# Clarity Nephrologist Training Guide

To access Clarity, go to:
**https://Clarity.Visonex.net/**

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# Clarity – Nephrologists

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If you have not already received your login/registration information for Clarity, please email Helpline@nwkidney.org.

Log into Clarity (clarity.visonex.net).

## Navigation

You will be logging into the Clarity training environment using the Username and Password you received prior to training.

When using Clarity, use **Internet Explorer**. This is the web browser that is used for build and testing by the vendor, making Internet Explorer the optimal browser to use. If you use another web browser, it will not function as smoothly, and you will notice differences in how things are displayed (pages will be in super small font).

To access Clarity, go to **https://Clarity.Visonex.net/** in Internet Explorer. Your username should be **FirstName.LastName**.


### Home Page

The Home Page is the first page you will see each time you log into Clarity. Here you will see updates and messages from Visonex about new releases, new events, or new Lunch-and-Learn opportunities. Keep an eye on this page for events you may want to participate in.

At the top of the page, you will **Northwest Kidney Centers – (Your Default Center Name)** and your name in the upper-right hand corner. It is helpful to double-check on who is logged in when using a shared workstation.

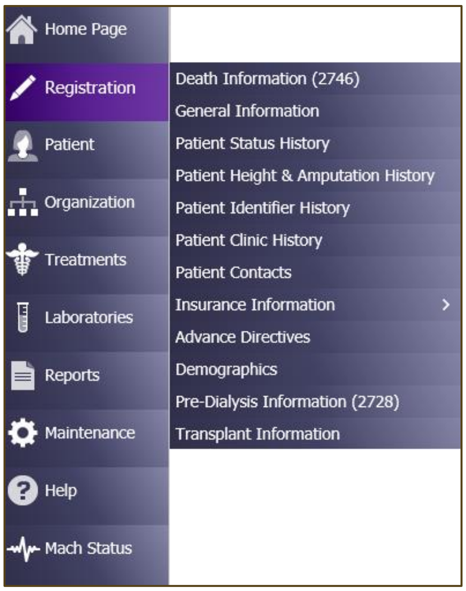
Under the Home Page on the left-hand side, you will see a list of menus. As you click through each menu, sub-menus appear.

Take a minute to look through the contents of each of the menus.

Let's do a quick review of what sub-menus & items you will find within each menu. We will work with a few of these menus/sub-menus during the training today.

## Registration

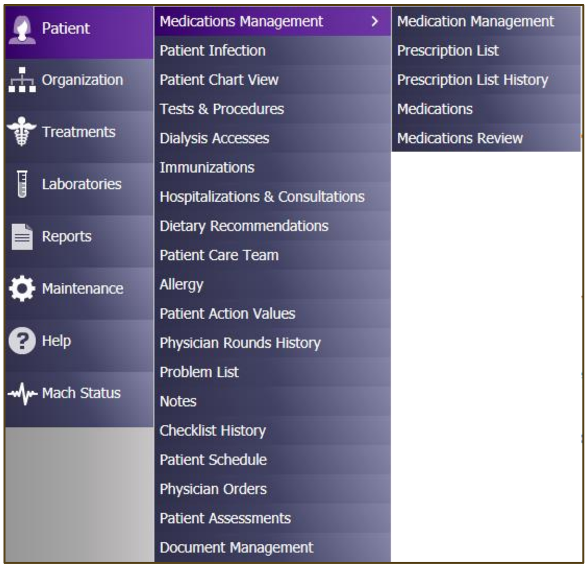
Patient registration will continue as it currently does with the information populating to the appropriate screens within Clarity.




- Death Information (2746)
- Nursing Home History
- General Information
- Patient Status History
- Patient Height & Amputation History
- Patient Identifier History
- Patient Clinic History
- Patient Contacts
- Insurance Information
- Advance Directives
- Demographics
- Pre-Dialysis Information (2728)
- Transplant Information

## Patient

The Patient menu gives you the ability to view and/or update items outside of a patient's treatment. This is where you do things like—review patient data (Patient Chart View), access patient assessments to complete, review scanned documents in DocuWare, and place General (generic) Physician Orders.




- Medication Management
- Patient Infection
- **Patient Chart View**
- Tests & Procedures
- Dialysis Accesses
- Immunizations
- Hospitalizations & Consultations
- Dietary Recommendations
- Patient Care Team
- Allergy
- Physician Rounds History
- Problem List
- Notes
- Checklist History
- Patient Schedule
- Physician Orders
- **Patient Assessments**
- **Document Management (DocuWare)**

## Treatments

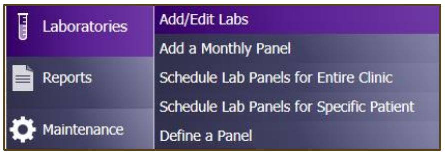
The Treatments menu is where you will find the information regarding a patient's Dialysis Prescription, Treatment documentation (In-Center = Real Time Charting (RTC) & Home = Visit Management), Treatment History, and access In-Center Rounding List in Physician Rounding Dashboard.


- Dialysis Prescriptions
- Visit Management
- Primary Nephrologist Dashboard
- Enter Treatments
- **Treatment History**
- Sodium & UF Profiles
- **Physician Rounding Dashboard**
- Clinic Working Schedule
- **Real-Time Charting (RTC)**
- Treatment Alert
- Physician Visit Request
- Billing

## Laboratories

Lab results will be available in Clarity from Ascend. At this point in time, lab orders will continue to be ordered in Ascend, meaning physicians will order them as generic free text orders.

**Add/Edit Labs** are where the labs are accessed by NKC staff to review results. Lab results can be reviewed in other areas within Clarity—Reports, Patient Chart View, etc.




## Reports

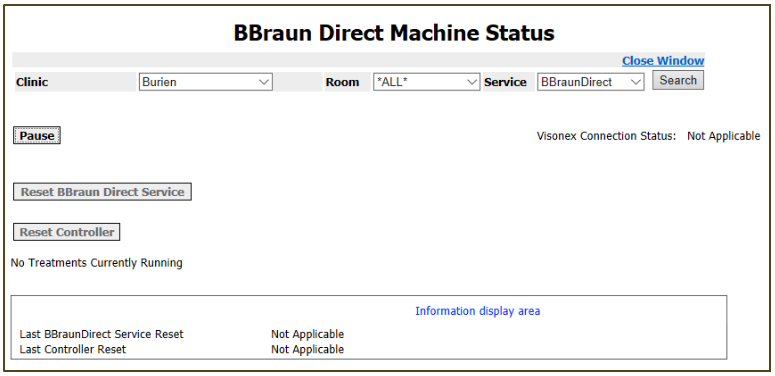
Reports are found with Report Wizard. You will be able to run Clinic reports and Patient reports. We will talk more about reports an how to run them later.


## Machine Status

Machine Status will display all machines at the clinic (that have been active within the last 48 hours) and the patients that are running.

This screen will list which patients are on which machines and how long they have left on their run. You can change the unit it displays by selecting a different clinic from the drop-down. This information is automatically updated every minute. If you would to update it yourself click the **Search** button and this will refresh it.

Typically, when things are functional the station number will not have any colors/highlights. This screen can also help identify machines that are not sending information to Clarity. If the station number is highlighted in **red,** this indicates that there is a problem with the machine communicating to Clarity.



## New Patient Referral

You will continue to fill out paper referral paperwork and modality specific initial orders. This workflow is not changing.

## Initial Orders

A patient will be starting dialysis. The initial orders for the patient will follow much of the same workflow that you currently complete.

You will complete your initial NKC referral and dialysis orders on paper (like you do today). These dialysis orders will be faxed to the NKC Admissions staff.

Once the orders have been received by NKC Admissions, they will assign the patient to their clinic. The initial dialysis orders (paper) will be transcribed in Clarity by the Care Manager. When they have entered the orders, you will receive a notification that there are orders needing E-Signature on your Home Page in Clarity.

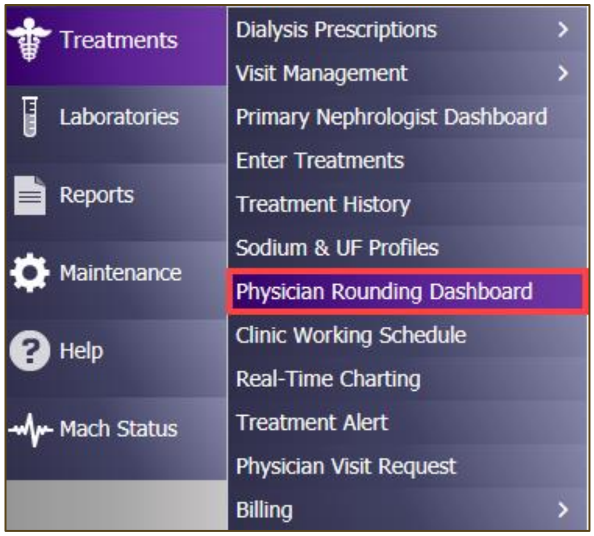

If the order is correct, the physician signs the order by entering their **Username** and **Password** and click **Sign Orders.**

If the order is not correct, the physician will make any necessary changes, reject the order, and put a rejection reason. (There is not a way for the rejected order to be routed back to the nurse.)

We will work through these details of the ordering workflows during the In-Center Rounding section.

## In-Center Rounding

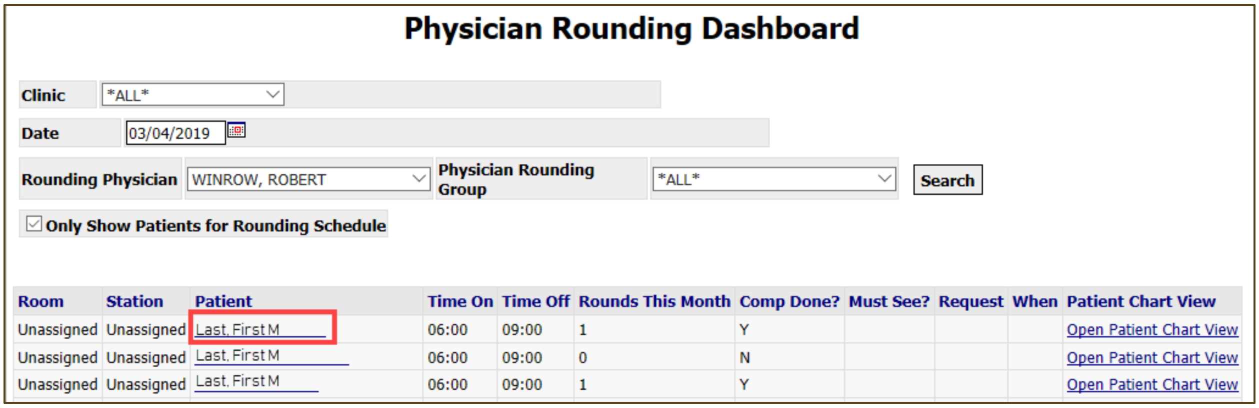
You are rounding on patients that are in-center today. Login into Clarity and go to **Treatment > Physician Rounding Dashboard**.




Select the **Clinic**, **Rounding Physician**, or **Physician Rounding Group** you want to use to find your patients.


Once you have found your patient, click on the patient's name—it will bring you straight to **Real Time Charting > Physician Rounding** tab. (Currently, this functionality for Home Patients (link to **Visit Management > Physician Assessment PD or HH**) is not available).

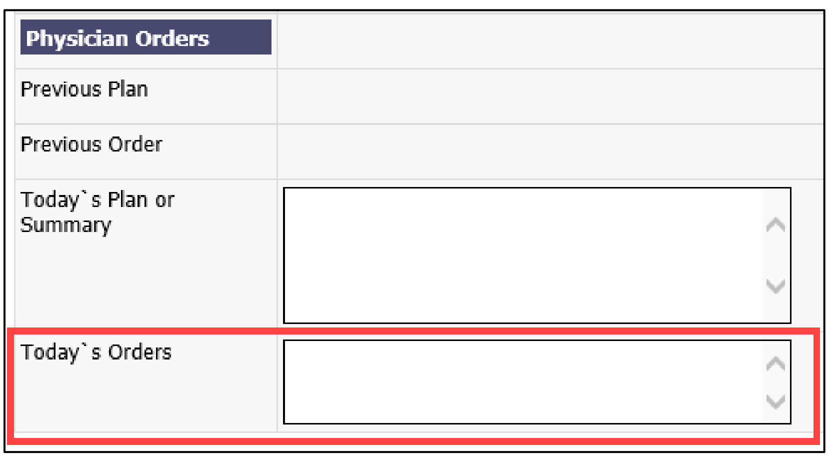
Using the **Open Patient Chart View** hyperlink, this will bring you to the patient's chart where you can view Registration Information, Lab Results, Treatment Results, etc.




Document the appropriate items within the **Physician Rounding** assessment. As you work through the various assessments within Clarity, you will notice the different ways you can document.

You will see drop-down menus, checkboxes, radio buttons (like a checkbox, but a circle and it only allows you to choose one answer/option), and free text boxes.

In the **Today's Orders** box, you will have the ability to generate free-text orders.




When you have completed documenting your assessment or would like to save it to complete later, enter your **Username** and **Password** and click **Save Changes**.

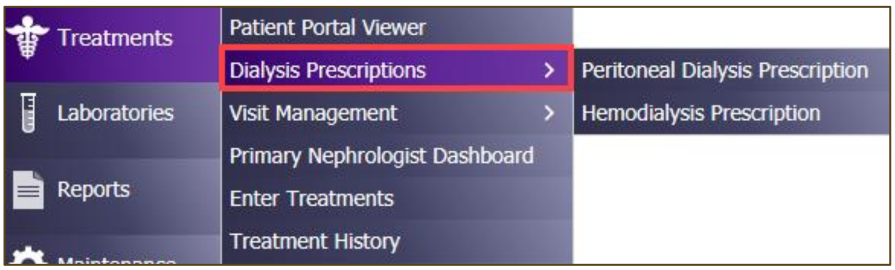
Finally, update your primary EMR, as needed. Note: Some practices require full documentation in primary EMR.

## Orders

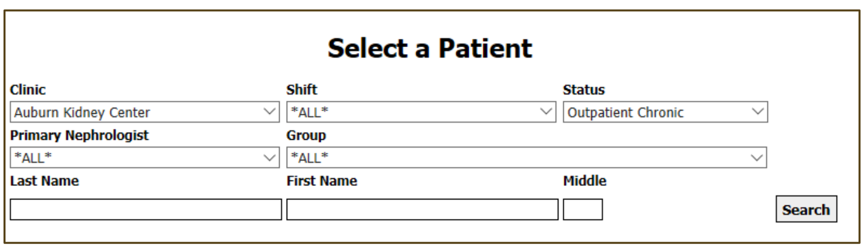
If there are orders to be placed, there are a few workflows that would be important to know as a nephrologist.

### *Dialysis Orders – Direct Order Entry*

Outside of the initial Dialysis Prescription, there may be times that changes may need to be made. The easiest and most direct way to make changes to the Dialysis Prescription is to go to **Treatments > Dialysis Prescription** and select the appropriate dialysis prescription type.

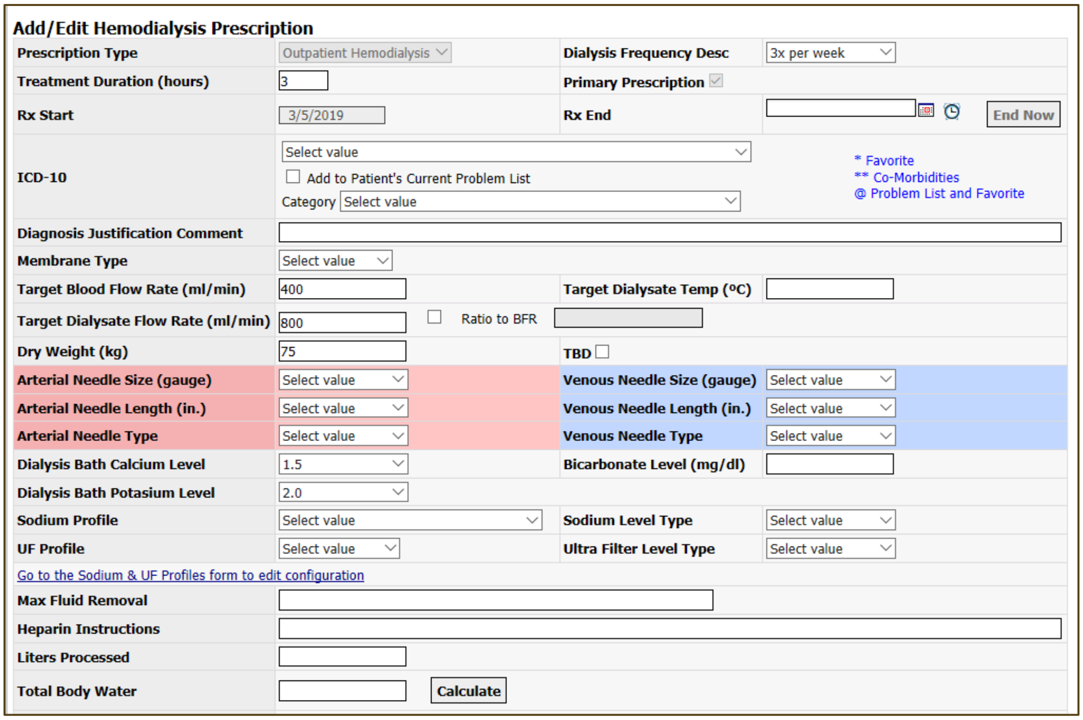



Once you have selected the appropriate dialysis prescription type, you will be asked to select your patient. You can do so by searching by their name, clinic, shift, and/or status.




After you have found your patient, the dialysis prescription(s) will display for you. To make the changes, select the **Date** of the dialysis prescription. The details of the prescription will open below.

Select the **Change Order** button at the bottom of the prescription. This makes the dialysis prescription editable for any changes you need to make. (Note: The form changes based on the order type.)



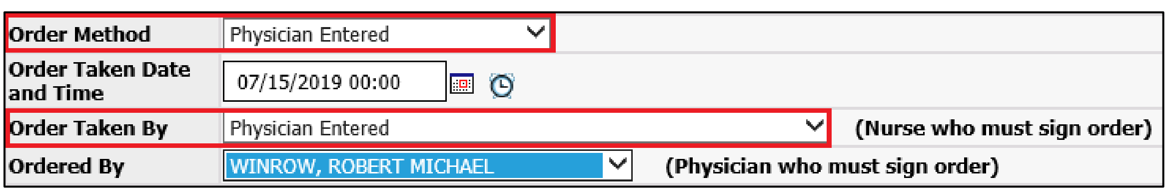
**Add/Edit Hemodialysis Prescription**

| | | | |
|---|---|---|---|
| Prescription Type | Outpatient Hemodialysis | Dialysis Frequency Desc | 3x per week |
| Treatment Duration (hours) | 3 | Primary Prescription | ☑ |
| Rx Start | 3/5/2019 | Rx End | End Now |
| ICD-10 | Select value<br>☐ Add to Patient's Current Problem List<br>Category Select value | | * Favorite<br>** Co-Morbidities<br>@ Problem List and Favorite |
| Diagnosis Justification Comment | | | |
| Membrane Type | Select value | | |
| Target Blood Flow Rate (ml/min) | 400 | Target Dialysate Temp (ºC) | |
| Target Dialysate Flow Rate (ml/min) | 800 ☐ Ratio to BFR | | |
| Dry Weight (kg) | 75 | TBD ☐ | |
| Arterial Needle Size (gauge) | Select value | Venous Needle Size (gauge) | Select value |
| Arterial Needle Length (in.) | Select value | Venous Needle Length (in.) | Select value |
| Arterial Needle Type | Select value | Venous Needle Type | Select value |
| Dialysis Bath Calcium Level | 1.5 | Bicarbonate Level (mg/dl) | |
| Dialysis Bath Potasium Level | 2.0 | | |
| Sodium Profile | Select value | Sodium Level Type | Select value |
| UF Profile | Select value | Ultra Filter Level Type | Select value |
| Go to the Sodium & UF Profiles form to edit configuration | | | |
| Max Fluid Removal | | | |
| Heparin Instructions | | | |
| Liters Processed | | | |
| Total Body Water | Calculate | | |

**IMPORTANT NOTE: Heparin orders will not be ordered as part of the Dialysis Prescription, but separately as a medication.**

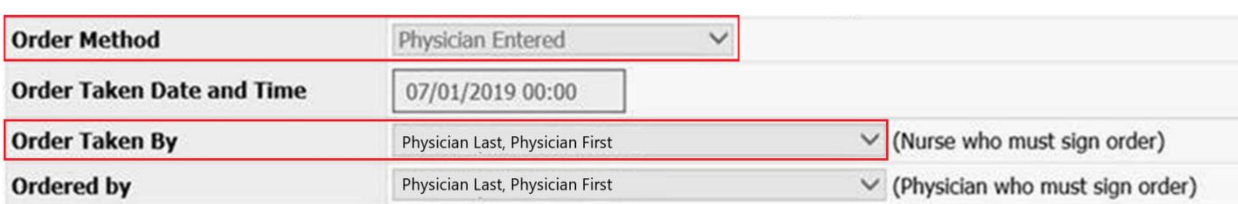
After entering your changes, select **Physician Entered** in the **Order Method**. **Order Taken Date and Time** is a required field. Enter **Physician Entered** in the **Order Taken By** field and your name in the **Ordered By** field.

## CORRECT ORDER ENTRY



| | | |
|---|---|---|
| Order Method | Physician Entered | |
| Order Taken Date and Time | 07/15/2019 00:00 | |
| Order Taken By | Physician Entered | (Nurse who must sign order) |
| Ordered By | WINROW, ROBERT MICHAEL | (Physician who must sign order) |

## INCORRECT ORDER



| | | |
|---|---|---|
| Order Method | Physician Entered | |
| Order Taken Date and Time | 07/01/2019 00:00 | |
| Order Taken By | Physician Last, Physician First | (Nurse who must sign order) |
| Ordered by | Physician Last, Physician First | (Physician who must sign order) |

Once you have made changes to the dialysis prescription, it will end the previous prescription and begin new one (that contains your changes).

*Medications – Direct Order Entry*

If a medication needs to be changed or updated, the easiest way to do that is by direct order entry in **Medications**. To do that, go to **Patient > Medications Management > Medications**.

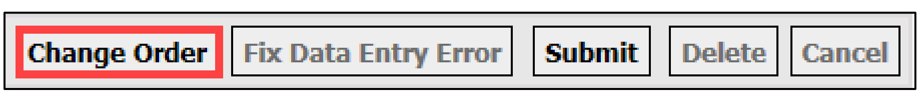
To add a new medication order, click **Add New**.

*Important Notes about Ordering Medications within Clarity*

When searching for a medication in Clarity, you can begin typing the brand OR generic name for the medication and Clarity will return both the brand AND generic names for the medication.


*Making Changes to a Medication*

To make changes or updates to a medication, click on the medication link. Once the medication is open, go to the bottom of the screen and select the **Change Order** button.



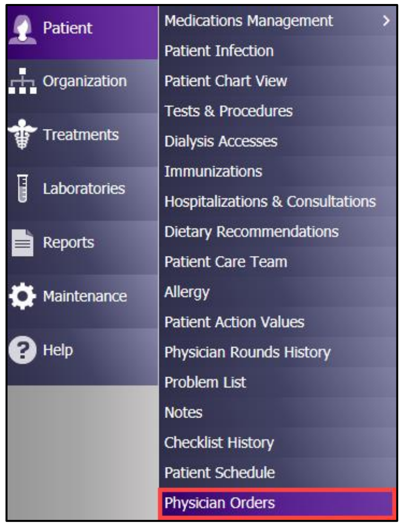

Make all changes needed and click **Submit.**

Important Note: You cannot e-prescribe in Clarity. Use your home EMR to e-prescribe medications.

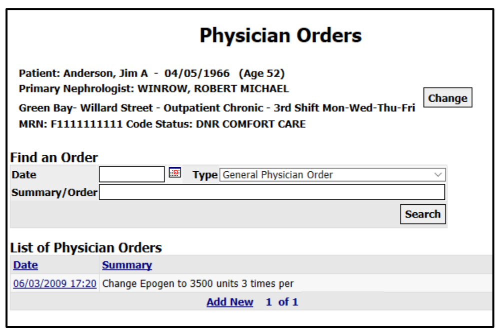
*Free Text Order Entry*

Another way to place orders using Free Text Order Entry is through **Patient > Physician Orders**.

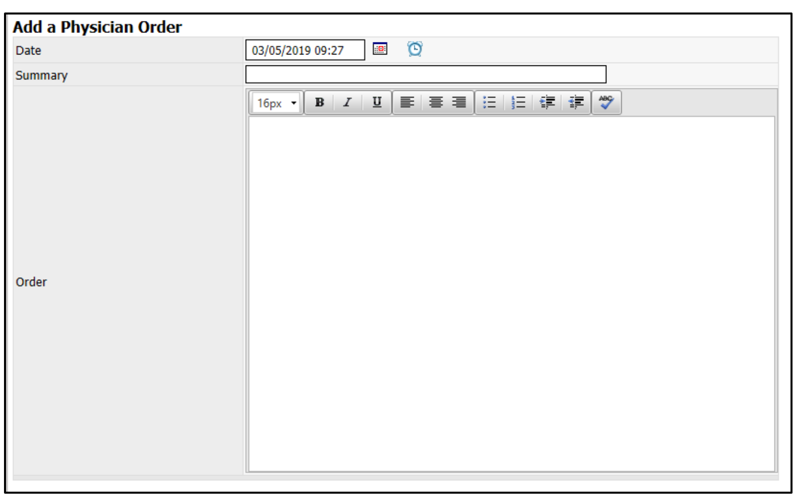
To do this, go to **Patient > Physician Orders**.




Select your patient and/or confirm the correct patient is selected. To place a free text order, click **Add New** at the bottom of the screen.



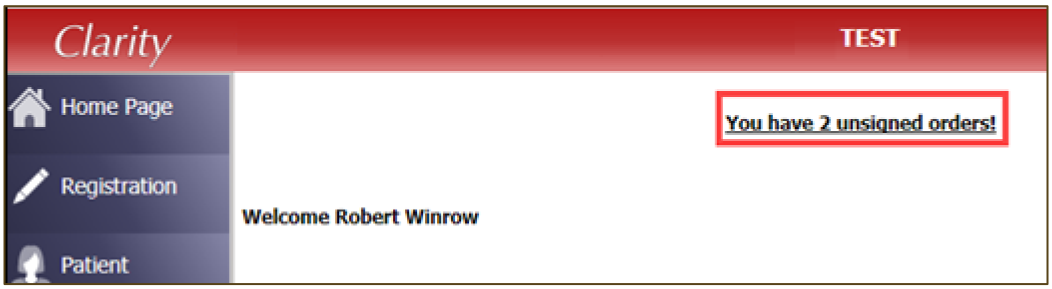

Enter the **Date, Summary,** and **Order** into the appropriate fields. It is important to fill out the **Summary** field, as it is gives you an overview of what the order is without having to open it. (Example – Change dry weight)



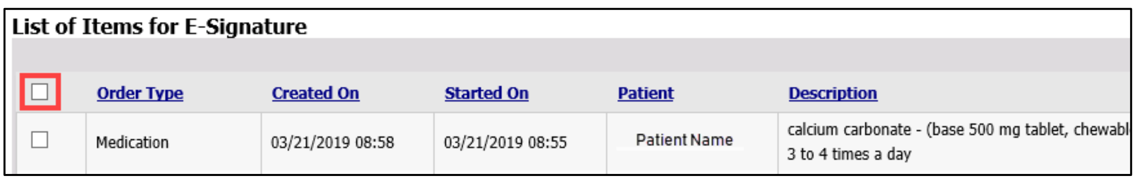
The nurse will then enter/update the order in the appropriate screens (dialysis prescription, etc.) and send the order to you for your e-signature.

*E-Signing Orders*

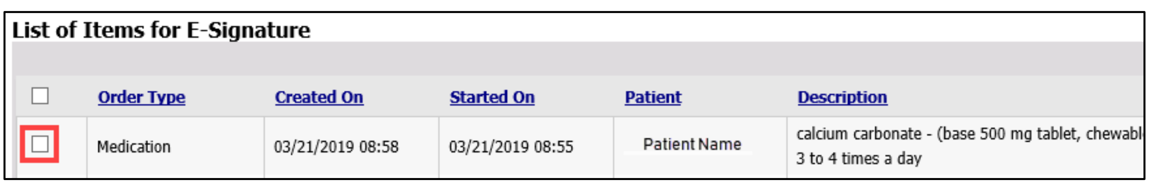
There is a notification at the top of the home page of Clarity letting you know that you have **Unsigned Orders**.




Click the checkbox next to **Order Type** to sign off all orders at one time.




Click the checkbox next to each order to sing them individually.

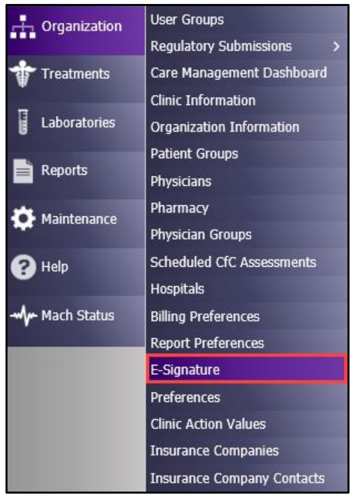



Enter **Username** and **Password** and click **Sign Selected**.

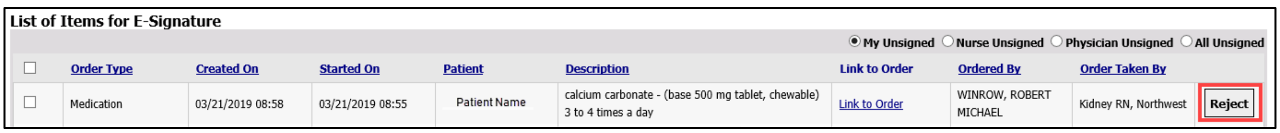
*Rejecting Orders*

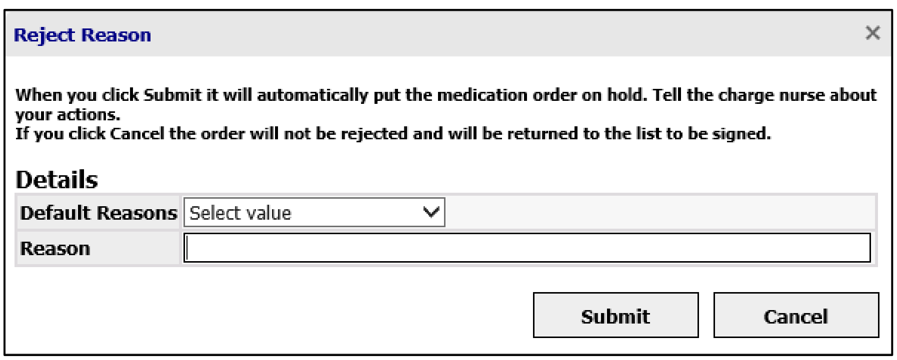
If the order that is sent to you for sign-off is incorrect, click on the **Link to Order** link to the appropriate changes to the order (Medications, Dialysis Prescriptions).

Once those corrections have been made, you will need to reject the order. To get back to the order, you can go to the Home Page and click the **Unsigned Orders** link or you can go to the **Organization** menu > **E-signature**.




Click the **Reject** button and document a reason for rejections (this is a required field).




*Lab Orders*

**All lab orders, at this time, will be ordered as a free-text order within Clarity.** Like we have seen before, you can place these orders within your assessment. If we were not within an assessment and we needed to place lab orders, we could also go to **Patient > Physician Orders**, select your patient, and create a new order by clicking **Add New**.

Enter the labs that you would like for this patient and click **Submit.**

What happens next is similar to what we have seen with other free text orders, the order will appear on the **Untranscribed Orders** report. The next steps are slightly different—the nurse will enter the order(s) into Ascend.

You will log into Ascend, select your **Patient/Order** and select **Authenticate**. This workflow from this point on should not be different than what you and the NKC staff currently do within Ascend.

## Order Methods

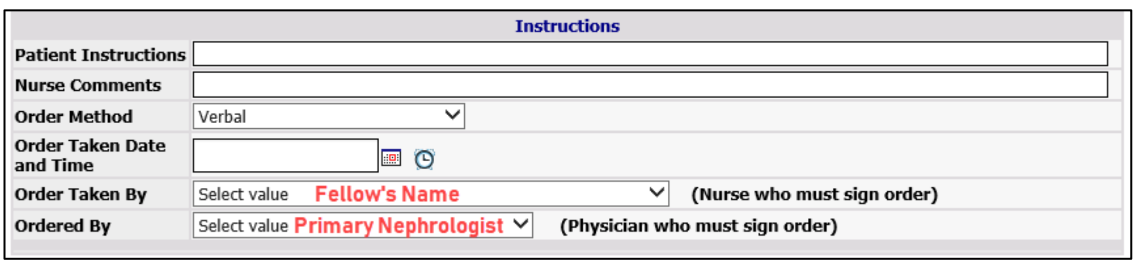
There are several Order Methods available within Clarity. Depending on how the order originates and who places the order, you will see requests for your E-Signature on your Clarity Home Page.

These are the order methods that will require your e-signature.

| |
|---|
| Verbal Orders |
| Telephone Order with Readback |
| Written/Fax |

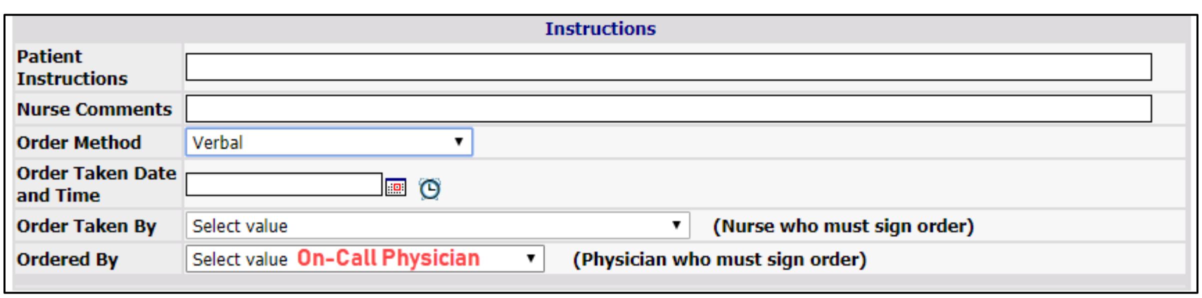
## Fellow Workflow

If a fellow is on-call and gives verbal orders, the nurse will enter the fellow's name in the **Order Taken By** field and the primary nephrologist's name would be entered in the **Ordered By** field. This will route the order for e-signature to the primary nephrologist.




## On-Call Physician Workflow

When you are on-call and place a verbal order, the nurse will enter the you as the covering physician (not the primary nephrologist) in the **Ordered By** field. This will route the order to you for your e-signature.



If you have not already done so, complete your Physician Rounding assessment, and enter your **Username** and **Password** and click **Save Changes**.

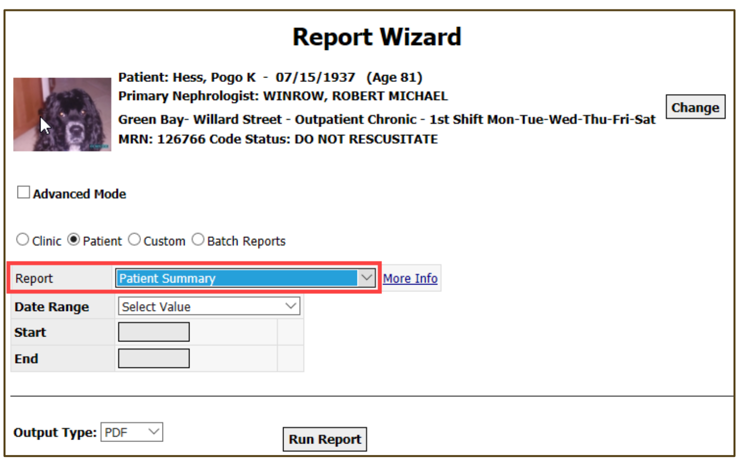
Continue with your facilitation of care coordination and update your primary EMR, as needed.

If needed, you can go to Patient > Notes and copy and paste the **Physician Rounding** assessment into your primary EMR.

## Patient Summary Report

The Patient Summary report would be appropriate to have on-hand while you are rounding. You can print the **Patient Summary** report by completing the following steps:

1. Go to **Reports > Report Wizard**
2. Select the **Patient** radio button
3. In the drop-down menu, select the **Patient Summary** report
4. Select the appropriate **Patient** and **Date Range**
5. Click **Run Report—**the report will be in a separate web browser window




## Clinic Patient Visit – MD Office Primary EMR

In preparation for a patient's clinic visit, your support staff will run the Patient Summary Report in Clarity. This is a report that would need to be run individually for each patient. (There will not be batch reports for this report). Proceed with your standard office workflows and documentation for a dialysis patient visit.

Once your documentation is complete in your primary EMR, you can either directly enter your note into Clarity or fax your visit documentation to NKC.

## Clinic Patient Visit – Clarity

Patient visits your office and your support staff run the Patient Summary report in Clarity. Proceed with your standard office workflows and documentation for a dialysis patient visit.

Enter your note using the MD Office Visit (electronic) assessment (**Patient > Patient Assessments)**.

Once you have completed your MD Office Visit note, place your orders in Clarity.

## Home Program Rounding

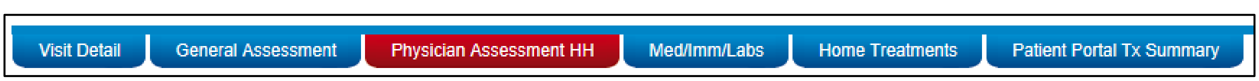
You are rounding at the home unit, as they have their Monthly visit with their Home RN.

Like previously discussed, the **Patient Summary** report would be a useful report to have on hand as you are rounding.

Go to **Treatment > Visit Management** and select **Home Hemodialysis** or **Peritoneal Dialysis**.


Select the **Clinic**, **Rounding Physician**, or **Physician Rounding Group** you want to use to find your patients. Select your specific patient.

Once **Visit Management** is open, click on the **Physician Assessment HH** or **Physician Assessment PD** (depending on your patient).





Complete your documentation in the **Physician Assessment**. You can utilize the **Today's Orders** box at the bottom of the **Physician Assessment** to do free-text order entry. If orders need to be placed, you can do so now, or whenever makes sense in your workflow.

When you have completed documenting your assessment or would like to save it to complete later, enter your **Username** and **Password** and click **Save Changes**.

Continue with your facilitation of care coordination and update your primary EMR, as needed.

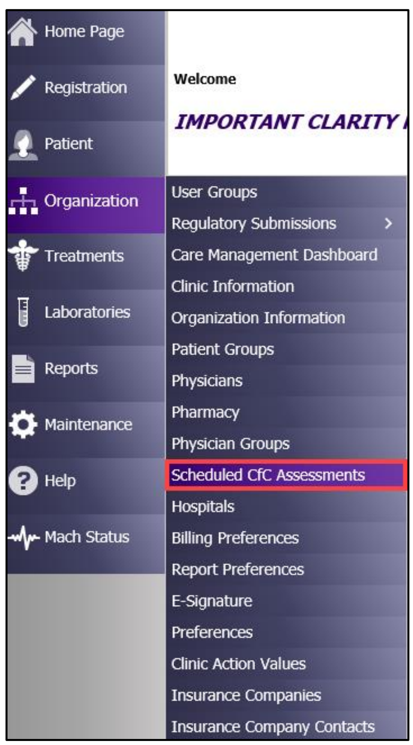
## Modality Change

If there is a modality change, gather the appropriate documentation (whether it be you or your support staff). Just like you do now, you complete the Paper Modality Change form and complete the Dialysis Orders. These forms will then be faxed to Central Admitting.

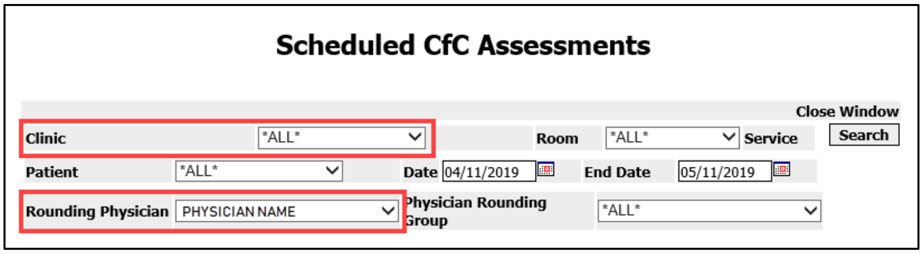
If the patient is changing to in-center hemodialysis, support staff will assign the patient to the unit.

## CIA

As you prepare for your upcoming POC Calls, log into Clarity and select **Organization > Scheduled CfC Assessments**.

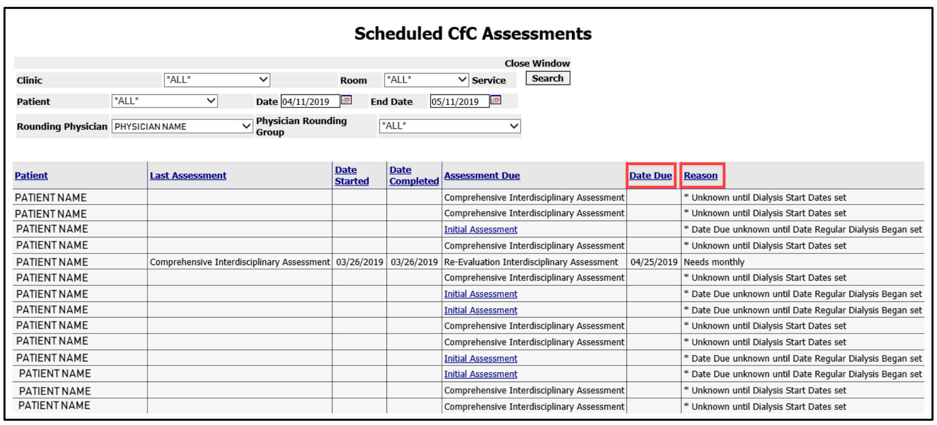



From the **Schedule CfC Assessments** screen, select **All** in the **Clinic** field and **(Your Name)** in the **Rounding Physician** field.




Once you have made your selections in the **Clinic** and **Rounding Physician**, the **Scheduled CfC Assessments** screen appears. The **Scheduled CfC Assessments** report is modality specific-- you will need to select the appropriate In-Center, PD, or Home Hemo clinic to reflect those patients. This report will also include **Unstable** patients, as unstable patients will be included in the POC calls.

Review the **Date Due** and **Reason** columns.




| Patient | Last Assessment | Date Started | Date Completed | Assessment Due | Date Due | Reason |
|---|---|---|---|---|---|---|
| PATIENT NAME | | | | Comprehensive Interdisciplinary Assessment | | * Unknown until Dialysis Start Dates set |
| PATIENT NAME | | | | Comprehensive Interdisciplinary Assessment | | * Unknown until Dialysis Start Dates set |
| PATIENT NAME | | | | Initial Assessment | | * Date Due unknown until Date Regular Dialysis Began set |
| PATIENT NAME | | | | Comprehensive Interdisciplinary Assessment | | * Unknown until Dialysis Start Dates set |
| PATIENT NAME | Comprehensive Interdisciplinary Assessment | 03/26/2019 | 03/26/2019 | Re-Evaluation Interdisciplinary Assessment | 04/25/2019 | Needs monthly |
| PATIENT NAME | | | | Comprehensive Interdisciplinary Assessment | | * Unknown until Dialysis Start Dates set |
| PATIENT NAME | | | | Initial Assessment | | * Date Due unknown until Date Regular Dialysis Began set |
| PATIENT NAME | | | | Initial Assessment | | * Date Due unknown until Date Regular Dialysis Began set |
| PATIENT NAME | | | | Comprehensive Interdisciplinary Assessment | | * Unknown until Dialysis Start Dates set |
| PATIENT NAME | | | | Comprehensive Interdisciplinary Assessment | | * Unknown until Dialysis Start Dates set |
| PATIENT NAME | | | | Initial Assessment | | * Date Due unknown until Date Regular Dialysis Began set |
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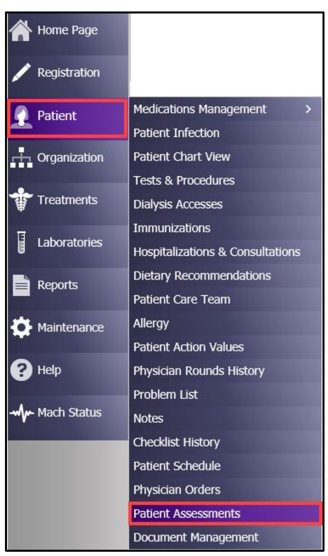
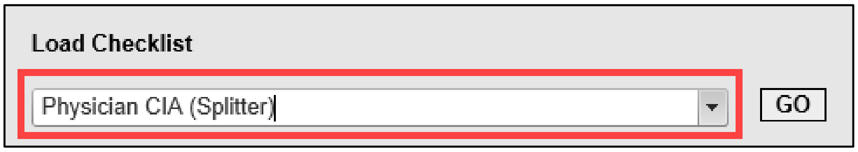
| PATIENT NAME | | | | Comprehensive Interdisciplinary Assessment | | * Unknown until Dialysis Start Dates set |
| PATIENT NAME | | | | Comprehensive Interdisciplinary Assessment | | * Unknown until Dialysis Start Dates set |

Once you determine the patient's you will need to document on, go to **Patient > Patient Assessments**.

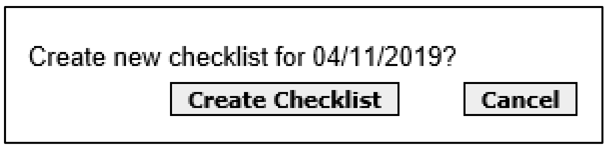


From the drop-down menu, select the **Physician CIA Splitter** assessment and click **Go**.



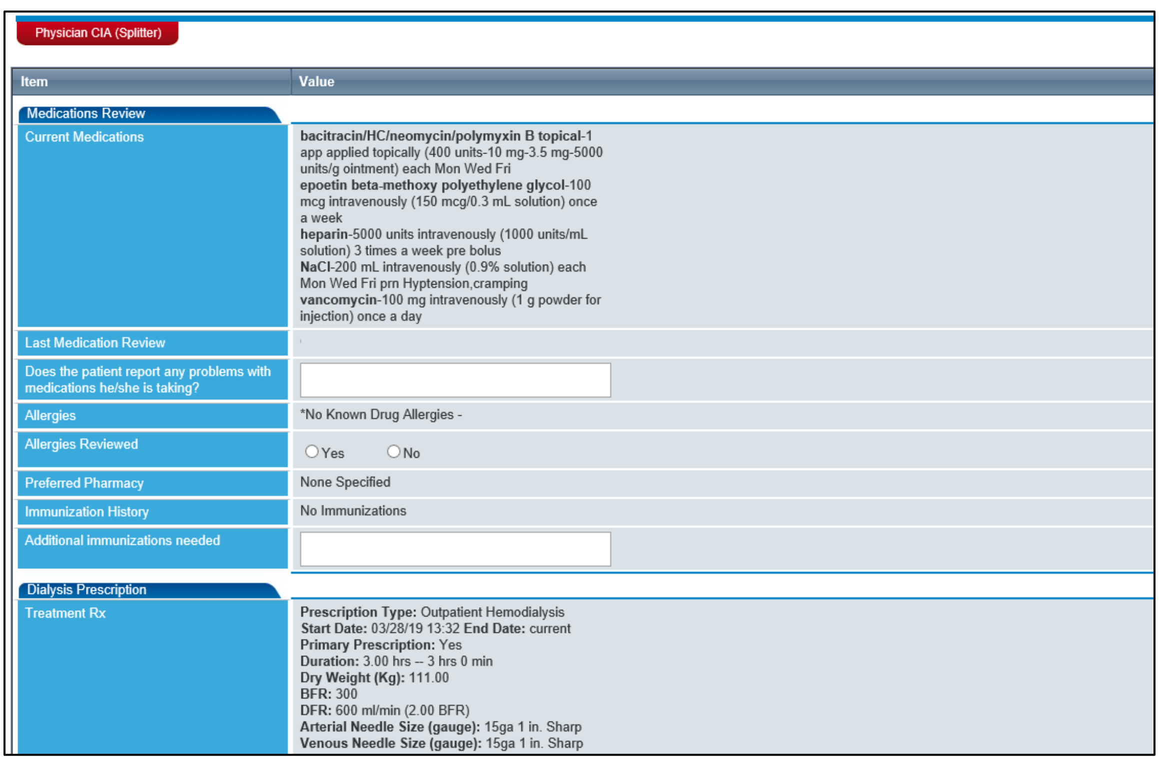

Search for your patient by typing their name in the **Patient Search** field. Select **Add New**, today's date, and click **Submit**.

Click **Create Checklist**.

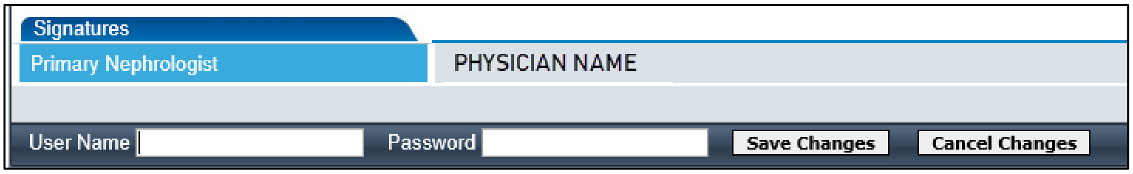



Complete the documentation for the **Physician CIA (Splitter)** assessment. This will be the assessment you use for all CIAs (initial, unstable, etc).

As you work through assessments in Clarity, you will notice the different ways you can document. You will see drop-down menus, checkboxes, radio buttons (like a checkbox, but a circle and it only allows you to choose one answer/option), and free text boxes.



Upon completion of your documentation, go to the bottom of the assessment, enter your **User Name** and **Password** and click **Save Changes**.

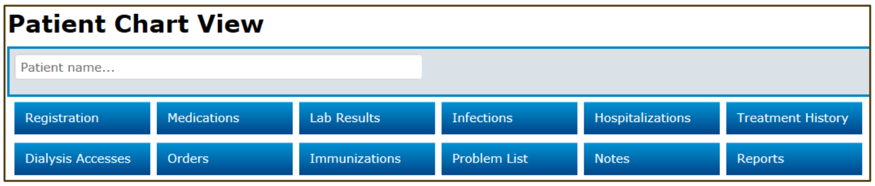



Repeat this workflow for every clinic you have patients assigned to.

# Patient Chart View

To review a patient’s chart when you are not actively documenting, you can utilize **Patient Chart View**.

1. Go to **Patient > Patient Chart View** and select/search for your patient (if they are not already selected)



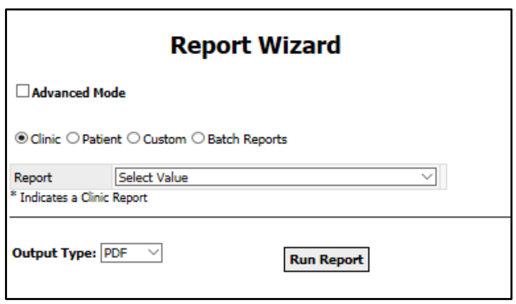

2. From here, you can review Registration Information, Lab Results, Treatment Results, etc.
3. Click through the various tabs to see how the information displayed
4. If you are in Patient Chart View and need to start documenting a treatment in RTC or in Visit Management, click the link to **RTC** or **Visit Management** at the bottom of the page. You will find the link to DocuWare (document management system) in the header.
    a. This will open up a new tab in your web browser
    b. It will require you to re-enter the **Clinic, Patient,** and **Date**

## Reports

There are two types of reports that you will use frequently within Clarity—**Clinic** reports and **Patient** reports. **Patient** reports will give you the selected report on a particular patient. **Clinic** reports give you the selected report within your clinic's population. The **Clinic** reports will mostly be used by the Medical Directors.

Let's begin by using reports by going to **Reports > Report Wizard.**


Select the **Clinic** or **Patient** radio button (depending on what type of report you want to run).

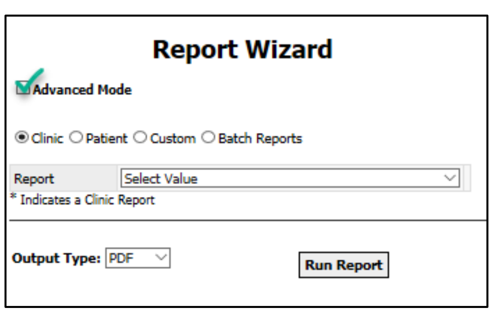



In the drop-down menu, select the desired report. Select the appropriate **Patient Shift/Patient**, as needed.

Once you have selected your report, click **Run Report.** The report will be in a separate web browser window.

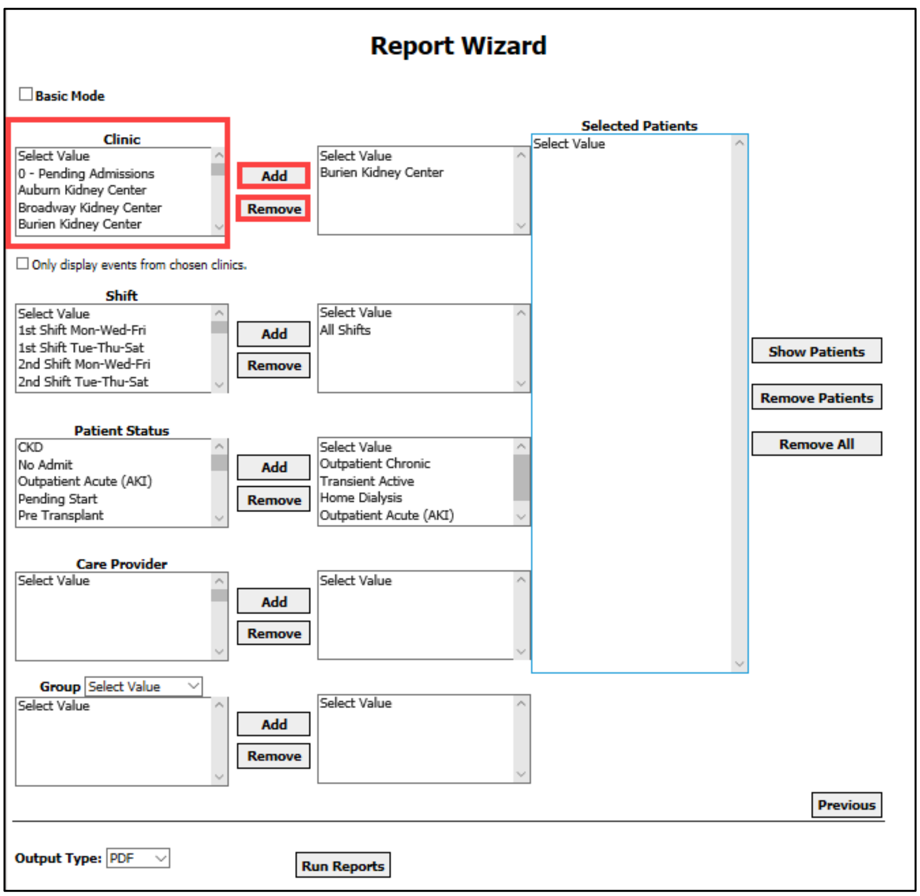
If you would like to run a **Clinic** report for multiple clinics, you can do so using **Advanced Mode**.

To use **Advanced Mode**, check the checkbox in **Report Wizard**.



Once **Advanced Mode** has opened, click the **Next** button.


Once the window opens, you will see you have multiple options to add multiple **Clinics**, **Shifts**, **Patient Status**, **Care Providers**, and **Groups**.

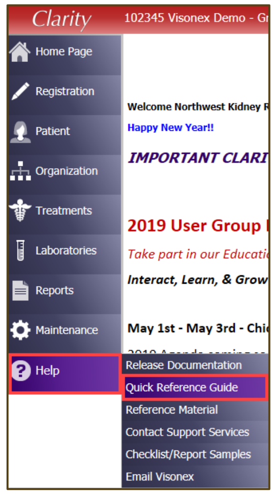



If desired, click **Show Patients** to verify the list of patients.

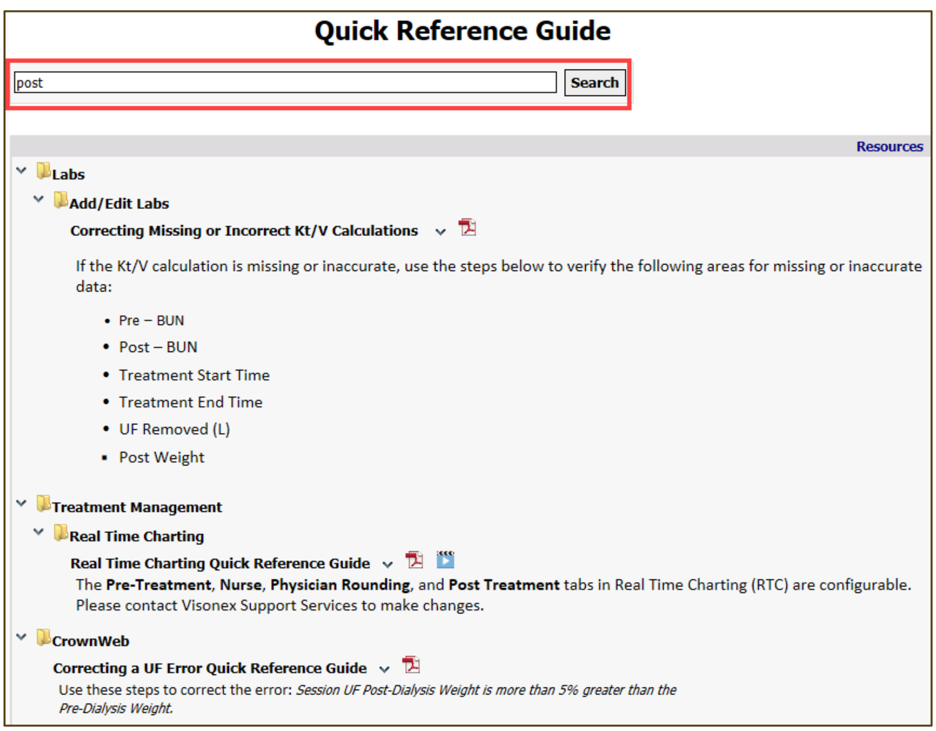
After your make your selections, click **Run Reports** and the report will be in a separate web browser window.

# Help

Within Clarity, there are a number of available resources to help guide and troubleshoot. These **Quick Reference Guides** cover a multitude of topics and are available under the **Help > Quick Reference Guides.**




To find the Quick Reference Guide you are looking for you, you can open the category folders to find the topic you are looking or search for keywords in the Search box.



Click the icon to open the document as a PDF. If there is a icon, there is a video available to watch about the topic.
You can also find help materials, recorded Lunch-and-Learns, and videos under **Reference Material.**