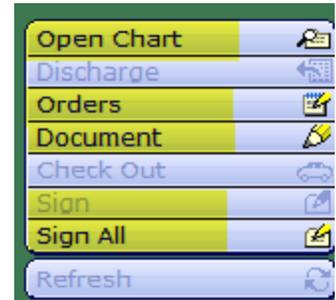
Navigation Tips:

- Use a patient identifier such as PHN
- Defaults to “All Patient” search thus shows admitted and discharged patients
- Change to “Active Inpatients” if you need to narrow your results



Side Buttons visible on Desktop

- *Open Chart* – go to the EMR and view documentation in Notes and/or Other Reports.
- *Discharge* – not currently available
- *Orders* – direct link to OE process
- *Document* – go to Physician Documentation to view current documentation, edit draft documentation or create new documentation. This button is also available in the EMR
- *Checkout* – not currently available
- *Sign or Sign All* – process to view and sign multiple documents



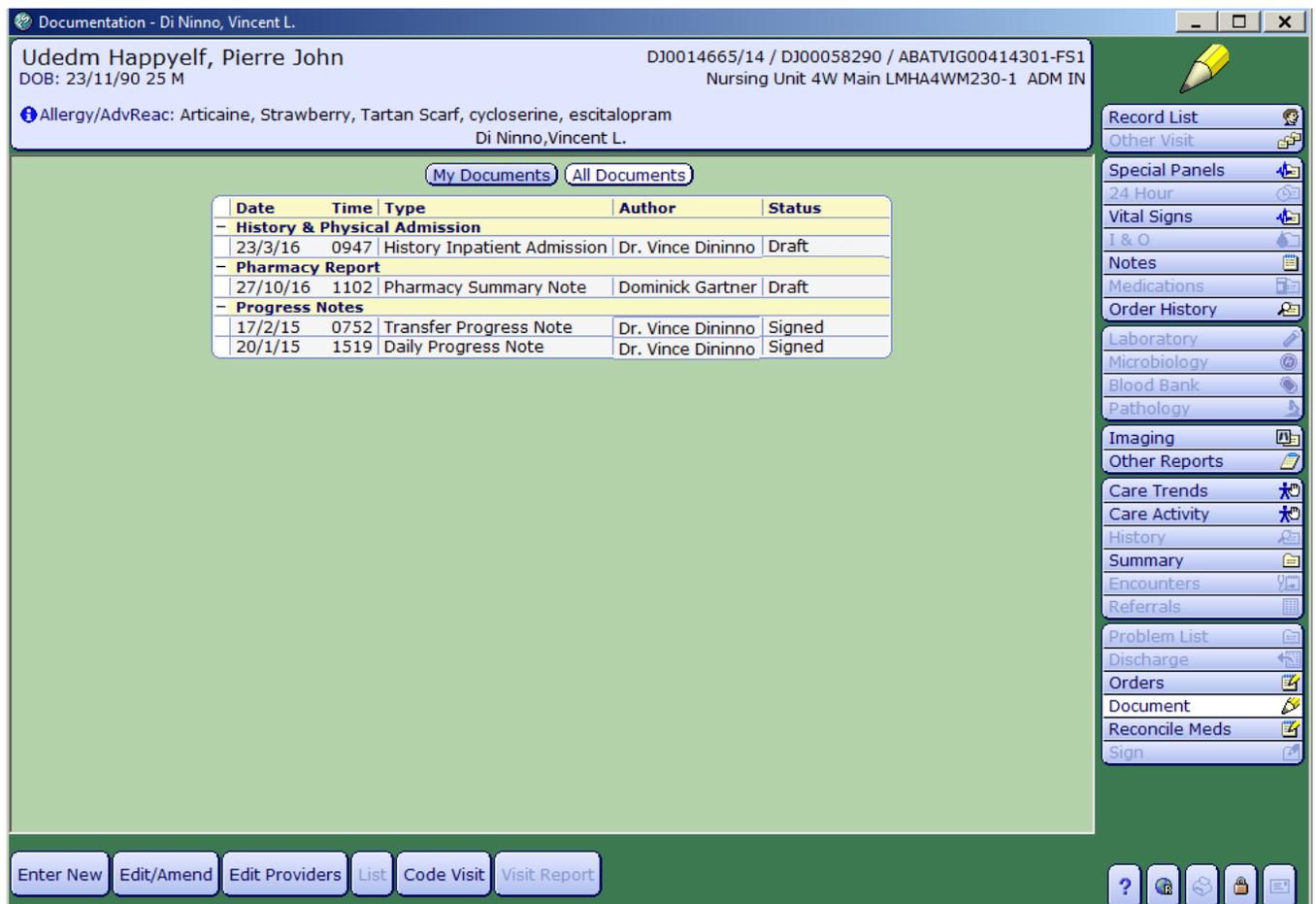
Documentation

Available templates are access driven

All documentation in Draft and Signed status will be viewable in the EMR

Amendments can be added after a document is signed (free text option only)

Documentation can be completed on current admissions or discharged patients



Documentation - Di Ninno, Vincent L.

Udedm Happyelf, Pierre John
DOB: 23/11/90 25 M

DJ0014665/14 / DJ00058290 / ABATVIG00414301-FS1
Nursing Unit 4W Main LMHA4WM230-1 ADM IN

Allergy/AdvReac: Articaïne, Strawberry, Tartan Scarf, cycloserine, escitalopram
Di Ninno, Vincent L.

My Documents All Documents

Date	Time	Type	Author	Status
- History & Physical Admission				
23/3/16	0947	History Inpatient Admission	Dr. Vince Dininno	Draft
- Pharmacy Report				
27/10/16	1102	Pharmacy Summary Note	Dominick Gartner	Draft
- Progress Notes				
17/2/15	0752	Transfer Progress Note	Dr. Vince Dininno	Signed
20/1/15	1519	Daily Progress Note	Dr. Vince Dininno	Signed

Enter New Edit/Amend Edit Providers List Code Visit Visit Report

Header Buttons:

- *My Documents* – documents specific to your provider for this visit (account)
- *All Documents* – documents for all providers for this visit (account)

Footer Buttons:

- *Enter New* – Access the physician templates and create a new document
- *Edit/Amend* – Edit an existing document in Draft or InProcess or Amend a document in Signed status
- *Edit Providers* – not currently used
- *List* – go back to the list of documents for this patient after you have opened one
- *Code Visit* – not currently used
- *Visit Report* – not currently used

Navigation and Tips:

- Documentation functionality can be accessed directly from the Physician Desktop or from the EMR (via Document side button)
- Documents can take several minutes before they appear or update in the EMR.
- Documentation statuses are:
 1. *Draft* – saved by the provider but not signed. Will appear in the EMR
 2. *In Process* – autosaved by Meditech. **Does not appear in the EMR**
 3. *Signed* – esignature via the providers pin. Will appear in the EMR
 4. *iSigned* – esignature via the provides pin using the multiple “Sign” side button. Will appear in the EMR
 5. *Addendum* – after amending a signed document however this changes to *Signed* within a minute or less
 6. *Cancelled* – when a draft or saved document has been cancelled. Will appear in the EMR

How to Document:

Enter New

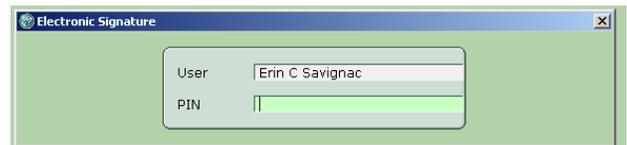
- I. Highlight a patient from your physician desktop (or use a patient in the EMR)
- II. Click Document side button (or click on the pencil symbol if using the Inpatient list)
- III. Click Enter New footer button
- IV. Pick one of the available templates listed in your Favourites or in ALL
- V. Open the template by clicking Open, F12 or double clicking it
- VI. Navigate through the available fields on the template
- VII. Preview the template to validate the content and display
- VIII. Save the template in Draft or Signed status
- IX. If saving to a signed status you will be required to enter your PIN number
- X. Document will appear in EMR under Notes and/or Other Reports

Edit Draft or change to Signed

- I. Highlight a patient from your physician desktop (or use a patient in the EMR)
- II. Click Document side button
- III. Click on one of the draft documents listed for this visit
- IV. Click the Edit/Amend footer button
- V. Navigate through the available fields on the template
- VI. Preview the template to validate the content and display
- VII. Save the template in Draft or Signed status
- VIII. If saving to a signed status you will be required to enter your PIN number
- IX. Document will update in EMR

Sign a document

- This PIN number is defined by the physician and can be changed through the “Change PIN/Password” routine on their main Meditech menu
 - If PIN reset is required please contact Solution Center at 1-844-633-4832 and they will assist with this process
- I. Once the “Signed” option is chosen, a pop up will appear that requires you to enter your current PIN number.
 - II. Enter the PIN and save
 - III. The document will now display with the date, time, type and status



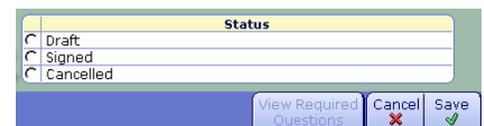
The image shows a dialog box titled "Electronic Signature". It contains two input fields: "User" with the text "Erin C Savignac" and "PIN" with a green highlight over the input area.

Amend a signed document

- I. Highlight a patient from your physician desktop (or use a patient in the EMR)
- II. Click Document side button
- III. Click on one of the signed documents listed for this visit
- IV. Click the Edit/Amend footer button
- V. The pdf version of the document will display and you can free text the amendment (addendum)
- VI. Save and sign with your PIN number. (Cannot be saved to Draft status)
- VII. Document will update in EMR

Cancel a document that is in Draft

- I. Highlight a patient from your physician desktop (or use a patient in the EMR)
- II. Click Document side button
- III. Click on one of the draft documents listed for this visit
 - I. Click the Edit/Amend footer button Click save or F12
 - II. Document opens, now click save or F12
- III. Bottom left gives the option to save as Draft, Signed , Cancel – Pick Cancel
- IV. Enter a reason for cancelling (if no reason entered it will revert back to Draft status)
- V. Save or F12



The image shows a dropdown menu titled "Status". The menu items are "Draft", "Signed", and "Cancelled". Below the menu are three buttons: "View Required Questions", "Cancel" (with a red X icon), and "Save" (with a green checkmark icon).

Cancel a document that has been saved in Signed status

- I. Contact the Solution Center at 1-844-633-4832
- II. Include the patient ULI or Account information, date of document, name of the template and reason for the request
- III. Include a contact number where you can be reached at
- IV. The document will be restored to Draft status and then you can proceed with cancelling it.

Printing a Document

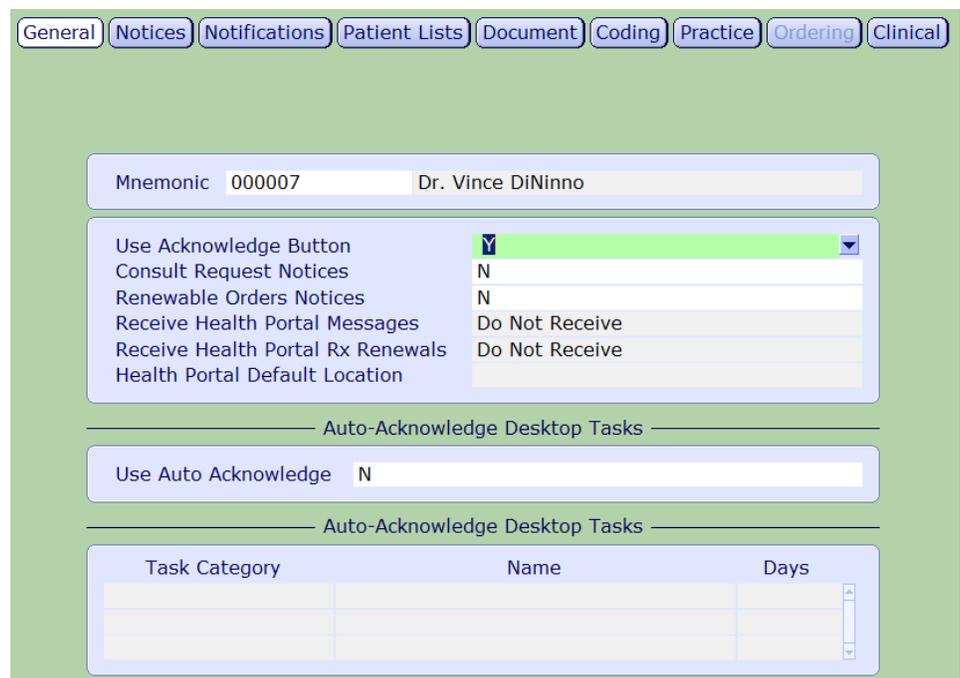
As per direction with the Print Cessation project, all inpatient reports will no longer be printed to the unit. Should the physician want a copy of the documentation they have completed, it can be printed from the EMR under "Other Reports" panel. Please remember EMR printing uses local print settings therefore printing on discharged patients will auto print to HREC dept.

Preferences

Providers can manage various preferences settings from the *Physician Desktop* view then click *Preferences* footer button



General



Task Category	Name	Days

Notices

Determine which notices appear on your desktop

General Notices Notifications Patient Lists Document Coding Practice Ordering Clinical

Admission, Discharge, Transfer

	Create Notice	Priority	Remove Undone Event
Admission/Registration	N		
Discharge/Departure	N		
Transfer/Swap	Y		

Result Notices

Use Organization's Notification Defaults N

	Send Notice	Normal	Abnormal	Upon Final
Inpatient	Y			
Outpatient	N			
Discharged Inpatient	N			
Emergency Patient	N			
Office Patient	N			
Departed Emergency	N			

	Create Notice	Priority	Days	Patient Type
Immunization				

Notifications

Set up your preferred alerts for labs and other results

General Notices Notifications Patient Lists Document Coding Practice Ordering Clinical

Display System Notifications on Desktop N

Send Result Rules and User Defined Notifications to Email Y

Item Type	Item
Nursing	Blood Pressure Diastolic
Nursing	Blood Pressure Systolic
Nursing	Patient Temperature
Laboratory	Prothromb Time International Ratio

*Name Blood Pressure Diastolic
No values exist for this entry.

Less Than or Equal to
Greater Than or Equal to

Type	Sex	Age From	Age To	Critical	Abnormal	Normal	Delta
Value	Unknown	0	120	No	No	No	No

Value: Less than or Equal to 60
Value: Greater than or Equal to 110

Patient List

Set your default desktop view when first opening Physician Desktop

Initial Signon Default List:

Desktop Default Subpanel:
Desktop Default Cover:

— Inpatient Rounding Defaults —

Inpatient Default Facilities

LMHA	Medicine Hat Regional Hospital
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Default Subpanel: Inpatient List:

— Outpatient Rounding Defaults —

Outpatient Default Facilities

LMHA	Medicine Hat Regional Hospital
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Outpatient Default Locations

<input type="text"/>	<input type="text"/>
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Default Subpanel: Outpatient List:

Document

An optional way to set your favourites for documentation

Template	Description
PDHISTPHYS01	History Inpatient Admission
PDPROGNOTE01	Progress Note (basic)

Formatted Data	Description
JMF	
PCM.IO	I&O
PCM.LABS	Laboratory

Section	Description
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Canned Text	Description
JMF	

Not Used

** The remaining tabs for Coding, Practice, and Clinical are not used.

Quick Clicks / Shortcuts

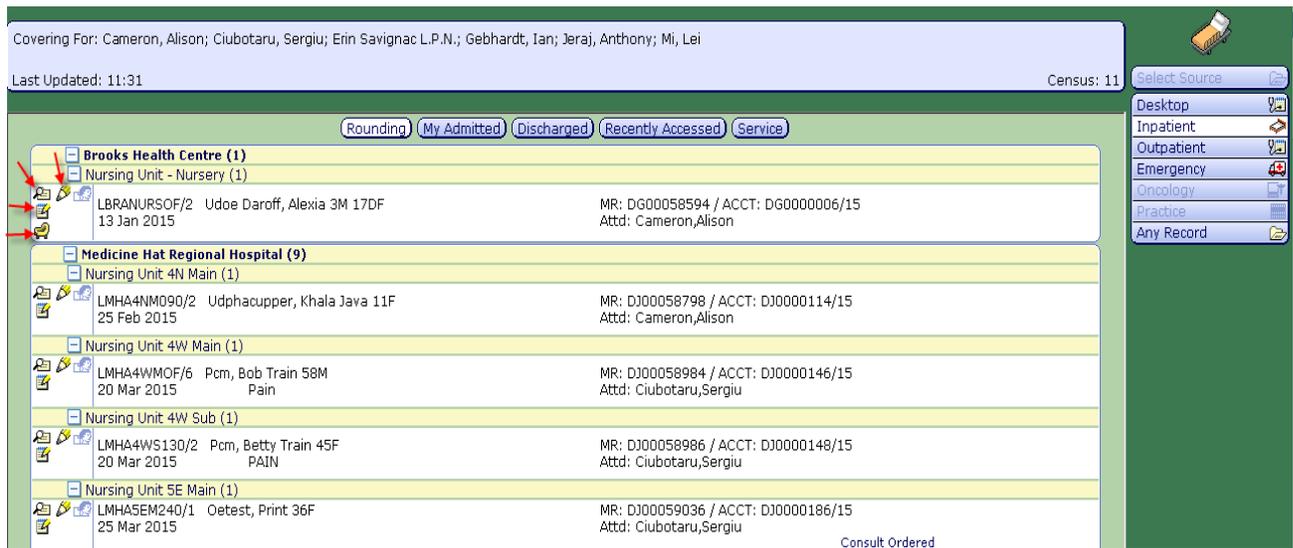
From the Inpatient display screen the physician can also choose to use the quick options available in the left of the patient record.

To launch the patients EMR-click on the **card** with the magnifying glass.

To launch Physician Documentation –click on the **pencil**.

The **crib** indicates a child.

To launch POM (physician Ordering)–click on **pencil and paper**. (not currently in use)



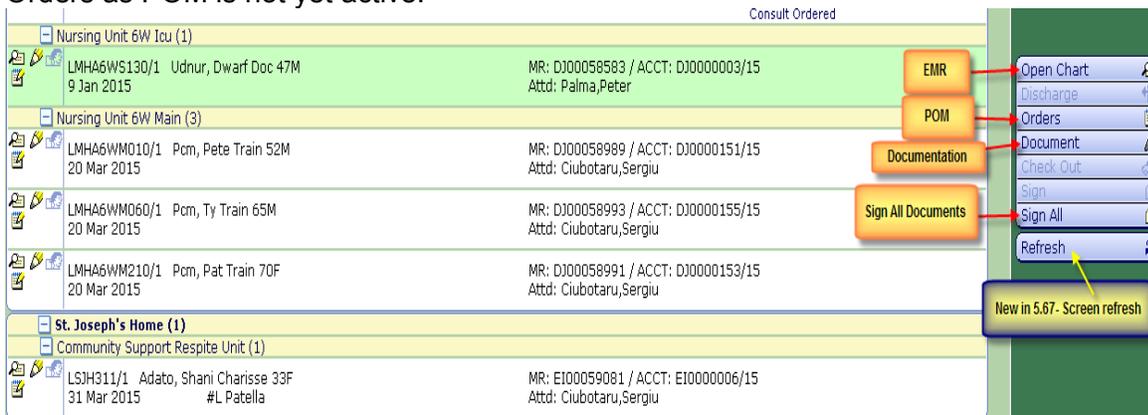
Covering For: Cameron, Alison; Ciubotaru, Sergiu; Erin Savignac L.P.N.; Gebhardt, Ian; Jeraj, Anthony; Mi, Lei
Last Updated: 11:31 Census: 11

Buttons: Rounding | My Admitted | Discharged | Recently Accessed | Service

Location	Visit ID	Physician	MR / ACCT	Attd:
Brooks Health Centre (1)				
Nursing Unit - Nursery (1)	LBRANURSOF/2	Udoe Daroff, Alexia 3M 17DF	MR: DG00058594 / ACCT: DG0000006/15	Attd: Cameron,Alison
Medicine Hat Regional Hospital (9)				
Nursing Unit 4N Main (1)	LMHA4NM090/2	Udphacupper, Khala Java 11F	MR: DJ00058798 / ACCT: DJ0000114/15	Attd: Cameron,Alison
Nursing Unit 4W Main (1)	LMHA4WMOF/6	Pcm, Bob Train 58M Pain	MR: DJ00058984 / ACCT: DJ0000146/15	Attd: Ciubotaru,Sergiu
Nursing Unit 4W Sub (1)	LMHA4WS130/2	Pcm, Betty Train 45F PAIN	MR: DJ00058986 / ACCT: DJ0000148/15	Attd: Ciubotaru,Sergiu
Nursing Unit 5E Main (1)	LMHA5EM240/1	Oetest, Print 36F	MR: DJ00059036 / ACCT: DJ0000186/15	Attd: Ciubotaru,Sergiu

Consult Ordered

If the physician highlights a specific visit (by clicking once on the visit itself) the other options available to the physician will highlight in the bottom left of the screen as well. As per the picture below-these options launch certain routines.*Most physicians will not have access at this time to Orders as POM is not yet active.



Consult Ordered

Location	Visit ID	Physician	MR / ACCT	Attd:
Nursing Unit 6W Icu (1)	LMHA6WS130/1	Udnur, Dwarf Doc 47M	MR: DJ00058583 / ACCT: DJ0000003/15	Attd: Palma,Peter
Nursing Unit 6W Main (3)	LMHA6WMO10/1	Pcm, Pete Train 52M	MR: DJ00058989 / ACCT: DJ0000151/15	Attd: Ciubotaru,Sergiu
	LMHA6WMO60/1	Pcm, Ty Train 65M	MR: DJ00058993 / ACCT: DJ0000155/15	Attd: Ciubotaru,Sergiu
	LMHA6WM210/1	Pcm, Pat Train 70F	MR: DJ00058991 / ACCT: DJ0000153/15	Attd: Ciubotaru,Sergiu
St. Joseph's Home (1)				
Community Support Respite Unit (1)	LSJH311/1	Adato, Shani Charisse 33F #L Patella	MR: EI00059081 / ACCT: EI0000006/15	Attd: Ciubotaru,Sergiu

Callout Box Actions:

- EMR → Open Chart
- POM → Discharge
- Documentation → Orders
- Sign All Documents → Document
- Refresh → Refresh
- New in 5.67 - Screen refresh

Basic pDoc Troubleshooting

General navigation questions – If not covered in this manual please discuss with your sites pDoc champions, Dr. DiNinno or Dr. Ciubotaru.

Downtime Options – Depending on the length of the system downtime, if you cannot wait for the Meditech system to return to a readiness state, please use other options such as dictation or paper charting. Copies of previously documented electronic PWM templates are saved on a designated “downtime computer” in LMHA facility. A unit clerk should be able to direct you on the process to view these documents if Meditech EMR is not available.

Issues that are more technical, please call the Solution Centre 1-844-633-4832

Provide details of the issue including your contact number and urgency. If this is a patient specific issue please include a patient identifier, date and template type.

Examples for Solution Centre:

Unable to document or documentation button is not highlighted.

Unable to Sign documentation. Sign option is not highlighted. Pin not working

Edit or Cancel a “signed” status document

Documented on incorrect patient or incorrect account

Meditech PWM is inaccessible to all users from all devices.

Meditech PWM will not load or is displaying error messages when loading

Patients are not displaying on Inpatient list as they should be

Printing is not working as expected.

Issues you can try to troubleshoot on your own:

Patients are not displaying for physician’s I am covering

- Confirm “covering” for it set to expected physicians
- Confirm you don’t have a location checked off
- Rounding list is only one that will show names of patients you are covering

Need to change or reset my PIN number

- Go to your main Meditech menu and click “Change PIN” and try to reset it yourself
- If this does resolve your issue, please call the solution center.

Can’t see all the templates.

- Defaults to show your favourites so you may have to click “All” to see the available templates and scroll through a few pages

Patient has been discharged but I need to enter a new document or sign a draft document

- Use “any record search” to find the patient and pick the correct account (visit)
- Click document side button and proceed

Display results in my documentation such as lab and vital signs

- When documenting in a Meditor text box there is a “result’ footer button.

- Click on this and see if there is an applicable option and save it
- The content will populate the text box
- If you cannot find that result you can also copy and paste content from the EMR

Receiving the following error message when logging into the Physician desktop:

- Appears if you are covering for a physician who has been inactivated in Meditech
- Move message to the side and see what name is listed behind it
- Go to your list of covering physicians and remove this name

