Project GEMINI

Soarian Clinicals Results Viewing Quick User Guide

Physicians, Medical Secretaries, Residents and Nurse Practitioners
(For clinicians who provide care in one unit/location)

December, 2008
Vs. c5
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Before Starting

How do I protect my patient’s privacy and confidentiality?

Passwords and Security

Passwords enable users to gain entrance into the system. **They are unique to each staff member and are not to be shared.** The only circumstance under which you would provide your password would be for troubleshooting purposes, such as a call to the Help Desk.

Passwords are case sensitive (use of upper and lower case letters are recognized by the system) and must be a minimum of six characters. If at any time you think that your password has been compromised, please contact the Help Desk to report the problem and have your password reset.

You are responsible for whatever is done on the computer under your password. Therefore, you need to keep it to yourself at all times. Choose a password that is difficult to guess, and never leave it written down anywhere near your computer, desk or day book.

Some of the menus have varying functions which are specific to the user. Personnel are not authorized to implement tasks that are not on their specific menu. For your protection, completely log off the system by clicking on the logoff link (top right of window) whenever you are leaving the computer.

While using the computer to access patient information, ensure the computer screen and any printouts you create are only visible to authorized people who need to know that information.

What is Soarian Clinical Access?

Soarian Clinical Access (SCA) is the software for viewing clinical results and is the portal for future phases of Project Gemini, including computerized provider order entry (CPOE) and Charting.

For easy reference, clinical data dating back to January 1997 is available in SCA. Digital images, however, are available in SCA from May 2004 forward. Images older than that date can be obtained from the Film Library.
Getting Started

This section will show you how to:
- Logon
- Change your password
- Logout

Logging in

1. Double click on the Soarian Clinicals icon on your Desktop. The sign-in screen displays.
2. Enter your username and password.

   Note: Your Username is your Novell ID - your last name followed by your first initial, usually (e.g. smithj)
   Your password is smh, followed by the number on the back of your badge above the barcode (e.g. smh12345)
   If you have problems logging in, call the Help Desk at ext. 5751 for assistance.

   If your Username and Password are correct, you will be prompted to change your password.

Changing your password

5. Type your existing password in the Old Password field (eg smh####)
6. Type a new password in the New Password field. Passwords must be a minimum of six (6) characters.
7. Retype the new password in the Confirm New Password field and click OK. The main screen displays once you have successfully changed your password.

Logging off

1. Click the Log Off link on the right side of the toolbar.

   Note: To protect patient privacy, be sure to logoff (using the Log Off link) when you leave the computer.
About the patient census

The first time you enter the system, you are required to select a Health Care unit (HCU). Once selected, it stays selected.

Selecting a health-care unit

1. Click on Select a unit in the middle of your screen at the top. The Entity Selection window displays.

2. Click on the letters SMH and click OK. You are now ready to set up your census.

Physicians may maintain up to six (6) different censuses at any given time. With the exception of My Patients Only, these census options are defined using the Search Button and chosen in the census drop-down list on the main screen as shown here.

Six census options

1. My Patients Only displays only the patients associated directly to you as an attending or admitting physician (as defined in the Registration system). This could also include referring physicians and eventually ordering physicians in the future. These patients display automatically and do not require any set up. As well, Inpatients that have been added manually using the Search button (as described in the section below: Adding a Patient to the Census) display in this category.

2. Include Coverage Patients allows you to display patients of a physician(s) for which you are covering.

3. Nurse Station Patients enables you to display Inpatients that are assigned to a nurse station. The Nurse Station tab in the Search window enables you to define one or more nurse station units.

4. Patient Service Selections enables you to display patients according to the service they are assigned (e.g., Cardiology). The Patient Service tab in the Search window enables you to define your Patient Service Selections view.

5. Outpatients enables you to display those Outpatients that are either registered to you or to the outpatient medically responsible unit to which you set your view. As well, Outpatients that have been added manually using the Search Button (as described in the section below: Adding a Patient to the Census) display in this category.

The Outpatients tab in the Search window enables you to define your outpatient view, including the date range for which to display outpatients in your census.

6. Combined Census enables you to display patients according to the service they are assigned, as well as patients for an assigned nurse station.
Managing the patient census

To add a list of patients to your census for a particular nursing station unit(s), or from the service under which the patient is receiving care, or for an outpatient clinic, use the Search button. The setup differs slightly for Inpatients and Outpatients. See steps below for both methods.

Adding Inpatients to your census

1. Click on the Search button on the toolbar. The Search window displays.
2. Select the tab Location & Service.
3. Under Patient Services, select the + sign.
4. Select SMH. Scroll down to the Services.
5. Click in the check box(es) next to the service(s) you want on your census (eg Cardiology).
6. You can add patients from selected nursing station units in the same way under Nurse Station.
7. Click the Save&Close button to save your changes and return to the main screen.
8. Click the Refresh button on the main screen to refresh your census.
   Your patients will display under Nurse Station Patients if you chose Nurse Station or Patient Service Selections if you chose Patient Service.

Adding Outpatients to your census

1. Click on the Search button and select the Outpatients tab.
2. Do one of the following
   a) Select My Patient census to display Outpatients assigned to you as admitting or attending physician.
   b) Select My Coverage to display patients of physicians that you may be covering (must be set up in the Coverage tab).
   c) Select Nurse Station Units to display Outpatients of a clinic or clinics.
   d) Select Patient Service to display Outpatients by the service they receive.
3. Enter the number of days before today and after today you want to view the outpatient list (maximum two days).
   Enter 1 day before and 1 day after to get today’s Outpatients.
4. Click in the checkboxes for Outpatient Service or Clinic you want, and click the down arrow to select them.
5. When you choose Save&Close, you will be able to see the Outpatients in your Outpatient list.
6. If you want to remove a unit, click in the check box next to it, and click the Up arrow.
Managing the patient census (cont’d)

Creating a Combined Census

1. Click the + Signs to add Hospital Services and Nurse Stations
2. Select the check boxes next to the units, and click here to add the Patient Service and Nurse Station to the Combined Census

In this example:
- All Team D Medicine patients will display in the “Patient Service Selections census
- 14C patients will display in the ‘Nurse Station Patients’ census
- Only the Team D Medicine patients on 14C will display in the Combined Census”

Adding a patient manually to the Census

You can build your own census by finding patients and adding them to your census.

1. After completing a search, select the patient’s name.
2. Click the Add to Census button.

Removing a patient manually from the census

1. On the main screen, click on the patient’s name to open up the census view

1. Click the Remove Patient from Census button.

Sorting the census

The Sort buttons allow you to quickly find a patient in the list. When you sort by room/bed, the units are sorted first and then by room/bed number. Sorting by name puts your list in alphabetical order by last name.

Sort your patients by Rm & Bed #
Sort your patients by Name
Finding a patient not on my census

There may be circumstances in which the patient record you need is not on your census. For example, the patient may be discharged or transferred to another unit and you require that patient’s results, but you can search for the patient and access the record. If the record is required for ease of future access, you can also add the record to your census and remove it when it is no longer required.

Finding a patient by Medical Record Number (MRN)

1. Click the Search button located on the toolbar at the top right corner of the SCA screen.

2. Select the ID panel.

3. ID Type is MR#

4. Enter the MR# (patient chart #)

5. Click the Search button. The patient displays.

Finding a patient by name

1. Click the Search button located on the toolbar at the top right corner of the SCA screen.

2. Select the By Name panel.

3. Enter the Last Name (minimum data required)

4. Click the Search button. A list of patients displays.

Accessing the Patient Record from the Search Screen

1. To view the Patient’s Record, click the down arrow left of the patient’s name on the Search screen and choose View Patient Record.
**Viewing Patient Information**

**Viewing the Facesheet**

The Facesheet displays all the demographic information for the patient captured in the registration system of the hospital.

![Image of Facesheet](image)

**Viewing the Encounter Summary**

If you want to view a list of all the patient’s visits, it is available in the Encounter Summary from January 1, 1997.

1. To begin, choose Encounter Summary from the Access Websites Related to this Patient button on the patient record.
   
   ![Image of Encounter Summary](image)

   Will display Last 12 Months.

   To display Last 24 Months or All Encounters, select the option, and then click the Submit button.

**Viewing the Medication Profile**

The purpose of the VMP is to provide the clinician with a snapshot of a patient's medication regimen. The information comes from the orders entered into the Pharmacy system from the copies of physician orders. The VMP should be used in conjunction with the nursing Medication Administration Record, the Kardex and the patient's chart to assist with medication management. You access the Viewable Medication Profile from the same patient-specific website list on the patient record as the Encounter Summary above.

After selecting Viewing Medication Profile select a Visit # 290010909 for the Profile you want.

Only orders received in the Pharmacy Department are reflected on the profile.

There is a delay between the time the order is written and when it is entered into the Pharmacy system. Orders from overnight are processed the following morning when Pharmacy opens.
Viewing Results on the Main Screen

**Current** results can be viewed on the **main screen** in the open patient census. If there are new results (last 25 hours), a green box indicator displays on the closed and open view. If within those current results, any are critical, a red box displays. As well, there are icons that allow you to perform other tasks, such as viewing the patient’s demographic information (facesheet), viewing visit details and opening up the patient’s record.

**Viewing new results on the main screen**

1. In the patient list, click on the patient’s name.

<table>
<thead>
<tr>
<th>14C</th>
<th>1-403803</th>
<th>DUCK-T, DONALD</th>
<th>41</th>
<th>♀</th>
</tr>
</thead>
<tbody>
<tr>
<td>7CC</td>
<td>712C1</td>
<td>TRAIN-T, ONE</td>
<td>32</td>
<td>♀</td>
</tr>
<tr>
<td>7CC</td>
<td>712C2</td>
<td>TRAIN-T, TWO</td>
<td>51</td>
<td>♂</td>
</tr>
<tr>
<td>7CC</td>
<td>714C1</td>
<td>TRAIN-T, THREE</td>
<td>31</td>
<td>♂</td>
</tr>
</tbody>
</table>

The census view of the patient displays.

10/06/08 09:38

Chest Pain Assess...

**Result Indicator:**
green for new results or red for new results that are critical.

To return to closed census view, click on the down arrow here.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon" alt="Facesheet" /></td>
<td>For viewing patient demographics and visit information.</td>
</tr>
<tr>
<td><img src="icon" alt="Remove Patient" /></td>
<td>For accessing laboratory results, cardiovascular results, transcriptions, images, order status and nurses’ charted data. <strong>Note:</strong> You can remove a patient from the census only if you have manually added using the <strong>Search Tool</strong>.</td>
</tr>
<tr>
<td><img src="icon" alt="Patient Record" /></td>
<td>For echarting of patient data, such as vital signs and assessments. (Expected completion date - Spring 09).</td>
</tr>
<tr>
<td><img src="icon" alt="Charting Functionality" /></td>
<td>For placing non-medication orders, such as labs, diets and medical imaging. Medication order entry will follow at a future date.</td>
</tr>
<tr>
<td><img src="icon" alt="Order Functionality" /></td>
<td>For displaying details of the patient’s current and future visits.</td>
</tr>
<tr>
<td><img src="icon" alt="Visit Data" /></td>
<td>For displaying physicians associated to the patient.</td>
</tr>
<tr>
<td><img src="icon" alt="Physicians" /></td>
<td>For displaying nurses associated to the patient as they are defined in the Nurse Assignment Tool.</td>
</tr>
<tr>
<td><img src="icon" alt="Acct#" /></td>
<td>The patient’s current visit number.</td>
</tr>
<tr>
<td><img src="icon" alt="MR#" /></td>
<td>The patient’s permanent chart number.</td>
</tr>
<tr>
<td><img src="icon" alt="Green" /></td>
<td>Indicates new results in the last 25 hours.</td>
</tr>
<tr>
<td><img src="icon" alt="Red" /></td>
<td>Indicates critical results.</td>
</tr>
</tbody>
</table>
Choosing a Date / Time Range

The results that display automatically when you open the patient record will be Last 6 Occurrences, but there are other options for changing the number of occurrences and date and time range for the results you need.

Selecting a Date Range

1. Click on the arrow next to the date range.

2. Choose a From: and To: date and click OK to update your screen with the results for the dates you chose.

Selecting a Pre-set Time range:

Changing the Number of Occurrences

You can choose Last 6 Occurrences Last 12, or All Occurrences

Last 6 Occurrences and Last 12 Occurrences Expanded options will open up all reports for you on the Patient Record avoiding having to open each one individually.

All Occurrences will return all results back to 1997.
Viewing Laboratory Results on the Patient Record

The results screen has a drop-down list on the left side which enables you to display the results you want to view in what are called Flowsheets, such as Diagnostic Laboratories, Imaging by Dept., Transcriptions, Cardiovascular Diagnostics, Orders, Clinical Documentation and Scanned Documents.

**Viewing lab results on the patient record**

To open up the patient record and view laboratory results (Diagnostic Laboratories):

1. On the main screen, click on the **Chart** icon for the patient. The Patient Record displays.
2. Select Diagnostic Laboratories from the drop-down list on the left side of the window, if it is not displaying.
3. Click on a group name (eg Routine Haematology) to view the results.

**Results Indicators**

- **H**: Abnormal High
- **HH**: Critical High
- **L**: Abnormal Low
- **LL**: Critical Low
- **A**: Report with Abnormal Indicator
- **AA**: Report with Critical Indicator

**Black text**

Preliminary status

**Italics**

Edited information

**▲**

Note added

**Numeric value results display as numbers.** If you want to view the details (laboratory report) of a numeric result, click on top of any number. **The report opens for viewing.**

If there has been a revision to a result, click the **History** tab to view.

**Text-based results display as document icons.** To view the report, click on the icon.
Trending / Graphing Lab Results

You have the ability to graph or trend results of a date range of your choosing. Using the Trend functionality enables you to view results in a linear format and is useful when comparing results over time.

**Trending / Graphing numerical result data**

1. Click the **Enable Trends / Graph** button top right of window. Check boxes display next to the results.

2. Click the check box(es) next to the results you want to trend. You can trend a maximum of five results at a time.

3. Click on the **Graph** or **Trend** button next to the Enable Graph and Trend button. The appropriate window displays showing your results.

4. Select **Graph** and **Trend** parameters from left side of screen, i.e. **Separate/Combined**, **Time Range**, and **Chronological/Reverse Chronological**.

5. Click the **Calendar** icon if you want to change the time range and then click the **Refresh** button.

6. To change from **Trends** to **Graph** or vice versa, click the appropriate button in the bottom left corner of the screen and click the **Refresh** button.
Viewing Transcription and Imaging Reports

The Transcription Flowsheet displays all consult notes dictated on the patient. Reports for images (e.g. CT Scan) are displayed under Imaging by Dept.

To view a Transcription report:

1. Select the Transcription flowsheet from the drop-down list box on the left side of the patient’s record.

2. Click on a report you want to view.
   The report displays. You have the option to print or view the report.

3. Click the Close box when finished.

To view an Imaging by Dept. report:

1. Select the Imaging by Dept Flowsheet from the drop-down list box on the left side of the patient’s record.

2. Click on a report you want to view.
   The report displays.

3. If you want to view the related image, click the View Image button.
   MagicWeb opens and you have the option to study the image.
Viewing Cardiovascular Results

To view a Cardiovascular Diagnostics report:

1. Select the **Cardiovascular Diagnostics** flowsheet from the drop-down list box on the left side of the patient’s record.

2. Click on the document icon for the report you want.

3. Click on the **View Image** button to view the tracing.

4. Click the **Close** box when you are finished viewing the tracing.

*Note: The interpretation of a Cardiac Catheterization result displays as a transcription in the transcription flowsheet.*
Viewing Status of Orders

The **Orders Flowsheet** displays the status of all **Non-Medication** Orders entered by an RN or Clerical Assistant in the unit. The entry of medications into Soarian Clincals is a future functionality targeted for late 2009.

To view the **Status of Orders**:

1. Select the **Orders** flowsheet from the drop-down list box on the left side of the patient’s record. The icons on the screen represent the status of the orders placed.

2. To view the revision history and other details about the order placed, click on the status symbol. The report displays.

3. Click on the **History** tab to see the revisions.

4. Click the **Close** box when finished.
Viewing Clinical Documentation

Clinical Documentation is gradually being implemented in inpatient units of the hospital. By the end of March 2009, RNs and Health Discipline professionals in all Inpatient units of the hospital will be electronically charting Vital Signs, Intake & Output, Nursing Assessments, Health Discipline Assessments and Interprofessional Notes in Soarian Clinicals. Physician orders, Medical / Operative Notes, Physician Progress and Consultation Notes will continue to be documented by paper.

From the patient record, we can view the clinical documentation from the flowsheet drop-down list for those patients currently on electronic charting.

To view Clinical Documentation:

1. Select **Clinical Documentation** from the Flowsheet drop-down

2. Click on a value, such as the temperature, to view details of that particular value.

   The report opens to the details window for viewing of **that particular value only**.

3. Clicking the **View** tab displays the charting for **all** the vital signs

   Each 24-hour period of documentation has 3 columns

<table>
<thead>
<tr>
<th></th>
<th>Day Shift</th>
<th>Night Shift</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/13/08 07:00 - 06:59</td>
<td>1200</td>
<td>1200</td>
<td>1200</td>
</tr>
<tr>
<td>12/13/08 19:00 - 06:59</td>
<td>400</td>
<td>400</td>
<td>400</td>
</tr>
<tr>
<td>12/12/08 07:00 - 18:59</td>
<td>1000</td>
<td>1000</td>
<td>1000</td>
</tr>
</tbody>
</table>

More information on Viewing Clinical Documentation can be found in the **Electronic Clinical Documentation Viewing Only** Elearning Module on the Intranet.
Charts that are managed by the Health Records Department are scanned post-discharge into digitalized documents and made available through the Soarian Clinicals portal. These documents are available for visits that began January 1, 2007 onward.

To retrieve a single scanned document:

1. Select **Scanned Document** from the Flowsheet drop-down list.

2. Click on the **Head** icon for the scanned document you want.

The image displays in a Viewer. You can use the toolbar buttons to enhance the readability of the document.

Navigation buttons display the number of pages of the document and enable you to navigate to a page within the document.

Click on **Quit** button to return to the patient record.

To view multiple documents for a patient at the same time:

1. Click on the **Patient-Specific External Applications** button on the patient’s record.

2. Choose **Sovera Patient Link** and you can view the whole chart of the patient (post-discharge as of Jan 1/07).

If you want to have the search capability to view other patient’s scanned documents, you click on the **Links** button (top right of window) and choose **Sovera Document Management**.

More information on using the Sovera application to retrieve, navigate and manipulate scanned documents can be found in the Sovera Document Management Elearning Module on the Intranet.