Clarity – CKD

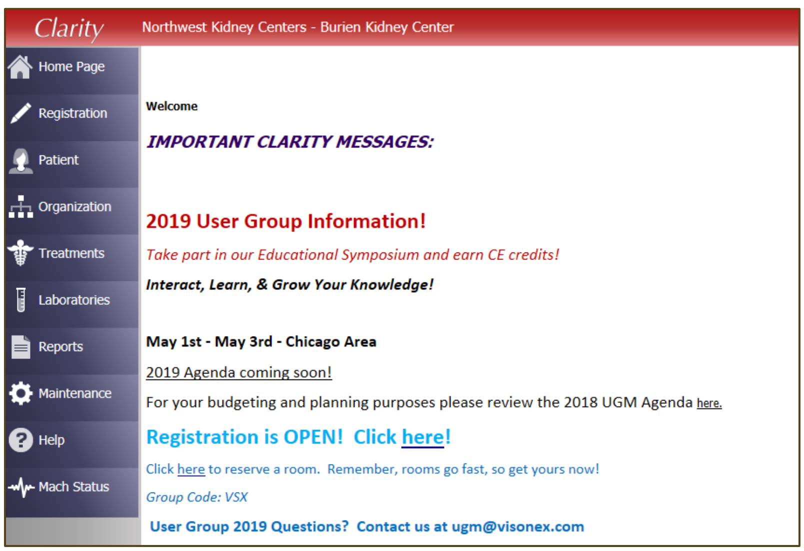
Contents

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).

If this is your first time logging in, you will see a few pop-ups that we will address. Once they have been addressed, you will be brought to the Home Page for Clarity.



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 –CKD** (your default department) 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.

Note: Your default department will be **CKD**, however, it is important to note that there is also a **Medical Nutrition Services** department.

It is important to point out that while Clarity does have features that allows for messaging within the application, we will not be using this functionality. DO NOT MESSAGE PHYSICIANS IN CLARITY. This is not the physician's primary EMR and they will not be checking for messages. Please continue to use the methods of communication that you use now.

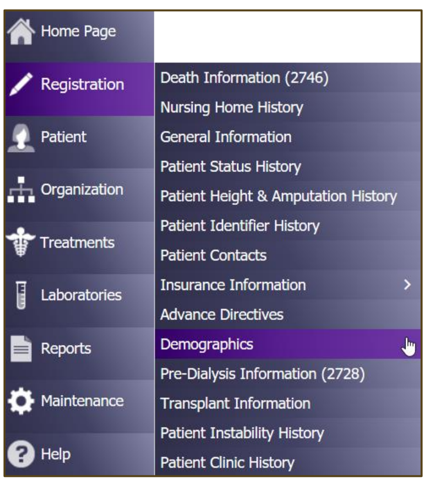
Under the Home Page on the left-hand side, you will see a list of menus. As you click through each menu, sub-menus appear.

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

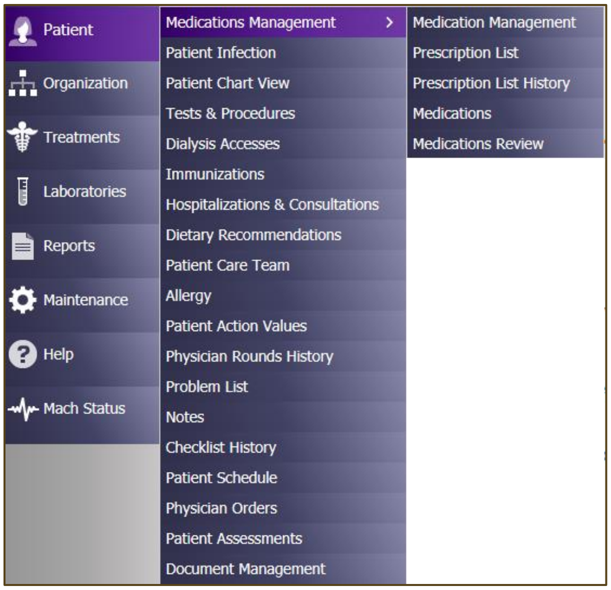
Patient registration will still be done in Time. Time will interface with Clarity and you will see that information populate to the appropriate screens within this menu.



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

Patient

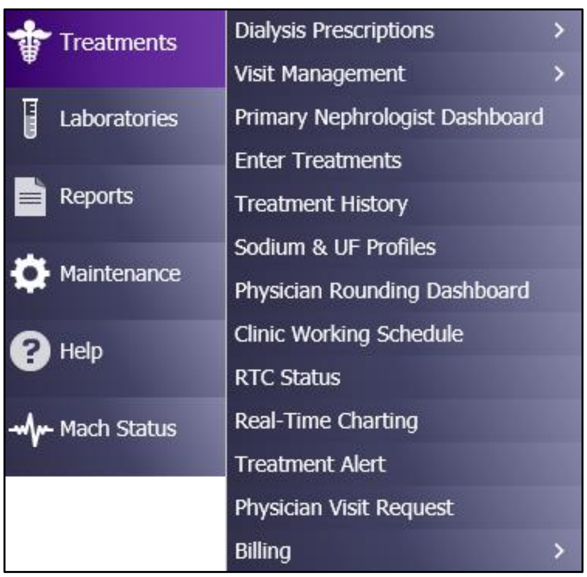
The Patient menu gives you the ability to view and/or update items outside of a patient's treatment. This is where you do things like-- document patient assessments, view a patient's care team, and view a patient's schedule.



- 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

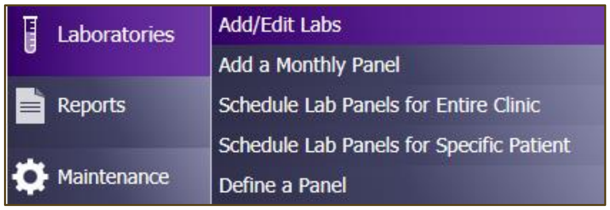
The Treatments menu is where you will find the information regarding a patient's Dialysis Prescription, Treatment documentation (In-Center = Real Time Charting (RTC) & Home = Visit Management), and Treatment History.



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

Laboratories

Lab results will be available in Clarity from Ascend. At this point in time, lab orders will continue to be ordered in Ascend. **Add/Edit Labs** are where the labs are stored within Clarity. Lab results can reviewed in other areas within Clarity—Reports, Patient Chart View, etc.



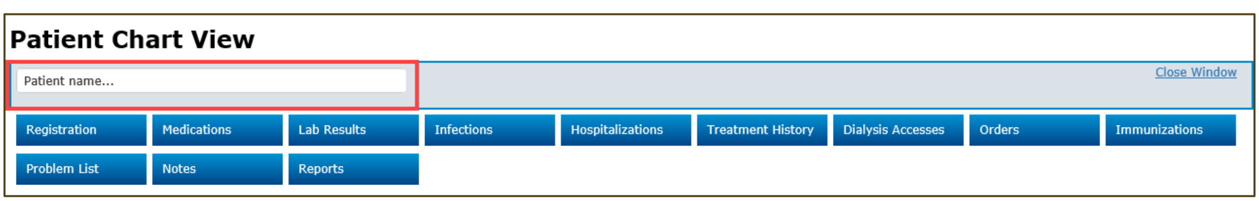
Reports

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.

Request for CKD Admin

If you receive a request for CKD services, you (CKD Admin staff) will begin by determining if the patient is in the EMR.

The easiest way to do that is to go to **Patient > Patient Chart View** and search for the patient’s name.



If the patient is not present in Clarity, refer to the CKD Procedures as to how to process referrals.

Once we have determined whether or not a patient is present in Clarity, you will upload any referral documentation into Clarity (via Docuware). We will walk through these steps a little later.

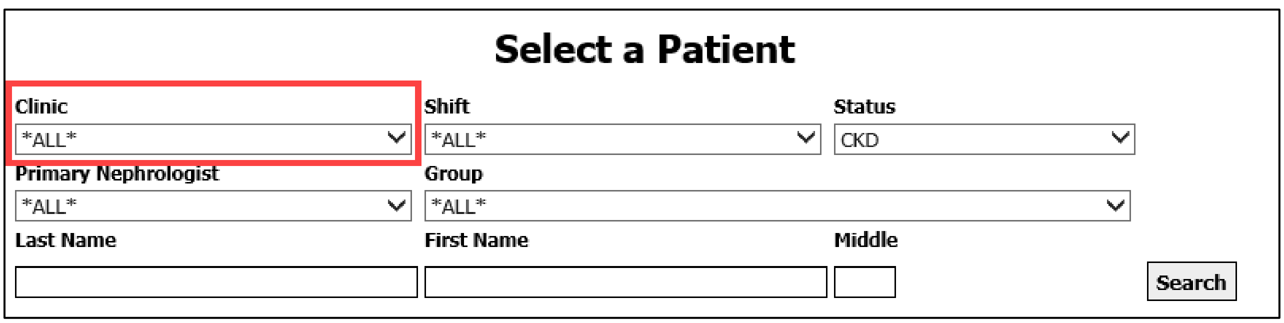
At this point, we will contact the patient to schedule. Follow the procedures for CKD scheduling.

If for whatever reason you are not able to schedule the patient, you will document the reason why within Clarity.

Locating a Patient in Clarity

Before we document a note within Clarity, let's talk about how you find a patient in Clarity. To do this, let's go to **Patient > Notes**, as we are going to document a note in a moment.

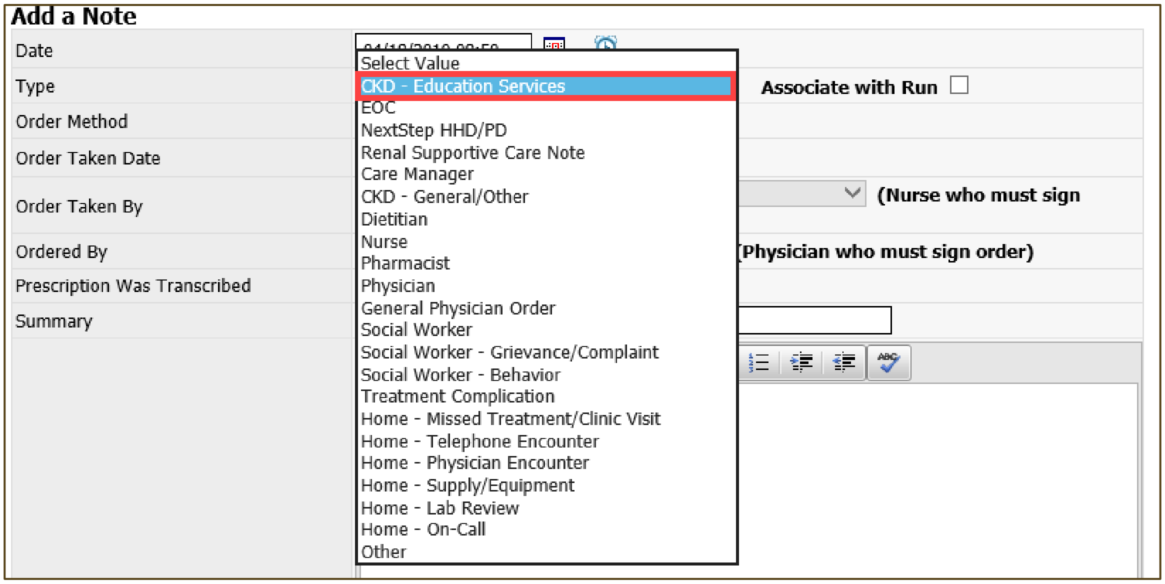
Select the appropriate **Patient**—by first changing the **Clinic** to **ALL**, as this will show patients that are CKD or MNT and then by searching with their first/last name.



Notes

To access notes, go to **Patient > Notes**. Once in **Notes**, you can review notes by other staff or click **Add New** to add your own note.

Once you click **Add New**, you will have the ability to select the **Type** of note. There are two types of CKD notes— **CKD – Referral for Education Services** and **CKD – General/Other**.



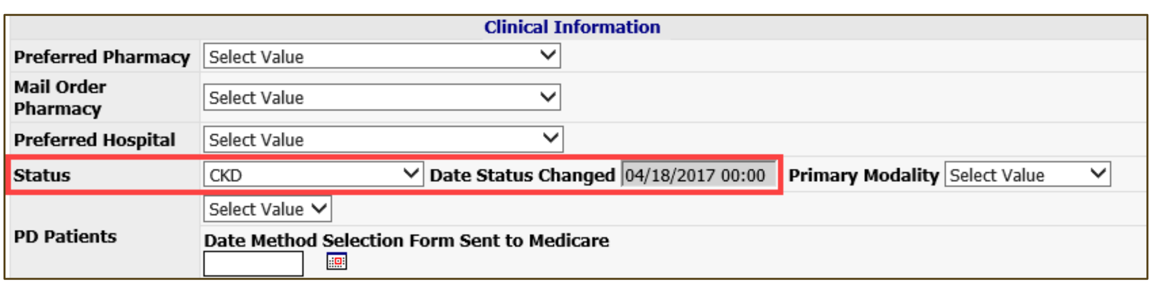
With this scenario, the **CKD – Referral for Education Services** note type is the note you would use.

The **CKD – General/Other** note type can be used for things that are 1) not related to a referral or 2) not as a result of receiving a service. For example—if a patient calls an educator a week after coming to class with questions, you would document the necessary information under this type of note. This type of note does not apply to the scheduler checklist (CKD-Education Services) nor does it apply to education received (CKD-Education Services or CKD-Medical Nutrition Therapy).

Once these steps have been completed, be sure to fax the provider if you were unable to schedule by coping your note (or vital pieces of it) into a fax document in MS Word and send via RightFax.

Status Changes

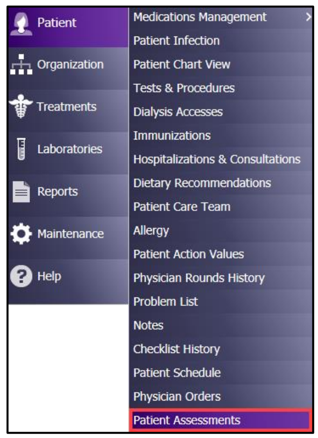
If a CKD or MNT patient's status changes, you will make those changes in TIME. Once those changes have been made, you will see the patient's status update in Clarity under **Registration** > **General Information.**



CKD Educator

As a CKD educator, you continue to provide the educational services as you did previously. What changes is how you document those services within the system.

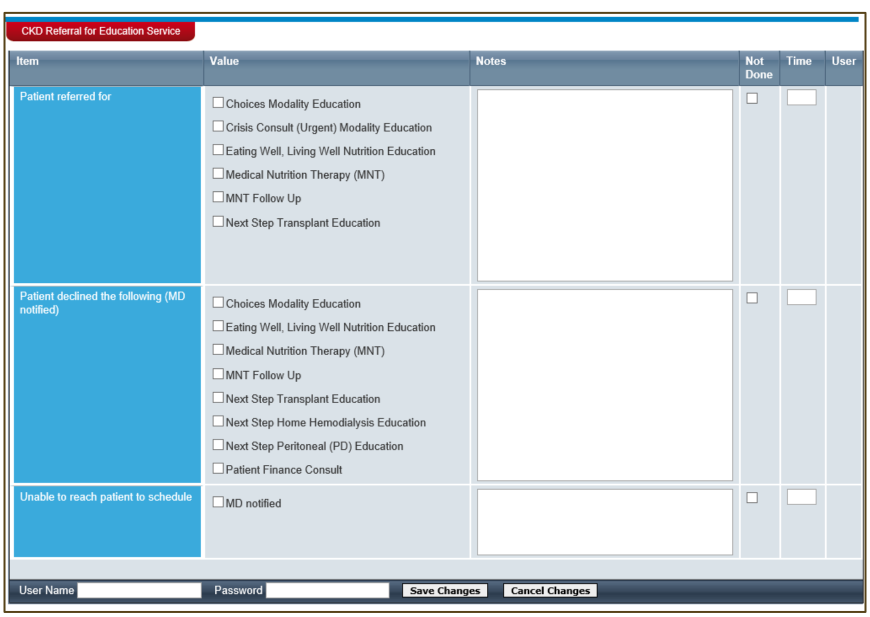
To document any education services you have provided, go to **Patient > Patient Assessments**.



Select the **CKD Education Services** assessment. Once you have selected the assessment, you will be prompted to

Select the appropriate **Clinic**, **Patient**, and **History.** Click **Add New** under **History** to document the assessment, if you have not already done so. Enter the appropriate date

Once you create the new checklist, you will be brought to the **CKD Education Services** assessment.

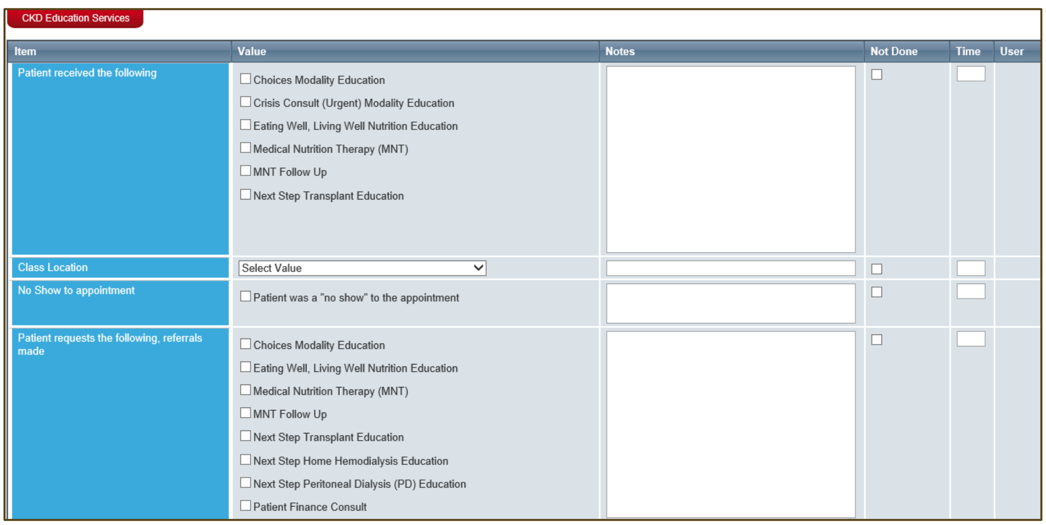


It is within this assessment that you document what type of education service the patient is receiving.

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.

Here you document whether the patient has received any of the following by checking the appropriate checkboxes: **Choices Modality Education**, **Crisis Consult (Urgent) Modality Education, Eating Well, Living Well Nutrition Education, Medical Nutrition Therapy (MNT), and Next Step Transplant Education**.



To the right of the checkboxes, you will see a Notes text box. You can document education interactions, key findings, and additional details within this text box.

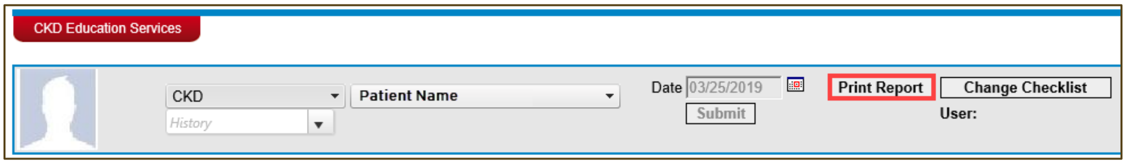
If the patient was a No Show to the appointment, you can document this by checking the **Patient was a "no show" to the appointment** checkbox.

If the patient requests any additional services, check the checkbox and complete the appropriate referral process.

Once you have completed your documentation for your patient, enter your **Username** and **Password,** and click **Save Changes.**

Now that your documentation is completed and saved, you can print the assessment to fax to the physician. The easiest way to do this to go to the top of the screen (next to the date) and click **Print Report**.

This will create a report based on the assessment and pop-up in a second window for you to print.



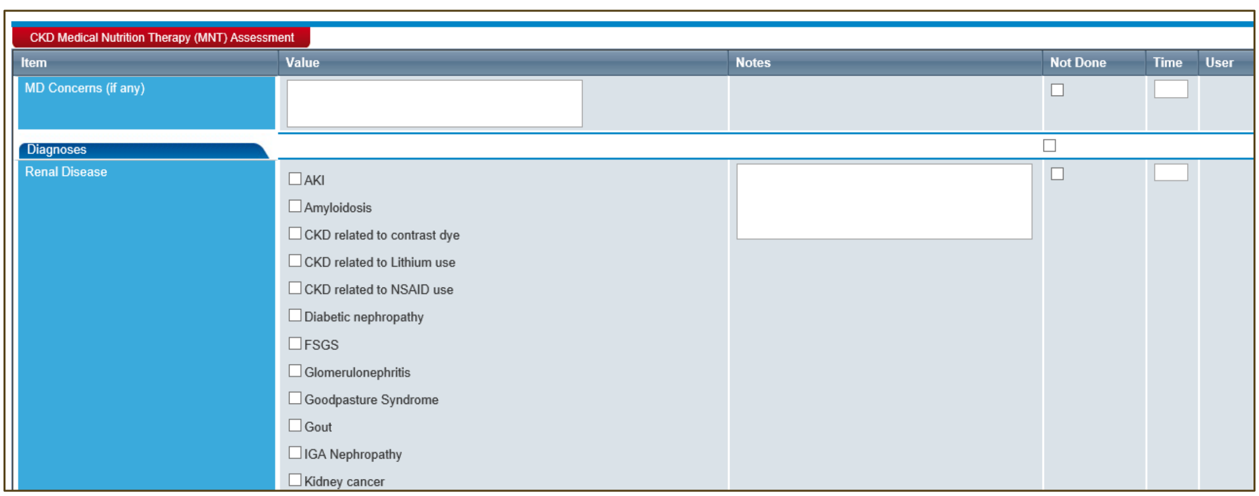
If the patient requested additional services, notify the CKD admin staff through the MS Outlook bounce-back reply (see CKD Procedures).

If the services provided was Medical Nutrition Therapy (MNT), the CKD Registered Dietitian will upload the following documents into DocuWare:

1. Copy of MNT Assessment
2. Signed Patient Account Agreement
3. Signed MNT Consent of Care
4. 24 Diet Recall

CKD Registered Dietitian

Outside of the CKD Education Services assessment, there is the **CKD Medical Nutrition Therapy (MNT) Assessment** (**Patient** > **Patient Assessments)**.



Just as we saw with the other assessment, you will document the MNT visit by using the checkboxes and text boxes.

Upon completion of the assessment, enter your **Username** and **Password,** and click **Save Changes.**

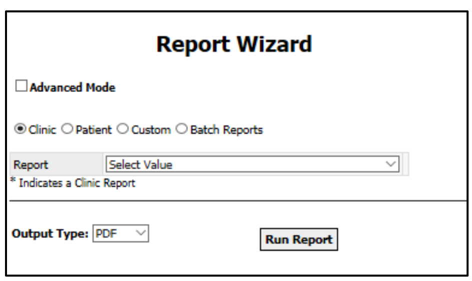
Reports

Report Wizard

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. Whereas **Clinic** reports give you the selected report within your clinic's population.

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).

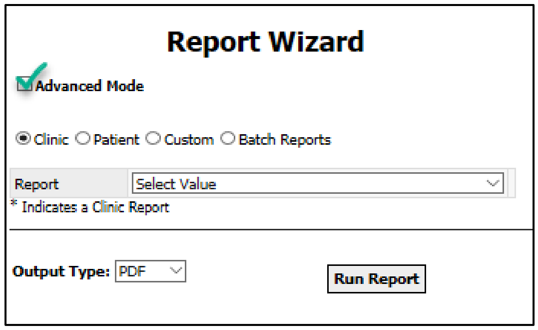


In the drop-down menu, select the desired report. Select the appropriate **Patient Shift/Patient**, as needed.

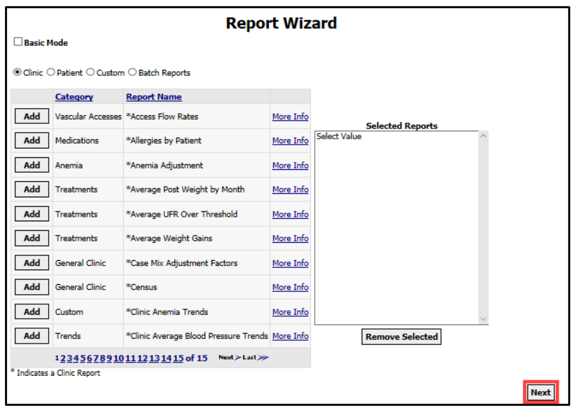
Once you have selected your report, click **Run Report.** The report will be in a separate web browser window.

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

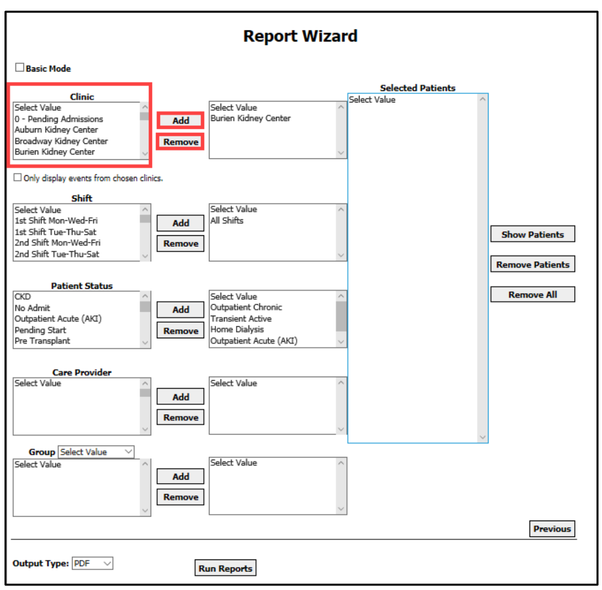
To use **Advanced Mode**, check the checkbox in **Report Wizard**.



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.

Much of the reporting that CKD will use will be run from the ADW (Analytic Data Warehouse). As the IT team completes their work, you will receive an update on how these reports are accessed and run.

Report Examples

Patient Reports

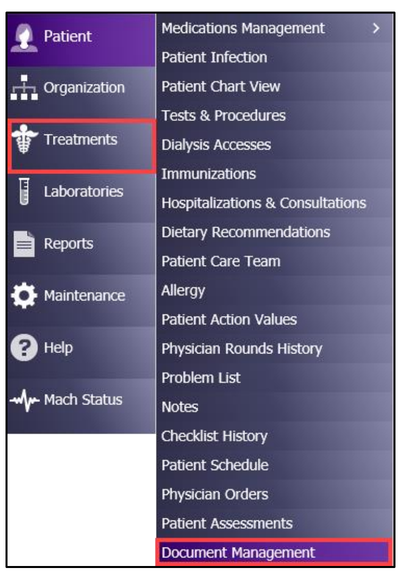
1. Clearance Trends
    a. This report contains two graphs, which display trends for URR and Kt/V. Values for these labs are provided for the past year. Report displays prescribed BFR, DFR, treatment time and membrane type. There is also a section with Total Rx Time, Total Tx Time, and Total Variance.

To see other examples of reports available within Clarity, you can go to **Help > Checklist/Report Samples**. This can help give you an understanding of what information is output from each report.

Uploading Scanned Documents into Docuware

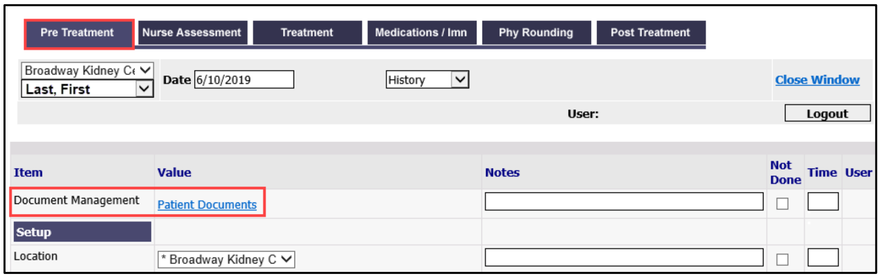
Prior to uploading the document into Docuware, follow current procedures for scanning documents.

1. Log into Clarity
    a. If uploading documents for multiple patients, select **Patient > Document Management**

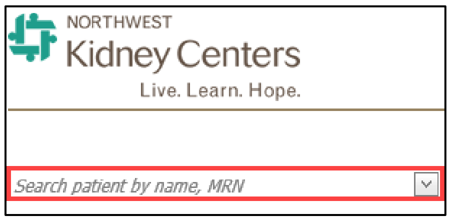


    b. If uploading documents for a specific patient, select **Treatments > Real-Time Charting > Pre-Treatment** tab

i. NOTE: A patient must first be selected then it will bring you directly to that patient's scanned documents.

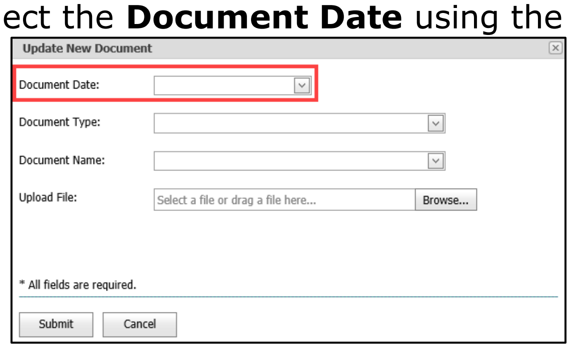


2. Search for your patient—either by **MRN, First,** or **Last Name**



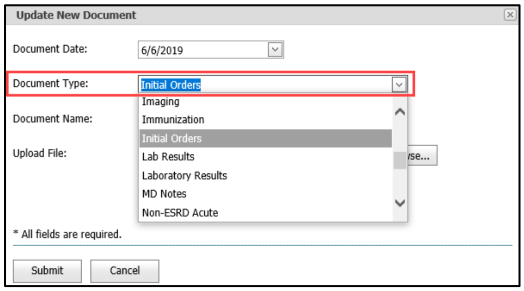
3. Once you select the correct patient, in the upper-right hand corner, click the **Upload Document** link.

4. Once you select the **Upload New Document** link, set the following information:
   a. **Document Date**
      i. Select the **Document Date** using the calendar

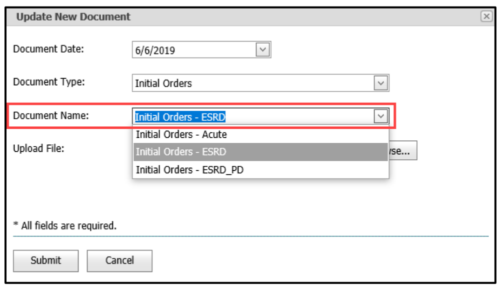


   b. **Document Type –** Select the **Document Type** using the drop-down menu

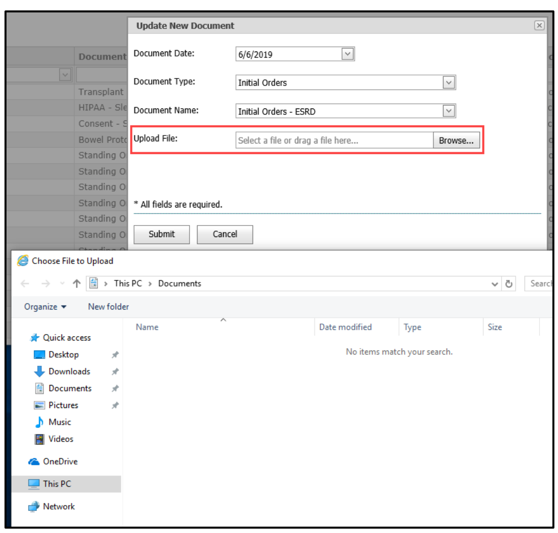
i. The **Document Type**(s) available are common and succinct.



c. **Document Name –** Select the **Document Name** using the drop-down menu



5. Use the **Browse** button to select the scanned document from where you saved the file

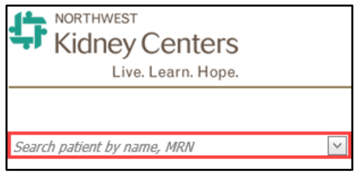


6. After selecting the document to upload, click the **Submit** button to complete the upload to Docuware

Search and View Scanned Documents in Docuware

To review documents that have already been uploaded to Docuware, follow these steps:

1. Log into Clarity and go to **Patient > Document Management**
2. Search for your patient—either by **MRN, First,** or **Last Name**



3. Filter by any of the following items:
    a. **Document Date**
    b. **Document Type**
    c. **Document Name**
    d. **Upload By**
    e. **Upload Date**
    f. **Edited By**
    g. **Edited Date**

Document Date	Document Type	Document Name	Upload By	Upload Date	Edited By	Edited Date

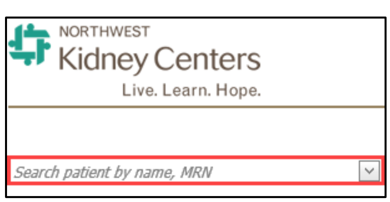
4. After finding the document, click the **View** link in the far-right column

Upload By	Upload Date	Edited By	Edited Date	Upload New Document
				Clear
Last, First	05/02/2019	Last, First	05/15/2019	View Edit Delete
Last, First	02/22/2019	Last, First	03/26/2019	View Edit Delete
Last, First	02/22/2019	Last, First	03/26/2019	View Edit Delete

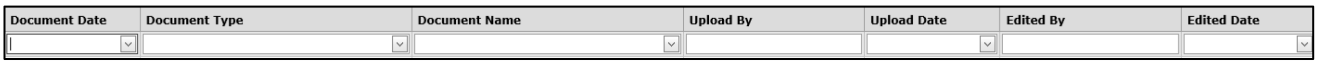
Edit or Delete Scanned Documents in Docuware

You may edit or delete documents that you have uploaded to Docuware, follow these steps:

1. Log into Clarity and go to **Patient > Document Management**
2. Search for your patient—either by **MRN, First,** or **Last Name**



3. Filter by any of the following items:
    a. **Document Date**
    b. **Document Type**
    c. **Document Name**
    d. **Upload By**
    e. **Upload Date**
    f. **Edited By**
    g. **Edited Date**

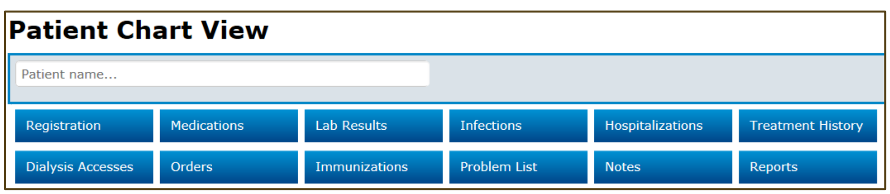


4. After finding the document, click the **Edit or Delete** link in the far-right column and perform the action needed

Patient Chart View

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

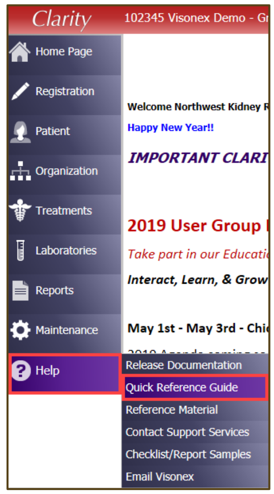
1. Go to **Patient > Patient Chart View** and select/search for your patient (if they are not already selected). (A separate browser tab will open for Patient Chart View).



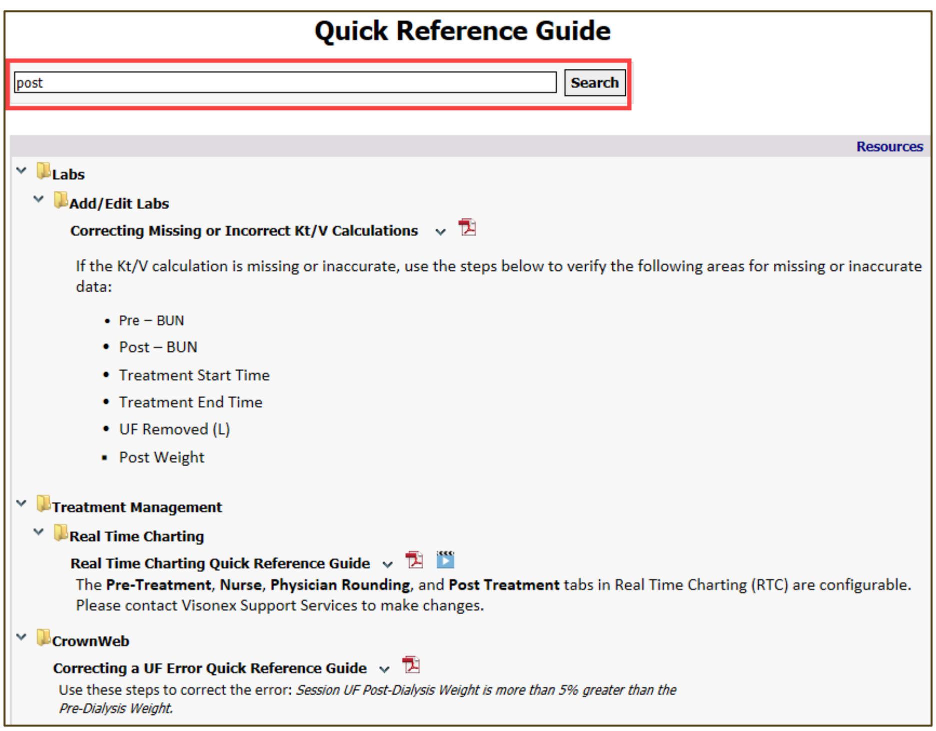
2. From here, you can review Registration Information, Lab Results, Treatment Results, etc.
3. Click through the various tabs to see how the information is displayed
4. If you are in Patient Chart View and need to start documenting on a assessment, you will go back to the "main" Clarity tab. From here, you would go to **Patient > Patient Assessment** and select the assessment you wish to document on.

Help

Within Clarity, there are several 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.**

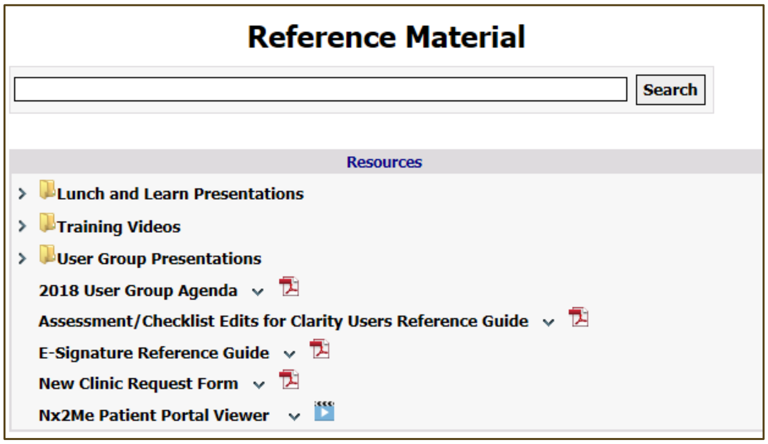


To find the Quick Reference Guide you are looking for you, you can open the category folders to find the topic you are looking or search for keywords in the Search box.



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.**



Sample reports are also available for your review under **Help > Checklist/Report Samples**. This can help give you an understanding of what information is output from each report.