Provider Disaster Documentation Training Checklist
Health Informatics and Analytics

Name and Role: Location:

Preceptor Name and Role: Date:

Review of Provider Default Home Screen

- Example: Learn about default layout of the home screen.
- Example: Schedule, patient lists, dashboards, inbox, and messages.

Rounding

- Example: Use Patient Lists
- Example: Write progress note from Notes activity using a [SmartText or quick charting options in your EHR].
- Example: Document a procedure.
- Example: Write a handoff report from Patient Lists.
- Example: Write and sign an order.

Admission

- Example: Search Patient Lists and assign yourself to a patient. Review problems in the appropriate area in your EHR.
- Example: Complete admission med rec. Write new orders for the floor using an Order Set.
- Example: Write H&P note. Discuss voice recognition and dictation options.

Transfer

- Example: Complete transfer med rec and modify signed and held orders.

Discharge

- Example: Understand when to use EHR tools which assist in the discharge process [mpages, navigators, macros].
- Example: Update Rx Routing navigator section. Use Discharge Orders section to complete discharge med rec.
- Example: Use a discharge Order Set. Preview the discharge template.

Patient List

- Example: Differences between My List and Available Lists
- Example: Move patient lists from the Available Lists up to your My Lists for easy access
- Example: Learn about the difference between provider groups and provider teams.
- Example: Sign-in and Sign-out of a provider team
- Example: Add a column to team lists

Consult

- Example: Use a consult list in Patient Lists. Associate a consult order with a consult note.
In Basket/In Box/Message Center

- **Example:** Introduce layout and key features.
- **Example:** Discuss when you will receive My Open Charts messages. Jump to missing information in the encounter from In Basket. Complete the required documentation and sign the visit.
- **Example:** Providers will receive Coding Queries and CDI Queries requesting documentation clarification in their In Baskets. Discuss how to respond and how to satisfy these message requests.
- **Example:** Discuss when you will receive My incomplete notes messages and how to complete them. Find messages in Completed Work folder and move them back to My Messages. Use the Sent Messages folder and see the audit trail for a message.

External Records

- **Example:** Request, review, and add information to a patient's local chart using Care Everywhere.
- **Example:** Use the Request Outside Records activity to request patient information from an outside organization.
- **Example:** Use the Longitudinal Plan of Care report to review outside information available in Care Everywhere. Reconcile outside information into the local chart.
- **Example:** Manually send an outside message to a provider at another organization.

ePrescribing

- **Example:** Pre-requisite setup
- **Example:** ID proofing.
- **Example:** EMR configuration to enable and train.

Additional Information:

Follow-Up Contacts:

Training Follow-Ups:

Signatures: