

# Care Pathways

5<sup>TH</sup> 2020  
EDITION

**MedTrak** *learning*

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## Learn by doing

Build your own care pathways  
for the treatment of patients  
with specific conditions.

using the

**ELECTRONIC HEALTH RECORD**

**Rick Schanhals**

edited by **David A. Blaszak**

Software licensed by:

**ADePT Electronic Solutions, LLC**

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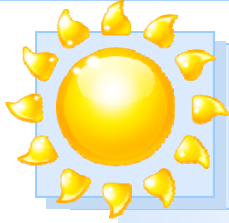
**Care Pathways** • 5th Edition (2020)

**MedTrak eBook Processor (custom curriculum developer)** • (2019)

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(as of July 2020)

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# Preface

## What is this book about?

*Care Pathways, 5th Edition* provides a unique opportunity for health care students to experience real-world interactions with health care professionals. This “experiential learning” text introduces health care students to care pathways and enables the students to work with health care professionals to build their own versions of care pathways.

Efficient medical workflow is paramount to effective patient care that produces the desired patient outcomes in the shortest period of time at the lowest possible cost. This is a tall task that requires the input of experienced care givers to build the necessary care pathways for the most complicated presenting problems. The goal of this book is to provide health care students the experience of working with a clinical advisor to build a care pathway for the treatment of a specific presenting problem. This type of direct learning project combines the critical thinking elements of comprehending content, following directions, interpreting provider treatment knowledge, translating that knowledge into a usable care pathway, and applying the care pathway to patient care.

This book provides a step-by-step guide to eliciting the necessary medical workflow knowledge to build a care pathway involving the treatments, tests, observations, and instructions using MedTrak’s care pathways internet-based methodology. Students can work on their care pathways from anywhere at anytime they have an internet connection.

MedTrak is the developer of an EHR (electronic health record) that is a problem-focused, rules-based, health care workflow system. With millions of patient visits processed in a variety of healthcare settings, MedTrak is time-tested and proven technology that enables healthcare facilities to operate at peak efficiency, and it includes not only the EHR but also a fully-integrated practice management system.

MedTrak’s roots originate in the emergency department.

## Logging into MedTrak

- ▶ MedTrak is an internet-based, fully integrated EHR (electronic health record) and practice management system that can be accessed anywhere there is an internet connection. While completing the exercises in this book, MedTrak is your **Application Services Provider (ASP)**, thus enabling you to use the same programs and database servers as other students.
- ▶ You do not need to install any software. Every time that you click a button in MedTrak, your work is saved.
- ▶ Write down your MedTrak username and password, and keep it somewhere safe.
- ▶ Log out of MedTrak by clicking the *Log Off* button.

## Browsers and devices

Although MedTrak works with most modern browsers, it works best when run in Google Chrome.

Not all of MedTrak’s functionality may work as designed when using other browsers, such as Internet Explorer, Mozilla Firefox, Safari, and Opera.

The use of mobile devices is discouraged. Traditional computers are recommended, due to the size of the display, the efficiency of data entry, and cursor precision.



*Chrome, Internet Explorer, and Mozilla Firefox are recommended.*



*Other major browsers will work with MedTrak, but functionality may differ.*



*Mobile devices can access MedTrak, but it is best to use a computer.*

## Using your browser with MedTrak

When you access your virtual clinic in MedTrak, you should not use your browser buttons for navigation. In order to move from one part of the system to another, you will use MedTrak’s internal links and buttons.



*Back button*



*Favorites & Bookmarks*



*Refresh button*

*Please do not use your browser’s navigation functions in MedTrak.*

## Important Note



It is recommended that you complete the first eleven chapters of the MedTrak *Medical Clinic Workflow* book before proceeding any further in this book.

You can skip **Chapter 6, Scheduling**.

You should be familiar with the basics of how to use MedTrak's medical workflow system to fully understand how to build a care pathway and run a patient using the care pathway.

A care pathway involves the care of a patient from initial notification of a medical condition through completion of treatment by all disciplines involved and facilities utilized over a span of time that is based on the patient's presenting problem.

To be effective, the care pathway must include input from all caregivers and provide efficient methods of notification (reminders) and documentation of the anticipated process. The care pathway includes all treatments, tests, observations, and instructions at the point-of-care and allows caregivers to deviate from the care pathway when necessary.

## History of care pathways

The building blocks of modern care pathways date back to the 1940s when the chemical company DuPont developed a project modeling technique later named the *critical path method*. In the 1980s, this was translated into a case management method for the Center for Case Management, and subsequently applied to clinical care theory.

The first real-world clinical care pathway was introduced in 1985 at the New England Medical Center in Boston.

Below is the definition of a care pathway adopted in 2008 by the European Pathway Association. Dr Kris Vanhaecht originally wrote this definition in his 2007 Phd dissertation.



A care pathway is a complex intervention for the mutual decision making and organization of care processes for a well-defined group of patients during a well-defined period.

Defining characteristics of care pathways include:

- (i) An explicit statement of the goals and key elements of care based on evidence, best practice, and patients' expectations and their characteristics;
- (ii) the facilitation of the communication among the team members and with patients and families;
- (iii) the coordination of the care process by coordinating the roles and sequencing the activities of the multidisciplinary care team, patients and their relatives;
- (iv) the documentation, monitoring, and evaluation of variances and outcomes; and
- (v) the identification of the appropriate resources.

The aim of a care pathway is to enhance the quality of care across the continuum by improving risk-adjusted patient outcomes, promoting patient safety, increasing patient satisfaction, and optimizing the use of resources.

# Medical Clinic Workflow

## Medical workflow

Integrating the electronic medical record into the health care management system provides the basis for efficient **medical workflow**. When done in a logical and smooth flowing manner, this type of system enables clinicians to better care for their patients while lowering the cost of the patient's treatment. The result is improved patient care by integrating rules-based problem solving with evidence-based medical actions. This reduces patient treatment time, while producing accurate and timely billing.

### Medical workflow efficiencies focus on:

- Supporting the collaboration of the medical staff.
- Improving communications both within the medical facility and with outside resources and agencies.
- Reducing or eliminating the paperwork where appropriate.
- Integrating evidence-based actions at every step of treatment while using rules-based problem solving.

## Medical processes

**Medical processes** are like business and manufacturing processes that can be broken down into the detailed steps needed for completion. By performing these detailed medical steps the same way each time, the medical staff is able to diagnose and treat each patient in a consistent, thorough, and efficient manner. Medical workflow systems enable the clinicians to always complete every step in the patient's care without missing anything. It does not matter whether the clinician is experienced or new on the job, using a medical workflow system will help ensure that each patient's care is consistent with the standards set by the medical facility.

### Medical workflow systems enable the clinical staff to know:

- What clinical process step (action) the patient needs next
- How long the patient has been waiting for the next step
- Who is responsible for performing the next step

Medical workflow systems also help to reduce the stress level in a medical facility by providing up-to-the-second patient tracking information for each patient in the medical facility. This information makes it easier for new employees to perform their job with the same consistency and efficiency as the experienced clinicians. This information also makes it easier for physicians and administration to manage the medical facility.

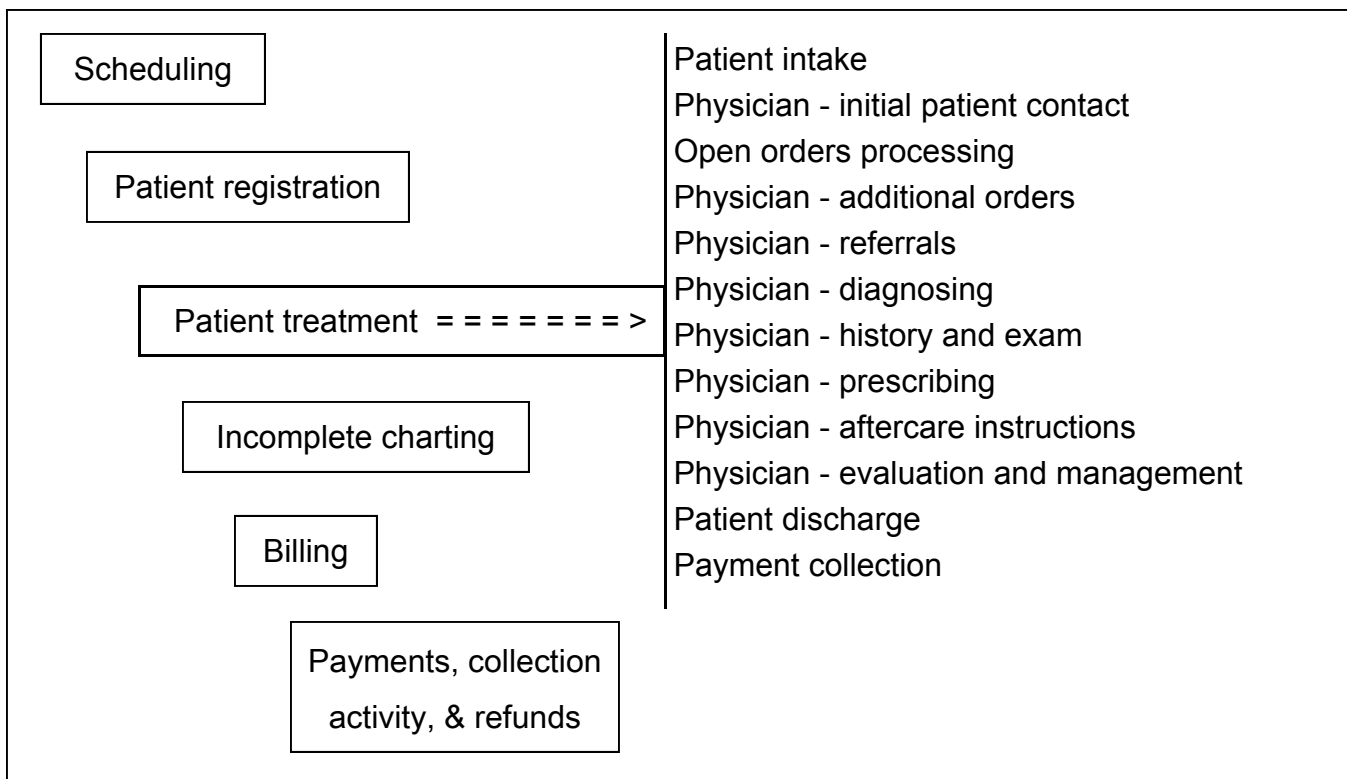


Responsibilities, skills, and medical knowledge in the health care setting clearly separate the medical disciplines into a hierarchical structure:

- The physician has direct responsibility for the patient's care.
- The nursing staff supports the physician by carrying out the physician's orders.
- The front desk personnel schedule, register, and collect payments.
- The administrative staff monitors patient charts and outside communications.
- The billing staff prepares and sends out bills and records payments.

Medical workflow is further complicated by the very nature of the patient's presenting problems. While some medical facilities see predominately one type of presenting problem, others see patients for everything from a drug screen collection, a sports physical, chronic asthma, a broken arm, a laceration of the foot, to a sore throat. Many of these patients are scheduled, but some are walk-ins without an appointment. The medical facility needs to efficiently treat each one of these types of patient encounters without missing a single necessary process. In order to do this, the facility needs to be able to track each patient from registration through discharge. This tracking needs to include all physician orders for diagnostics and treatments. Additionally, the clinical staff needs to coordinate their actions to ensure that each step in the patient's care is done efficiently and in the proper order.

## Major Categories of Medical Workflow •••••●



## Structure of MedTrak's care pathways

The structure of MedTrak's care pathways includes the following elements:

Care Pathway  
name and  
description

Patient locations

Time frames

Categories

Process steps

Rules

### Care pathway name and description

**Patient locations** during treatment

**Time frames** for the treatments, tests, observations, and instructions

**Categories** of the treatments, tests, observations, and instructions

**Process steps** involved in the treatments, tests, observations, and instructions

**Rules** - Orders involved in each of the process steps

Patient's age range – if applicable

Patient's gender – if applicable

Patient's weight range – if applicable

Questions (steps) or results of the rule's workflow

Triggers for normal answers to a question (step)

Values of the test results that will drive another rule (order)

### *Coming up...*

In the next chapters, you will follow a patient (suffering from chest pains) through all the aspects of a care pathway.

After studying this care pathway example, you will build your own care pathway in MedTrak.

# Cardiac Patient Workflow Documentation

## 2

Below is a summary of the treatment of a patient who is suffering from chest pains.

*A patient calls the hospital's call center to report that they are having chest pains. The call center triages the patient over the phone by calling up a chest pain protocol. The call center connects the patient to 911 to request an ambulance. While on the phone with the patient, the call center gathers some minimal information about the patient.*

*The emergency medical services team picks up the patient; and while en route to the emergency department, the EMS team evaluates the patient and connects them to a real time ECG.*

*Upon arrival at the emergency department, the ER physician continues to evaluate the patient, starts treatment, and contacts the cardiologist.*

*The cardiologist examines the patient in the emergency department and determines that the patient needs heart catheterization. The patient is transferred to the cardiovascular operating department and prepped for surgery. The cardiologist performs the surgery, and the patient is moved to the post anesthesia care unit (PACU) to start their recovery.*

*The patient is moved from PACU to the cardiovascular intensive care unit (CVICU). When the patient's condition improves, the cardiologist has the patient moved to a regular medical unit. The Cardiologist orders cardiac rehab for the patient.*

*The cardiologist discharges the patient from the hospital to the continued care of the cardiac rehab department. When appropriate the cardiac rehab therapist recommends to the cardiologist that the patient is capable of continuing their rehab on their own.*

In the example above, the patient is tracked from the time of the phone call to the hospital's call center until they are self-treating at home.

Detailed documentation of the care pathway for this type of patient condition is illustrated on the following pages of this chapter.



Patient is at home and then in an ambulance

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Pre-Arrival	Patient's Home	<p><b>Patient:</b> Calls 911 or Hospital Call Center</p> <p><b>Call Center:</b> triages patient, assess severity of chest pain connects patient to 911</p> <ol style="list-style-type: none"> <li>1. Register patient – minimal information</li> <li>2. Select chest pain from problem list – this drives chest pain protocol with some orders being optional and some being automatic. The completion of some orders, drives the next order. So that no orders are done out of sequence.</li> <li>3. Load patient onto call center status screen</li> <li>4. Connects patient to 911 – based on answer to question about disposition – “connected patient to EMS” – auto order EMS run sheet and ECG</li> <li>5. Patient appears on EMS status screen</li> </ol>	<p>EMS run sheet</p> <p>ECG</p> <p>Vital Signs</p>	<p>Call Center collects data on basic Demographics, known historical problems, current meds, allergies primary care physician.</p> <ol style="list-style-type: none"> <li>1. Call center status screen shows patient.</li> <li>2. Central control status screen shows all patients.</li> </ol>
Pre-Arrival	EMS	Receives call and picks up patient		
Pre-arrival	EMS	<p>EMS evaluates patient, connects patient to real time ECG</p> <p>Collects or verifies basic demographic patient information, current medications, allergies and any known chronic conditions.</p> <ol style="list-style-type: none"> <li>1. Picks up patient and logs in system that patient is in route.</li> <li>2. Hooks up ECG</li> <li>3. Verifies patient demographic information</li> <li>4. Verifies or collects history, current meds, allergies</li> <li>5. First question of EMS run sheet is ETA also drives order for checking on prior admissions. Using IHE rules would bring old information to screen for viewing by clinical staff.</li> </ol>		<p>EMS triages patient en-route. Patient condition determines action taken and time taken to ED.</p> <p>EMS status screen shows patient with outstanding run sheet questions.</p>

## Patient is in the ambulance

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Pre-Arrival	EMS	EMS sends communication on patient status to ED. Info includes basic demographic patient information, current medications, allergies and any known chronic conditions.  Informs ED of Estimated Time of Arrival		ETA is communicated to charge nurse. Auto-orders prior admissions check, pulling of old charts, chest pain protocol, chest pain room prep list, and paging order for ED MD.
Pre-Arrival	In ED	Unit secretary commences pre-registration with data received from EMS, looks for patient prior admissions, pulls old charts  1. Unit secretary accesses the EMS status screen to log whether there are any old charts available.  2. Based on providers on duty census (based on log-in information, system auto pages ED MD		ER status screen shows orders for prior admissions check, pulling of old charts, chest pain protocol, chest pain room prep list and paging of ED MD.
Pre-Arrival	In ED	Charge nurse receives information from EMS, pre-registration information from unit clerk- pages ED MD, mobilizes staff and reviews chest pain protocol and prepares chest pain room.		Interface to cell phone system for messaging.

## Patient arrives in emergency department

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
ED Arrival	In ED	EMS takes patient through designated entrance for cardiac patients and takes patient direct to chest pain receiving room		EMS documents in their handheld that they delivered patient to chest pain receiving room and they document any supplies and additional processes,
ED Arrival	Reception Area	Unit secretary receives patient information from EMS, utilizes EMS run sheet and additional information from patient's relatives if accompanying patient, continues pre-registration		All EMS information is attached to patient and is available to ED personnel from their status screen. Any missing patient demographic information is flagged for capture by the unit secretary.

## Patient is placed in the chest pain room

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
ED Unit	Chest Pain Room	Unit secretary completes pre-registration at patient bedside. Scans old charts into new chart, if needed.		Interface for scanning of old records.
ED Unit	Reception Area	Unit secretary verifies patient insurance eligibility status		Interface to insurance system for eligibility status.
ED Unit	Chest Pain Room	Nursing staff commences online documentation, utilizes information from call center, EMS and data obtained from patient/accompanying relatives	<b>Start Chest Pain Pathway</b>	Any missing patient medical history, current medications and allergies information is flagged for capture by the nurse.
ED Unit	Chest Pain Room	ED Physician assess patient, reviews chart, EMS run report, previous admission charts and takes full history from patient or accompanying relatives - verifies current meds and known historical problems		Online documentation Any missing patient information is flagged for capture by the physician.
ED Unit	Chest Pain Room	ED physician orders 12 lead ECG; cardiac serum markers; admission blood tests x-rays and echogram	<b>Vital signs</b> <b>ECG</b> <b>Pulse oximetry</b> <b>CBC w/diff w/platelets</b> <b>CKO</b> <b>CMP</b> <b>PT</b> <b>PTT</b> <b>Type and Serum</b> <b>ABGs</b> <b>Chest x-ray (portable)</b> <b>Bed rest</b> <b>NPO - nothing per oral</b>	within 15 minutes of arrival 1. Results of orders will drive other ED personnel into action. 2. Any verbal orders must be placed into system. ED personnel should not perform any order that is not in the system. 3. Status screen displays all orders and current status of each.
ED Unit	Chest Pain Room	ED physician reviews lab & x-rays results as they come through on-line		Providers use status screen to access results to all orders.

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
ED Unit	Chest Pain Room	ED Physician prescribes meds, IVs as indicated	<b>Heparin lock</b> <b>Continuous cardiac monitoring</b> <b>I &amp; O</b> <b>Fluids per physician</b>	<ol style="list-style-type: none"> <li>Orders placed by physician will drive other ED personnel into action.</li> <li>Status screen displays all orders and current status of each.</li> </ol>
ED Unit	Chest Pain Room	ED physician pages Cardiologist and patient's primary care physician	<b>Contact cardiologist</b> <b>Contact patient's physician</b>	Status screen displays all orders and current status of each.
ED Unit	Chest Pain Room	Cardiologist evaluates patient, reviews chart, meds and test results		Cardiologist uses EHR to review all patient information.
ED Unit	Chest Pain Room	Cardiologist informs ED physician and ED charge nurse need to admit patient to chest pain unit.	<b>Admittance</b> <b>Transport</b> <b>Room assignment</b>	<p>ED transport tech and receiving nurse in chest pain unit auto-notified of pending admission</p> <ol style="list-style-type: none"> <li>ED status screen displays patient in transit to chest pain unit.</li> <li>Chest pain unit status screen displays patient in transit from ED.</li> <li>Chest pain unit status screen displays order to ready a room for patient.</li> </ol>
ED Unit	In-transit	ED tech transport accompanied by ED nurse picks up patient and transports to chest pain unit		<ol style="list-style-type: none"> <li>Upon arrival in chest pain Unit, ED tech/nurse triggers arrival in EHR.</li> <li>Patient moved to chest pain unit room in EHR.</li> </ol>

## Patient is moved to chest pain unit

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Chest Pain Unit	Chest pain unit	Cardiologist re-evaluates the patient's condition, reviews charts, current meds and confirms the need for cardiac catheterization	<b>Cardiac catheterization</b>	Cardiologist options at this step. Patient to have catheterization or remain in unit for stabilization or other testing.
Chest Pain Unit	Pre-Cath	If cath lab is ready for patient, cath lab pages patient transport to transport patient to cath lab		If cath lab is ready, auto order patient transport.
Pre-Procedure	Pre-Cath	If the cath lab is not ready, patient waits in chest pain unit	<b>Transport</b>	Nurse contacted when room is ready  Patient transport status screen will show pending orders for transport of patients and current status of timing.
Pre-Procedure	In-transit	Chest pain unit tech moves the patient to the cath lab holding area.		Patient transport status screen is auto updated with patient movement.  Cath lab status screen shows patient is at the cath lab table and auto orders safety check and cath procedure.

## Patient is moved to cardiovascular pre-operating unit

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Pre-Op	CVOR	Nurse initiates safety record online (right patient, right ECG, etc.)	<b>Safety record</b>	CVOR status screen shows that the nurse needs to complete the safety record.
Pre-Op	CVOR	Anesthesiologist fills out assessment sheet online in the holding area	<b>Anesthesia assessment</b>	Based on appropriate answers to assessment sheet, EHR will order up equipment preparation order.



Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Pre-Op	CVOR	Anesthesia tech/nurse prepares anesthesia equipment	<b>Equipment preparation</b>	CVOR status screen shows that the nurse needs to prepare the equipment.
Pre-Op	CVOR	Patient prepared for surgery	<b>Patient preparation</b>	CVOR status screen shows that the nurse needs to prepare the patient for surgery.
Pre-Op	CVOR	OR Tech ensures equipment needed intra-operatively is on case cart		OR tech documents in EHR the equipment on the case cart.
Pre-Op	CVOR	Patient in OR suite		CVOR status screen shows that the patient is in the OR suite and ready for surgery.
Pre-Op	CVOR	Auto-notification to surgeon and anesthesiologist of patient's arrival in OR	<b>Paging orders</b>	CVOR status screen shows that the surgeon and anesthesiologist have been paged or otherwise notified.
Pre--Op	CVOR	Surgeon checks and signs consent prior to entering OR suite	<b>Surgery consent form</b>	CVOR status screen shows that the surgeon needs to sign the consent form.  1. Surgeon's signature on patient consent form documented in EHR
Pre-Op	CVOR	Surgeon, anesthesiologist, and nurse sign safety form	<b>Safety form signed</b>	Surgeon's and nurse's signature on safety form documented in EHR.
Pre-Op	CVOR	Patient prepped for surgery	<b>Surgery preparation</b>	Surgery nurse to document in EHR the prep work.

## Patient in surgery

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Intra-Op	CVOR	Surgery begins		
Intra-OP	CVOR	In-case documentation completed by appropriate peri-operative team	<b>In-case documentation</b>	CVOR status screen displays documentation needed for each team member by discipline.

## Post-operative steps

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Post-Op	CVOR	Surgeon completes post-operative summary and orders in CPOE	<b>Post operative orders</b>	<ol style="list-style-type: none"> <li>1. CVOR status screen displays orders placed by surgeon and post-operative summary questions.</li> <li>2. Status screen prompts the surgeon for post-operative orders.</li> </ol>
Post-Op	CVOR	Equipment prepared for transfer	<b>Transfer</b>	Status screen shows patient ready for transfer. All information needed in system before transfer is entered.
Post-Op	CVOR	Anesthesiologist, CVOR staff, OR transport escorts patient to PACU	<b>Transport</b>	OR transporter updates EHR of completion of patient move.

## Patient in post-anesthesia care unit (PACU)

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
PACU	PACU	PACU receives the patient	<b>Post procedure readiness order</b>	1. PACU status screen shows patient in unit.
PACU	PACU	PACU assess patient's readiness for transfer to CVICU (24 hours post-procedure).		1. PACU documents the patient's post-procedure readiness. 2. Auto-orders patient transfer to CVICU based on answers to readiness questions. 3. PACU status screen to show if CVICU has a bed available or not.
PACU	In transit	Patient transferred to CVICU	<b>Transport</b>	1. PACU status screen shows patient moved to CVICU. 2. Patient transport status screen shows patient in CVICU. 3. CVICU status screen shows patient in unit.

## Patient in cardiovascular intensive care unit (CVICU)

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
CVICU	CVICU Room	Necessary equipment arrives with the patient. CVICU checks off that necessary equipment arrived with the patient.	<b>Equipment order</b>	1. EHR auto-orders missing equipment based on answers to equipment checklist.
CVICU	CVICU Room	Nurse processes accompanied orders; if no orders, nurse contacts physician for new orders (via phone); Physician gives nurse orders	<b>Physician orders</b>	1. CVICU status screen shows that the physician has been paged or otherwise notified about the need for patient orders.
CVICU	CVICU Room	Orders placed in EHR alert all departments of the patient's needs for their services.	<b>Post-operative orders</b>	1. CVICU status screen shows orders placed by department. 2. Various departmental status screens show their orders for this patient.

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
CVICU	CVICU Room	Nurse performs admission	<b>Admission order</b>	CVICU status screen shows patient admitted to department.
CVICU	CVICU Room	Nurses performs patient assessment throughout the day. (Critical Care Flowsheet)-online documentation	<b>Critical Care Flowsheet order</b>	CVICU status screen reminds nursing of critical care assessment information and timing of assessments.
CVICU	CVICU Room	Physician assesses patient twice a day with ability to re-view assessment by others via on-line patient record	<b>Physician Assessment order</b>	CVICU status screen reminds provider of critical care assessment information and timing of assessments. 1. Patient assessment is a timed order that remains active until the physician says that it can be stopped. 2. When patient assessment order is closed by physician system auto-orders patient transfer to medical unit.
CVICU	CVICU Room	Nurse processes physician orders throughout patient stay		1. CVICU status screen reminds nursing of critical care assessment information and timing of assessments. 2. CVICU status screen to show if medical unit has a bed available or not.
CVICU	CVICU Room	The physician writes a unit-transfer order in CPOE when patient is stabilized.	<b>Unit Transfer</b>	1. This is an auto-order based on the physicians closing of the assessment order. 2. Nurse verifies transfer order
CVICU	In Transit	Patient transferred to medical unit		1. CVICU transporter updates EHR of completion of patient move. 2. CVICU status screen shows patient in transit to medical unit.

## Patient is moved to medical unit

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Patient Rounds	Medical Unit	A cardiac patient is ordered by a cardiac surgeon or a cardiologist to attend cardiac rehab.	<b>Cardiac Rehab order</b>	Cardiac surgeon writes the cardiac rehab order for the patient. 1. Medical unit status screen shows open order for cardiac rehab.
	Medical Unit	The patient schedules a cardiac rehab appointment before being discharged from the hospital.		After discharge, the patient is responsible for scheduling the cardiac rehab appointment. 1. Cardiac rehab unit status screen shows that patient is to call to schedule appointments. 2. This order remains as a reminder until patient is scheduled.
Discharge process	Medical Unit	Patient is discharged from the hospital before attending cardiac rehab. Patient is discharged from hospital with aftercare instructions based on instruction selections and orders by the discharging physician.	<b>Rehab discharge order</b>	1. Medical unit discharges patient from their status screen. 2. Instructions and prescriptions printed out for patient including medications and cardiac rehab order. 3. Case is still open pending the cardiac rehab phase. 4. Patient is still on the cardiac rehab pending screen as a patient who is still being treated.

## Patient is in cardiac rehab

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Prior to patient's first appt	Cardiac Rehab	Cardiac rehab defines the patient as an Acute patient or a Maintenance patient. Patient is reminded by system of scheduled appointment for cardiac rehab. Either by auto-call, email, fax, or personal call.	<b>Cardiac rehab order</b>	An acute patient is defined as being out of the hospital for less than 12 months. A maintenance patient is a patient who has recently completed the Acute rehab phase and would like to continue cardiac rehab or have been out of the hospital more than 12 months.

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Day of scheduled appt	Admission / Registration	The patient arrives at MOB registers and is admitted into cardiac rehab	<b>Registration</b>	Based on registration (using above criteria) the system places the proper order.
Initial Acute Visit	Cardiac Rehab	If the patient is acute, the cardiac rehab director conducts a complete medical evaluation of the patient. The cardiac physical therapist conducts a complete physical evaluation of the patient.	<b>Physical evaluation</b>	The evaluations help cardiac rehab design a rehab program for the patients. <a href="#">Cardiac rehab status screen shows patient's rehab program steps.</a>
Initial Acute Visit	Cardiac Rehab	Based on the evaluations, an acute rehab program is designed specifically for the patient.	<b>Acute Rehab</b>	The duration of the rehab program varies between 1-3 months depending on the evaluation results.
Subsequent Acute and Maintenance Visits	Cardiac Rehab	The patient attends cardiac rehab 3 times a week on Mondays, Wednesdays, and Fridays for the duration of the rehab. 1. Results of ECG analysed by therapist. Based on therapist assessment system could auto-order notification of results to the cardiologist. 2. System generates charges based on steps performed by therapist.	<b>ECG order</b>	Patient ECG measurements are recorded online: 1) Patient is resting prior to start of rehab, 2) During rehab at the peak portion of the program, 3) Patient is resting after completing rehab. If any significant problems arise, the patient's cardiologist is immediately informed. At the end of the day, the cardiac rehab director enters charges for the patients.
Subsequent Acute and Maintenance Visits	Cardiac Rehab	The cardiac RN evaluates the progress of the patient during each rehab visit.	<b>Progress notes</b>	During each visit, the nurse writes progress notes in the patient online chart. A patient progress summary is completed every 10-12 visits. This summary is sent to the patient's referring cardiologist and/or surgeon. (Or Auto-faxed)
Subsequent Acute and Maintenance Visits	Cardiac Rehab	Cardiac rehab designs a patient home rehab program online while the patient continues therapy.	<b>Home rehab program</b>	The home program is written up on the Exercise Prescription form for the patient to take home.  <a href="#">System generates home exercise program based on therapist's selections.</a>

## Patient is moved to medical unit

Timing	Location	Workflow Step	Care Pathway Orders	Notes (comments)
Rehab Progress Assessment/ Discharge Process	Cardiac Rehab	If the patient has completed his/her therapy goals, the patient is discharged from the hospital.  If the patient has not reached his/her goals, the rehab continues.	<b>Cardiac rehab discharge order</b>	Cardiac rehab completes a patient discharge summary. Auto-notification to patient's primary physician. The summary is sent to the patient's referring cardiologist and/or surgeon.  Patients can continue rehab up to 36 visits or the amount specified by the insurance provider.
Post-Rehab	Cardiac Rehab	Cardiac rehab conducts a follow-up phone call to check on the patient's progress with the home rehab program.	<b>Cardiac follow-up order</b>	Auto-notification of patient progress phone call  Based on patient' progress auto orders to be placed to alert of possible issues.
<b>END</b>				

As you can see from the previous documentation, there are a number of workflow steps required by many different disciplines that need to be taken to treat an emergency cardiac patient. Each one of these steps can be broken down into the individual parts needed to fully treat and document the treatment of the patient.

The breakdown of these steps is very involved and needs the collaboration of each discipline to be sure that nothing is missed.

The example care pathway that follows is only a portion of the above example.

MedTrak is set up to enable the clinical team to begin building the care pathway with minimal information, and then to continue to build out the care pathway with input from everyone concerned. By using the care pathway on test patients, the clinical staff will see the pathway in action and be able to add to it, modify it, and remove parts in real-time.

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# Cardiac Patient - Narrative and Spreadsheet

## 3

The example in this book tracks a chest pain patient from the time that they arrive at the emergency department until they are discharged from the hospital on the third day

*After complaining of chest pain and numbness in the left arm at home, John Smith's wife drives him to the emergency room at Bedford Memorial Hospital. Upon arrival at the hospital, the emergency department's triage nurse alerts the charge nurse and emergency department MD that a chest pain patient just arrived, places John in a wheelchair, and moves him into the emergency department's chest pain room. The charge nurse activates the chest pain care pathway while the unit secretary collects demographic and insurance information from John's wife.*

*The chest pain care pathway requires the completion of the following treatments, tests, observations, and instructions at the **initiation (zero minute mark)** of the pathway. The nurse asks some basic patient medical history questions that the physician reviews with the patient. The physician obtains the rest of the patient's medical history and performs a physical examination following the chest pain protocol questions. The tests done by the nursing staff include an ECG within the first 15 minutes, and a pulse oximetry test where if the result is less than 95%, the value will trigger an order for oxygen and an order for an ABG (arterial blood gas) lab test. But, if the result of the pulse oximetry test is less than 98% but greater than 94%, the input of the value will trigger the order for the oxygen only and not the ABG lab test. The provider considers giving the patient SL Nitro. The lab does the following tests, CK, CMP, PT, PT, and type and serum (draw and hold). The nurse inserts an IV with a Heparin lock and gives the patient fluids as indicated by the physician. The nurse takes the patient's vital signs every 15 minutes during the first hour, and hooks the patient up to a continuous cardiac monitor. The patient is instructed to stay in bed and not to eat or drink anything. The nurse also monitors the patient's intake and output (I&O).*

*At the **fifteen minute mark**, the care pathway calls for the completion of the following treatments, tests, observations, and instructions. If the chest pain persists, the physician is to consider giving the patient Nitrates – SL, either topical or IV, also ASA 325mg, and Glyco-protein. The x-ray department x-rays the patient's chest using a portable x-ray machine. The physician notifies the patient's personal physician of the patient's condition, and orders a consultation with a cardiologist. The nurse continues the Heparin lock, the continuous cardiac monitoring, and the recording of the patient's intake and output. The nurse also takes the patient's vital signs and reminds the patient to stay in bed and to not eat or drink anything. The nurse orients the patient to their physical surroundings, explains all of the procedures, and assesses the patient's risk factors. At **thirty minutes**, the nurse takes the patient's vital signs, and again at **45 minutes**.*

*At **one hour post arrival** to the emergency department, the cardiologist evaluates the patient with the ED physician and reviews the on-line chart, the medications, the chest x-ray, and the CBC lab results. The cardiologist informs the ED physician and the ED charge nurse of the need to admit the patient to a monitored bed in the chest pain unit. The nurse continues the Heparin lock, the continuous cardiac monitoring, and the recording of the patient's intake and output. The nurse also takes the patient's vital signs and reminds the patient to stay in bed and to not eat anything. The patient is now allowed to drink clear liquids. The nurse explains the plan of care and admission to a monitored bed to the patient and the patient's family. The nurse also assesses the patient's home situation, family resources, and support system.*

*At two hours post arrival to the emergency department, the cardiologist has the nurse repeat the ECG. The patient is then transported to a monitored bed in the chest pain unit by an ED tech.*

*At three to six hours post arrival the patient is now in the chest pain unit. The lab does another CK. The nurse continues the IV with a Heparin lock, taking vital signs each hour, and also the continuous cardiac monitor. The nurse instructs the patient to continue drinking only clear liquids and stay in bed other than using the bathroom. The nurse also continues to monitor the patient's intake and output (I&O). Social services meets with the patient and the patient's family to discuss the patient's care at home after they are discharged from the hospital. The dietary staff discusses the patient's diet with the patient and patient's family.*

*At six to twelve hours post arrival the lab does another CK at the eighth hour. The nurse continues the IV with a Heparin lock, taking vital signs each hour if still on nitroglycerin or every two hours if not, and also the continuous cardiac monitor. The nurse instructs the patient that they can have solid food as tolerated and stay in bed other than using the bathroom. The nurse also continues to monitor the patient's intake and output (I&O). The nurse also instructs the about medicating to manage their symptoms.*

*At twelve to 24 hours post arrival the cardiologist orders an ECG if indicated and considers cardiac catheterization if indicated. The nurse continues the IV with a Heparin lock, taking vital signs per the unit routine, and also the continuous cardiac monitor. The patient can advance their diet as tolerated and should stay in bed other than using the bathroom. The nurse also continues to monitor the patient's intake and output (I&O).*

*At day two post arrival the cardiologist decides that the patient does not need cardiac catheterization and will release the patient to home on the third day. The lab does a PTT test, and the nurse does another ECG. The nurse continues the IV with a Heparin lock, taking vital signs per the unit routine, and also the continuous cardiac monitor. The patient can advance their diet as tolerated and should stay in bed other than using the bathroom. The cardiologist reviews the assessment and plan of care, the risk factors, the prescribed medications, and the chest pain assessment with the patient and the patient's family. The nurse reinforces the dietary instructions.*

*At day three post arrival the nurse does another ECG and discontinues the IV. The nurse discharges the patient with written copies of all of their instructions.*

To enable more efficient building of the care pathway, use a spreadsheet (see the next pages) to break down the processes into categories (shown below). These categories of processes are specific to this example. MedTrak's care pathway processor enables you to build any categories and associated rules necessary for your care pathway.

The categories in this example are: activities, tests, diet, medications, consultations, IVs, treatments, vital signs, discharge planning, and teaching.

Time	Activities	Tests	Diet	Meds	Consults	IV's	Tx's	Vital Signs	Disch Plan	Teaching
------	------------	-------	------	------	----------	------	------	-------------	------------	----------

Time	Activities	Tests	Diet	Meds	Consults	IV's	Txs	Vital Signs	Disch Plan	Teaching
0-15 min	Bed rest	ECG within 1st 15 min	NPO	Consider <b>SL Nitro</b>		Insert <b>Heparin</b> lock	Intake & output (I & O)	On presentation 15 min Pulse Ox		
		CKO within 1st 30 min (stat)		If <b>pulse ox</b> 98% and chest pain start <b>O2</b>		Fluids as indicated		Continuous cardiac monitoring until 12 lead done & evaluated by MD		
		<b>CMP</b>								
		<b>CBC</b>								
		<b>PT</b>								
		<b>PTT</b>								
		<b>Type and serum</b> (draw and hold)								
		<b>ABG's</b> if pulse ox 95%								

Time	Activities	Tests	Diet	Meds	Consults	IV's	Tx's	Vital Signs	Disch Plan	Teaching
15-30 min	Bed rest	Portable <b>CNR</b>	NPO	If pain persists: <b>Nitroglycerin - SL</b> topical or IV	Notify <b>PMD</b> and obtain <b>Cardiology</b> consult	<b>Heparin</b> lock	I & O	Continuous cardiac monitoring		Orient patient to physical surroundings. Explain all procedures. Assess risk factors.
		Send all bloods drawn except <b>Type</b> and <b>Screen</b> (stat)		Start IV <b>Heparin</b> as per protocol				VS q 15 min x 4		
		Repeat <b>ECG</b> at 60 min		<b>ASA</b> 325 mg pp						
				Consider <b>Glycoprotein</b> inhibitor						
1-3 hrs	Bed rest	Check <b>CKO</b> results at 1 hour post sent	Clear liquids	Consider Beta blockers		<b>Heparin</b> lock	I & O	Continuous cardiac monitoring	Assessment of home family resources support systems	Explain admission and plan of care to patient and family
	Arrange for admission to monitored bed	Check <b>CBC</b> at 1 hour post sent				Continue IV	Admit to South ICU	VS q 30 min while on IV Nitro		
		Check <b>CNR</b> results								

Time	Activities	Tests	Diet	Meds	Consults	IV's	Tx's	Vital Signs	Disch Plan	Teaching
2 hrs		Repeat ECG at hour 2 if indicated								
3-6 hrs	Bed rest with bathroom privileges	Check CK4 at hour 4	As appropriate	Continue IV Heparin	Social services	Heparin lock	I & O	Continuous cardiac monitoring		
		Check CK4 results			Dietary as indicated			VS q 1 hr while on IV Nitro		
6-12 hrs	Bed rest with bathroom privileges	Check CK8 at hour 8	As appropriate	Continue IV Heparin		Heparin lock	I & O	Continuous cardiac monitoring		Medication instruction as indicated - symptom management
		Check CK8 results						VS q 1 hour if still on IV Nitro		
		Schedule Stress test as indicated						VS q 2 hr if off		

Time	Activities	Tests	Diet	Meds	Consults	IV's	Tx's	Vital Signs	Disch Plan	Teaching
12-24 hrs	Bed rest with bathroom privileges	Consider <b>Echocardiogram</b> if indicated	Advance as tolerated	Continue IV <b>Heparin</b>		<b>Heparin</b> lock	I & O	Continuous cardiac monitoring		
		Consider <b>Cardiac Cath</b> for day 2 if indicated						VS per unit routine		
Day 2	Bed rest with bathroom privileges	<b>PTT</b> as per protocol	Advance as tolerated	Continue IV <b>Heparin</b>		<b>Heparin</b> lock			Identify discharge needs	<b>Teach:</b> A & P Risk factors Activity Chest pain assessment Medications Reinforce diet teaching Cardiac cath teaching if indicated
		<b>ECG</b>								
Day 3	Advance as tolerated	<b>ECG</b>	Advance as tolerated	Discontinue IV <b>Heparin</b>					Discharge patient	

# Helpful Tips and Navigation

## 4



### Learning Outcomes

- ▶ How to identify the common elements on a MedTrak screen
- ▶ How to use the function keys
- ▶ How to use the tab key
- ▶ How to select an item in a list
- ▶ How to select a command from the Help screen
- ▶ How to enter a command
- ▶ How to use multiple commands on the same screen
- ▶ How to search
- ▶ How to use selection boxes



### Key Concepts

- ▶ User Guide
- ▶ Common elements
- ▶ Function keys
- ▶ Basic navigation
- ▶ Selecting items
- ▶ Entering commands
- ▶ Searching
- ▶ Selection boxes

## MedTrak's Online User Guide



This chapter utilizes the **User Guide** on the MedTrak Main Menu. Because you will reference the **User Guide** throughout the exercises in this chapter, keep it open on your desktop (it is in its own window).

Do These Steps  
4.01 =====>

1. Sign into **MedTrak**  
(You should be on the MedTrak Main Menu)
2. Click the **User Guide** button  
(The **User Guide** will open in a new window)
3. Move the **User Guide** aside to keep it accessible
4. In the **MedTrak** window:  
Click the **Patient Registration** button  
(You should be on the Patients screen)

## Section 1 - Common Screen Elements



Do These Steps  
4.02 =====>

1. In the **User Guide** window:  
Read **Section 1 - Common Elements**
2. In the **MedTrak** window:  
Review the different elements on the Patients screen

## Section 2 - Function Keys



Do These Steps  
4.03 =====>

1. In the **User Guide** window:  
Read **Section 2 - Function Keys**
2. In the **MedTrak** window:  
Try the different function keys on the Patients screen



## Section 3 - Basic Navigation

1. In the **User Guide** window:  
Read **Section 3 - Basic Navigation**
2. In the **MedTrak** window:  
Press the **Tab** key to move the cursor down the screen
3. Hold the **Shift** key down and press the **Tab** key to move the cursor up the screen

Do These Steps  
<==== 4.04

## Section 3.1 - Selecting Items

1. Place the cursor in the command field next to a patient
2. Press the **ENTER** key
3. On the next screen, click the **Exit Screen** button (**F3** key)
4. Type an "x" and press the **ENTER** key
5. On the next screen, click the **Exit Screen** button (**F3** key)
6. Click the **Select Patient** button under **Available Functions** on the left side of the screen
7. On the next screen, click the **Exit Screen** button (**F3** key)

Do These Steps  
<==== 4.05

## Section 3.2 - Entering Commands

1. Place the cursor in the command field next to a patient
2. Click the **Change Patient** button under **Available Functions** on the left side of the screen
3. On the next screen, click the **Exit Screen** button (**F3** key)

Do These Steps  
<==== 4.06

Do These Steps  
4.07 =====>

1. Place the cursor in the command field next to a patient
2. Type the *Change* command - "**ch**"
3. Press the *ENTER* key
4. On the next screen, click the *Exit Screen* button (**F3** key)

Do These Steps  
4.08 =====>

1. Place the cursor in the command field next to a patient
2. Click the *More Functions...* button under **Available Functions** on the left side of the screen (**F1** key)
3. Click the *Change* checkbox
4. On the next screen, click the *Exit Screen* button (**F3** key)

Do These Steps  
4.09 =====>

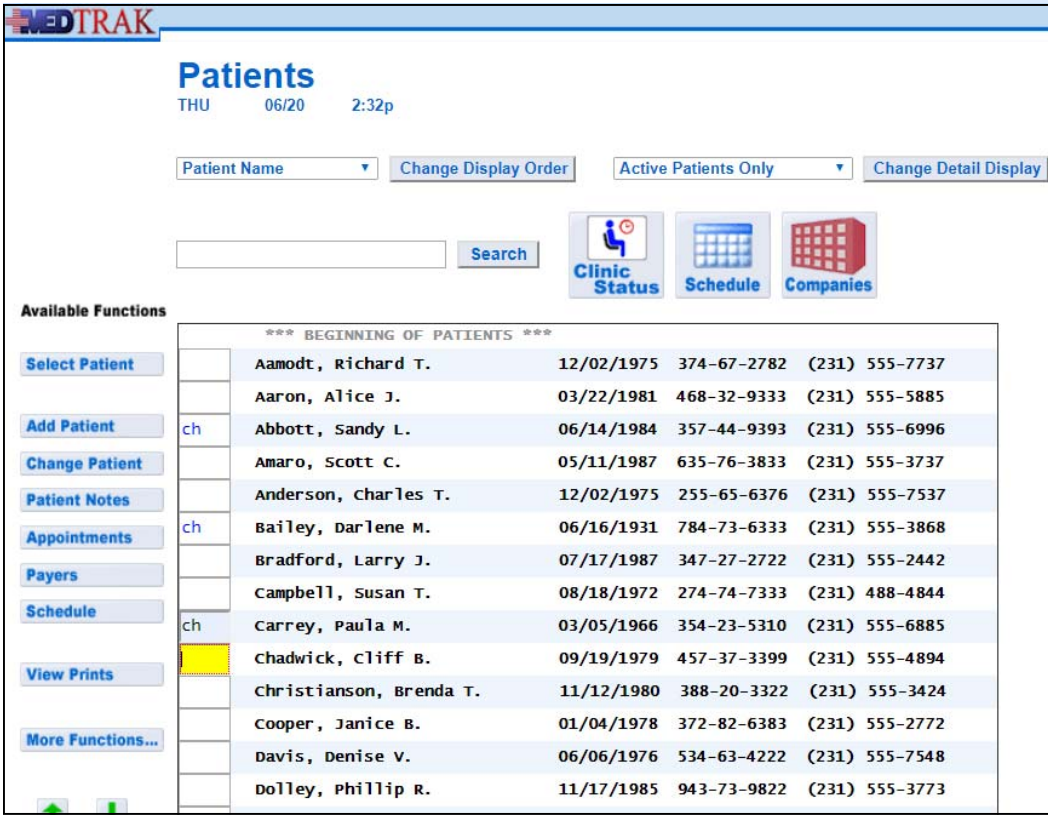
1. Place the cursor in the command field next to a patient
2. Click the *More Functions...* button under **Available Functions** on the left side of the screen (**F1** key)
3. Click the *Change* web link button
4. On the next screen, click the *Exit Screen* button (**F3** key)

## Multiple Commands on a Screen



Manual entry offers an additional benefit of being able to run several commands on records consecutively. To change three patient's records using the change command, type "**ch**" in three command fields (shown on the next page) and press the *ENTER* key. Use the *Tab* key to move to the next field. The change program processes three times in a row - once for each selected record, thus saving time.

You can navigate nearly every screen without taking your hands away from the keyboard.



1. On the Patients screen, type the “ch” command next to three patients
2. Press the *ENTER* key
3. When the 1st patient screen appears, click the *Exit Screen* button (*F3* key)
4. When the 2nd patient screen appears, click the *Exit Screen* button (*F3* key)
5. When the 3rd patient screen appears, click the *Exit Screen* button (*F3* key)

Do These Steps  
<==== 4.10

## Section 4 - Selection Boxes

1. In the **User Guide** window:  
Read **Section 4 - Selection Boxes**  
(You will use selections boxes during patient registration and clinical processing.)

Do These Steps  
<==== 4.11

## Searching .....

Do These Steps  
4.12 =====>

1. In the **User Guide** window:  
Read **Section 7 - Searching**
2. In the **MedTrak** window:  
Practice searching for some patient names

## Browsers and Devices .....

Do These Steps  
4.13 =====>

1. In the **User Guide** window:  
Read **Section 8 - Browsers and Devices**

# Computerized Provider Order Entry (CPOE)

## 5



### Learning Outcomes

- ▶ An understanding of computerized provider order entry (CPOE)
- ▶ How a care pathway uses orders from the CPOE



### Key Concepts

- ▶ Adding a care pathway name and description
- ▶ Adding categories to a care pathway
- ▶ Adding processes to a category
- ▶ Adding rules to process
- ▶ Creating freeform (custom) patient orders
- ▶ Changing the name of the care pathway or description
- ▶ Changing the sort order of records in a care pathway
- ▶ Changing a patient order that is attached to a rule
- ▶ Deleting a record in the care pathway
- ▶ Un-deleting a record in the care pathway
- ▶ Reviewing the log of a record in the care pathway
- ▶ Printing your care pathway



CPOE

Providers use the **computerized provider order entry** (CPOE) feature of an EHR to place orders on behalf of the patient. An order is a request by the provider for a test, treatment, or administrative process. Typical orders are requests for imaging (x-rays), laboratory tests, hearing and sight tests, treatments for injuries and illnesses, medications, and referrals to specialists or scheduled testing like MRIs and CT scans.

Problem-focused

MedTrak is a **problem-focused** system. This means that when a patient is seen for a specific injury or illness, the **most likely orders** for that injury or illness would appear first for the provider to select. This saves the physician time when placing orders in the CPOE. If the patient has a right elbow injury, then MedTrak would display the most likely orders that the provider would need for that type injury. If the patient has an earache, then MedTrak would display the most likely orders for that type of illness.

Most likely orders

Radiology

MedTrak's CPOE categorizes orders as follows:

**Radiology** - This category includes all of the imaging that is done on-site.

Laboratory

**Laboratory** - This category includes laboratory tests that are done on-site and off-site (meaning that the laboratory test will be done by another facility). The laboratory sub-categories include:

General lab work	Coagulation
Arthritis lab work	Blood bank
Aspiration	Serology
Blood borne pathogens (BBP)	Urine Analysis
Laboratory collections	Microbiology
Hematology	Toxicology
Blood chemistry	Drug Screens

Ancillary Studies

**Ancillary Studies** - This category includes all types of testing not in the radiology or laboratory categories. The ancillary studies sub-categories include:

Echocardiogram tests	Respiratory tests
ECGs	TB skin tests
Hearing tests	Vision tests
Physical tests	

Treatment (Injuries)

**Treatment (Injuries)** - This category includes surface trauma repairs and splinting or bracing of body parts.

Treatment (HEENT/Systems)

**Treatment (HEENT/Systems)** - This category includes head, eye, ear, nose, throat, respiratory, cardio, and skin treatments.

Treatment (Follow-up)

**Treatment (Follow-up)** - This category includes suture removals and any other type of procedure needed following the patient's initial treatment.

**Treatment (Medications)** - This category includes medications that are given in the medical facility. The treatment medications sub-categories include:

- |                       |                          |
|-----------------------|--------------------------|
| Cardiac medications   | G.I. medications         |
| Allergy medications   | Immune medications       |
| Antibiotics           | Muscle relaxants         |
| C.N.S. medications    | Pain medications         |
| Endocrine medications | Other miscellaneous meds |

Treatment  
(Medications)

**Medications** - This category includes both dispensed and prescribed medications that the patient takes at home.

Medications

**Referrals / Authorizations** - This category includes referrals to specialists and specialized testing. It also includes requests for authorization for a procedure or surgery. The referrals / authorizations sub-categories include:

Referrals /  
Authorizations

- |                         |                           |
|-------------------------|---------------------------|
| Accupuncturist          | Neurology                 |
| Allergist               | Nuclear Medicine          |
| Anesthesiology          | OB - Gynecology           |
| Attorney                | Ophthalmology             |
| Audiology               | Optometrist               |
| Cardiology              | Oral Surgeon              |
| Chiropractic – In house | Orthopedic Consultation   |
| Chiropractic – Referral | Pain Management           |
| CT Scan                 | Pediatrics                |
| Dentist                 | Physiatry                 |
| Dermatology             | Plastic Surgeon           |
| Emergency Room          | Podiatrist                |
| EMG – In house          | Psychology                |
| EMG – Referral          | Pulmonology               |
| Endocrinology           | Radiology - Referral      |
| ENT                     | Rehab Services - In-house |
| Family Physician        | Rehab Services - Referral |
| Gastroenterologist      | Rheumatology              |
| General Surgeon         | Scheduled Testing - Other |
| Gynecology              | Surgery Authorization     |
| Hand Surgeon            | Toxicology                |
| Internal Medicine       | Ultrasound                |
| Interpreter Services    | Urology                   |
| Mammography             | Wound Specialist          |
| MRI                     |                           |
| Neurologic Surgeon      |                           |

Administrative Orders

Additional Orders

**Administrative Orders** - This category includes orders that are for case management and other non-treatment related purposes.

**Additional Orders** - This category includes any orders that do not fall into one of the previous categories.

## Care Pathways and the CPOE .....

MedTrak's care pathway functionality is based on using the orders from the CPOE. When you build a care pathway in MedTrak, you select orders from the CPOE and attach them to the rules.

When a provider selects an order from the CPOE, the EHR places a single instance of that order resulting in an open order for completion. An order attached to a rule in a care pathway, can be a single order or a multiple order placed several times over a period of time.

For example, when treating a patient, the provider places an order for a pulse oximetry test for a patient. This order is placed in real-time and immediately becomes an open order for the clinical staff to complete for the patient. In a care pathway, the pulse oximetry order might be needed several times over the period of a couple of hours. The pulse oximetry order is attached to a rule that starts at the zero minute mark of the care pathway and is then automatically placed every half an hour over the next two hours. The structure and functionality of the care pathway enables the placement of orders to be immediate and in the future. The functionality of establishing rules for orders gives care pathways the power to be a very useful tool for certain presenting problems.

The use of MedTrak's CPOE is described in more detail in the next chapter and in several chapters in the *Medical Clinic Workflow* book.



# Building a Care Pathway In MedTrak

## 6



### Learning Outcomes

- ▶ How to build a care pathway in MedTrak



### Key Concepts

- ▶ Adding a care pathway name and description
- ▶ Adding categories to a care pathway
- ▶ Adding processes to a category
- ▶ Adding rules to process
- ▶ Creating freeform (custom) patient orders
- ▶ Changing the name of the care pathway or description
- ▶ Changing the sort order of records in a care pathway
- ▶ Changing a patient order that is attached to a rule
- ▶ Deleting a record in the care pathway
- ▶ Un-deleting a record in the care pathway
- ▶ Reviewing the log of a record in the care pathway
- ▶ Printing a care pathway

## Building a care pathway



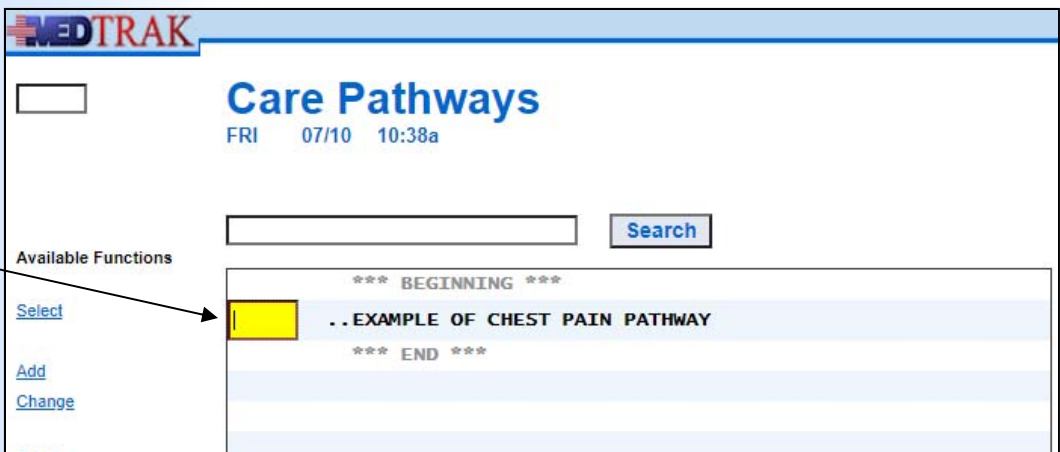
The following is an example of how to build a care pathway in MedTrak. By completing the steps in this chapter, you will learn the basics of how to add a new care pathway, add and change categories, add and change processes, attach rules (orders) to a process, and how to build a freeform rule when the rule does not exist in MedTrak's computerized provider order entry (CPOE) system. You will build just enough of a chest pain care pathway to develop an understanding of how to build your care pathway.

After logging into MedTrak, you land on the MedTrak Main Menu (shown below).



Care Pathways button

Click the *Care Pathways* button to display the Care Pathways screen (shown below).



Command field

When you first access this screen, the chest pain care pathway as described in the previous chapters appears. You can view this care pathway and use it for patient care, but you cannot change it.

With the cursor in the command field next to the **..Example of Chest Pain Pathway**, click the *Select* button, to display the Care Pathway screen. At this time, take a few minutes to review this screen (shown below).

The screenshot shows the MedTrak interface for a care pathway. At the top, it says 'Care Pathway' and 'FRI 07/10 10:40a'. The pathway name is 'EXAMPLE OF CHEST PAIN PATHWAY (17644)'. Below this are buttons for 'View by Category' and 'View by Time', and a search box. A table lists the pathway steps with color-coded headers: 'Pathway - black', 'Time/Category - green', 'Process - blue', and 'Rule - light blue'. The steps include: 'Example of Chest Pain Pathway', '0 MIN - ACTIVITIES', 'Bed Rest', 'BED REST - every 15 minutes for 180 minutes', '0 MIN - TESTS', 'EKG - within first 15 minutes', 'EKG', 'Creatine Kinase (CK) within first 30 minutes', 'CREATINE KINASE (CK)', 'Comprehensive Metabolic Panel (CMP)', 'COMP METABOLIC PANEL (CMP)', 'CBC with Diff', 'CBC W/DIFF', 'PT', 'PT', 'Type and serum (draw and hold)', 'TYPE & SERUM', 'ABG's - if pulse ox is <= 95%', and 'ABG'S'. On the left, there is an 'Available Functions' sidebar with options like 'Add Category', 'Add Process', 'Add Rule', 'Change', 'Delete', 'Un-delete', 'Log', 'Print', 'View Prints', 'More Functions', 'Page Up', 'Page Down', 'Exit Screen', and 'Main Menu'.

Care pathway name is in **black**

Categories are in **green**

Processes are in **dark blue**

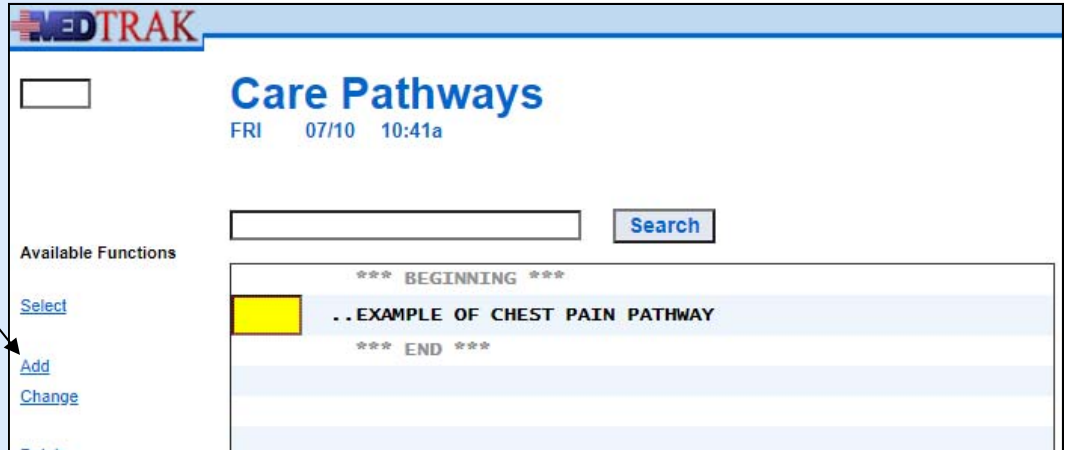
Rules (orders) are in **light blue**

1. Sign into **MedTrak**  
(You should be on the MedTrak Main Menu)
2. Click the **Care Pathway** button  
(You should be on the Care Pathways screen)
3. Be sure the cursor is in the command field next to the **..Example of Chest Pain Pathway**
4. Click the **Select** button  
(You should be on the Care Pathway screen)
5. Review this care pathway

Do These Steps  
<==== 6.01

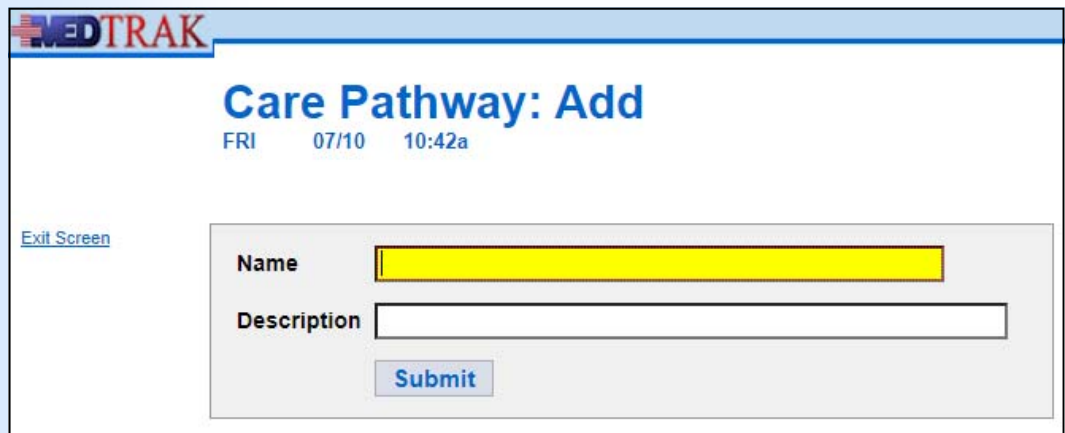
# Adding a new care pathway

After reviewing the example care pathway, click the *Exit Screen* button to return to the Care Pathways screen (shown below).



Add a new care pathway button

To add a new care pathway, click the *Add* button. The next screen to appear is the Care Pathway: Add screen (shown below).



Care Pathway: Add screen

On this screen, enter the name of the care pathway (**Chest Pain Pathway**) and the description (**1st Attempt - Chest Pain Pathway**) (shown below).



Care Pathway: Add screen filled in

After entering the care pathway name and description, click the *Submit* button. The next screen to appear is the Care Pathway screen for the new care pathway that you just added (shown below).

The screenshot shows the MEDTRAK interface for a Care Pathway. At the top, it says 'Care Pathway' with the date and time 'FRI 07/10 10:44a'. Below that, the pathway name is 'CHEST PAIN PATHWAY (25407)'. There are buttons for 'View by Category' and 'View by Time', and a search bar. A table lists the pathway details, with the first row highlighted: '1st Attempt - Chest Pain Pathway'. A sidebar on the left lists 'Available Functions' such as 'Add Category', 'Add Process', 'Add Rule', 'Change', 'Delete', 'Un-delete', 'Log', 'Print', 'View Prints', and 'More Functions'. Callout boxes on the right point to the pathway name and description in the table.

Care Pathway  
screen

Care pathway  
name

Care pathway  
description

1. Click the *Exit Screen* button  
(You should be back on the Care Pathways screen)
2. Click the *Add* button  
(You should be on the Care Pathway: Add screen)
3. Type "Chest Pain Pathway" in the **Name** field
4. Type "1st Attempt - Chest Pain Pathway" in the **Description** field
5. Click the *Submit* button  
(You should be on the Care Pathway screen)

Do These Steps  
<==== 6.02

## Adding care pathway categories

The first step, after adding the care pathway, is to start adding the categories. To add a category to the new care pathway, with the cursor in the command field next to **1st attempt - Chest Pain Pathway**, click the *Add Category* button. The next screen to appear is the Care Pathway / Category: Add screen (shown on the next page).



Category: Add screen

In this example, the first category you will add is the **Activities** category at the **zero minute** mark. This information is filled in on the Care Pathway / Category: Add screen (shown below).

Activities category at zero minutes

After entering the category information, click the **Submit** button. The Care Pathway / Category: Add screen refreshes with the message “**Successful add - ready to add another...**” at the top (shown below).

Successful add message

Now enter the information for the **Diet** category at the **zero minute** mark (shown below).

**MEDTRAK**

## Care Pathway / Category: Add

FRI 07/10 10:58a

**i Successful add - ready to add another...**

Pathway: **CHEST PAIN PATHWAY (25407)**

[Exit Screen](#)

Sort:

Category:

Value:

Unit: **minutes** ▼

Diet category at zero minutes

Click the **Submit** button to add the **Diet** category.

You could continue to add the rest of the categories at this time, but for the purposes of learning how to build a care pathway, click the **Exit Screen** button to return to the **Care Pathway** screen showing the addition of the **Activities** and **Diet** categories at the **zero minute** mark (shown below).

**MEDTRAK**

Active Only ▼

## Care Pathway

FRI 07/10 11:05a

Pathway: **CHEST PAIN PATHWAY (25407)**

Pathway - black Time/Category - green Process - blue Rule - light blue

\*\*\* BEGINNING \*\*\*

Pathway	Time/Category	Process	Rule
1st Attempt - Chest Pain Pathway	0 MIN - Activities		
	0 MIN - Diet		
*** END ***			

Available Functions

- [Add Category](#)
- [Add Process](#)
- [Add Rule](#)
- [Change](#)
- [Delete](#)
- [Un-delete](#)
- [Log](#)

Activities and Diet categories added

1. With the cursor in the command field next to **1st Attempt - Chest Pain Pathway**
2. Click the **Add Category** button  
(You should be on the **Care Pathway / Category: Add** screen)

Do These Steps  
<==== 6.03

Do These Steps  
6.04 =====>

1. Type "**Activities**" in the **Category** field
2. Type **0** (zero) in the **Value** field
3. Select **minutes** from the **Unit** drop-down list
4. Click the **Submit** button  
(The Care Pathway / Category: Add screen refreshes)  
(The message "**Successful add - ready to add another...**" appears)
5. To add the **Diet** category, type "**Diet**" in the **Category** field
6. Type **0** (zero) in the **Value** field
7. Select **minutes** from the **Unit** drop-down list
8. Click the **Submit** button  
(The Care Pathway / Category: Add screen refreshes)  
(The message "**Successful add - ready to add another...**" appears)
9. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)  
(Both the **Activities** and **Diet** categories should appear)

Now build the remaining categories in this example. With the cursor next to the care pathway description, click the **Add Category** button. On the Care Pathway / Category: Add screen enter the **Tests** category at the **zero minute** mark (shown below).

Tests  
category at zero  
minutes



Now add the **Tests** category at the **fifteen minute** mark (shown below).

**Care Pathway / Category: Add**  
 FRI 07/10 11:07a  
 Successful add - ready to add another...  
 Pathway: CHEST PAIN PATHWAY (25407)  
 Exit Screen  
 Sort:   
 Category:   
 Value:   
 Unit:   
 Submit

Tests category at fifteen minutes

After adding both of the **Tests** categories, click the *Exit Screen* button to return to the Care Pathway screen showing all of the categories (shown below).

**Care Pathway**  
 FRI 07/10 11:09a  
 Pathway: CHEST PAIN PATHWAY (25407)  
 View by Category View by Time  
 Search  
 Available Functions: Add Category, Add Process, Add Rule, Change, Delete  
 Pathway - black Time/Category - green Process - blue Rule - light blue  
 \*\*\* BEGINNING \*\*\*  
 1st Attempt - Chest Pain Pathway  
 0 MIN - Activities  
 0 MIN - Diet  
 0 MIN - Tests  
 15 MIN - Tests  
 \*\*\* END \*\*\*

All categories added

1. Be sure the cursor is in the command field next to **1st Attempt - Chest Pain Pathway**
2. Click the *Add Category* button  
(You should be on the Care Pathway / Category: Add screen)
3. Type "Tests" in the **Category** field
4. Type **0** (zero) in the **Value** field
5. Select **minutes** from the **Unit** drop-down list

Do These Steps  
 <==== 6.05

Do These Steps  
6.06 =====>

1. Click the *Submit* button  
(The Care Pathway / Category: Add screen refreshes)  
(The message “**Successful add - ready to add another...**” appears)
2. To add the **Tests** category at the **fifteen minute** mark, type “**Tests**” in the **Category** field
3. Type **15** (fifteen) in the **Value** field
4. Select **minutes** from the **Unit** drop-down list
5. Click the *Submit* button  
(The Care Pathway / Category: Add screen refreshes)  
(The message “**Successful add - ready to add another...**” appears)
6. Click the *Exit Screen* button  
(You should be back on the Care Pathway screen)  
(All of the categories should appear)

## Adding processes to categories

Now let’s add the **Bed Rest** process to the **Activities** category at the **zero minute** mark. To add a process to a category, you need place the cursor next to the category.

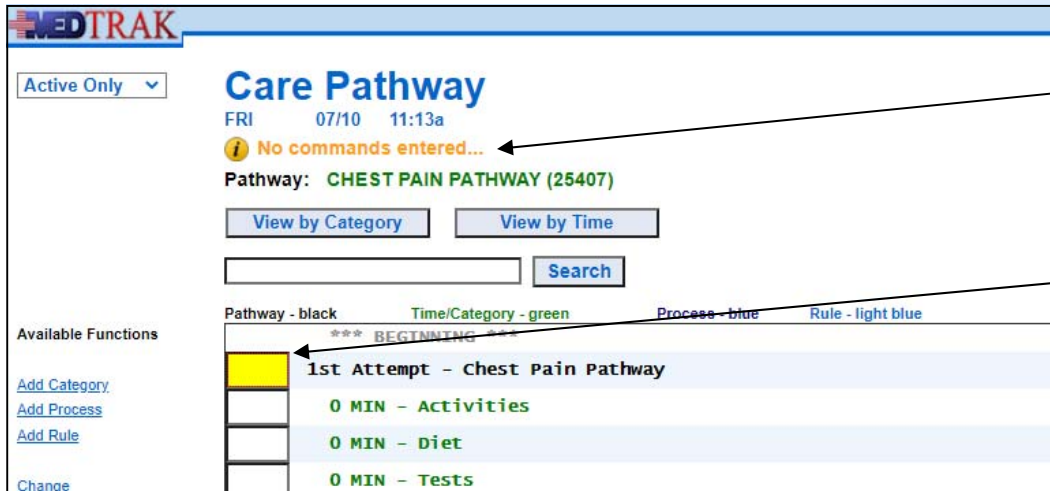
If you have still have the cursor next to the care pathway description when you click the *Add Process* button, you will get the following error message “**Can only Add Process from Category level.**” Also, MedTrak will leave the cursor in the command field next to the care pathway description. In the command field will be the **ADP** command for adding a process (shown below).

Add process error message

Add process command (ADP) at care pathway level



If this occurs, you need to clear the **ADP** command from the command field and press the **ENTER** key. The Care Pathway screen refreshes with the message “**No commands entered...**” (shown below).



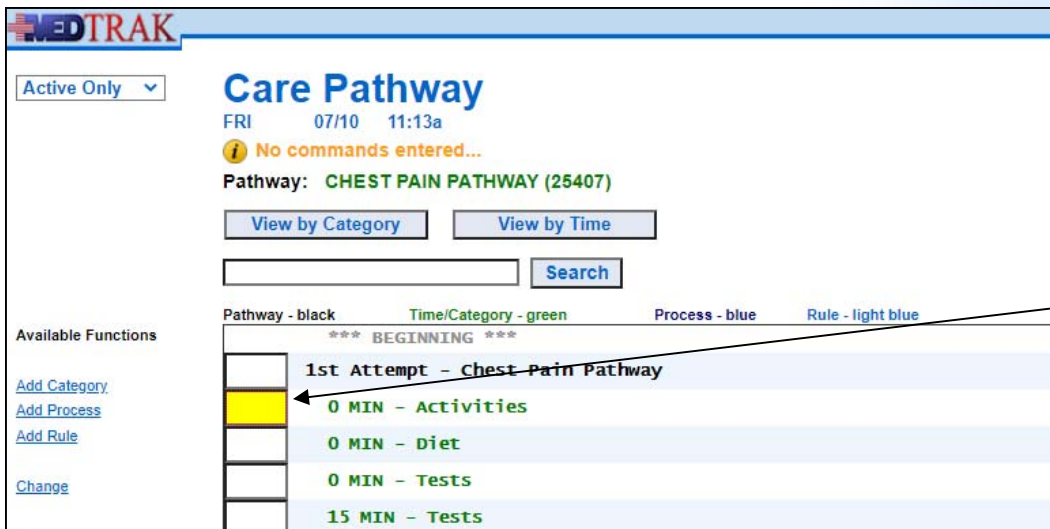
Message

Command field cleared

1. Place the cursor next to **1st Attempt - Chest Pain Pathway**
2. Click the **Add Process** button  
(The message “**Can only Add Process from Category level.**” appears)  
(The **ADP** command is in the command field)
3. Clear the **ADP** command from the command field
4. Press the **ENTER** key  
(The Care Pathway screen refreshes)  
(The message “**No commands entered...**” appears)

Do These Steps  
<==== 6.07

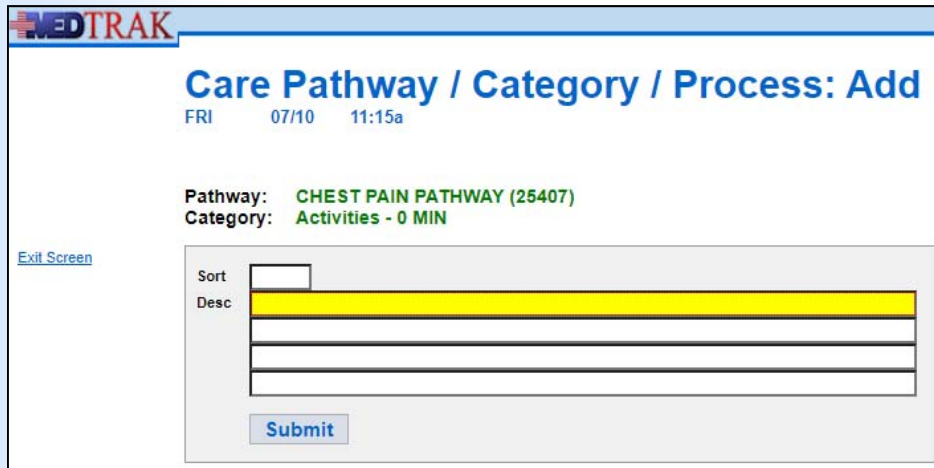
Place the cursor in the command field next to the **Activities** category at the **zero minute** mark (shown below).



Cursor next to **Activities** at zero minute mark

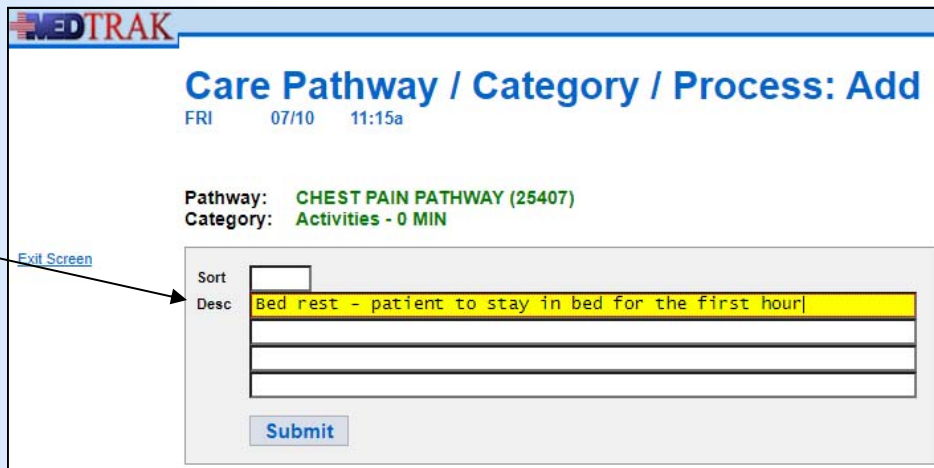
Click the *Add Process* button. The next screen to appear is the Care Pathway / Category / Process: Add screen (shown below).

Process: Add screen



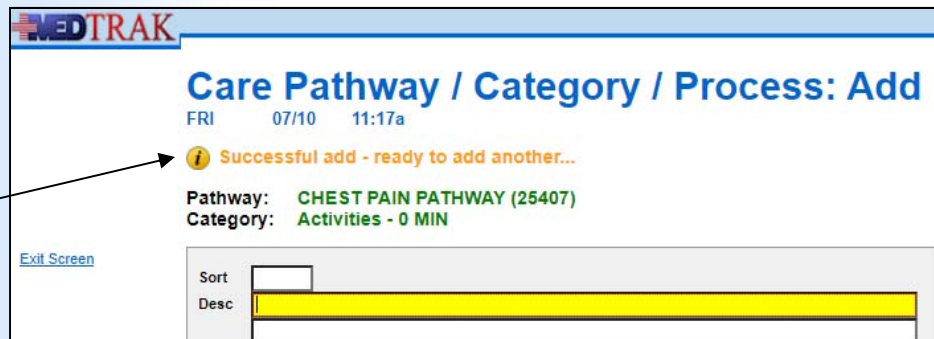
The process for the **Activities** category at the **zero minute** mark is to instruct the patient to stay in bed for the first hour. In the process **Desc** (description) field, type the following **“Bed rest - patient to stay in bed for the first hour”** (shown below).

Process description



Click the *Submit* button. All of the MedTrak add screens work in a similar manner. The category, process, or rule will add and the screen will refresh for you to add the next one at that level (shown below).

Successful add message





Now check out how adding the first process looks. Click the *Exit Screen* button to return to the Care Pathway screen (shown below).

The screenshot shows the MEDTRAK interface for the 'Care Pathway' screen. At the top, it displays 'Active Only' and the pathway name 'CHEST PAIN PATHWAY (25407)'. Below this, there are buttons for 'View by Category' and 'View by Time', and a search bar. The main content area shows a list of processes under the 'Activities' category. The processes listed are: '1st Attempt - Chest Pain Pathway', '0 MIN - Activities', 'Bed rest - patient to stay in bed for the first hour', '0 MIN - Diet', and '0 MIN - Tests'. A callout box labeled 'Bed rest process' points to the 'Bed rest - patient to stay in bed for the first hour' process.

1. Place the cursor in the command field next to the **Activities** category at the **zero minute** mark
2. Click the *Add Process* button  
(You should be on the Care Pathway / Category / Process: Add screen)
3. Type “**Bed rest - patient to stay in bed for the first hour**” in the **Desc** field
4. Click the *Submit* button  
(The Care Pathway / Category / Process: Add screen refreshes)  
(The message “**Successful add - ready to add another...**” appears)
5. Click the *Exit Screen* button  
(You should be back on the Care Pathway screen)  
(The **Bed Rest** process should appear)

Do These Steps  
<==== 6.08

## Adding rules to processes

Now add the **Bed Rest** rule (patient order) to the **Bed Rest** process. To add a rule to a process, you need place the cursor next to the process and click the *Add Rule* button. The next screen to appear is the Care Pathway / Category / Process / Rule: Add screen (shown on the next page).

Rule: Add screen

Order field

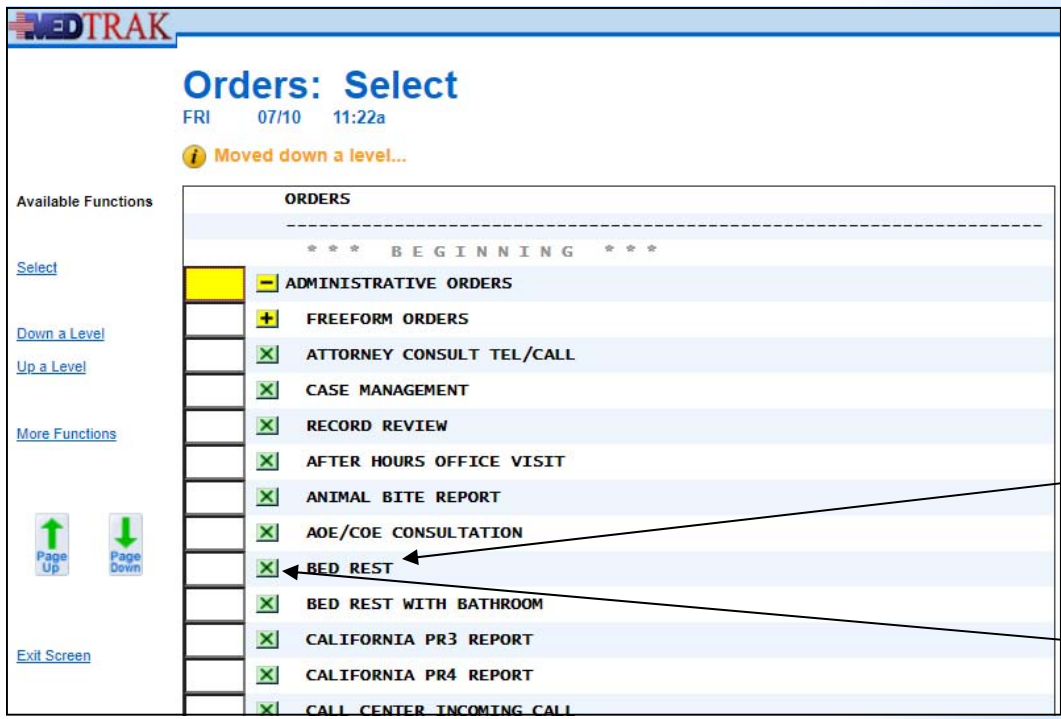
Select an Order button

Care pathway rules in MedTrak are patient orders which you select from the CPOE database. You learned about the CPOE database earlier in this book. In this example, the **Bed Rest** order is located in the **Administrative Orders** subsection of the CPOE. With the cursor in the **Order** field (as shown above), click the **Select an Order** button. The next screen to appear is the Orders: Select screen (shown below).

Orders: Select screen

Administrative Orders

To access the **Administrative Orders**, click the yellow plus sign next to **Administrative Orders**. The next screen to appear is the **Orders: Select** screen for the **Administrative Orders** subsection of the CPOE database (shown below).

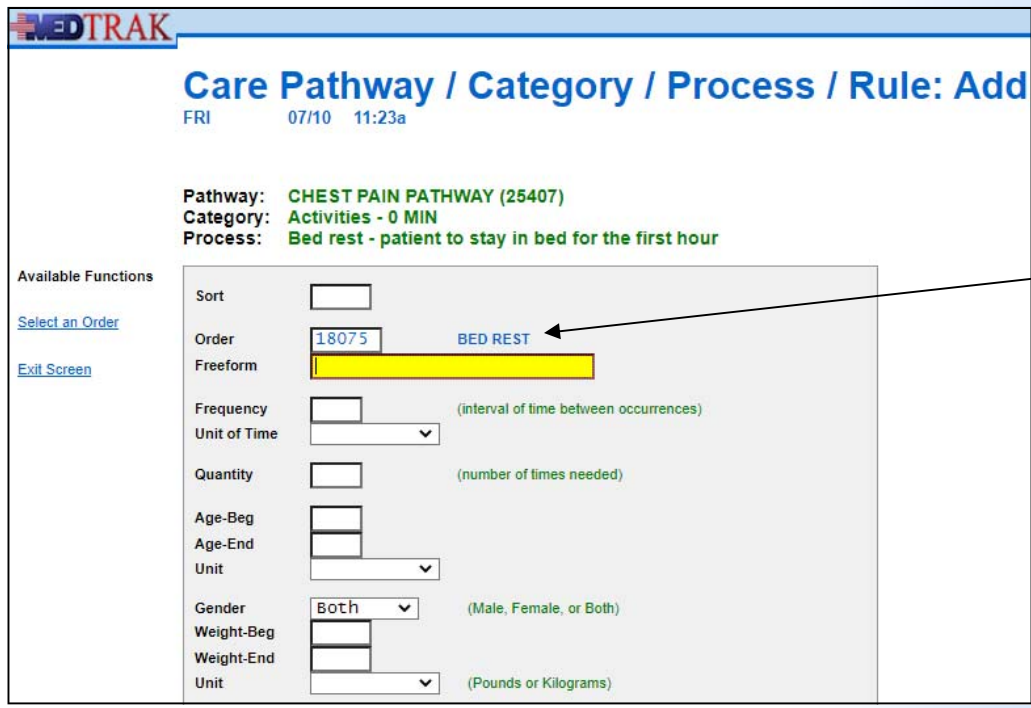


Orders: Select screen for Administrative Orders

Bed Rest order

Green X

Now select the **Bed Rest** order. To select an order, click the green X next to the order. The **Care Pathway / Category / Process / Rule: Add** screen refreshes displaying the **Bed Rest** order (shown below).



Bed Rest order selected for rule

Now build the parameters for the **Bed Rest** rule. The patient is to stay in bed for the first hour, and you want to remind the patient of this every fifteen minutes. So, the **Frequency** (or interval of time between occurrences) is fifteen, the **Unit of Time** is minutes, and the **Quantity** is four (shown below).

Frequency

Unit of Time

Quantity

**MEDTRAK**  
**Care Pathway / Category / Process / Rule: Add**  
 FRI 07/10 11:23a

Pathway: CHEST PAIN PATHWAY (25407)  
 Category: Activities - 0 MIN  
 Process: Bed rest - patient to stay in bed for the first hour

Available Functions  
[Select an Order](#)  
[Exit Screen](#)

Sort:   
 Order: 18075 BED REST  
 Freeform:   
 Frequency: 15 (interval of time between occurrences)  
 Unit of Time: minutes  
 Quantity: 4 (number of times needed)  
 Age-Beg:   
 Age-End:   
 Unit:   
 Gender: Both (Male, Female, or Both)  
 Weight-Beg:   
 Weight-End:   
 Unit:  (Pounds or Kilograms)  
 Submit

For the purposes of building this sample care pathway, the remaining fields on this screen will not be used. After entering the parameters of the **Bed Rest** rule, click the **Submit** button to attach the rule to the **Bed Rest** process. The Care Pathway / Category / Process / Rule: Add screen refreshes with the message **“Successful add - ready to add another...”** at the top (shown below).

Successful add message

**MEDTRAK**  
**Care Pathway / Category / Process / Rule: Add**  
 FRI 07/10 11:25a

Successful add - ready to add another...

Pathway: CHEST PAIN PATHWAY (25407)  
 Category: Activities - 0 MIN  
 Process: Bed rest - patient to stay in bed for the first hour

Available Functions  
[Select an Order](#)  
[Exit Screen](#)

Sort:   
 Order:   
 Freeform:   
 Frequency:  (interval of time between occurrences)  
 Unit of Time:   
 Quantity:  (number of times needed)  
 Age-Beg:   
 Age-End:   
 Unit:



Now check out how adding the first rule looks. Click the *Exit Screen* button to return to the Care Pathway screen which now displays the **Bed Rest** rule (shown below).

The screenshot shows the MEDTRAK interface for the 'Care Pathway' screen. The pathway is 'CHEST PAIN PATHWAY (25407)'. The screen displays a list of processes and rules. The 'Bed rest - patient to stay in bed for the first hour' rule is highlighted in yellow. A callout box points to this rule with the text 'Bed Rest rule (patient order)'.

1. Place the cursor next to the **Bed rest** process
2. Click the *Add Rule* button  
(You should be on the Care Pathway / Category / Process / Rule: Add screen)
3. Be sure the cursor is in the **Order** field
4. Click the *Select an Order* button  
(You should be on the Orders: Select screen)
5. Click the yellow plus sign next to **Administrative Orders**  
(You should be on the Orders: Select screen for **Administrative Orders**)
6. Click the green X next to the **Bed Rest** order  
(You should be back on the Care Pathway / Category / Process / Rule: Add screen)  
(The **Bed Rest** order is now attached to the rule)
7. Type **15** (fifteen) in the **Frequency** field
8. Select **minutes** from the **Unit of Time** drop-down list
9. Type **4** (four) in the **Quantity** field

Do These Steps  
<==== 6.09

Do These Steps  
6.10 =====>

1. Click the **Submit** button  
(The Care Pathway / Category / Process / Rule: Add screen refreshes)  
(The message “**Successful add - ready to add another...**” appears)
2. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)  
(The **Bed Rest** rule is now attached to the **Bed Rest** process)

Now add the **Diet** rule. With the cursor next to the **Diet** category at the **zero minute** mark, click the **Add Rule** button. The Care Pathway screen refreshes with the following error message “**Can only Add Rule from Process level.**” (shown below).

Add rule error message

Add rule command (ADR) at category level

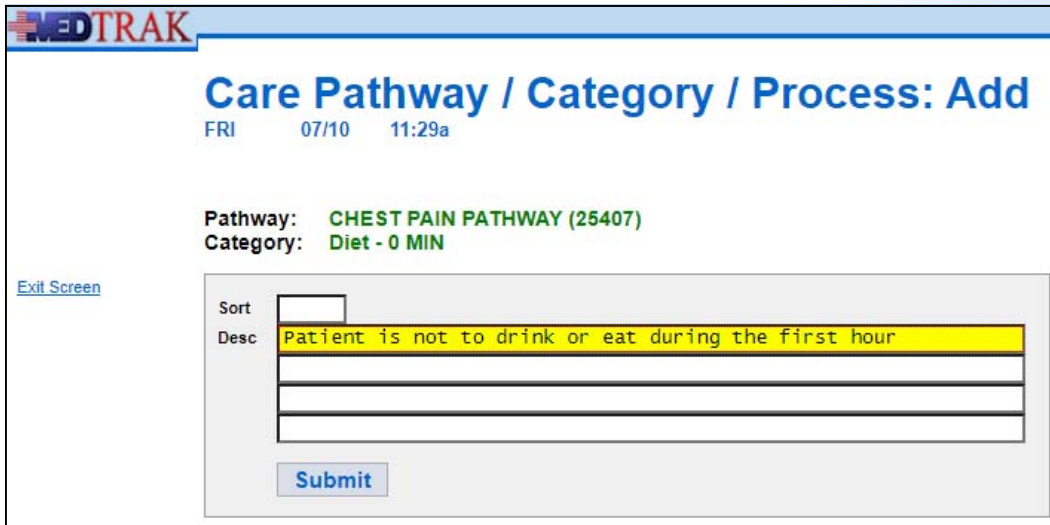
The screenshot shows the MEDTRAK interface for a Care Pathway. At the top, it says "Care Pathway" and "FRI 07/10 11:27a". A red error message reads: "Can only Add Rule from Process level." Below this, it says "Pathway: CHEST PAIN PATHWAY (25407)". There are buttons for "View by Category" and "View by Time", and a search box. A legend indicates: Pathway - black, Time/Category - green, Process - blue, Rule - light blue. On the left, "Available Functions" includes "Add Category", "Add Process", "Add Rule", "Change", "Delete", "Un-delete", "Log", "Print", and "View Prints". The main table lists categories with their durations and processes:

Category	Duration	Process
1st Attempt - Chest Pain Pathway		
0 MIN - Activities		
Bed rest - patient to stay in bed for the first hour		
BED REST - every 15 minutes for 60 minutes		
0 MIN - Diet		
0 MIN - Tests		
15 MIN - Tests		

The "Add Rule" button is highlighted in yellow, and an arrow points to the "ADR" command in the "Diet" row. Another arrow points to the error message.

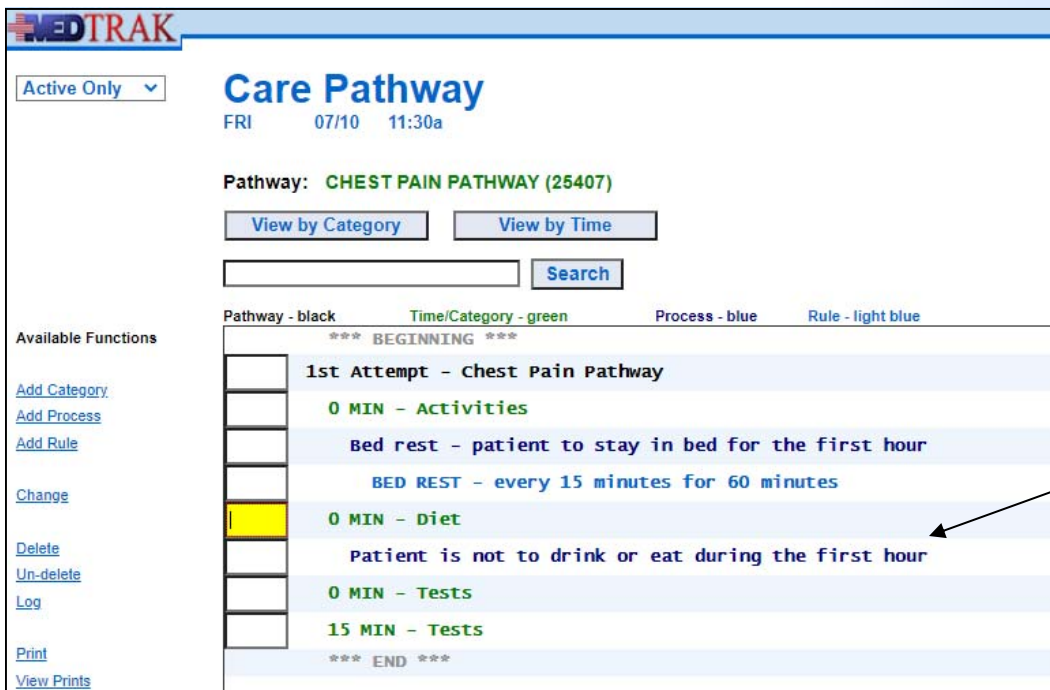
You need to add the **NPO (nothing per oral)** process to the **Diet** category before adding the rule (attaching the order). With the cursor in the command field for the **Diet** category at the **zero minute** mark, clear the **ADR** command and then click the **Add Process** button.

The next screen to appear is the Care Pathway / Category / Process: Add screen. On this screen, type “**Patient is not to drink or eat during the first hour**” in the **Desc** field (shown on the next page).



Process: Add screen

Click the *Submit* button to add this process. The screen refreshes and is ready for you to add another process. Click the *Exit Screen* button. The Care Pathway screen reappears displaying the new process (shown below).



Diet process

1. Place the cursor in the command field next to the **Diet** category at the **zero minute** mark
2. Click the *Add Rule* button  
(The message “Can only Add Rule from Process level.” appears)  
(The ADR command is in the command field)
3. Clear the **ADR** command from the command field

Do These Steps  
<==== 6.11

Do These Steps  
6.12 =====>

1. Click the **Add Process** button  
(You should be on the Care Pathway / Category / Process: Add screen)
2. Type **“Patient is not to drink or eat during the first hour”** in the **Desc** field
3. Click the **Submit** button  
(The Care Pathway / Category / Process: Add screen refreshes)  
(The message **“Successful add - ready to add another...”** appears)
4. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)  
(The **Diet** process should appear)

## Creating your own rules (patient orders) ●●●●●●●●

MedTrak’s CPOE database does not contain all of the patient orders (rules) that you might need to build your care pathway. In this example, the **NPO - nothing per oral** order does not exist.

Place the cursor in the command field next to the **Diet** process, click the **Add Rule** button. The next screen to appear is the Care Pathway / Category / Process / Rule: Add screen (shown below).

Rule: Add screen

**MEDTRAK**

### Care Pathway / Category / Process / Rule: Add

FRI 07/10 11:31a

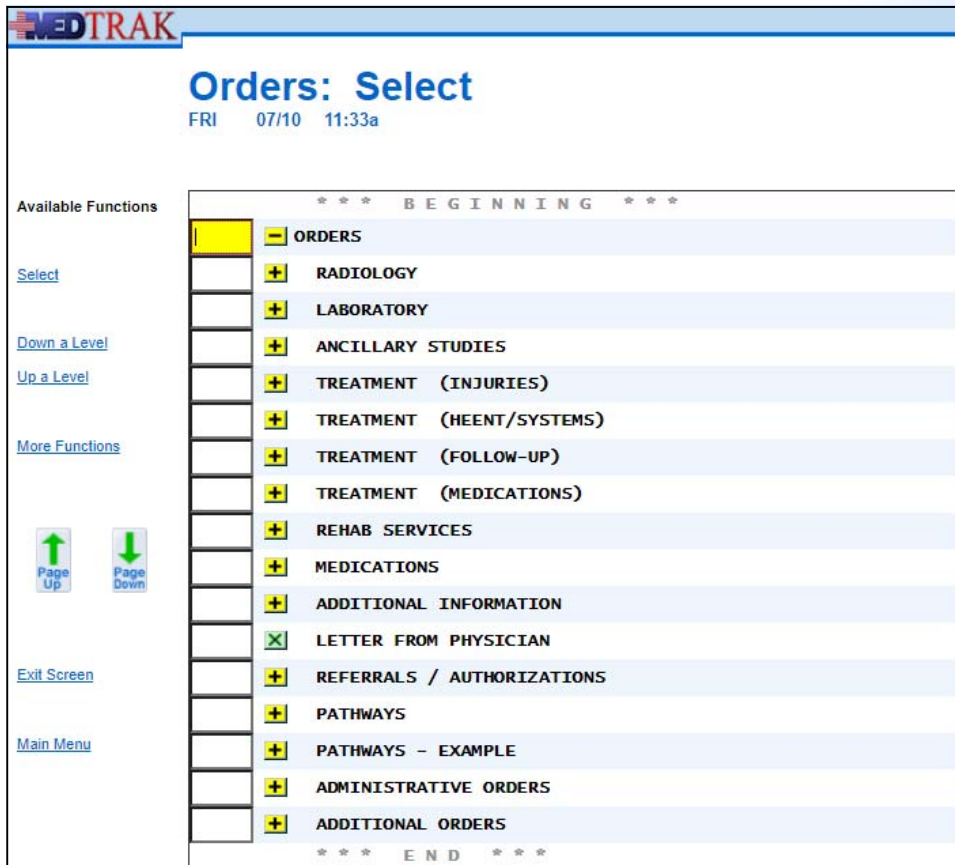
Pathway: **CHEST PAIN PATHWAY (25407)**  
 Category: **Diet - 0 MIN**  
 Process: **Patient is not to drink or eat during the first hour**

Available Functions  
[Select an Order](#)  
[Exit Screen](#)

Sort:   
 Order:   
 Freeform:   
 Frequency:  (interval of time between occurrences)  
 Unit of Time:   
 Quantity:  (number of times needed)  
 Age-Beg:   
 Age-End:   
 Unit:   
 Gender:  Both (Male, Female, or Both)  
 Weight-Beg:   
 Weight-End:   
 Unit:  (Pounds or Kilograms)

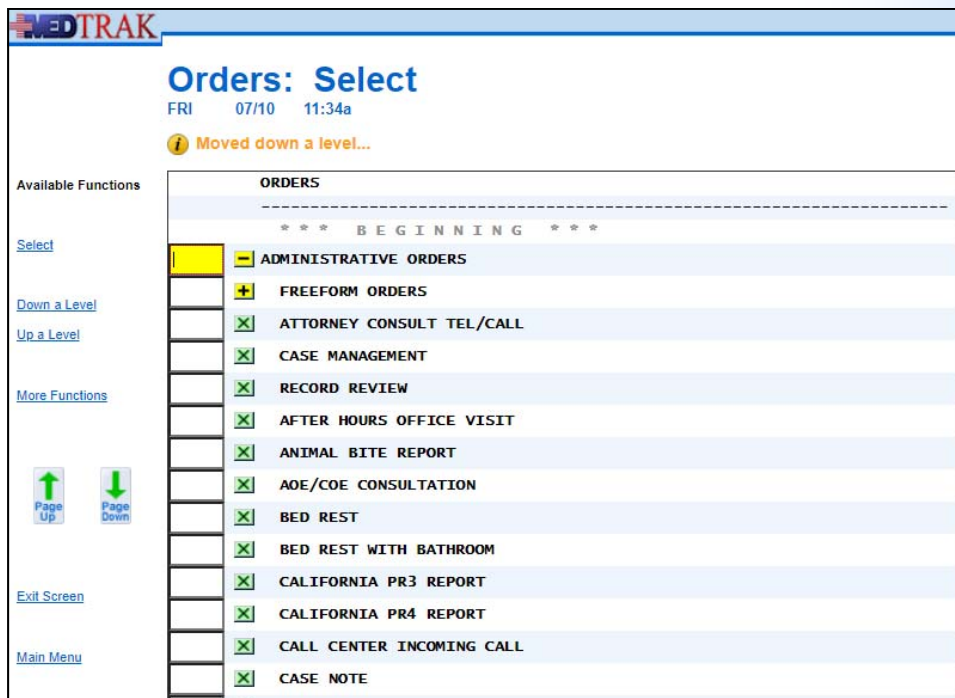


With the cursor in the **Order** field, click the *Select an Order* button. The next screen to appear is the Orders: Select screen (shown below).



Orders: Select screen

To access the **Administrative Orders**, click the yellow plus sign next to **Administrative Orders**. The next screen to appear is Orders: Select screen for the **Administrative Orders** subsection of the CPOE database (shown below).

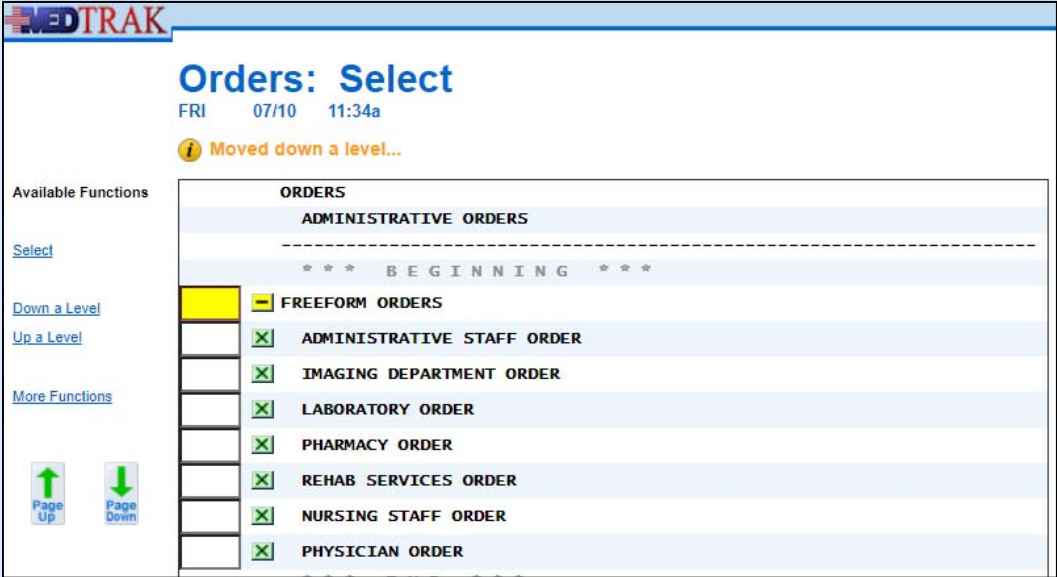


Orders: Select screen for Administrative Orders

Click the *Page Down* button to view the next screen of Administrative Orders. You will not find the **NPO** order because it does not exist. Now click the *Page Up* button to return to the first screen.

MedTrak created a way for you to build your own orders when you cannot locate them in MedTrak's CPOE database. They are called freeform orders. You will notice a selection called **Freeform Orders** that is located on the first screen of the Orders: Select screen for the **Administrative Orders** subsection. To access these orders, click the yellow plus sign next to the **Freeform Orders**. The next screen to appear is the Orders: Select screen for the **Freeform Orders** subsection (shown below).

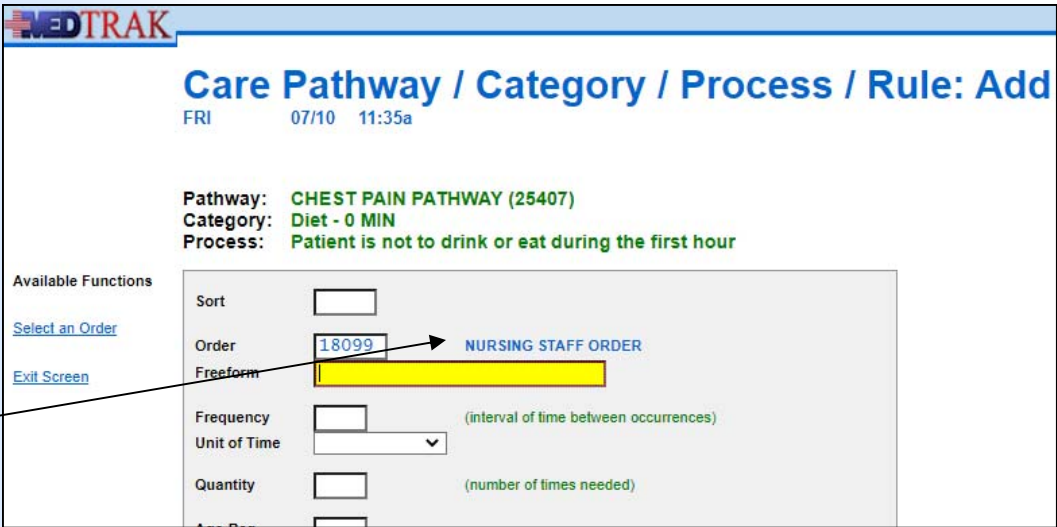
Orders: Select screen for Freeform Orders



The **NPO** order is a nursing staff order. To select the **Nursing Staff Order**, click the green X next to the order. The Care Pathway / Category / Process / Rule: Add screen refreshes displaying the **Nursing Staff Order** (shown below).

Rule: Add screen

Nursing Staff Order



1. Place the cursor in the command field next to the **Diet** process on the **Care Pathway** screen
2. Click the **Add Rule** button  
(You should be on the **Care Pathway / Category / Process / Rule: Add** screen)
3. Click the **Select an Order** button  
(You should be on the **Orders: Select** screen)
4. Click the yellow plus sign next to **Administrative Orders**
5. Click the **Page Down** button
6. Observe that the **NPO - nothing per oral** order does not appear
7. Click the **Page Up** button  
(You should be back on the first **Orders: Select** screen)
8. Click the yellow plus sign next to **Freeform Orders**  
(You should be on the **Orders: Select** screen for **Freeform Orders**)
9. Click the green X next to the **Nursing Staff Order**  
(You should be back on the **Care Pathway / Category / Process / Rule: Add** screen)  
(The **Nursing Staff Order** should appear)

Do These Steps  
<==== 6.13

The **NPO** order is also for the first hour and should be repeated four times like the **Bed Rest** order. To create this order, type “**NPO - nothing per oral**” in the **Freeform** field. The patient is not to drink or eat during the first hour, and you want to remind the patient of this every fifteen minutes. So, the **Frequency** (or interval of time between occurrences) is fifteen, the **Unit of Time** is minutes, and the **Quantity** is four (shown below).

**MEDTRAK**

**Care Pathway / Category / Process / Rule: Add**  
FRI 07/10 11:35a

Pathway: CHEST PAIN PATHWAY (25407)  
Category: Diet - 0 MIN  
Process: Patient is not to drink or eat during the first hour

Available Functions  
[Select an Order](#)  
[Exit Screen](#)

Sort

Order  NURSING STAFF ORDER

Freeform

Frequency  (interval of time between occurrences)

Unit of Time

Quantity  (number of times needed)

NPO order details

For the purposes of building this sample care pathway, the remaining fields on this screen will not be used. After entering the parameters of the **NPO** rule, click the **Submit** button to attach the rule to the **Diet** process. The Care Pathway / Category / Process / Rule: Add screen refreshes with the message “**Successful add - ready to add another...**” at the top. Click the **Exit Screen** button to return to the Care Pathway screen (shown below).

The screenshot shows the MEDTRAK Care Pathway interface. At the top, it displays 'Active Only' and 'Care Pathway' with the date and time 'FRI 07/10 11:38a'. The pathway is identified as 'CHEST PAIN PATHWAY (25407)'. There are buttons for 'View by Category' and 'View by Time', and a search bar. Below this is a table of rules with columns for Pathway, Time/Category, Process, and Rule. The rule 'NPO - NOTHING PER ORAL - every 15 minutes for 60 minutes' is highlighted in yellow. A callout box on the left points to this rule with the text 'NPO rule (patient order)'. On the far left, there is a list of 'Available Functions' including Add Category, Add Process, Add Rule, Change, Delete, Un-delete, Log, Print, View Prints, and More Functions.

NPO rule  
(patient order)

Do These Steps  
6.14 =====>

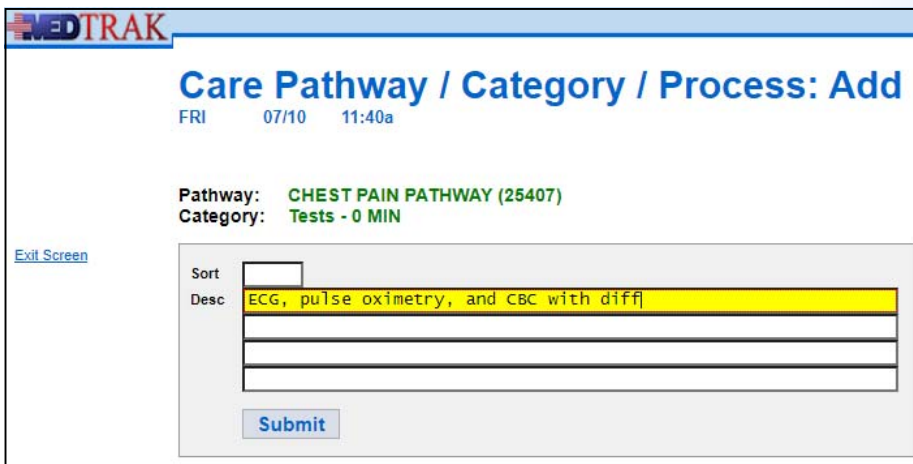
1. Type “NPO - nothing per oral” in the **Freeform** field
2. Type **15** (fifteen) in the **Frequency** field
3. Select minutes from the **Unit of Time** drop-down list
4. Type **4** (four) in the **Quantity** field
5. Click the **Submit** button  
(The Care Pathway / Category / Process / Rule: Add screen refreshes)  
(The message “**Successful add - ready to add another...**” appears)
6. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)  
(The **NPO** rule is now attached to the **Diet** process)



You learned how to add categories to your care pathway. You also learned how to add processes to a category. Then you learned how to add a rule (patient order) to a process and how to build a freeform order for a rule. These are the basic functions needed for building a care pathway in MedTrak.

Now build the remaining processes and attach the rules to them for this example care pathway.

The next process to build is the first **Tests** process. With the cursor next to the **Tests** category at the **zero minute** mark, click the **Add Process** button. On the **Care Pathway / Category / Process: Add** screen, type **“ECG, pulse oximetry, and CBC with diff”** in the **Desc** field (shown below).



Process: Add screen

Click the **Submit** button to add the process, and then click the **Exit Screen** button to return to the **Care Pathway** screen (shown below).



ECG, pulse ox, and CBC process

Now add the **ECG with report**, **Pulse Oximetry**, and **CBC with differential and with platelets** tests (rules) to the new process. Each of these tests will only be ordered once at this time frame.

Place the cursor next to the **ECG, pulse oximetry, and CBC with diff** process and click the **Add Rule** button. Then click the **Select an Order** button to locate the **ECG w/report** test which is in the **ECG** subsection of the **Ancillary Studies** section of MedTrak's CPOE. Select the **ECG w/report** order and then type a one in the **Quantity** field (shown below).

ECG w/report order

The screenshot shows the MedTrak interface for adding a rule. The title is "Care Pathway / Category / Process / Rule: Add". The pathway is "CHEST PAIN PATHWAY (25407)", the category is "Tests - 0 MIN", and the process is "ECG, pulse oximetry, and CBC with diff". Under "Available Functions", the "Order" field is set to "12213" and "ECG W/REPORT". The "Quantity" field is set to "1".

Click the **Submit** button to add the rule (patient order) to the process.

Now add the **Pulse Oximetry** order to this process. Click the **Select an Order** button to locate the **Pulse Oximetry** test which is in the **Ancillary Studies** section of MedTrak's CPOE. Select the **Pulse Oximetry** order and then type a one in the **Quantity** field (shown below).

Pulse Oximetry order

The screenshot shows the MedTrak interface for adding a rule. The title is "Care Pathway / Category / Process / Rule: Add". The pathway is "CHEST PAIN PATHWAY (25407)", the category is "Tests - 0 MIN", and the process is "ECG, pulse oximetry, and CBC with diff". Under "Available Functions", the "Order" field is set to "15621" and "PULSE OXIMETRY". The "Quantity" field is set to "1".

Click the **Submit** button to add the rule (patient order) to the process.

Now add the **CBC with differential and with platelets** order to this process. Click the *Select an Order* button to locate the **CBC w/diff w/platelet** laboratory test which is in the **Hematology** subsection of the **Laboratory** section of MedTrak's CPOE. Select the **CBC w/diff w/platelet** order and then type a one in the **Quantity** field (shown below).

**Care Pathway / Category / Process / Rule: Add**  
 FRI 07/10 11:48a

Pathway: CHEST PAIN PATHWAY (25407)  
 Category: Tests - 0 MIN  
 Process: ECG, pulse oximetry, and CBC with diff

Available Functions  
[Select an Order](#)  
[Exit Screen](#)

Sort:   
 Order: 12532 CBC W/DIFF W/PLATELET  
 Freeform:   
 Frequency:  (interval of time between occurrences)  
 Unit of Time:   
 Quantity: 1 (number of times needed)  
 Age-Beg:

CBC w/diff w/platelet order

Click the *Submit* button to add the rule, and then click the *Exit Screen* button to return to the Care Pathway screen (shown below).

**Care Pathway**  
 FRI 07/10 11:48a

Pathway: CHEST PAIN PATHWAY (25407)  
[View by Category](#) [View by Time](#)  
 [Search](#)

Pathway - black Time/Category - green Process - blue Rule - light blue

Available Functions  
[Add Category](#)  
[Add Process](#)  
[Add Rule](#)  
[Change](#)  
[Delete](#)  
[Un-delete](#)  
[Log](#)  
[Print](#)  
[View Prints](#)  
[More Functions](#)  
[Page Up](#) [Page Down](#)

\*\*\* BEGINNING \*\*\*  
 1st Attempt - Chest Pain Pathway  
 0 MIN - Activities  
 Bed rest - patient to stay in bed for the first hour  
 BED REST - every 15 minutes for 60 minutes  
 0 MIN - Diet  
 Patient is not to drink or eat during the first hour  
 NPO - NOTHING PER ORAL - every 15 minutes for 60 minutes  
 0 MIN - Tests  
 ECG, pulse oximetry, and CBC with diff  
 ECG W/REPORT  
 PULSE OXIMETRY  
 CBC W/DIFF W/PLATELET  
 15 MIN - Tests  
 \*\*\* END \*\*\*

3 new rules

Do These Steps  
6.15 =====>

1. Place the cursor next to the **Tests** category at **zero minutes**
2. Click the **Add Process** button  
(You should be on the Care Pathway / Category / Process: Add screen)
3. Type **“ECG, pulse oximetry, and CBC with diff”** in the **Desc** field
4. Click the **Submit** button  
(Care Pathway / Category / Process: Add screen refreshes)  
(**“Successful add - ready to add another...”** appears)
5. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)  
(The **ECG, pulse oximetry, and CBC with diff** process should appear)

Do These Steps  
6.16 =====>

1. Place the cursor next to the **ECG, pulse oximetry, and CBC with diff** process
2. Click the **Add Rule** button  
(You should be on the Care Pathway / Category / Process / Rule: Add screen)
3. Be sure the cursor is in the **Order** field
4. Click the **Select an Order** button  
(You should be on the Orders: Select screen)
5. Click the **yellow plus sign** next to **Ancillary Studies**  
(You should be on Orders: Select for **Ancillary Studies**)
6. Click the **yellow plus sign** next to **ECG**  
(You should be on the Orders: Select screen for ECG)
7. Click the **green X** next to the **ECG w/report** order  
(You should be back on the Care Pathway / Category / Process / Rule: Add screen)  
(The **ECG w/report** order is now attached to the rule)
8. Type **1 (one)** in the **Quantity** field
9. Click the **Submit** button  
(The Care Pathway / Category / Process / Rule: Add screen refreshes)  
(The message **“Successful add - ready to add another...”** appears)



1. Be sure the cursor is in the **Order** field
2. Click the **Select an Order** button  
(You should be on the Orders: Select screen)
3. Click the yellow plus sign next to **Ancillary Studies**  
(You should be on Orders: Select for **Ancillary Studies**)
4. Click the green X next to the **Pulse Oximetry** order  
(You should be back on the Care Pathway / Category / Process / Rule: Add screen)  
(The **Pulse Oximetry** order is now attached to the rule)
5. Type **1 (one)** in the **Quantity** field
6. Click the **Submit** button  
(The Care Pathway / Category / Process / Rule: Add screen refreshes)  
(The message “**Successful add - ready to add another...**” appears)

Do These Steps  
<===== 6.17

1. Be sure the cursor is in the **Order** field
2. Click the **Select an Order** button  
(You should be on the Orders: Select screen)
3. Click the yellow plus sign next to **Laboratory**  
(You should be on Orders: Select screen for **Laboratory**)
4. Click the yellow plus sign next to **Hematology**  
(You should be on the Orders: Select for **Hematology**)
5. Click the green X next to the **CBC w/diff w/platelet** order  
(You should be back on the Care Pathway / Category / Process / Rule: Add screen)  
(The **CBC w/diff w/platelet** order is attached to the rule)
6. Type **1 (one)** in the **Quantity** field
7. Click the **Submit** button  
(The Care Pathway / Category / Process / Rule: Add refreshes)  
(The message “**Successful add - ready to add another...**” appears)
8. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)  
(The three new rules should appear)

Do These Steps  
<===== 6.18

The next process to build is the second **Tests** process at the **fifteen minute** mark. With the cursor next to the **Tests** category at the **fifteen minute** mark, click the **Add Process** button. On the Care Pathway / Category / Process: Add screen, type “**Chest x-ray using portable x-ray machine**” in the **Desc** field (shown below).

Process: Add screen

Click the **Submit** button to add the process, and then click the **Exit Screen** button to return to the Care Pathway screen.

With the cursor next to the **Chest x-ray using portable x-ray machine** process, click the **Add Rule** button. Then click the **Select an Order** button to locate the **X-ray Chest (2VW)** test which is in the **X-ray Chest** subsection of the **X-ray Trunk** subsection of the **Radiology** section of MedTrak’s CPOE. Select the **X-ray Chest (2VW)** order, and then type a one in the **Quantity** field (shown below).

X-ray Chest (2VW) order

Click the *Submit* button to add the rule, and then click the *Exit Screen* button to return to the Care Pathway screen (shown below).

The screenshot shows the MEDTRAK Care Pathway interface. At the top, it displays 'Active Only' and 'Care Pathway' with the date 'FRI 07/10 11:53a'. The pathway is identified as 'CHEST PAIN PATHWAY (25407)'. There are buttons for 'View by Category' and 'View by Time', and a search box. Below this, a table lists various rules. The table has columns for 'Pathway', 'Time/Category', 'Process', and 'Rule'. The rules are as follows:

Pathway	Time/Category	Process	Rule
	*** BEGINNING ***		
	1st Attempt - Chest Pain Pathway		
	0 MIN - Activities		
	Bed rest - patient to stay in bed for the first hour		
	BED REST - every 15 minutes for 60 minutes		
	0 MIN - Diet		
	Patient is not to drink or eat during the first hour		
	NPO - NOTHING PER ORAL - every 15 minutes for 60 minutes		
	0 MIN - Tests		
	ECG, pulse oximetry, and CBC with diff		
	ECG W/REPORT		
	PULSE OXIMETRY		
	CBC W/DIFF W/PLATELET		
	15 MIN - Tests		
	Chest x-ray using portable x-ray machine		
	X-RAY CHEST (2VW)		
	*** END ***		

On the left side of the screen, there is a list of 'Available Functions' including: Add Category, Add Process, Add Rule, Change, Delete, Un-delete, Log, Print, View Prints, More Functions, Page Up, and Page Down. At the bottom left, there is an 'Exit Screen' button. A callout box on the right points to the 'Chest x-ray using portable x-ray machine' rule with the text 'New x-ray rule'.

1. Place the cursor next to the **Tests** category at the **fifteen minute mark**
2. Click the *Add Process* button  
(You should be on the Care Pathway / Category / Process: Add screen)
3. Type “**Chest x-ray using portable x-ray machine**” in the **Desc** field
4. Click the *Submit* button  
(The Care Pathway / Category / Process: Add screen refreshes)  
(The message “**Successful add - ready to add another...**” appears)
5. Click the *Exit Screen* button  
(You should be back on the Care Pathway screen)  
(The **Chest x-ray using portable x-ray machine** process should appear)

Do These Steps  
<==== 6.19

Do These Steps  
6.20 =====>

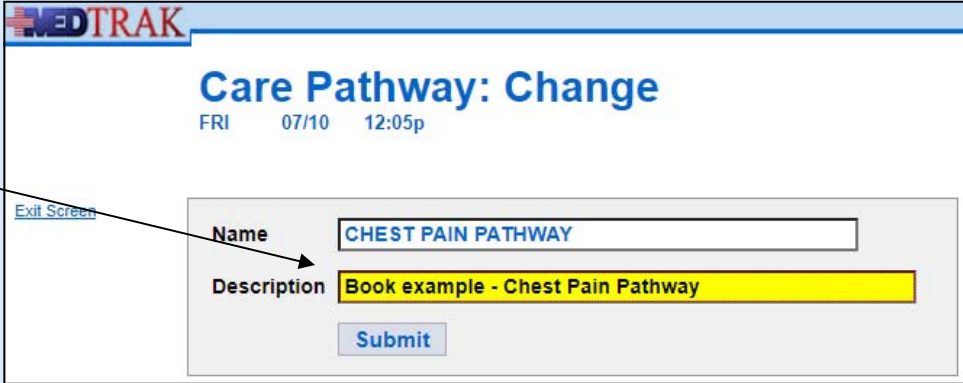
1. Place the cursor next to the **Chest x-ray using portable x-ray machine process**
2. Click the **Add Rule** button  
(You should be on the Care Pathway / Category / Process / Rule: Add screen)
3. Be sure the cursor is in the field next to the **Order** field
4. Click the **Select an Order** button  
(You should be on the Orders: Select screen)
5. Click the yellow plus sign next to **Radiology**  
(You should be on Orders: Select screen for **Radiology**)
6. Click the yellow plus sign next to **X-ray Trunk**  
(You should be on Orders: Select screen for **X-ray Trunk**)
7. Click the yellow plus sign next to **X-ray Chest**  
(You should be on Orders: Select screen for **X-ray Chest**)
8. Click the green X next to the **X-ray Chest (2VW) order**  
(You should be back on the Care Pathway / Category / Process / Rule: Add screen)  
(The **X-ray Chest (2VW)** order is now attached to the rule)
9. Type **1 (one)** in the **Quantity** field
10. Click the **Submit** button  
(The Care Pathway / Category / Process / Rule: Add screen refreshes)  
(The message "**Successful add - ready to add another...**" appears)
11. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)  
(The new x-ray rule should be added to the **Chest x-ray using portable x-ray machine process**)





Type “**Book example - Chest Pain Pathway**” in the **Description** field (shown below).

Description field changed



Click the **Submit** button. The **Care Pathway** screen reappears displaying the care pathway description change (shown below).

Care pathway description changed



Do These Steps  
6.21 =====>

1. Place the cursor next to the care pathway description on the **Care Pathway** screen
2. Click the **Change** button  
(You should be on the **Care Pathway: Change** screen)
3. Type “**Book example - Chest Pain Pathway**” in the **Description** field
4. Click the **Submit** button  
(You should be back on the **Care Pathway** screen)  
(The care pathway description should be changed)

You can use the **Change** button to correct not only the care pathway name and/or description, but also the categories, processes, and rules.

## Changing the sequence of records .....

What if the sequence of the categories or the processes within a category or the rules within a process are not in the order you would like them to appear? When you built the categories, processes, and rules, MedTrak organized them in the order you built them. If this is not the order that you want, you can change it.

After reviewing the example care pathway, you decide that at the **zero minute** mark you want the **Tests** category to appear first, the **Activities** category to be second, and the **Diet** category to be third. MedTrak organized these with the **Activities** category first, the **Diet** category second, and the **Tests** category third, because this is the order that you built them.

Each category, process, and rule is assigned a sort order number when added into MedTrak. This is automatically done based on the order that you entered the data. The **Activities** category was assigned sort order number **0100**, the **Diet** category was assigned sort order number **0200**, and the **Tests** category was assigned **0300**.

To review the sort order numbers for each of the categories at the **zero minute** mark, use the **Change** button to display the Care Pathway / Category: Change screens.

Place the cursor next to the **Activities** category at the **zero minute** mark and click the **Change** button. The Care Pathway / Category: Change screen appears (shown below).

The screenshot shows the MedTrak interface for editing a category. The title is "Care Pathway / Category: Change" with a timestamp of "FRI 07/10 1:30p". The pathway is identified as "CHEST PAIN PATHWAY (25407)". There is a link for "Exit Screen". The form contains the following fields:

- Sort:  (An arrow points from this field to a callout box on the right.)
- Category:  (The text is highlighted in yellow.)
- Value:
- Unit:  (with a dropdown arrow)

A "Submit" button is located at the bottom of the form.

Activities  
category at zero  
minutes

Sort order  
number is 0100

Notice that the sort order number is **0100**.

Click the *Exit Screen* button to return to the Care Pathway screen. Place the cursor next to the **Diet** category at the **zero minute** mark and click the *Change* button. The Care Pathway: Change screen appears (shown below).

Diet category at zero minutes

Sort order number is 0200

Notice that the sort order number is **0200**.

Click the *Exit Screen* button to return to the Care Pathway screen. Place the cursor next to the **Tests** category at the **zero minute** mark and click the *Change* button. The Care Pathway: Change screen appears (shown below).

Tests category at zero minutes

Sort order number is 0300

Notice that the sort order number is **0300**.

MedTrak automatically numbered the categories when you added them. The **Sort** order field is a four-digit number. MedTrak started numbering at 0100 and added one hundred each time another category was added.

The sort order numbering is inclusive to each tier of data. MedTrak starts the numbering at each new level. For instance, the sort order numbers for the three rules that you added to the **ECG, pulse oximetry, CBC with diff** process at the **zero minute** mark also started at **0100**.



To move the **Tests** category to be the first one in the **zero minute** categories, all you have to do is change the **Sort** order number to a number lower than 0100. You could make it 0099 or 0000 or any number in between.

Type **0050** in the sort order number field on the Care Pathway / Category: Change screen for the **Tests** category at the **zero minute** mark (shown below).

**MEDTRAK**  
**Care Pathway / Category: Change**  
 FRI 07/10 1:33p  
 Pathway: CHEST PAIN PATHWAY (25407)  
[Exit Screen](#)  
 Sort:   
 Category:   
 Value:   
 Unit:

Sort order number for **Tests** changed to 0050

Click the **Submit** button. The Care Pathway screen reappears with the **Tests** category moved above the **Activities** and **Diet** categories (shown below).

**MEDTRAK**  
**Care Pathway**  
 FRI 07/10 3:02p  
 Pathway: CHEST PAIN PATHWAY (25407)  
   
   
 Pathway - black    Time/Category - green    Process - blue    Rule - light blue  
 Available Functions  
 Add Category  
 Add Process  
 Add Rule  
 Change  
 Delete  
 Un-delete  
 Log  
 Print  
 View Prints  
 More Functions

Time/Category	Process	Rule
*** BEGINNING ***		
0 MIN - Tests	Book example - Chest Pain Pathway	
	ECG, pulse oximetry, and CBC with diff	
	ECG W/REPORT	
	PULSE OXIMETRY	
	CBC W/DIFF W/PLATELET	
0 MIN - Activities	Bed rest - patient to stay in bed for the first hour	
	BED REST - every 15 minutes for 60 minutes	
0 MIN - Diet	Patient is not to drink or eat during the first hour	
	NPO - NOTHING PER ORAL - every 15 minutes for 60 minutes	
15 MIN - Tests	Chest x-ray using portable x-ray machine	
	X-RAY CHEST (2vw)	

**Tests** category moved above the **Activities** category

**Diet** category still after the **Activities** category

Do These Steps  
6.22 =====>

1. Place the cursor next to the **Activities** category at the **zero minute** mark
2. Click the **Change** button  
(You should be on the Care Pathway / Category: Change)  
(Note that the sort order number is **0100**)
3. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)
4. Place the cursor next to the **Diet** category at the **zero minute** mark
5. Click the **Change** button  
(You should be on the Care Pathway / Category: Change)  
(Note that the sort order number is **0200**)
6. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)
7. Place the cursor next to the **Tests** category at the **zero minute** mark
8. Click the **Change** button  
(You should be on the Care Pathway / Category: Change)  
(Note that the sort order number is **0300**)
9. Type **0050** in the **Sort** field
10. Click the **Submit** button  
(You should be back on the Care Pathway screen)  
(The **Tests** category is now before the **Activities** category)

Categories, processes, and rules all have a **Sort** order field. You can control the order of your care pathway structure using the sort order number.

## Changing an order attached to a rule



What if you attached the wrong order to a rule? For example, the **X-ray Chest (2VW)** rule at the **fifteen minute** mark should be a one-view x-ray and not the two-view x-ray.

To correct this error, place the cursor next to the **X-ray Chest (2VW)** rule and click the **Change** button. The Care Pathway / Category / Process / Rule: Change screen appears (shown on the next page).

**MEDTRAK**  
**Care Pathway / Category / Process / Rule: Change**  
 FRI 07/10 3:05p

Pathway: CHEST PAIN PATHWAY (25407)  
 Category: Tests - 15 MIN  
 Process: Chest x-ray using portable x-ray machine

Available Functions  
[Select an Order](#)  
[Exit Screen](#)

Sort: 0100  
 Order: 11084 X-RAY CHEST (2VW)  
 Freeform: [Yellow bar]  
 Frequency: [ ] (interval of time between occurrences)  
 Unit of Time: [ ]  
 Quantity: 1 (number of times needed)  
 Age-Beg: [ ]  
 Age-End: [ ]  
 Unit: [ ]  
 Gender: Both (Male, Female, or Both)  
 Weight-Beg: [ ]  
 Weight-End: [ ]  
 Unit: [ ] (Pounds or Kilograms)  
 Submit

X-ray rule

X-ray Chest (2VW) order

To change the two-view chest x-ray to a one-view chest x-ray, with the cursor in the **Order** field, click the *Select an Order* button. Using the same procedure that you did to select the two-view x-ray, locate and select the one-view x-ray in the **X-ray Chest** subsection of the **X-ray Trunk** subsection of the **Radiology** section. The Care Pathway / Category / Process / Rule: Change screen reappears displaying the **X-ray Chest (1VW)** order (shown below).

**MEDTRAK**  
**Care Pathway / Category / Process / Rule: Change**  
 FRI 07/10 3:06p

Pathway: CHEST PAIN PATHWAY (25407)  
 Category: Tests - 15 MIN  
 Process: Chest x-ray using portable x-ray machine

Available Functions  
[Select an Order](#)  
[Exit Screen](#)

Sort: 0100  
 Order: 11213 X-RAY CHEST (1VW)  
 Freeform: [Yellow bar]  
 Frequency: [ ] (interval of time between occurrences)  
 Unit of Time: [ ]  
 Quantity: 1 (number of times needed)  
 Age-Beg: [ ]  
 Age-End: [ ]  
 Unit: [ ]  
 Gender: Both (Male, Female, or Both)  
 Weight-Beg: [ ]  
 Weight-End: [ ]  
 Unit: [ ] (Pounds or Kilograms)  
 Submit

X-ray Chest (1VW) order



Click the *Submit* button. The Care Pathway screen reappears with the x-ray rule now a **X-ray Chest (1VW)** order (shown below).

**MEDTRAK**

Active Only ▾

## Care Pathway

FRI 07/10 3:07p

Pathway: **CHEST PAIN PATHWAY (25407)**

View by Category View by Time

Search

Pathway - black	Time/Category - green	Process - blue	Rule - light blue
*** BEGINNING ***			
			Book example - Chest Pain Pathway
	0 MIN - Tests		
			ECG, pulse oximetry, and CBC with diff
			ECG W/REPORT
			PULSE OXIMETRY
			CBC W/DIFF W/PLATELET
	0 MIN - Activities		
			Bed rest - patient to stay in bed for the first hour
			BED REST - every 15 minutes for 60 minutes
	0 MIN - Diet		
			Patient is not to drink or eat during the first hour
			NPO - NOTHING PER ORAL - every 15 minutes for 60 minutes
	15 MIN - Tests		
			Chest x-ray using portable x-ray machine
			<b>X-RAY CHEST (1VW)</b>
*** END ***			

Available Functions

- Add Category
- Add Process
- Add Rule
- Change
- Delete
- Un-delete
- Log
- Print
- View Prints
- More Functions

Page Up Page Down

X-ray Chest (1VW) order now attached to the x-ray rule

Do These Steps  
6.23 =====>

1. Place the cursor next to the **X-ray Chest (2VW)** rule
2. Click the *Change* button
3. Be sure the cursor is in the **Order** field
4. Click the *Select an Order* button  
(You should be on the Orders: Select screen)
5. Locate and select the **X-ray Chest (1VW)** order  
(You should be back on the Rule: Change screen)  
(The chest x-ray order should now be a one-view)
6. Click the *Submit* button  
(You should be back on the Care Pathway screen)  
(The x-ray rule is now **X-ray Chest (1VW)**)

# Deleting or un-deleting a record

What if you have a category or process or rule that is just wrong and cannot be fixed? You need to remove it. You can use the *Delete* button to do so (shown below).

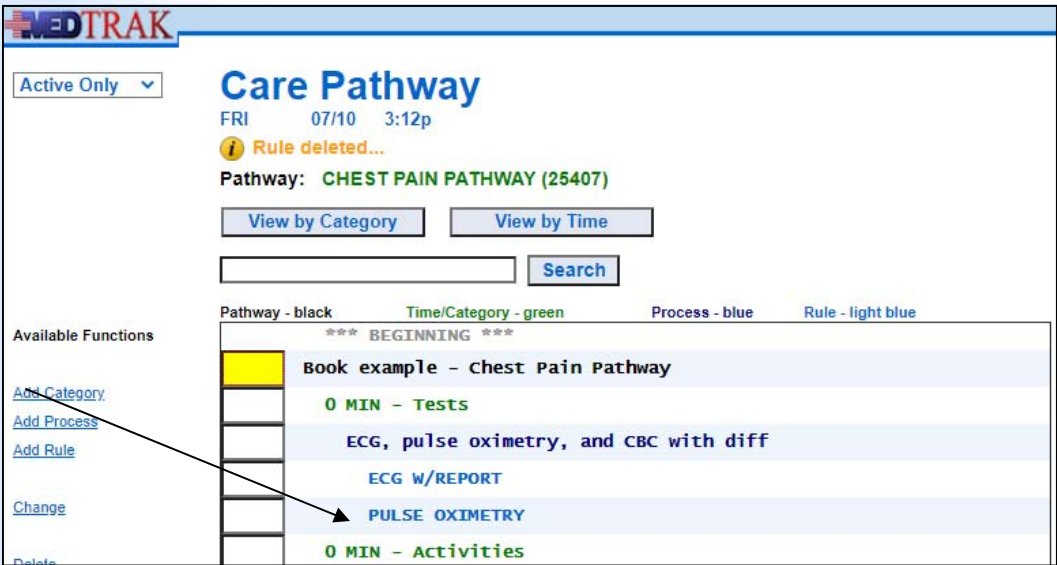
The screenshot shows the MEDTRAK interface for a Care Pathway. At the top, it says 'Care Pathway' with a date and time 'FRI 07/10 3:07p'. Below that, the pathway is identified as 'CHEST PAIN PATHWAY (25407)'. There are buttons for 'View by Category' and 'View by Time', and a search bar. A table of rules is displayed with columns for Pathway, Time/Category, Process, and Rule. The rule 'CBC W/DIFF W/PLATELET' is highlighted in yellow. On the left, there is a sidebar with 'Available Functions' including 'Delete' and 'Un-delete'. Callout boxes on the right point to the 'Delete' button, the 'Un-delete' button, and the 'CBC rule'.

For example, to remove the **CBC** rule at the **zero minute** mark, place the cursor next to the **CBC** rule and click the *Delete* button. The Care Pathway / Category / Process / Rule: Delete screen appears (shown below).

The screenshot shows the 'Care Pathway / Category / Process / Rule: Delete' screen. It displays the following information: Pathway: CHEST PAIN PATHWAY (25407), Category: Tests - 0 MIN, Process: ECG, pulse oximetry, and CBC with diff. There is a message: 'Click Delete button or press Enter to delete...'. Below this, there are various input fields for configuration: Sort (0300), Order (12532), Freeform, Frequency, Unit of Time, Quantity (1), Age-Beg, Age-End, Unit, Gender (Both), Weight-Beg, Weight-End, and Unit. A 'Delete' button is at the bottom. A callout box on the right points to the 'Rule: Delete screen'.

To delete the **CBC** rule, click the *Delete* button or press the **ENTER** key. The Care Pathway screen refreshes with the **CBC** rule removed (shown below).

Care Pathway without the CBC rule



Do These Steps 6.24 =====>

1. Place the cursor next to the **CBC w/Diff w/Platelet** rule
2. Click the *Delete* button  
(You should be on the Care Pathway / Category / Process / Rule: Delete screen for the **CBC w/Diff w/Platelet** rule)
3. Click the *Delete* button or press the **ENTER** key  
(You should be back on the Care Pathway screen)  
(The **CBC w/Diff w/Platelet** rule does not appear)

You can see that the delete function is a pretty powerful tool and easy to use (too easy). So, if you make a mistake and delete something that you did not want to delete, MedTrak has an un-delete function. To use the un-delete function, you need to change the Care Pathway screen to display all records including deleted ones. To do this, click the drop-down arrow in the upper left corner of the screen where it currently displays **Active Only** (shown below).

Drop-down arrow



Select **All** from the drop-down list. The Care Pathway screen refreshes displaying all records including deleted ones (shown below).

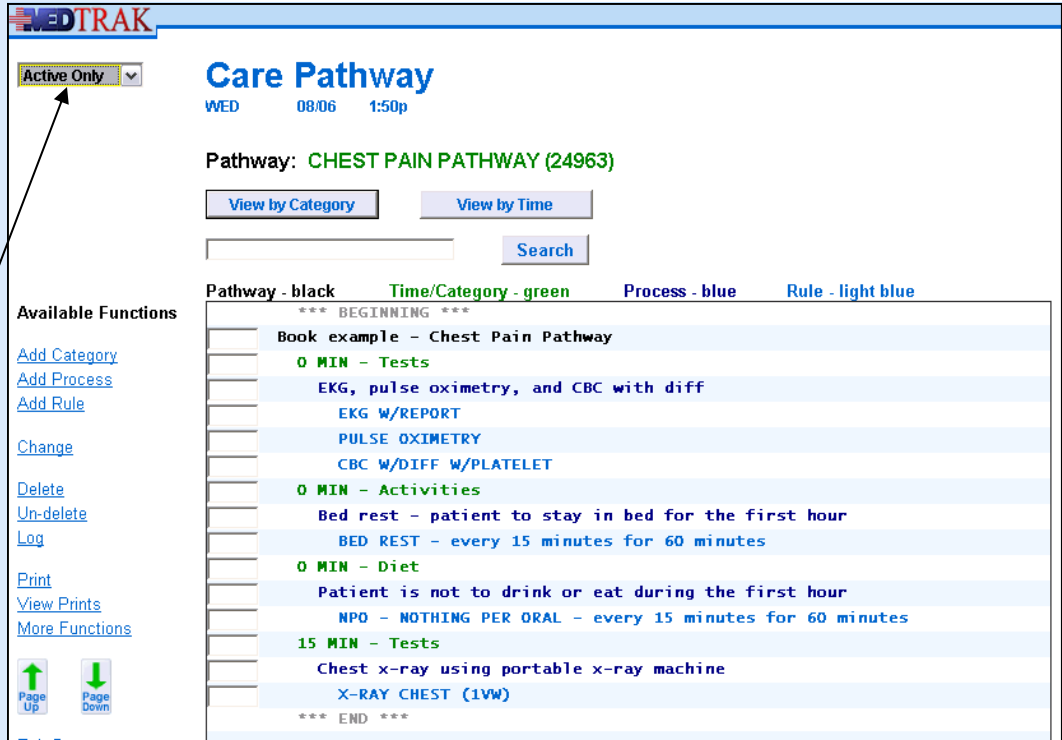
The screenshot shows the MEDTRAK interface for the 'Care Pathway' screen. At the top, there is a dropdown menu set to 'All'. Below it, the pathway name 'CHEST PAIN PATHWAY (25407)' is displayed. There are buttons for 'View by Category' and 'View by Time', and a search box. A table of rules is shown with columns for Pathway, Time/Category, Process, and Rule. The rule 'DELETED: CBC W/DIFF W/PLATELET' is highlighted in yellow. A callout box points to the 'All' dropdown with the text 'All to display all records including deleted ones'. Another callout box points to the 'Un-delete' button in the 'Available Functions' list with the text 'Un-delete button'. A third callout box points to the yellow-highlighted rule with the text 'Deleted CBC rule'.

To un-delete the **CBC w/Diff w/Platelet** rule, place the cursor next to it and click the **Un-delete** button. The Care Pathway screen refreshes with the **CBC w/Diff w/Platelet** rule now active again (shown below).

This screenshot shows the same MEDTRAK interface as the previous one, but the rule 'CBC W/DIFF W/PLATELET' is now active and highlighted in yellow. A callout box points to this rule with the text 'CBC rule is active again'. The 'Un-delete' button in the 'Available Functions' list is no longer highlighted.



To change the Care Pathway screen back to showing only active records, you click the drop-down arrow in the upper left corner of the screen and select the **Active Only** option (shown below).



Active Only option selected

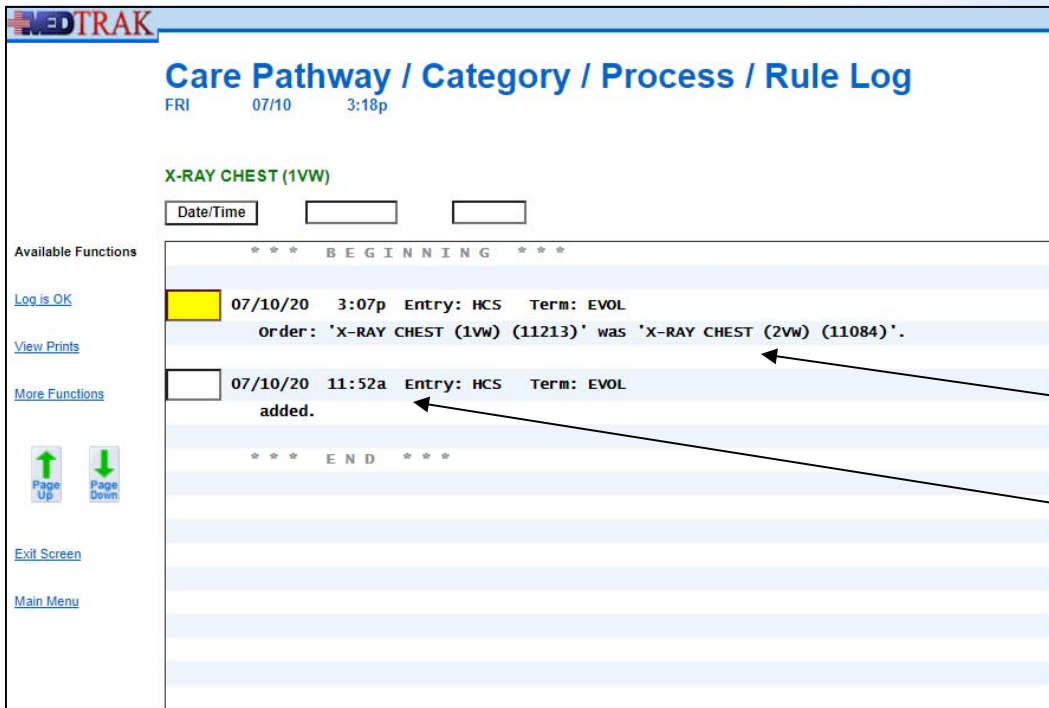
Do These Steps  
6.25 =====>

1. Click the drop-down arrow in the upper left corner of the Care Pathway screen where it currently displays **Active Only**
2. Select the **All** option  
(The Care Pathway screen refreshes showing all records, including the deleted ones)
3. Place the cursor next to the deleted **CBC w/Diff w/Platelet** rule
4. Click the *Un-delete* button  
(The Care Pathway screen refreshes)  
(The **CBC w/Diff w/Platelet** rule is active again)
5. To reset the Care Pathway screen to showing only active records, click the drop-down arrow in the upper left corner of the Care Pathway screen where it currently displays **All**
6. Select the **Active Only** option  
(The Care Pathway screen refreshes showing only active records)

## Displaying the log of a record .....

MedTrak keeps a log of every data addition, correction, and deletion action involving the categories, processes, and rules of your care pathway. To view this log, place the cursor next to the category, process, or rule and click the **Log** button. The Log screen for that selection will appear.

Place the cursor next to the **X-ray Chest (1VW)** rule and click the **Log** button to display the Care Pathway / Category / Process / Rule Log screen (shown below).



Log for X-ray rule

X-ray rule changed

X-ray rule added

1. Place the cursor next to the **X-ray Chest (1VW)** rule
2. Click the **Log** button  
(You should be on the Care Pathway / Category / Process / Rule Log screen)
3. Review the log records on this screen
4. Click the **Exit Screen** button  
(You should be back on the Care Pathway screen)

Do These Steps  
<==== 6.26



# Printing your care pathway

You can print your care pathway from the Care Pathways screen (shown below).

**MEDTRAK**

## Care Pathways

FRI 07/10 3:20p

Search

Available Functions

- Select
- Add
- Change
- Delete
- Un-delete
- Log
- Print
- View Prints
- More Functions

\*\*\* BEGINNING \*\*\*

..EXAMPLE OF CHEST PAIN PATHWAY

**CHEST PAIN PATHWAY - Book example - Chest Pain Pathway**

\*\*\* END \*\*\*

Print button

View Prints button

Or, you can print your care pathway from the Care Pathway screen (shown below).

**MEDTRAK**

## Care Pathway

FRI 07/10 3:22p

Active Only

Pathway: **CHEST PAIN PATHWAY (25407)**

View by Category View by Time

Search

Pathway - black Time/Category - green Process - blue Rule - light blue

Available Functions

- Add Category
- Add Process
- Add Rule
- Change
- Delete
- Un-delete
- Log
- Print
- View Prints
- More Functions

\*\*\* BEGINNING \*\*\*

**Book example - Chest Pain Pathway**

**0 MIN - Tests**

ECG, pulse oximetry, and CBC with diff

ECG W/REPORT

PULSE OXIMETRY

CBC W/DIFF W/PLATELET

**0 MIN - Activities**

Bed rest - patient to stay in bed for the first hour

BED REST - every 15 minutes for 60 minutes

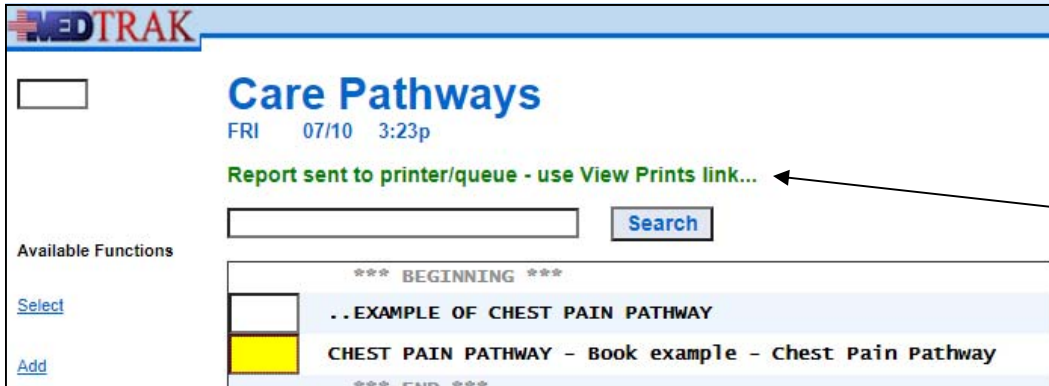
**0 MIN - Diet**

Patient is not to drink or eat during the first hour

Print button

View Prints button

To print your care pathway from either screen, click the *Print* button. The screen refreshes with the message “**Report sent to printer/queue - use View Prints link...**” at the top (shown below).



Print message

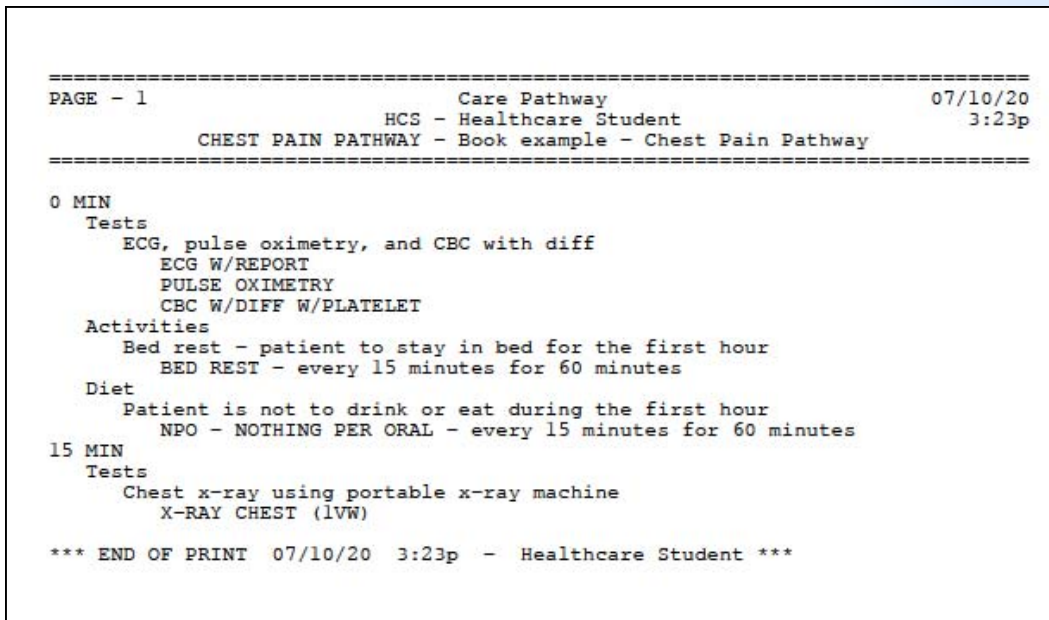
This means that your report, in PDF format, is now in your Available User Reports queue and ready for you to send to a printer or to save on your computer. On either screen, click the *View Prints* button. This will open up the Available User Reports screen in another window (shown below) .



Care Pathway print

View Report button

With the cursor in command field next to the Pathway Report, click the *View Report* button. The PDF print will open up in another window for you to either print or save (shown below).



Do These Steps  
6.27 =====>

1. On either the Care Pathways or the Care Pathway screen
2. Click the *Print* button  
(“*Report sent to printer/queue - use View Prints link...*” message appears)
3. Your care pathway, as a PDF, will be available shortly
4. Click the *View Prints* button  
(The Available User Reports window opens)
5. Find your report (If it does not appear, click the *Refresh* button)
6. Place the cursor next to the Pathway Report print
7. Click the *View Print* button  
(The Care Pathway PDF opens in another window)
8. Print the report or save / download it to your computer
9. Close the PDF window
10. Close the Available User Reports window  
(You should be back on the original screen)



## Learning Outcomes

- ▶ How to register a patient in MedTrak



## Key Concepts

- ▶ Selecting the patient
- ▶ Choosing patient responsibility as the company
- ▶ Adding a new case
- ▶ Choosing self pay as the payer
- ▶ Adding a doctor visit
- ▶ Choosing the presenting problem(s)

## Registering a patient

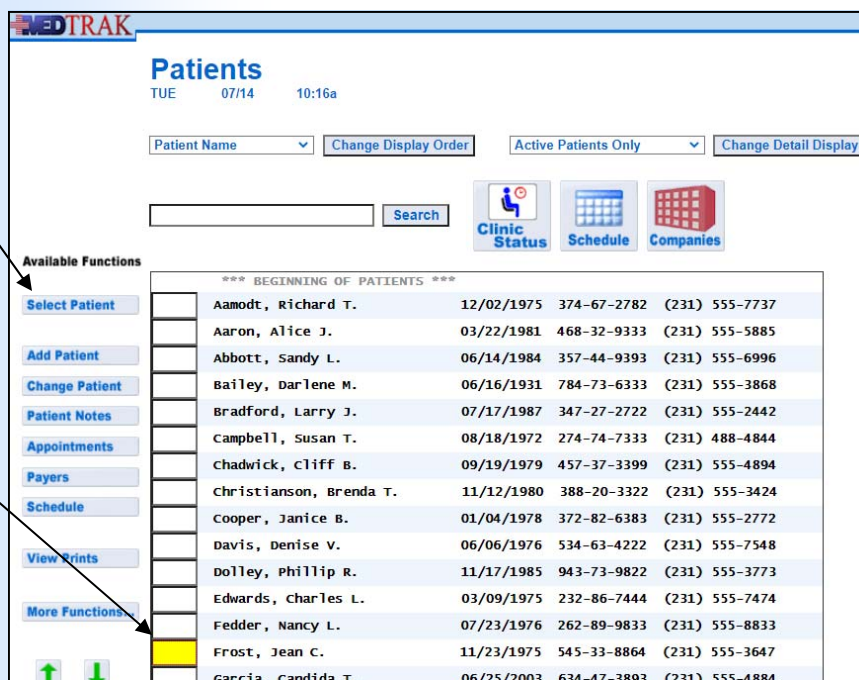
If you already know how to register patients in MedTrak because you completed one of our other books, then this chapter will be just a refresher. If you do not have any previous MedTrak experience, then pay careful attention to the workflow steps involved in registering a patient.

In order to streamline the registration process for the purposes of testing and running your care pathways in MedTrak, use the existing patients that are preloaded in the patient database. Also, choose **Self Pay** as the payer type and **Doctor** as the type of visit. As you can imagine, the patient registration process can include many different options depending on the patient's payer situation, the patient's presenting problem, and the type of provider needed. Using the suggestions above will simplify the registration process.

To register Jean C. Frost, after logging into MedTrak, you land on the MedTrak Main Menu (shown below).



Click the *Patient Registration* button to display the Patients screen. On this screen place the cursor next to Ms. Frost (shown below).





Click the *Select Patient* button to display the Company: Select screen (shown below).

Company: Select  
TUE 07/14 10:20a  
Select a company for FROST, JEAN C...

Available Functions

*** BEGINNING OF COMPANIES ***			
<b>..Patient Responsibility</b>			2
AB Manufacturing	1234 Truxton Ave		1
Amwal Manufacturing	150 Monroe NW		3

MedTrak manages patient responsibility cases (self pay, guarantor, group health, Medicare, Medicaid, and Tricare), where the patients are responsible for payment of services through their group health coverage or out of their own pocket, and occupational medicine cases (workers' compensation and employee health), where the employer is responsible for payment of services through their workers' compensation insurance or the employer's checkbook.

For the purposes of testing and running patients using your care pathways, choose patient responsibility on the Company: Select screen. Place the cursor next to **..Patient Responsibility** and click the *Select Company* button. The next screen to appear is the New Case screen. For the book example, type "Chest pains" in the **Complaint** field (shown below).

New Case  
TUE 07/14 10:25a  
No cases yet...

..Patient Responsibility (2)  
Frost, Jean C. (471VRJ)

Password \*\*\*\*\* Initials HCS

Choose either

Complaint

or

Physical

Job Title

Injury Date  (mm/dd/yy, t, or y)

Injury Time  (hh:mm or hh:mmp)

Work loc/address of injury

City of Injury

County of Injury

Date Last Worked  (mm/dd/yy, t, or y)

Auto Accident

Ins. Claim Number

ER Visit

ER Visit Date  (mm/dd/yy, t, or y)

Referred from  hospital / other

New Patient

Submit



Do These Steps  
7.01 =====>

1. **Log into MedTrak**  
(You should be on the MedTrak Main Menu)
2. **Click the *Patient Registration* button**  
(You should be on the Patients screen)
3. **Place the cursor next to *Jean C. Frost***
4. **Click the *Select Patient* button**  
(You should be on the Company: Select screen)
5. **Place the cursor next to *..Patient Responsibility***
6. **Click the *Select Company* button**  
(You should be on the New Case screen)
7. **Type “Chest pains” in the *Complaint* field**

On the New Case screen, click the *Submit* button. The next screen to display is the Entity / Payers: Select screen (shown below).

**Entity / Payers: Select**  
TUE 07/14 10:31a  
No patient/payers yet...  
Frost, Jean C. (471VRJ)  
Password \*\*\*\*\* Initials HCS

Available Functions

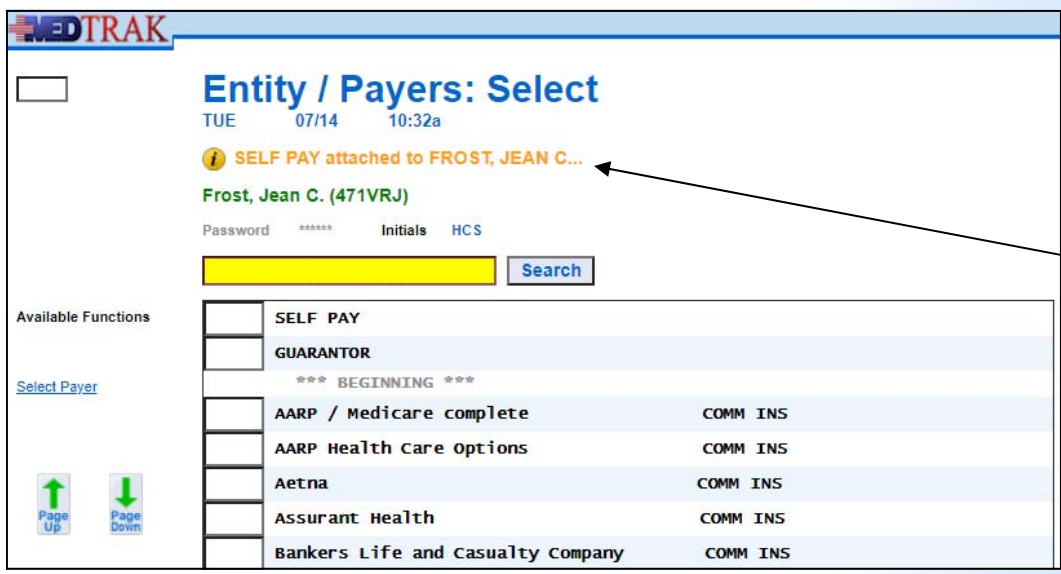
<input checked="" type="checkbox"/>	SELF PAY	
<input type="checkbox"/>	GUARANTOR	
	*** BEGINNING ***	
<input type="checkbox"/>	AARP / Medicare complete	COMM INS
<input type="checkbox"/>	AARP Health Care options	COMM INS
<input type="checkbox"/>	Aetna	COMM INS
<input type="checkbox"/>	Assurant Health	COMM INS
<input type="checkbox"/>	Bankers Life and Casualty Company	COMM INS
<input type="checkbox"/>	Blue Cross / Blue Shield of Arizona	COMM INS
<input type="checkbox"/>	Blue Cross / Blue Shield of Michigan	COMM INS
<input type="checkbox"/>	Blue Cross of Massachusetts	COMM INS
<input type="checkbox"/>	Blue Shield of California	COMM INS
<input type="checkbox"/>	Cigna	COMM INS
<input type="checkbox"/>	Consolidated Insurers	COMM INS

Page Up Page Down Exit Screen

Entity / Payers:  
Select screen

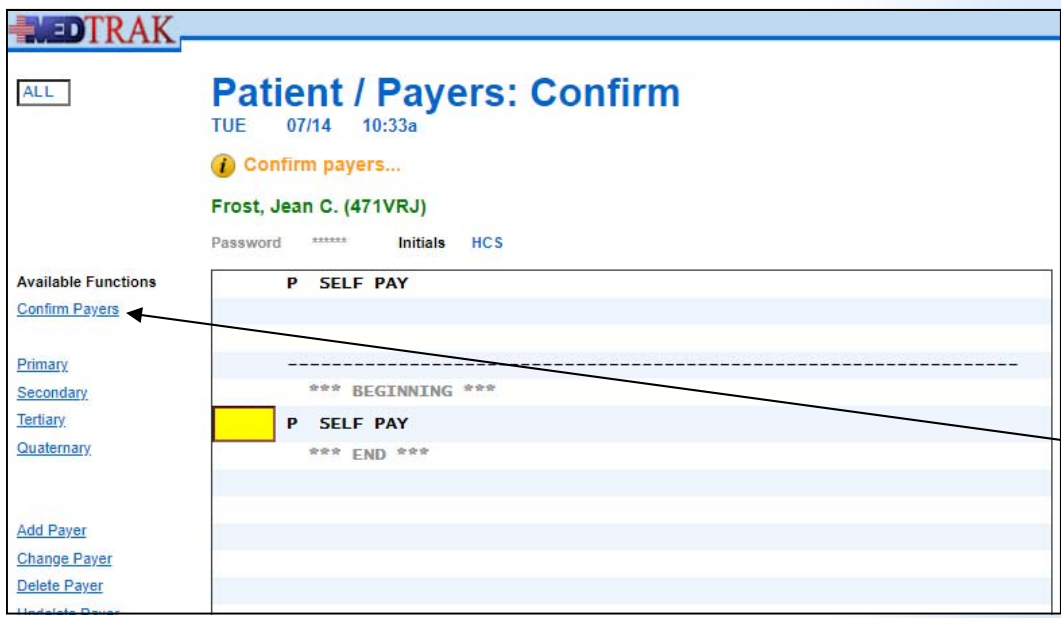
*Exit Screen*  
button

This screen lists all of the authorized payers for the entity that owns the healthcare facility. For the purposes of testing and running your care pathways, choose self pay as the payer. Place the cursor in the command field next to **Self Pay** and click the *Select Payer* button. The Entity / Payers: Select screen refreshes with the message “**SELF PAY attached to FROST, JEAN C...**” at the top (shown on the next page).



Self Pay attached message

After attaching **Self Pay** to Ms. Frost, click the **Exit Screen** button. The next screen to appear is the Patient / Payers: Confirm screen (shown below).



Patient / Payers: Confirm screen

Confirm Payers button

1. Click the **Submit** button  
(You should be on the Entity / Payers: Select screen)
2. Place the cursor next to **Self Pay**
3. Click the **Select Payer** button  
(The Entity / Payers: Select screen refreshes)  
(Message "SELF PAY attached to FROST, JEAN C..." appears)
4. Click the **Exit Screen** button  
(You should be on the Patient / Payers: Confirm screen)

Do These Steps  
<==== 7.02

To confirm that self pay is the payer, click the *Confirm Payers* button. The next screen to appear is the Visit Add screen. On this screen, select **Doctor** as the **Type of Visit** using the drop-down list of visit types (shown below).

Visit Add screen

Doctor selected as the Type of Visit

Click the *Submit* button. The next screen to appear is the Clinical Note Add screen. Select “**Chest Pain**” as the presenting problem (shown below).

Clinical Note Add screen

Chest Pain selected as the presenting problem

MedTrak is a problem focused system. Select chest pain for the presenting problem for this example, but when you build your care pathway, select the appropriate presenting problem.

After selecting the presenting problem, click the *Submit* button. The Clinical Note Add screen refreshes with the message “**Chest pain selected...**” at the top. Then click the *Exit Screen* button. Your patient is registered and now appears on the Clinic Status screen. The Patients screen reappears (shown below).

**Patients**  
TUE 07/14 10:37a  
Report sent to printer/queue - use View Prints link...

Patient Name [v] Change Display Order Active Patients Only [v] Change Detail Display

[Search] Clinic Status Schedule Companies

Available Functions

*** BEGINNING OF PATIENTS ***						
Select Patient		Aamodt, Richard T.	12/02/1975	374-67-2782	(231) 555-7737	
Add Patient		Aaron, Alice J.	03/22/1981	468-32-9333	(231) 555-5885	
Change Patient		Abbott, Sandy L.	06/14/1984	357-44-9393	(231) 555-6996	
Patient Notes		Bailey, Darlene M.	06/16/1931	784-73-6333	(231) 555-3868	
Appointments		Bradford, Larry J.	07/17/1987	347-27-2722	(231) 555-2442	
Payers		Campbell, Susan T.	08/18/1972	274-74-7333	(231) 488-4844	
Schedule		Chadwick, Cliff B.	09/19/1979	457-37-3399	(231) 555-4894	
View Prints		Christianson, Brenda T.	11/12/1980	388-20-3322	(231) 555-3424	
More Functions...		Cooper, Janice B.	01/04/1978	372-82-6383	(231) 555-2772	
		Davis, Denise V.	06/06/1976	534-63-4222	(231) 555-7548	
		Dolley, Phillip R.	11/17/1985	943-73-9822	(231) 555-3773	
		Edwards, Charles L.	03/09/1975	232-86-7444	(231) 555-7474	
		Fedder, Nancy L.	07/23/1976	262-89-9833	(231) 555-8833	

Patients screen

Clinic Status icon button

1. Click the *Confirm Payers* button  
(You should be on the Visit Add screen)
2. Select **Doctor** from the **Type of Visit** drop-down list
3. Click the *Submit* button  
(You should be on the Clinical Note Add screen)
4. Select **Chest Pain** as the presenting problem
5. Click the *Submit* button  
(The Clinical Note Add screen refreshes)  
(The message “**Chest Pain selected...**” appears)
6. Click the *Exit Screen* button  
(You should be back on the Patients screen)  
(The patient is registered and now on the Clinic Status screen)

Do These Steps  
<==== 7.03



The Clinic Status screen provides a real-time workflow view of the medical facility. Each member of the clinical staff, including the provider, uses this screen to access their part of the patient’s clinical care documentation in the EHR (electronic health record).

To view the Clinic Status screen from the Patients screen, click the *Clinic Status* icon located near the top of the screen. The Clinic Status screen for this example appears (shown below).

Clinic Status screen

Jean C. Frost

Waiting for a room workflow Status (Room)

The screenshot shows the MEDTRAK Clinic Status interface. At the top, it displays 'HCS Medical Care' and a 'Location' dropdown. Below this are navigation icons for Schedule, Patients, Companies, Search, and Further Review. A sidebar on the left lists 'Available Functions' such as Submit / Refresh, Name / Reason, Clinical Notes, Examine Patient, Order Entry, Open Orders, Provider's Notes, Out The Door, Discharge, Done, Schedule, Visit Log, Online Chart, Pathway, and View Prints. The main area is a table with columns: ORD, ROOM, NAME / REASON, ORDER, STATUS, DR, TC, CL, XR, LB, RS, TEC, DOC, TOT. The table shows a patient named 'Frost, Jean C.' with a status of 'Room' and a 'TC' value of 2. Below the table are 'Page Up' and 'Page Down' buttons and a 'Main Menu' button.

The Clinic Status screen shows that Jean C. Frost has been waiting for six minutes to be placed in a room by the clinical staff (TC).

Do These Steps 7.04 =====>

1. Click the *Clinic Status* icon button located near the top of the screen  
(You should be on the Clinic Status screen)  
(Ms. Frost should appear with a workflow **Status** of **Room**)



## Learning Outcomes

- ▶ How to perform patient intake



## Key Concepts

- ▶ Reason for visiting the medical facility
- ▶ Medical history
- ▶ Medications
- ▶ Allergies
- ▶ Body statistics
- ▶ Vital signs



# Patient intake

Again, in order to streamline the patient intake process for the purposes of testing and running your care pathways in MedTrak, you will skip most of the patient intake processing.

Normally, during the patient intake process, you would review the following with the patient:

Patient intake process

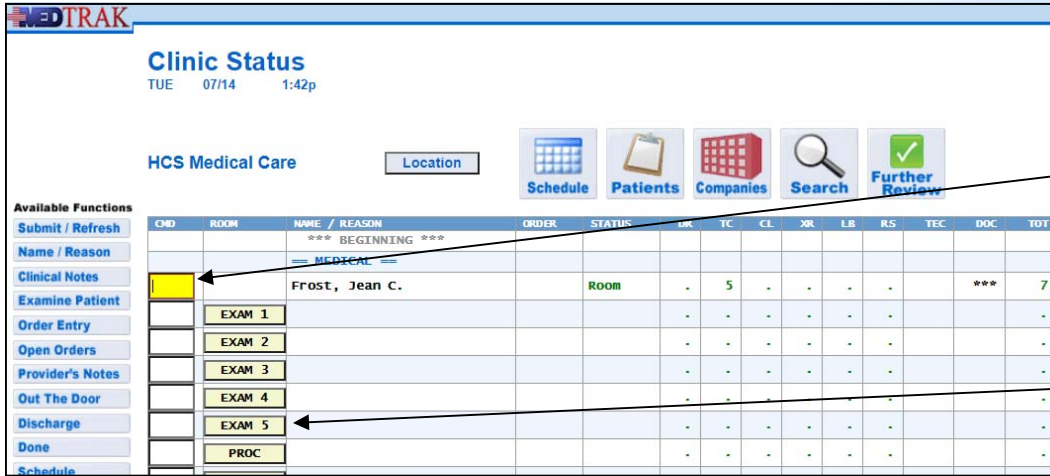
- Reason(s) for needing medical attention
- History of the chief complaint(s)
- Symptoms
- Previous medical history including similar illnesses or injuries
- Current prescription and over-the-counter medications
- Allergies including medication allergies
- Body statistics including height, weight, and BMI
- Vital signs including blood pressure, heart rate (pulse), respiration, and temperature
- Other clinical observations

As you learned in the previous chapter, your patient is now on the Clinic Status screen. You accessed this screen by clicking the *Clinic Status* icon button on the Patients screen, but you can also access this screen by clicking the *Clinic Status* button on the MedTrak Main Menu (shown below).

Clinic Status button



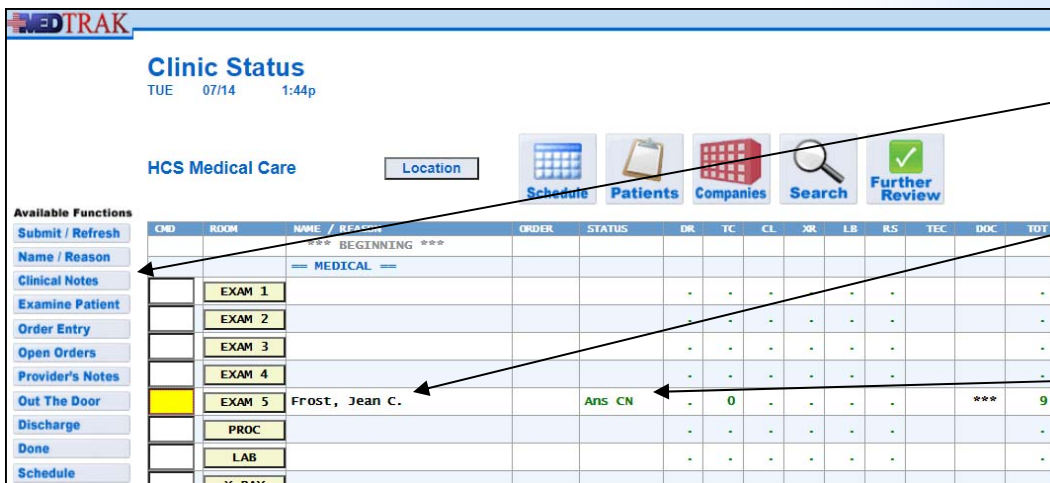
In this example, move Ms. Frost into **Exam 5** from the reception area. To do so, place the cursor next to Ms. Frost (shown below).



Cursor next to Ms. Frost

Exam 5 button

Then click the **Exam 5** room button. The Clinic Status screen refreshes with Ms. Frost in **Exam 5** (shown below).



Clinical Notes button

Ms. Frost in Exam 5

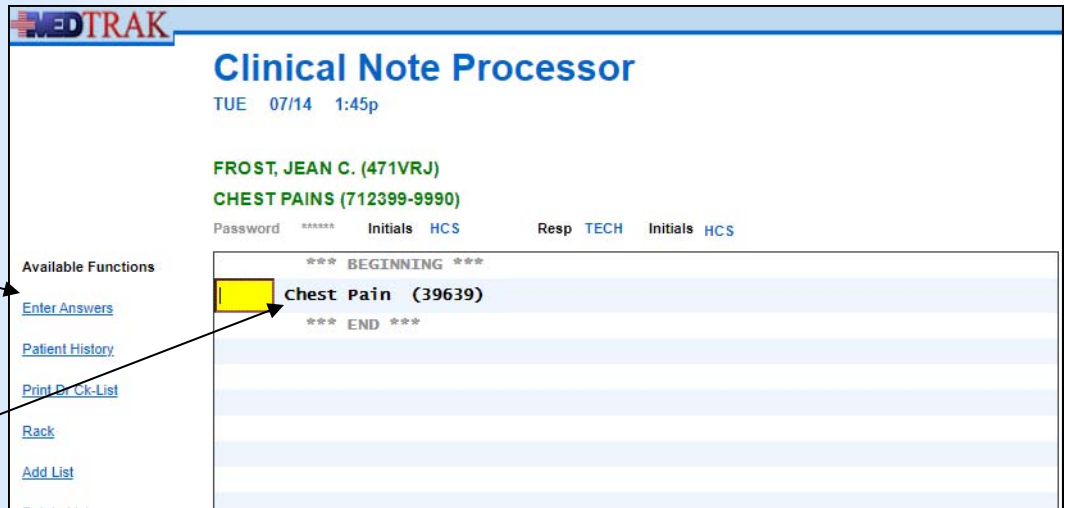
Answer clinical notes workflow Status (Ans CN)

1. If you are not already on the Clinic Status screen, click the **Clinic Status** button from the MedTrak Main Menu (You should be on the Clinic Status screen)
2. Place the cursor next to **Frost, Jean C.**
3. Click the **Exam 5** room button (The Clinic Status screen refreshes) (**Ms. Frost** is now in **Exam 5**) (The workflow **Status** is now **Ans CN**)

Do These Steps <==== 8.01

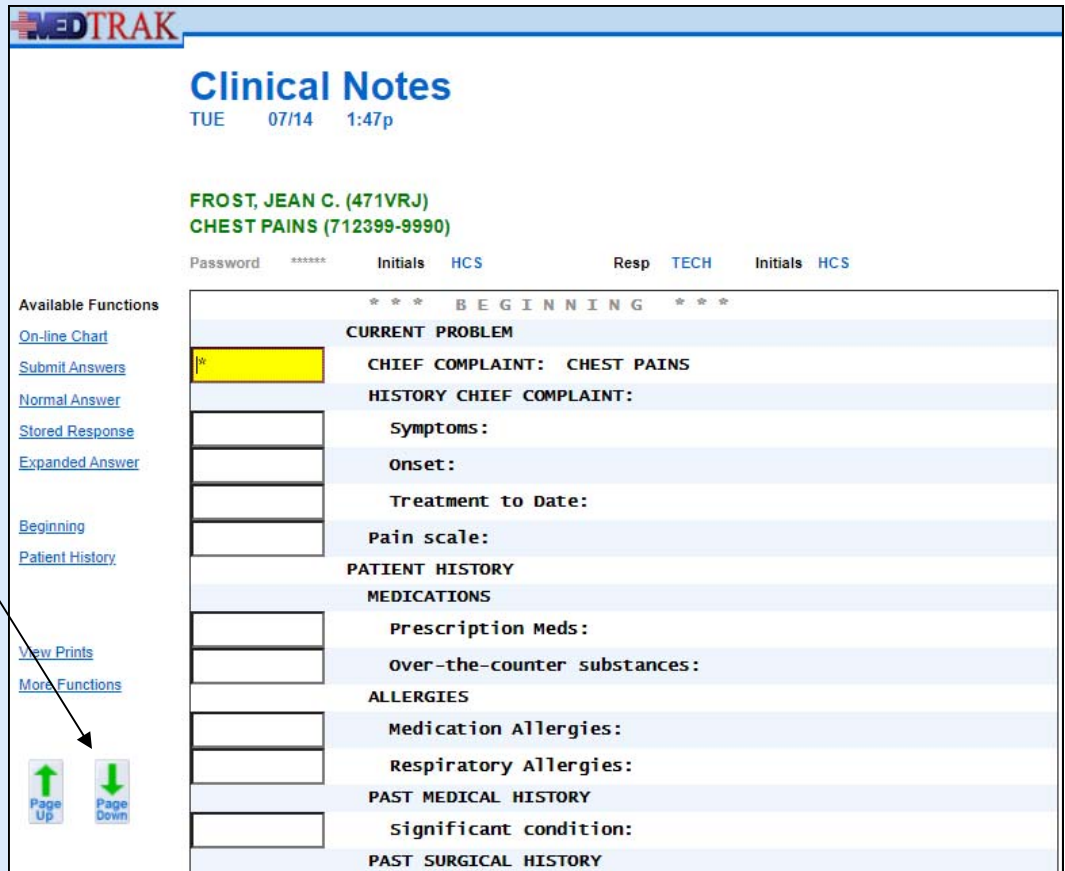
To simplify the patient intake process so that you can focus on testing and running your care pathways, you only need to answer the vital signs. With the cursor next to Ms. Frost, click the **Clinical Notes** button. The next screen to appear is the Clinical Note Processor screen (shown on the next page).

- Clinical Note Processor screen
- Enter Answers button
- Chest Pain clinical note selected



This screen displays the reason(s) that the patient is being seen at your facility. MedTrak is problem-focused so the clinical notes questions for Ms. Frost will be directly related to chest pain. To access the clinical notes, with the cursor next to **Chest Pain**, click the *Enter Answers* button. The first Clinical Notes screen appears (shown below).

- Clinical Notes first screen
- Page Down button



As previously indicated, you will only be answering the vital signs questions which are located on the second screen. To access the next Clinical Notes screen, click the *Page Down* button. The second Clinical Notes screen appears. On this screen, type Ms. Frost's vital signs (shown on the next page).

Submit Answers button

Vital signs entered

**MEDTRAK**  
**Clinical Notes**  
TUE 07/14 1:50p  
Paged down...  
FROST, JEAN C. (471VRJ)  
CHEST PAINS (712399-9990)  
Password \*\*\*\*\* Initials HCS Resp TECH Initials HCS

Available Functions  
[On-line Chart](#)  
[Submit Answers](#)  
[Normal Answer](#)  
[Stored Response](#)  
[Expanded Answer](#)  
[Beginning](#)  
[Patient History](#)  
[View Prints](#)  
[More Functions](#)  
[Page Up](#) [Page Down](#)

**PATIENT HISTORY**

**CARDIOVASCULAR**

Heart Disease:   
Hypertension:

**BODY STATISTICS (US)**

Height:  ft  in  
Weight:  lbs  oz  
BMI (body mass index):

**VITAL SIGNS**

**Blood Pressure**

Systolic:   
Diastolic:   
Pulse:   
Respirations:   
Temperature:

**NURSING OBSERVATIONS**

After entering the vital signs (shown above), click the *Submit Answers* button. The Clinical Notes screen refreshes with the message “**Changes processed --- re-displaying screen...**” and the vital signs answered (shown below).

Changes processed message

Vital signs answered

**MEDTRAK**  
**Clinical Notes**  
TUE 07/14 1:52p  
Changes processed --- re-displaying screen...  
FROST, JEAN C. (471VRJ)  
CHEST PAINS (712399-9990)  
Password \*\*\*\*\* Initials HCS Resp TECH Initials HCS

Available Functions  
[On-line Chart](#)  
[Submit Answers](#)  
[Normal Answer](#)  
[Stored Response](#)  
[Expanded Answer](#)  
[Beginning](#)  
[Patient History](#)  
[View Prints](#)  
[More Functions](#)  
[Page Up](#) [Page Down](#)

**PATIENT HISTORY**

**CARDIOVASCULAR**

Heart Disease:   
Hypertension:

**BODY STATISTICS (US)**

Height:  ft  in  
Weight:  lbs  oz  
BMI (body mass index):

**VITAL SIGNS**

**Blood Pressure**

Systolic: 120  
Diastolic: 80  
Pulse: 65  
Respirations: 14  
Temperature: 98

**NURSING OBSERVATIONS**

After answering the vital signs, click the *Exit Screen* button to return to the Clinical Notes Processor screen (shown on the next page).



Clinical Note Processor screen

Rack button

**MEDTRAK Clinical Note Processor**  
TUE 07/14 1:52p

**FROST, JEAN C. (471VRJ)**  
**CHEST PAINS (712399-9990)**  
Password \*\*\*\*\* Initials HCS Resp TECH Initials HCS

Available Functions  
[Enter Answers](#)  
[Patient History](#)  
[Print Dr Ck-List](#)  
**[Rack](#)**  
[Add List](#)

\*\*\* BEGINNING \*\*\*  
**Chest Pain (39639)**  
 \*\*\* END \*\*\*

To inform the provider that the patient is ready to be seen, click the *Rack* button. This is a reference to a process before the advent of the EHR when the patient’s chart was physically placed in a rack outside the exam room to indicate to the provider that the patient was ready to be examined. The Clinical Note Processor screen refreshes with the message “**RACK status set...**” (shown below).

RACK Status set message

**MEDTRAK Clinical Note Processor**  
TUE 07/14 1:53p

**RACK status set...**

**FROST, JEAN C. (471VRJ)**  
**CHEST PAINS (712399-9990)**  
Password \*\*\*\*\* Initials HCS Resp TECH Initials HCS

Available Functions  
[Enter Answers](#)  
[Patient History](#)

\*\*\* BEGINNING \*\*\*  
**Chest Pain (39639)**  
 \*\*\* END \*\*\*

Now click the *Exit Screen* button to return to the Clinic Status screen. Ms. Frost chart is now in the **Rack** workflow **Status** (shown below).

Chart is in the rack workflow Status (Rack)

**MEDTRAK Clinic Status**  
TUE 07/14 1:54p

HCS Medical Care

[Schedule](#) [Patients](#) [Companies](#) [Search](#) [Further Review](#)

Available Functions  
[Submit / Refresh](#)  
[Name / Reason](#)  
[Clinical Notes](#)  
[Examine Patient](#)  
[Order Entry](#)  
[Open Orders](#)  
[Provider's Notes](#)  
[Out The Door](#)  
[Discharge](#)  
[Done](#)  
[Schedule](#)  
[Visit Log](#)  
[Online Chart](#)

CMD	ROOM	NAME / REASON	ORDER	STATUS	DR	TC	CL	XR	LB	RS	TEC	DOC	TOT
		*** BEGINNING ***											
		--- MEDICAL ---											
		EXAM 1											
		EXAM 2											
		EXAM 3											
		EXAM 4											
		EXAM 5 Frost, Jean C.		<b>Rack</b>		<b>1</b>					HCS	***	<b>19</b>
		PROC											
		LAB											
		X-RAY											
		*** END ***											



To indicate that the provider is now examining the patient, click the *Examine Patient* button. The Clinic Status screen refreshes with the message “**Provider examining patient FROST, JEAN C...**” message and her workflow **Status** is now **Examine** (shown below).

CHD	ROOM	NAME / REASON	ORDER	STATUS	DR	TC	CL	XR	LB	RS	TEC	DOC	TOT
		*** BEGINNING ***											
		--- MEDICAL ---											
		EXAM 1											
		EXAM 2											
		EXAM 3											
		EXAM 4											
		EXAM 5 Frost, Jean C.		Examine	0						HCS	HCS	20
		PROC											
		LAB											

Provider examining message

Provider examining patient workflow Status (Examine)

1. With the cursor next to **Ms. Frost** on the Clinic Status screen
2. Click the *Clinical Notes* button  
(You should be on the Clinical Note Processor screen)
3. Click the *Enter Answers* button  
(You should be on the first Clinical Notes screen)
4. Click the *Page Down* button  
(You should be on the second Clinical Notes screen)
5. Type **120** in the **Systolic blood pressure** field
6. Type **80** in the **Diastolic blood pressure** field
7. Type **65** in the **Pulse** field
8. Type **14** in the **Respirations** field
9. Type **98** in the **Temperature** field
10. Click the *Submit Answers* button  
(You should be still on the second Clinical Notes screen)  
 (“**Changes processed --- re-displaying screen...**” message appears)
11. Click the *Exit Screen* button  
(You should be on the Clinical Note Processor screen)
12. Click the *Rack* button  
(The Clinical Note Processor screen refreshes)  
(The message “**RACK status set...**” appears)

Do These Steps  
<==== 8.02

Do These Steps  
8.03 =====>

1. Click the *Exit Screen* button  
(You should be back on the Clinic Status screen)  
(The workflow **Status** is now **Rack**)
2. With the cursor next to **Jean C. Frost**
3. Click the *Examine Patient* button  
(The Clinical Status screen refreshes)  
("Provider examining patient FROST, JEAN C..."  
message appears)  
(The workflow **Status** is now **Examine**)



## Learning Outcomes

- ▶ How to run the example care pathway you created on a patient



## Key Concepts

- ▶ Starting the care pathway
- ▶ Answering open orders
- ▶ Pausing the care pathway
- ▶ Re-starting the care pathway
- ▶ Voiding a patient from the Clinic Status screen

# Running a care pathway

Now you are ready to test the example chest pain care pathway that you built on Jean C. Frost.

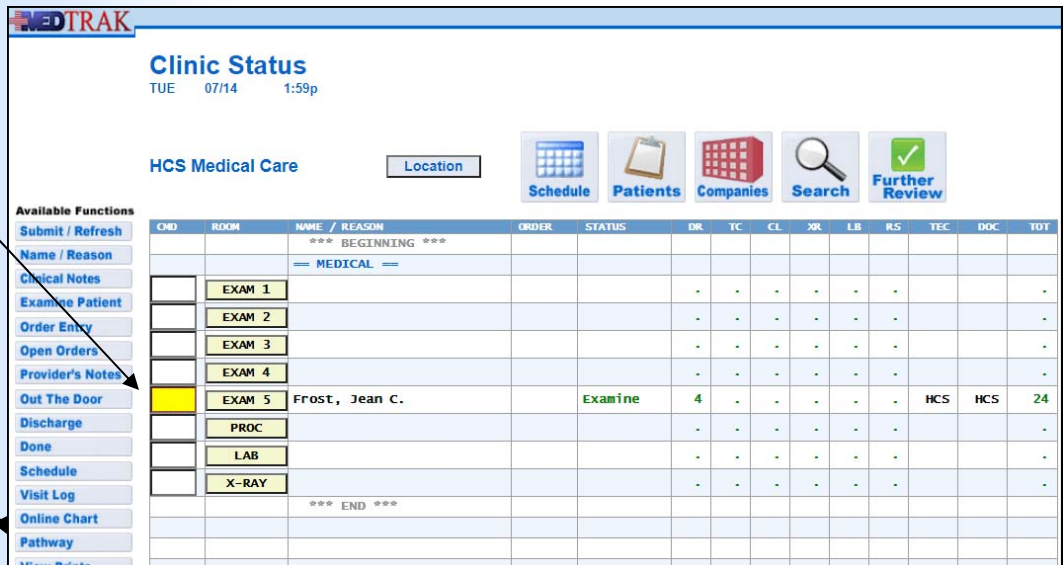
Jean C. Frost is on the Clinic Status screen in Exam 5. You can access this screen by clicking the *Clinic Status* button on the MedTrak Main Menu (shown below).

Clinic Status button



The Clinic Status screen appears. Place the cursor next to Ms. Frost (shown below).

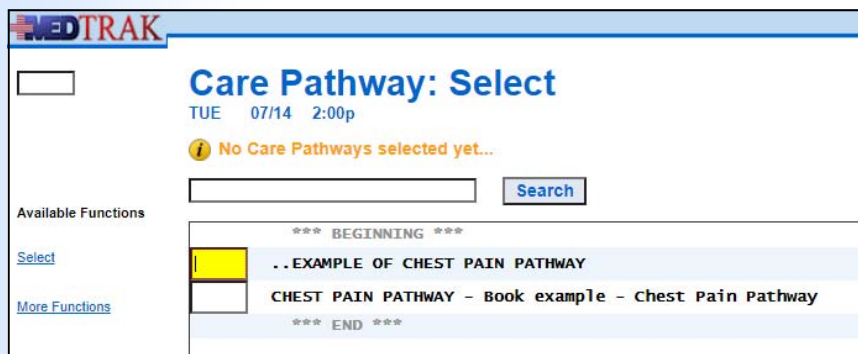
Cursor next to Ms. Frost



Pathway button

Click the *Pathway* button to access the Care Pathway: Select screen (shown below).

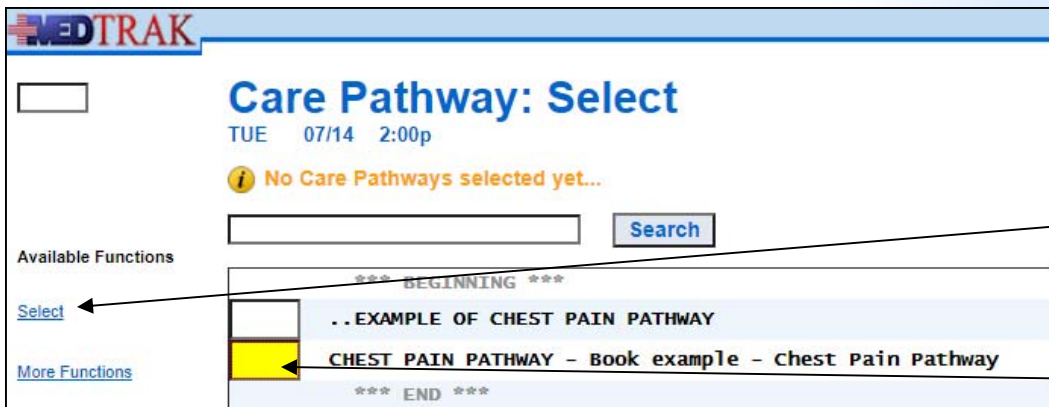
Care Pathway: Select screen



1. If you are not already on the Clinic Status screen, click the Clinic Status button from the MedTrak Main Menu (You should be on the Clinic Status screen)
2. Place the cursor next to Frost, Jean C.
3. Click the Pathway button (You should be on the Care Pathway: Select screen)

Do These Steps  
<==== 9.01

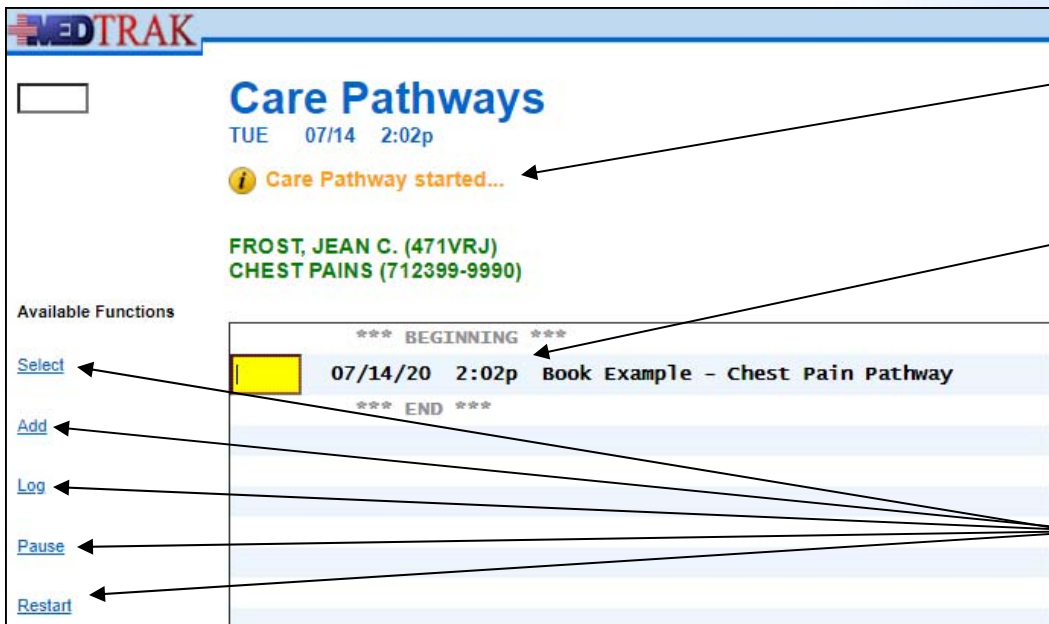
Place the cursor next to the chest pain book example care pathway that you built (shown below).



Select button

Cursor next to care pathway

Click the Select button. The next screen to appear is the Care Pathways screen. The message “Care Pathway started...” appears at the top (shown below).



Care Pathway started... message

Date and time the care pathway was started

Select Add Log Pause Restart buttons

The purpose of this screen is to provide control over the care pathways that are running for each patient. In this example, only one care pathway is running. If the patient presented with several problems which had associated care pathways, there could be more than one care pathway running at a time.



Select button

To review the status of all of the orders of a care pathway, use the **Select** button.

Add button

To start another care pathway, use the **Add** button and select it from the Care Pathway: Select screen.

Log button

To review the activity log of a care pathway that you started, use the **Log** button to review the entries.

Pause button

To pause a care pathway due to a change in the patient's condition that requires a medical intervention, use the **Pause** button. This suspends all of the future orders of the care pathway.

Restart button

If you did pause a care pathway and now want to start it again, use the **Restart** button. The timer starts again for all future orders.

You will use the **Select**, **Log**, **Pause**, and **Restart** buttons in this chapter.

Do These Steps  
9.02 =====>

1. Place the cursor next to the **Chest Pain Pathway - Book Example**
2. Click the **Select** button  
(You should be on the Care Pathways screen)  
(The message "**Care Pathway started...**" appears)  
(The start date and time of the care pathway display)

With the cursor next to the care pathway, click the **Select** button. The next screen to appear is the Care Pathway / Orders screen (shown below).

Care Pathway /  
Orders screen

Zero minute  
orders started

*** BEGINNING ***					
0 MIN	07/14/20	2:02p	BED REST	open order	
	07/14/20	2:02p	NPO - NOTHING PER ORAL	open order	
	07/14/20	2:02p	ECG W/REPORT	open order	
	07/14/20	2:02p	PULSE OXIMETRY	open order	
	07/14/20	2:02p	CBC W/DIFF W/PLATELET	open order	
15 MIN	07/14/20	2:17p	BED REST	not placed yet..	
	07/14/20	2:17p	NPO - NOTHING PER ORAL	not placed yet..	
	07/14/20	2:17p	X-RAY CHEST (1vw)	not placed yet..	
30 MIN	07/14/20	2:32p	BED REST	not placed yet..	
	07/14/20	2:32p	NPO - NOTHING PER ORAL	not placed yet..	
45 MIN	07/14/20	2:47p	BED REST	not placed yet..	
	07/14/20	2:47p	NPO - NOTHING PER ORAL	not placed yet..	

The Care Pathway / Orders screen displays the current status of all of the orders associated with the care pathway. When the care pathway starts, all of the orders at the **zero minute** mark are placed and become open orders. Future orders become open orders when the elapsed time reaches their start time. They have the “**not placed yet..**” status next to them.

1. Be sure the cursor is next to the care pathway
2. Click the *Select* button  
(You should be on the Care Pathway / Orders screen)
3. Review the status of the orders on this screen
4. When you build your care pathways, you will probably need to use the *Page Down* and *Page Up* buttons to review all of the orders

Do These Steps  
<==== 9.03

To review what these open orders look like on the Open Orders screen, click the *Exit Screen* button to return to the Care Pathways screen. Then click the *Exit Screen* button again to return to the Clinic Status screen (shown below).

ORD	ROOM	NAME / REASON	ORDER	STATUS	TC	CL	XR	LB	RS	TEC	DOC	TOT
*** BEGINNING ***												
--- MEDICAL ---												
		EXAM 1										
		EXAM 2										
		EXAM 3										
		EXAM 4										
		EXAM 5	Frost, Jean C.	Open		5				HCS	HCS	32

Open Orders button

Order status is Open

To review the open orders, be sure the cursor is next to Ms. Frost and click the *Open Orders* button. The next screen to appear is the Open Orders screen for Ms. Frost’s showing all of the orders placed at the **zero minute** mark (shown below).

Open Orders: FROST, JEAN C. (712399-9990)  
TUE 07/14 2:08p  
In EXAM 5...

NUR		BEGGINING OF OPEN ORDERS	
:		*	BED REST
*		*	Notes:
*		*	Completed by:
:		*	NPO - NOTHING PER ORAL
*		*	Notes:
*		*	Completed by:
TECH		BEGGINING OF OPEN ORDERS	
:		*	ECG W/REPORT
*		*	Notes:

Open Orders for Ms. Frost

From this screen, the clinical and administrative staff members read the orders placed by the care pathway. In this example, the nursing staff is to instruct the patient to stay in bed and not drink or eat anything. The technical staff is to do an ECG with report, a pulse oximetry, and a blood draw for a CBC laboratory test. After completing these orders, the person performing the order documents their completion on this screen (shown below).

Answers to order questions

**Open Orders: FROST, JEAN C. (712399-9990)**  
 TUE 07/14 2:08p  
 In EXAM 5...  
 Password \*\*\*\*\* Initials HCS

Available Functions: Submit Answers, Responsibility (\*), Procedure (a), Stored Response (:), Expanded Answer, Already Answered, More Functions, Page Up, Page Down

\*\*\* BEGINNING OF OPEN ORDERS \*\*\*

**NUR**

**BED REST**

Notes: pt agreed  
 Completed by: hcs

**TECH**

**ECG W/REPORT**

Notes: none  
 Completed by: hcs

**PULSE OXIMETRY**

Notes: none  
 Results: 98  
 Completed by: hcs

**CBC W/DIFF W/PLATELET**

After answering the questions on the Open Orders screen, click the *Submit Answers* button. The Clinic Status screen reappears showing that there is now an open order for the provider (**DR**) (shown below).

Open order for the provider (DR)

**Clinic Status**  
 TUE 07/14 2:11p  
 No open orders for TECH for FROST, JEAN C...

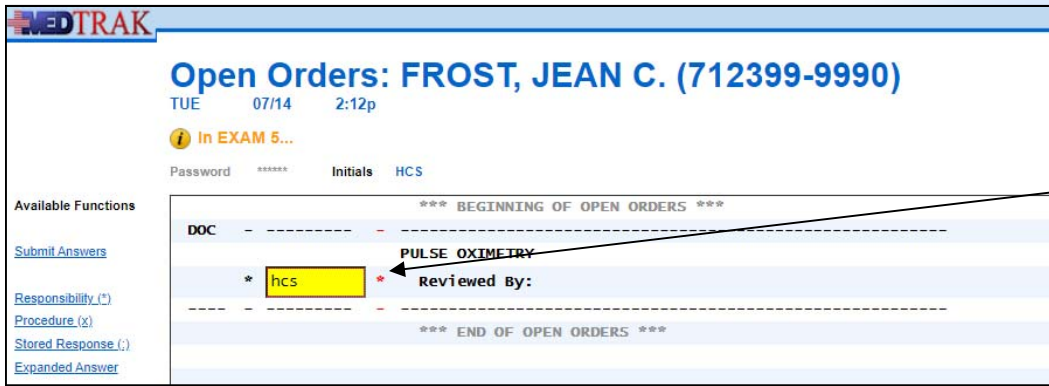
HCS Medical Care Location

Available Functions: Schedule, Patients, Companies, Search, Further Review

CHD	ROOM	NAME / REASON	ORDER	STATUS	DR	TC	CL	XR	LB	RS	TEC	DOC	TOT
		EXAM 1											
		EXAM 2											
		EXAM 3											
		EXAM 4											
		EXAM 5 Frost, Jean C.		open	0						HCS	HCS	36
		PROC											
		LAB											

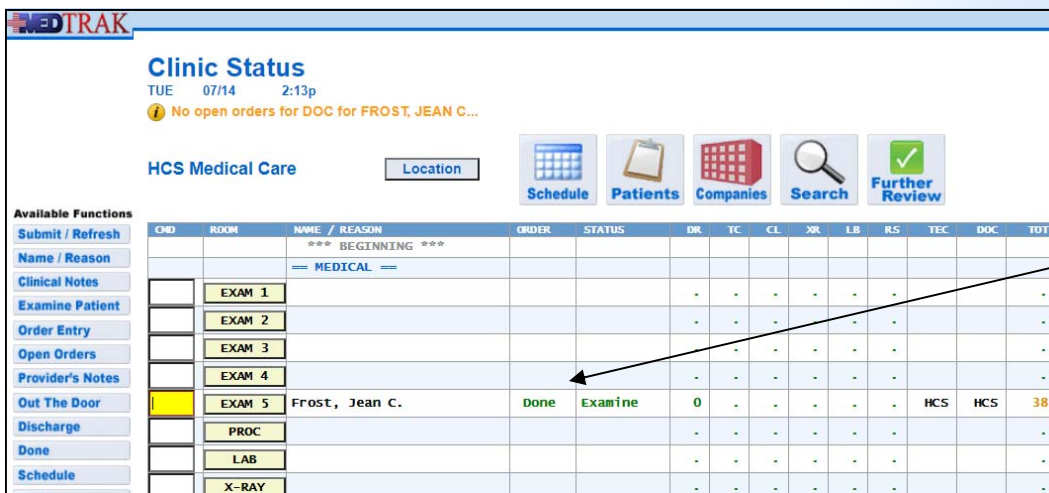
Be sure the cursor is next to Ms. Frost and click the *Open Orders* button. The Open Orders screen appears showing that the provider needs to review the results of the pulse oximetry test. The provider enters their MedTrak employee initials indicating that they reviewed the pulse oximetry test results (shown on the next page).





Provider's MedTrak employee initials

Then the provider clicks the *Submit Answers* button. The Clinic Status screen reappears showing an **Order** status of **Done** which indicates that there are now no open orders (shown below).



Order status is now Done

1. Click the *Exit Screen* button  
(You should be back on the Care Pathways screen)
2. Click the *Exit Screen* button again  
(You should be back on the Clinic Status screen)
3. Be sure the cursor is next to **Ms. Frost**
4. Click the *Open Orders* button  
(You should be on the Open Orders screen for Ms. Frost)
5. Type "pt agreed" in the **Bed Rest / Notes** field
6. Type your **MedTrak employee initials** in the **Bed Rest / Completed by** field
7. Type "understood" in the **NPO / Notes** field
8. Type your **MedTrak employee initials** in the **NPO / Completed By** field
9. Type "none" in the **ECG / Notes** field

Do These Steps  
<==== 9.04

Do These Steps  
9.05 =====>

1. Type your **MedTrak employee initials** in the **ECG / Completed By** field
2. Type **“none”** in the **Pulse Oximetry / Notes** field
3. Type **98** in the **Pulse Oximetry / Results** field
4. Type your **MedTrak employee initials** in the **Pulse Oximetry / Completed By** field
5. Type **“none”** in the **CBC / Notes** field
6. Type your **MedTrak employee initials** in the **CBC / Collected By** field
7. Click the **Submit Answers** button  
(You should be back on the Clinic Status screen)  
(There should be open orders for the provider (**DR**))
8. Click the **Open Orders** button  
(You should be on the Open Orders screen for Ms. Frost)
9. Type your **MedTrak employee initials** in the **Pulse Oximetry / Reviewed By** field
10. Click the **Submit Answers** button  
(You should be back on the Clinic Status screen)  
(The **Order** status should be **Done**)

To review the current status of the care pathway orders, be sure the cursor is next to Ms. Frost on the Clinic Status screen and click the **Pathway** button. The next screen to appear is the Care Pathways screen. On this screen, click the **Select** button to display the Care Pathway / Orders screen (shown below).

Current status of  
care pathway  
orders

*** BEGINNING ***						
0 MIN	07/14/20	2:02p	BED REST	completed		
	07/14/20	2:02p	NPO - NOTHING PER ORAL	completed		
	07/14/20	2:02p	ECG W/REPORT	pending results		
	07/14/20	2:02p	PULSE OXIMETRY	completed		
	07/14/20	2:02p	CBC W/DIFF W/PLATELET	pending results		
15 MIN	07/14/20	2:17p	BED REST	not placed yet..		
	07/14/20	2:17p	NPO - NOTHING PER ORAL	not placed yet..		



As you can see on this screen, several of the orders are completed, a couple are pending results, and the rest still need to be placed. After reviewing this screen, click the *Exit Screen* button to return to the Care Pathways screen, then click the *Exit Screen* button again to return to the Clinic Status screen.

1. Be sure the cursor is next to **Ms. Frost** on the Clinic Status screen
2. Click the *Pathway* button  
(You should be on the Care Pathways screen)
3. Be sure the cursor is next to the care pathway
4. Click the *Select* button  
(You should be on the Care Pathway / Orders screen)
5. Review the status of the orders on this screen
6. Click the *Exit Screen* button  
(You should be back on the Care Pathways screen)
7. Click the *Exit Screen* button again  
(You should be back on the Clinic Status screen)

Do These Steps  
<==== 9.06

Fifteen minutes after the start of the care pathway, MedTrak automatically places the orders for the **fifteen minute** mark. The Clinic Status screen now indicates that there are open orders again for Ms. Frost (shown below).

CHD	ROOM	NAME / REASON	ORDER	STATUS	DR	TC	CL	XR	LB	RS	TEC	DOC	TOT
		*** BEGINNING ***											
		== MEDICAL ==											
	EXAM 1				.	.	.	.	.	.			.
	EXAM 2				.	.	.	.	.	.			.
	EXAM 3				.	.	.	.	.	.			.
	EXAM 4				.	.	.	.	.	.			.
	EXAM 5	Frost, Jean C.		open	.	0	.	0	.	.	HCS	HCS	42
	PROC				.	.	.	.	.	.			.
	LAB				.	.	.	.	.	.			.
	X-RAY				.	.	.	.	.	.			.
		*** END ***											

Order status is now Open

There are now open orders for both the nursing (**TC**) and radiology (**XR**) staffs. To view the open orders, be sure the cursor is next to Ms. Frost and click the *Open Orders* button. The next screen to appear is the Open Orders screen for you to review the open orders for Ms. Frost (shown on the next page).

Open orders for nursing and radiology

**Open Orders: FROST, JEAN C. (712399-9990)**  
 TUE 07/14 2:20p  
 In EXAM 5...  
 Password \*\*\*\*\* Initials HCS

Available Functions: Submit Answers, Responsibility (\*), Procedure (x), Stored Response (.), Expanded Answer, Already Answered, More Functions

\*\*\* BEGINNING OF OPEN ORDERS \*\*\*

**NUR**

0 MIN 07/14/20 2:02p **BED REST** completed

\* Notes: \* Completed by:

07/14/20 2:02p **NPO - NOTHING PER ORAL** completed

\* Notes: \* Completed By:

**XRAY**

07/14/20 2:02p **X-RAY CHEST (1VW)** pending results

\* Notes: \* Any Chance of Pregnancy: \* X-ray Number: \* Completed By:

Do These Steps  
9.07 =====>

1. Be sure the cursor is next to **Ms. Frost**
2. Click the **Open Orders** button  
(You should be on Ms. Frost's Open Orders screen)
3. Review the open orders on this screen
4. Click the **Exit Screen** button  
(You should be back on the Clinic Status screen)

The Care Pathway / Orders screen is also updated with the current status of the patient's orders. To view this screen, be sure the cursor is next to Ms. Frost on the Clinic Status screen and click the **Pathway** button. On the Care Pathways screen, be sure the cursor is next to the care pathway and click the **Select** button. The Care Pathway / Orders screen appears (shown below).

Current status of care pathway orders

**Care Pathway / Orders**  
 TUE 07/14 2:21p

**FROST, JEAN C. (471VRJ)**  
**CHEST PAINS (712399-9990)**  
 Pathway: **Chest Pain Pathway, 07/14/20 2:02p**

Available Functions: Select, More Functions

\*\*\* BEGINNING \*\*\*

0 MIN	07/14/20	2:02p	BED REST	completed
	07/14/20	2:02p	NPO - NOTHING PER ORAL	completed
	07/14/20	2:02p	ECG W/REPORT	pending results
	07/14/20	2:02p	PULSE OXIMETRY	completed
	07/14/20	2:02p	CBC W/DIFF W/PLATELET	pending results
15 MIN	07/14/20	2:17p	BED REST	open order
	07/14/20	2:17p	NPO - NOTHING PER ORAL	open order
	07/14/20	2:17p	X-RAY CHEST (1VW)	open order

You can review the details of any order. To view the order details of the **Bed Rest** order at the **zero minute** mark, place the cursor next to the order and click the **Select** button. The **Bed Rest** order details screen appears (shown below).

**MEDTRAK**

## BED REST

TUE 07/14 2:22p

..PATIENT RESPONSIBILITY (2)  
FROST, JEAN C. (471VRJ)  
CHEST PAINS (712399-9990)

Password \*\*\*\*\* Initials HCS

Available Functions

[Submit Answers](#)

[Responsibility \(\\*\)](#)

* * * BED REST * * *	
NURSE	
pt agreed *	Notes: pt agreed
* *	Completed by: Healthcare student
* * * END * * *	

Bed Rest order  
details screen

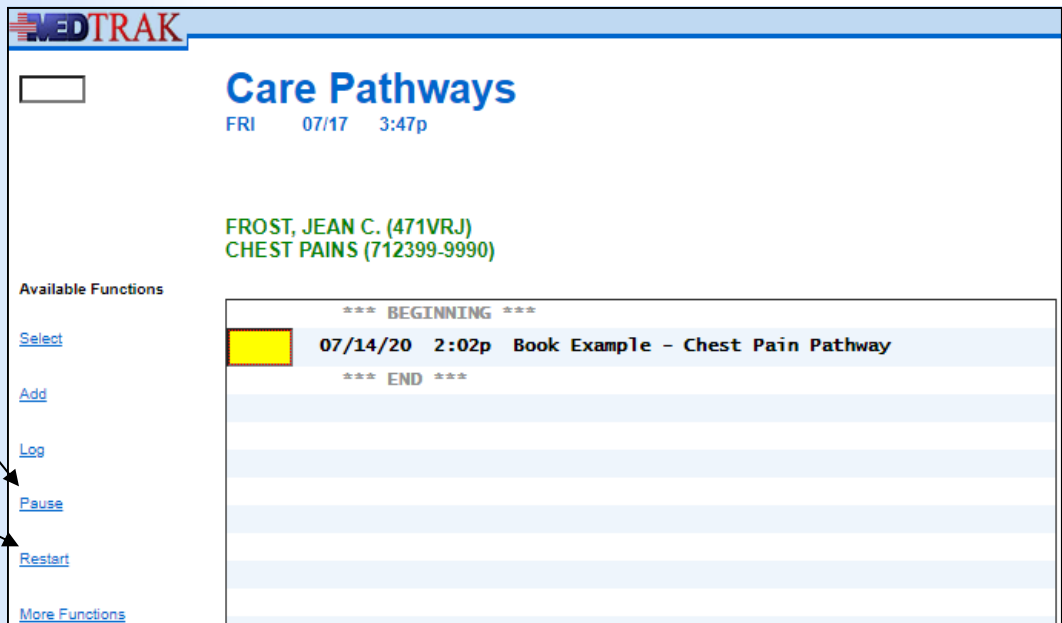
After reviewing this order, click the **Exit Screen** button to return to the Care Pathway / Orders screen. Then click the **Exit Screen** button again to return to the Care Pathways screen.

1. Be sure the cursor is next to **Ms. Frost** on the Clinic Status screen
2. Click the **Pathway** button  
(You should be on the Care Pathways screen)
3. Be sure the cursor is next to the care pathway
4. Click the **Select** button  
(You should be on the Care Pathway / Orders screen)
5. Review the status of the orders on this screen
6. Place the cursor next to the **Bed Rest** order at the **zero minute** mark
7. Click the **Select** button  
(You should be on the **Bed Rest** order details screen)
8. Review the details of this order
9. Click the **Exit Screen** button  
(You should be back on the Care Pathway / Orders screen)
10. Click the **Exit Screen** button again  
(You should be back on the Care Pathways screen)

Do These Steps  
<==== 9.08

## Pausing and restarting a care pathway

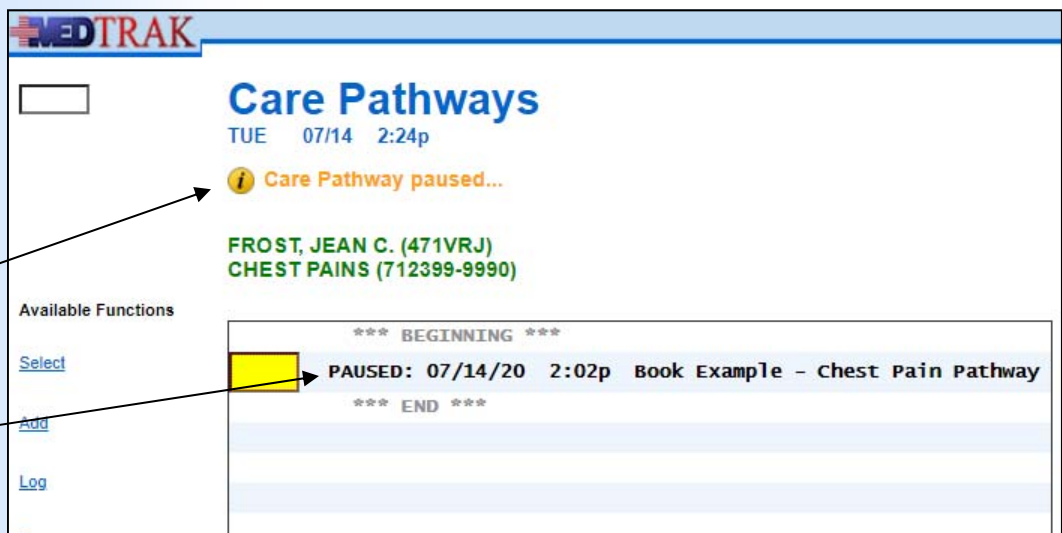
Because there are so many variables involved in patient care, sometimes it is necessary to pause a running care pathway. This temporary stop in the care pathway could be due to the patient developing a secondary condition that needs to be stabilized before proceeding with the care pathway. You pause a care pathway on the Care Pathways screen (shown below).



Pause button

Restart button

To pause a care pathway, place the cursor next to it on the Care Pathways screen and click the *Pause* button. The Care Pathways screen refreshes with the care pathway paused (shown below).



Care Pathway paused... message

Care pathway paused

Pausing the care pathway suspends all of the orders yet to be placed. The timer for placing the orders is put on hold until the care pathway is restarted.



Be sure the cursor is next to the care pathway and click the *Select* button to display the Care Pathway / Orders screen (shown below).

**MEDTRAK**

## Care Pathway / Orders

TUE 07/14 2:25p

FROST, JEAN C. (471VRJ)  
CHEST PAINS (712399-9990)

Pathway: Chest Pain Pathway, 07/14/20 2:02p

Available Functions

Select

More Functions

Page Up Page Down

Exit Screen

Main Menu

\*\*\* BEGINNING \*\*\*

0 MIN	07/14/20	2:02p	BED REST	completed
	07/14/20	2:02p	NPO - NOTHING PER ORAL	completed
	07/14/20	2:02p	ECG W/REPORT	pending results
	07/14/20	2:02p	PULSE OXIMETRY	completed
	07/14/20	2:02p	CBC W/DIFF W/PLATELET	pending results
15 MIN	07/14/20	2:17p	BED REST	open order
	07/14/20	2:17p	NPO - NOTHING PER ORAL	open order
	07/14/20	2:17p	X-RAY CHEST (1VW)	open order
PAUSED: 30 MIN	07/14/20	2:32p	BED REST	
PAUSED:	07/14/20	2:32p	NPO - NOTHING PER ORAL	
PAUSED: 45 MIN	07/14/20	2:47p	BED REST	
PAUSED:	07/14/20	2:47p	NPO - NOTHING PER ORAL	

Care pathway orders paused

1. Be sure the cursor is next to the care pathway on the Care Pathways screen
2. Click the *Pause* button  
(The Care Pathways screen refreshes)  
(The message “**Care Pathway paused...**” appears)  
(The care pathway is paused)
3. Click the *Select* button  
(You should be on the Care Pathway / Orders screen)
4. Review the status of the orders on this screen
5. Click the *Exit Screen* button  
(You should be back on the Care Pathways screen)

Do These Steps  
<==== 9.09

Restarting the care pathway reactivates the timer for the orders yet to be placed. To restart a care pathway, be sure the cursor is next to the care pathway on the Care Pathways screen and click the *Restart* button. The Care Pathways screen refreshes with the message “**Care pathway re-started...**” and the care pathway is active again (shown on the next page).



Care Pathway re-started... message

Care pathway is re-started

Do These Steps 9.10 =====>

1. Be sure the cursor is next to the care pathway on the Care Pathways screen
2. Click the *Restart* button  
 (The Care Pathways screen refreshes)  
 (The message “**Care Pathway re-started...**” appears)  
 (The care pathway is active again)

The pause and re-start of the care pathway is also recorded in the log. To view the log, be sure the cursor is next to the care pathway on the Care Pathways screen and click the *Log* button. The Care Pathway Log screen appears (shown below).

Care Pathway Log showing the start, pause, and re-start

To exit the Care Pathway Log screen, click the *Exit Screen* button.

1. Be sure the cursor is next to the care pathway on the Care Pathways screen
2. Click the *Log* button  
(You should be on the Care Pathway Log screen)
3. Review the log entries on this screen
4. Click the *Exit Screen* button  
(You should be back on the Care Pathways screen)

Do These Steps  
<==== 9.11

## Voiding patients from the Clinic Status screen

You will most likely not build your care pathway's categories, processes, and rules exactly the way that you want them to work the first time that you test them. It will be a process of improvement. This will necessitate the testing of your care pathways with multiple patients from the **Patients** database. Once you start a care pathway with one patient, you will not want to use that patient to test the next iteration of your care pathway. To remove a test patient from the Clinic Status screen, follow this procedure.

1. **Pause** the care pathway with the test patient.
2. **Void** the test patient from the Clinic Status screen.

Be sure the cursor is next to the test patient that you want to remove from the Clinic Status screen. Click the *Pathway* button to access the Care Pathways screen. Pause the care pathway by clicking the *Pause* button with the cursor next to the care pathway. Click the *Exit Screen* button to return to the Clinic Status screen. Type "void" in the command next to the patient (shown below).

The screenshot shows the MEDTRAK Clinic Status interface. At the top, it displays 'FRI 07/17 3:50p' and 'HCS Medical Care'. Below this are navigation buttons for 'Schedule', 'Patients', 'Companies', 'Search', and 'Further Review'. A table lists various medical orders for a patient. The table has columns for CMD, ROOM, NAME / REASON, ORDER, STATUS, DR, TC, CL, XL, LR, RS, TEC, DOC, and TOT. The patient 'Frost, Jean C.' is listed with an 'Open' status. The 'void' command is entered in the 'CMD' column next to the patient's name. A 'void command' callout box points to this entry. On the left side, there is a list of 'Available Functions' including 'Submit / Refresh', 'Name / Reason', 'Clinical Notes', 'Examine Patient', 'Order Entry', 'Open Orders', 'Provider's Notes', 'Out The Door', 'Discharge', 'Done', 'Schedule', 'Visit Log', 'Online Chart', and 'Pathway'.

CMD	ROOM	NAME / REASON	ORDER	STATUS	DR	TC	CL	XL	LR	RS	TEC	DOC	TOT
		*** BEGINNING ***											
		== MEDICAL ==											
		EXAM 1			.	.	.	.	.	.			.
		EXAM 2			.	.	.	.	.	.			.
		EXAM 3			.	.	.	.	.	.			.
		EXAM 4			.	.	.	.	.	.			.
void		EXAM 5 Frost, Jean C.		Open	.	6	.	4	.	.	HCS	HCS	8
		PROC			.	.	.	.	.	.			.
		LAB			.	.	.	.	.	.			.
		X-RAY			.	.	.	.	.	.			.
		*** END ***											

void  
command

After pausing the  
care pathway for  
the patient

Press the **ENTER** key. The next screen to appear is the Void Visit. On this screen, type "**Testing**" or any other reason in the **Reason** field (shown below).

Reason for voiding the visit

Click the **Submit** button. The Clinic Status screen reappears with the test patient removed (shown below).

Ms. Frost's visit is voided and she no longer appears

Do These Steps 9.12 =====>

1. Place the cursor next to the patient on the Clinic Status
2. Click the **Pathway** button  
(You should be on the Care Pathways screen)
3. Click the **Pause** button  
(The care pathway is paused)
4. Click the **Exit Screen** button  
(You should be back on the Clinic Status screen)
5. Type "**void**" in the command field next to the patient
6. Press the **ENTER** key  
(You should be on the Void Visit screen)
7. Type "**Testing**" or any other reason in the **Reason** field
8. Click the **Submit** button  
(You should be back on the Clinic Status screen)  
(The patient no longer appears on the screen)

# Building and Running Your Own Care Pathway

# 10



## Learning Outcomes

- ▶ How to build and run your own care pathway



## Key Concepts

- ▶ How to build your care pathway
- ▶ How to locate patient orders in a CPOE
- ▶ How to print your care pathway
- ▶ How to register patients
- ▶ How to process patient intake
- ▶ How to run your care pathway
- ▶ How to pause your care pathway
- ▶ How to restart your care pathway



## Assignment

- ▶ Your instructor will provide you with your assignment

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