**Daily Processes: Module 2**

### Definitions

**Daily Processes:** Include creating/maintaining a Scratch Census, entering a Daily Progress Note in StarPanel, entering/modifying/discontinuing orders in HEO/Wiz, cosigning orders, updating Team Summary, and maintaining a TaskList.

**Actions Menu:** Contains links that allows users to access specific sections of a patient’s EMR or open forms for documentation.

### Steps

**Daily Progress Note (StarPanel):**

1. **Accessing Forms:** There are multiple ways to access **Forms** and Daily Progress Note for a specific service.
   a. **Actions Menu:** Select the “Actions” link next to the patient’s name.

   ![Actions Menu Example](image)

   b. **From within patients chart in StarPanel:**

   ![Forms within StarPanel](image)

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c. Select “Progress Notes” and scroll down to the specific “Daily Progress Note” determined by your service.

2. **Completing Progress Note:** While many fields are free text, there are several that will import data from both provider and nursing documentation.

   a. Vitals can be imported from nursing documentation
Daily Processes: Module 2

b. Labs can be imported directly from StarPanel

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c. Radiology reports can also be viewed in a similar fashion

Click link to display the patient's most recent lab results. Formulate clinical impression and enter in the free-text box below.

d. Review and update Synopsis and Problems daily -- ***Can move problems to reprioritize/reorder as condition changes using the arrow \( \uparrow \) next to the problem*** (Acute at top, chronic at bottom).

e. All surgical procedures for this hospitalization (invasive and non-invasive) **must** be entered.

It is critical to enter all procedures patient undergoes during this hospitalization.

Do not forget to click calendar to add the date procedure was done.
Daily Processes: Module 2

f. Review and update Estimated DC

```
data entered here WILL NOT be displayed as part of this History and Physical.
Change Estimated DC
```

Estimated DC (discharge) should be reevaluated & updated each day

Updating Team Summary:

1. Several, but not all, of the Team Summary modules are embedded in the Daily Progress, History and Physical, and the Discharge Summary Notes. Changes made in the Team Summary will share the information over to these notes.
   a. Typically, Synopsis and Problem list appears in every progress note.
   b. The Surgical Procedures module is service dependent; therefore, some daily progress notes do not contain this module. However, it is essential this information is updated when applicable.

2. Accessing Team Summary can be accomplished either through the Actions menu or the Green Bar within the patient’s chart.

```
1251 Ztrainss5N, Albert MDS [Change]

24HR Labs  Demographics  Inpt. snapshot  Nurse Plan Flowsheet  Reminders?
AddToPanel  E-DOCS  Inpt. sn...hot (no meds)  OPC  Remove**
AdultNursingFlowsheet  ED Documents  Inpt.med. history  Open Chart in New Window  Reports/Studies
AllDocuments  FastLabs  Inpt.med.history  PedFlowsheet  RxStar
Appointments  Forms  Labs & Values  PedQuickView  StarNotes
Cardiac Rhythm Strips  Growth charts  MAR  Pending Labs  SN:NICU...ing Template
Chemotherapy Flow  Handover (General)  MAR (whole adm.)  Progress Note  Team Summary View
CodeStatus form (Adult/Handover (Ortho)  Med List Tool  ProviderCommWizard  TypeNew
CodeStatus form (Peds)  Handover (Surgical)  Mother/Baby info  ProviderLetter  Vascular Access
Consults  Health Care Team  My Favorites  Pt.Summary  Vital signs (entry)
Counseling orders  Immunizations  NewMag  Radiol. Impressions  Wz:ManagePre
CTR Flowsheet  Inpt. details  Nurse Care Flowsheet  RecentLabs  Wounds/Drain/Tube
CP/QuickView  Inpt. orders  Nurse Data Flowsheet  Reminder

-- OR --
```

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Daily Processes: Module 2

3. Common Team Summary modules include:
   a. Synopsis: Brief summary why patient is being admitted to the hospital

   ![Synopsis](Image)

   b. Problems: Contains the primary and secondary diagnoses. (Note: Primary diagnosis is established after clinical workup).

   ![Problems](Image)

   c. Hospital Course: Presents a history of the present illness and pertinent events for this hospitalization.

   ![Hospital Course](Image)

   d. Surgical Procedures: Lists the invasive and non-invasive procedures performed during this hospitalization.

   ![Surgical Procedures](Image)

   e. Plan for Service Specific Items: Items in this module are designated by service to be completed for ALL patients prior to discharge. These items will display in the Discharge Summary Note.

   ![Plan for Service Specific Items](Image)
Daily Processes: Module 2

f. Transition Plan: Items in this module are intended to be a reminder list for providers to ensure they have been completed prior to discharge. The items in this list are *only* visible in the Daily Progress draft version and *will not* display in the final, saved version.

<table>
<thead>
<tr>
<th>Transition Plan [Medicine]</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Flu Vaccine:</td>
</tr>
<tr>
<td>1. Discharge Prescriptions Status:</td>
</tr>
<tr>
<td>1. Follow-up Appointments needed:</td>
</tr>
<tr>
<td>1. Anticipated Home Health Needs:</td>
</tr>
<tr>
<td>1. Anticipated Patient Education Needs:</td>
</tr>
<tr>
<td>1. Family/Care Giver Contact Info:</td>
</tr>
<tr>
<td>1. Prophylaxis:</td>
</tr>
<tr>
<td>1. Other 1:</td>
</tr>
<tr>
<td>1. Other 2:</td>
</tr>
<tr>
<td>1. Other 3:</td>
</tr>
</tbody>
</table>

- Health Care Team: The information in this module can be updated at any time during the patient’s stay. This can be updated from the Actions menu, Daily Progress, Team Summary, or Discharge Summary.

- Information in each module saves automatically.

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Daily Processes: Module 2

Managing Orders (HEO/Wiz):

1. Review active orders in the left window for accuracy.
2. Modifying existing orders:
   a. Click on the order to be modified; popup menu will appear with options.
   b. Click on portion of order that needs to be changed and follow prompts.

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Daily Processes: Module 2

c. When finished, press “Enter” when prompted to complete. Order will now show in blue in Left window.

3. Discontinuing an order:
   a. Click on order to be discontinued and popup box will appear; Select “discontinue.”

   ![Discontinue order screenshot]

   b. Click “Done” and then “Accept Orders” if correct.

   ![Accept orders screenshot]

Cosigning Orders (HEO/Wiz & StarPanel):

1. When orders are entered for a provider by a nurse or medical student, the orders must be co-signed by the ordering provider.
   a. Orders entered by medical students will **not** be visible to nursing until they are cosigned.
   b. If there are orders to be cosigned, the “cosign” box at bottom of order entry screen will turn red.

2. HEO/Wiz:
   a. Find the appropriate patient on HEO/Wiz census.
   b. Double click the patient name to open the HEO/Wiz order entry view by clicking “Enter Orders.”
   c. Click the Cosign button at bottom of the page (highlighted when orders are awaiting a co-signature).

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d. Identify the orders that you wish to cosign by reviewing all orders listed in selected frame.
e. Only Co-Sign orders that you yourself gave verbally.
f. When all sections complete, click Submit. Submission validates the co-signature process.

3. StarPanel:
   a. This function can also be performed in StarPanel via the Actions menu for the specific patient.
   b. Click on “Cosign verbal orders” to access.
Daily Processes: Module 2

Task List:

1. The TaskList is an interface in StarPanel to help improve the efficiency and timeliness of completion of medical document queries (missing document, missing signatures or attestations and incorrect dates, etc.), coding queries and incomplete prescriptions.

2. Access TaskList through the TaskList Tab or through the red TaskList alert at the top of the screen.
   a. Red TaskList displays when there is a new task to address.

   ![TaskList Interface]

   b. Items in the TaskList are separated into four categories. To view the items in each section, click on the heading’s name to open and expand the list.

   ![Expanded TaskList]

   c. Click on the Triangle next to patient’s or document’s name to open task.

   ![Task Opening]

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3. Review the Task’s instructions to complete. Document will open automatically in the StarPanel frame below TaskList.

4. Document “Choose Response” and click “Send.” Task will then be complete and will be removed from the TaskList.