Beacon Outpatient Nurse Lesson Plan

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# Course Introduction

* Hello, my name is Sarah Sala and I welcome you to Aspirus Oncology Outpatient Nurse Epic training. I am excited to walk with you through this information to give you a basic idea of how the system functions.
* Class is trained in a training environment with fake patients. Class focuses on teaching you Epic functionality. We attempt to be as realistic as possible but there are some instances where the environment we are using and the scenarios we are going through are not completely accurate from a clinical standpoint.
* If you haven’t completed the Aspirus Outpatient Nurse Medical Assisant Epic Training please do this before processing with this training.

# Update to the Schedule view

* We will begin by logging in as a oncology nurse. As you can see the view is very similar to what was presented during ambulatory training. There are a few colomns that are specific to Oncology. The first column is:
* Columns of information
  + Tx Plan Signed – this is to indicate if the treatment plan has been signed
  + Research Plan Signed – this is to indicate if the treatment plan has been signed. One thing to keep in mind is that a patient can’t be on a treatment plan and a research plan. It is one or the other
  + TX Plan Auth Status – this is to indicate if the treatment plan has been has been prior auth’d
* Within in our Oncology application we have the ability to track our patient’s location. In our training environment you can see all of our patient’s are located at Aspirus Wausau Hospital. When I click on Room Patient I can select the correct location that the patient is in. The options you you see here will change based on your department.
* The next column is Location Start Time – this is to indicate what time the patient started in the location
* The final column is Time in Location – this is to indicate the total time that patient has been in the location.

### Review relevant visit information

* I am going to quickly review some highlights from the patient's chart right from my Schedule, which I can do first thing in the morning, or between patients.
* [Report](#_Toc467835791)s – The first report I would like to discuss is the Oncology SnapShot report.
  + If you are unable to see these reports click on the preview button
  + Oncology Snapshot
    - Oncology History
  + Springboard Reports
    - Treatment Plan - report shows details about the patient's treatment plan, so you don't have to go into the chart or open the Treatment Plan Manager.
    - Treatment Plan - Research

# Outpatient Start of Shift

## Reviewing the Schedule – Exercise 1

* Our first patient (Eva) has arrived so we want to indicate which chair/room she will be in
  + Click on Room Patient
  + Click on chair/room (Exam Room 1)
* Notice your **Patient Locatio**n and **Location Start Time** are now filled in

## Using Reports to Review Patient Information – Exercise 2

In this activity you'll practice using reports in the Multi-Provider Schedule to review patient information.

* PATIENT: Eva

|  |
| --- |
| **Scenario**  Patient: Eva, 32-year-old female   * + Find the patient on your schedule – 8:30 AM appointment   Reason for visit: Melanoma |

SCENARIO:

You're about to see your oncology patient, Eva, for the first time. To prepare, you'll use the reports in the schedule to gather information about her, including demographics, medical history, current medications, and upcoming treatment days.

## Initial Office Visit

Let's start by looking at how to document an initial office visit with a patient. Again the items that are displaying function the same as what was presented during the ambulatory training. There are only a few additional items that are specific to Oncology.

## Rooming Activity:

* Document everything you would for a normal office visit
  + Vitals
  + Medications
  + Allegeries
  + ext
* There are a few items that are Oncology specific
  + Oncology Assesment
    - Pre-Chemo Checklist
    - Pre-Radiation Checklist
    - Psychosocial Distress Tool
    - Toxicity Assessment
  + LDA’s
    - Click on New Reading
    - Add an LDA Peripheral IV (PIV) line
    - Document appropriate line properties and line assessment

## Plan Activity:

* The Plan Activity is where the Cancer Staging and Oncology History is entered
  + The Provider will add a cancer diagnosis to the Problem List and stage the cancer.
  + Oncology History can be entered by the Provider and/or the nurse.
    - The oncology history begins with the cancer diagnosis.
      1. There are certain items that population automatically such as diagnosis, treatment plan and radiation treatment
      2. Additional event are entered manually.

## Treatment Plan Overview

* Only Providers are able to queue up and sign a Standard Treatment Plan
  + Research Nurses are able to queue up a Research Plan and route to a Provider for signature
  + Pharmacists are able to queue up and route to Provider for signature or can sign using “transcribe from paper”.
* The treatment plan is divided into cycles. (click on Edit Plan to discuss the Treatment Plan template)
  + There may be a Prescriptions cycle contains orders the patient should have before beginning treatment.
  + The other cycles are numbered according to treatment.
* Days within each cycle are further numbered by treatment.

## Releasing Pre-treatment Orders for the Day – Exercise 4

In this activity you'll practice releasing labs, nursing orders and line care.

* PATIENT: Eva

SCENARIO:

Your Eva patient is scheduled to receive her first infusion treatment today. Before you release any pre-treatment orders, you need to check to see if these orders have been signed.

TRY IT OUT:

* Within Eva’s chart click on **This Visit**
* Notice the available reports:
  + The **Oncology SnapShot Report** = within this report you can see the **Oncology History**
  + The **Springboard Report** will have the some of the latest lab values
* From Eva's chart open the Treatment Plan navigator section.
  + The dollar bill icon lets you know if a prior auth has been completed for the current cycle
* Select the check box for each of the following order categories:
  + Labs (in production the labs should have already been released)
    - The calendar icon lets you know when the order was sent to the Workqueue.
  + Nursing Orders
  + Line Care
* Release the orders.
  + Hint: With these categories selected, click the Release Selected link.
* Which icon indicates that the orders have been released?

# Outpatient Infusion Visit

## Reviewing Synopsis and Releasing Remaining Orders – Exercise 5

In this activity you'll practice checking Synopsis for lab results, consulting a treatment conditions order, and releasing the remaining treatment day orders.

* PATIENT: Eva

SCENARIO:

Eva has arrived at the clinic and we have already checked her schedule, reviewed her information, and released her labs, nursing orders and line care. We need to check her lab results and based on those results proceed with treatment.

TRY IT OUT:

* If you're not there already, open your Eva patient's chart.
* Open the Treatment Plan navigator section and review the hold parameters order.
* Check Eva's lab results from the Synopsis activity.
  + Hint: Synopsis can be found along the top of Eva's chart.

## Synopsis Overview

* Point out different Synopsis Reports (Med Onc, Onc Nurse and Rad Onc)
  + Recent / current information pulling from flowsheet data and from other areas of the patient’s chart.
  + Patient Spotlight
* Up to 4 items can be push-pinned
* Do we need to hold treatment based on her results and the treatment conditions order?
  + Hint: We shouldn't have to delay treatment today for Eva. If her results didn't meet parameters, you would want to contact the treatment plan provider.
* Release Eva's remaining treatment orders.
  + Hint: Select **Checked Signed** and then click Release Selected.

CHECK YOUR WORK:

* All the orders in the treatment day should be signed and released (green check mark with a arrow).

## Administering Chemotherapy Medications – Exercise 6

In this activity you'll document the administration of chemotherapy meds to your patient and complete the treatment day.

* PATIENT: Eva

SCENARIO:

Eva's labs came back meeting the parameters for receiving treatment. She has already received her pre-medications, and you're ready to continue with the infusion and administer her chemotherapy and complete her treatment day.

* Open the **MAR**
* Scroll down to view Eva's chemotherapy medications.

C:\Users\M10028\AppData\Local\Temp\SNAGHTML1527e98.PNG

* Critical: Two check marks ( ) appear next to the chemotherapy orders, signifying that dual sign-off is required to administer these orders.
* Document the DOXOrubicin.
  + Administer DOXOrubicin, use TRN11145 for dual sign off
* Document the start of the CYTOXAN.
  + Administer Cytoxin, use TRN11145 for dual sign off
  + Hint: Don't forget to document when infusion were stopped.
* Document administration of any remaining medications.
* Select a **stop time** for all medications administered on the MAR.

## Removing a Line – Exercise 7

Now that you've finished administering all of Eva's medications, you need to remove the line.

TRY IT OUT:

* Go to the Flowsheets activity and open the Lines, Drains, Airways, Tubes, and Wounds Properties window for the PIV that you documented.
  + Hint: Click the IV Properties line in the Flowsheet.
* Document the Removal Date, Removal Time, and Removal Reason.

## Modify and add orders to the treatment plan – Exercise 8

### Introduction

* The patient is not tolerating the chemo dose well and you want to document the adverse reation.
* She is also experiencing nausea with chemo, so the Provider has asked you to prescribe Zofran for her to take before each infusion.

### Add orders

* Orders can be added to any combination of days or cycles within the plan.
* In the **Treatment Plan Manager**, expand the **Nursing Orders** section.
  + Click on **Add** 
    - Point out that the order is added directly into a category - you can change this category at any time.
  + Search for the Nursing Communication Reaction order
    - Enter reaction comments
  + Select any future days or cycles to copy the modified dosage to.
    - Add this order to ALL future days / cycles
  + Click **Change Category** to show the category options.
    - You can also drag-n-drop to another Category
    - Categories organize orders and make it easier for nurses to administer the right medication at the right time.
  + Add an order for Zofran
    - Be sure to add a Clinic Adminstered Medication Zofran order
      1. Hint: Click the radio button with the bed icon
  + Select any future days or cycles to copy the modified dosage to.
* Sign the new orders

**Important:** Orders can be added outside of the Treatment Plan using **Meds & Orders** in the **Plan** activity.

## Create Oncology History – Exercise 3

* Go to Plan > Problem List and click **Create Oncology History** under the patient's cancer problem.
  + Add an event of **Adverse Reaction** and enter a date of "t" for today.
  + Enter a comment about the adverse reaction
  + Is **Hormone Therapy** a choice to add to the Oncology History?
  + **Accept** and **save** the history.
* Note: ***Adverse reactions should also be added to the Treatment Plan as an adverse reaction nursing communication order.***

## Completing a Treatment Day – Exercise 9

In this activity you'll practice completing the treatment day and documentation.

* PATIENT: Eva

SCENARIO:

Eva has completed her infusion visit. You've administered and properly documented all of her medications, removed her line and added the adverse event documentation plus the Nursing Communication order. Last, you need to document the treatment, update charges, and complete the day.

TRY IT OUT:

* If you aren't there already, open Eva's chart from the schedule.
* In the Visit Navigator, open the **Nursing Notes** section in the Rooming activity and compose a short note.
* Open the **Charge Capture** navigator section and file the appropriate charges for the day.
  + Review the **Springboard Report** in your sidebar to review medication administrations.
* Last, you need to make sure that you mark Eva's current treatment day as complete.
  + Hint: Open the Treatment Plan navigator section. Click Complete Day in the treatment day header.
* What appears after you complete the day?

CHECK YOUR WORK:

* The next treatment day should now be showing in the Treatment Plan navigator section.

**Important:** Check to see if the appointments and labs for the next cycle / day have been signed. If they have not been signed, sign the appointments and labs so the orders flow to the appointment and lab workqueues.

# Defer, Cancel or Hold Treatment

## Holding Jan's Treatment – Exercise 10

In this activity, you will practice deferring a treatment day.

* PATIENT: Jan

SCENARIO:

Your patient's  ANC value is low, but not enough to merit cancelling treatment. Her oncologist tells you to postpone her treatment day to allow time for her to recuperate.

TRY IT OUT:

* Log in as the nurse on your info sheet.
* Find your patient on your schedule and open her chart.
* Open the Synopsis navigator section and review her lab values.
* Open the Treatment Plan navigator section and click on **Actions**.
  + Hint: Select Defer Day
  + Enter in requested information

## Canceling Jan's Treatment – Exercise 11

In this activity, you will practice canceling a treatment day.

* PATIENT: Jan

SCENARIO:

Your patient's  ANC value remains low so you need to cancel treatment.

TRY IT OUT:

* Log in as the nurse on your info sheet.
* Find your patient on the schedule and open her chart.
* Open the Synopsis navigator section and review her lab values.
* Open the Treatment Plan navigator section and click on **Actions**.
  + Hint: Select Cancel Day
  + Enter in requested information
* Can you act on any of the orders now that the day is canceled?

**IMPORTANT:** If a patient calls in and they don’t want to have treatment and it is for a Non-Clinical reason, you can just edit the day and this will adjust all other treatment days

There could be many reasons why you put a plan on hold but one example is if the patient was admitted

* When a treatment plan is put on hold a banner will appear across the top of the treatment plan activity and in the snapshot and springboard reports

Defer or Cancel need to have medical reason documented (this automatically happens when you defer or cancel the treatment).

Therapy Plan Overview

* Nurses are able to queue up and sign a Therapy Plan
* Edit Plan to make changes
* Begin Treatment to document the Treatment

# Administering Therapy Plans

## Adding an Order to a Therapy Plan – Exercise 12

In this activity you'll practice adding an order to a therapy plan.

* PATIENT: Eva

SCENARIO:

Eva has a Remicade therapy plan to help treat the symptoms of her Crohn’s disease. After a call with the Provider, you need to modify the Benedryl in her therapy plan orders to a higher dose.

TRY IT OUT:

* If you aren't there already, log in as the nurse on your info sheet.
* Find and open Eva's chart from the AWH - Oncololgy Infusion schedule.
* Open the therapy plan navigator section.
* Select the Benedryl order
  + Hint: You must be on the Edit Plan tab to edit orders in a patient's therapy plan.
* How often is your patient receiving the Benadryl?
  + Every Visit
* If you need to change this how would you do that?
  + Click on Interval and select the correct interval
* What is the current frequency and how would you change this?
  + Hint: click the summary sentence
  + Premedicate and click the magnifying glass
* We want to modify the dose to 50 mg
  + Click the 50 mg speed button
* Sign the new Benadryl order.
  + Hint: The Ordering and Authorizing Provider is the Treatment Plan Provider, or the oncologist on your info sheet.

CHECK YOUR WORK:

* Go back to the Treatment tab of the Therapy Plan.
  + The new Benadryl order should be there
  + The banner at the top of the therapy plan should be green to indicate that all orders are signed.

## Administering Therapy Plan Orders – Exercise 13

In this activity you'll begin treatment on a therapy plan and release a patient's therapy plan orders. Once medications have been administered, you'll also complete the therapy plan day.

* PATIENT: Eva

SCENARIO:

You've added the new Benadryl order to Eva's therapy plan, it is time to begin treatment, release the orders, and administer her therapy plan medications.

TRY IT OUT:

* If you aren't there already, open Eva's chart and navigate to the Therapy Plan section.
* Make sure you are on the Treatment tab.
* Begin Eva's therapy treatment.
  + Hint: Click Begin Treatment 1 (and be careful not to click to fast and Begin Treatment 2).
* Release all the signed orders, including the Benadryl order you just added in the previous exercise.
  + Hint: Notice the Emergency Medications are not selected by default.  We won't be administering those now, so leave them unselected.
  + Hint: You don't need to adjust the suggested Order Start Times.
* Practice documenting administration of the therapy plan medications on the MAR. The practice environment will let you administer medications off schedule if necessary.
  + Hint: You may need to add a line to Eva if she doesn't already have one in place.
* Once all medications have been administered, you need to let the system know all the therapy orders have been administered and Eva's treatment is Complete.
  + Hint: Go to the Actions button in the Treatment tab of the Therapy Plan section
* In the Visit Navigator, open the **Nursing Notes** section in the Rooming activity and compose a short note.
* Open the **Charge Capture** navigator section and file the appropriate charges for the day.
  + Review the **Springboard Report** in your sidebar to review medication administrations.

CHECK YOUR WORK:

* Begin Treatment 2 should now appear in the Treatment tab of the Therapy Plan navigator section.

## Create a Line Care Therapy Plan

Create a Therapy Plan as a class – no separate exercise was created.

* Go to Treatment > Therapy Plan and search for a therapy plan. (ex. Remicade (Inflizimab) Infusion Therapy Plan)
  + This would be for countinous treatment
  + Select the therapy plan and enter a start date of "t" for today.
  + Associate the Therapy Plan with correct DX
    - Add a new problem of Osteoporosis and associate it with the therapy plan.
  + Do not associate the plan with the patient's cancer, as Remicade is not directly treating the cancer.
  + Click on the **Preview** tab to review order details
* **Assign Plan** and click on **InFLIXimab 5mg/kg in saline 0.9% 250mL**
  + Order Schedule lets you limit the availability of the therapy plan.
    - Interval: how frequently the treatment is given
* "Daily" does not mean due every day, but that this treatment will be given every XX days.
  + - Duration: how long treatment will continue
* Specify the number of treatments or end date.
  + - Fill in the rest of the required information
* Unless you set a minimum separation in the Order Schedule, anyone can release the orders even if they're off schedule.
* A therapy plan is available until it's discontinued, which means it will stay on the patient's chart until someone manually removes it.
* Like the treatment plan, signed orders aren't active until released by the nurse.
* Unlike the treatment plan, **nurses can edit therapy plans** if they indicate an authorizing provider.
* Sign all orders in the plan.

# Patient Education eLearnings

* Log into HealthStream and watch the following:
  + Learning Assessment
  + Applying Patient Education
  + Documentation
  + Updating Documentation
  + Resolving Education
  + Education Review

# Answer Key

## Reviewing the Schedule Answers

Which department defaults in the Dept field?

* AWH Regional Cancer Center Infusion. The department you selected at login.

From where on the schedule can you determine if the patient has signed treatment plan orders?

* The Signed Tx Plan column.

## Using Reports to Review Patient Information Answers

What Chemotherapy medications will Eva be receiving today?

* DOXOrubicin and CYTOXAN

## Releasing Pre-treatment Orders for the Day Answers

Which icon indicates that the orders have been released?

* The icon with a green check mark with a arrow.

## Completing a Treatment Day Answers

What appears after you complete the day?

* The next treatment day's orders.

## Holding Treatment Answers

* Go into the Treatment Plan Manager. How can you tell that the plan is on hold?
  + Treatment Plan Hold banner appears.

## Canceling Treatment

* Can you act on any of the orders now that the day is cancelled?
  + No