

Clarity – CKD

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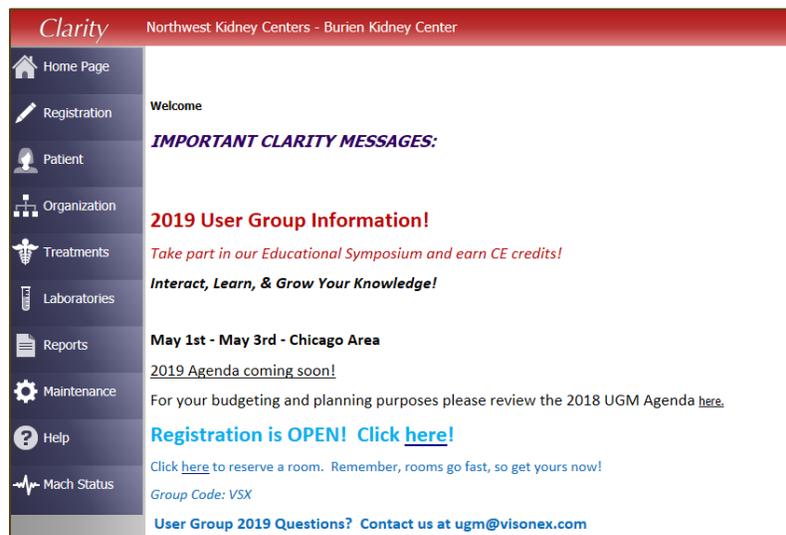
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Navigation

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 Visionex 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.

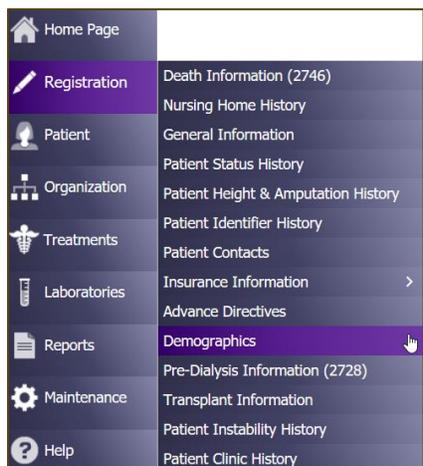
Under the Home Page on the left-hand side, you will see a list of menus. As you click through each menu, sub-menus appear.

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.

Patient	Medications Management >	Medication Management
Organization	Patient Infection	Prescription List
Treatments	Patient Chart View	Prescription List History
Laboratories	Tests & Procedures	Medications
Reports	Dialysis Accesses	Medications Review
Maintenance	Immunizations	
Help	Hospitalizations & Consultations	
Mach Status	Dietary Recommendations	
	Patient Care Team	
	Allergy	
	Patient Action Values	
	Physician Rounds History	
	Problem List	
	Notes	
	Checklist History	
	Patient Schedule	
	Physician Orders	
	Patient Assessments	
	Document Management	

- 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.

Treatments	Dialysis Prescriptions >
Laboratories	Visit Management >
Reports	Primary Nephrologist Dashboard
Maintenance	Enter Treatments
Help	Treatment History
Mach Status	Sodium & UF Profiles
	Physician Rounding Dashboard
	Clinic Working Schedule
	RTC Status
	Real-Time Charting
	Treatment Alert
	Physician Visit Request
	Billing >

- 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

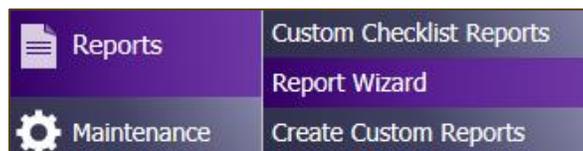
Laboratories

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 and 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.

Select a Patient

Clinic *ALL* ▼	Shift *ALL* ▼	Status CKD ▼
Primary Nephrologist *ALL* ▼	Group *ALL* ▼	
Last Name <input type="text"/>	First Name <input type="text"/>	Middle <input type="text"/>

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**.

Add a Note	
Date	Select Value
Type	CKD - Education Services
Order Method	EOC
Order Taken Date	NextStep HHD/PD
Order Taken By	Renal Supportive Care Note
Ordered By	Care Manager
Prescription Was Transcribed	CKD - General/Other
Summary	Dietitian
	Nurse
	Pharmacist
	Physician
	General Physician Order
	Social Worker
	Social Worker - Grievance/Complaint
	Social Worker - Behavior
	Treatment Complication
	Home - Missed Treatment/Clinic Visit
	Home - Telephone Encounter
	Home - Physician Encounter
	Home - Supply/Equipment
	Home - Lab Review
	Home - On-Call
	Other

Associate with Run

(Nurse who must sign)

Physician who must sign order)

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 copying 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**.

Clinical Information	
Preferred Pharmacy	Select Value
Mail Order Pharmacy	Select Value
Preferred Hospital	Select Value
Status	CKD Date Status Changed 04/18/2017 00:00 Primary Modality Select Value
PD Patients	Date Method Selection Form Sent to Medicare

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.

CKD Referral for Education Service					
Item	Value	Notes	Not Done	Time	User
Patient referred for	<input type="checkbox"/> Choices Modality Education <input type="checkbox"/> Crisis Consult (Urgent) Modality Education <input type="checkbox"/> Eating Well, Living Well Nutrition Education <input type="checkbox"/> Medical Nutrition Therapy (MNT) <input type="checkbox"/> MNT Follow Up <input type="checkbox"/> Next Step Transplant Education		<input type="checkbox"/>		
Patient declined the following (MD notified)	<input type="checkbox"/> Choices Modality Education <input type="checkbox"/> Eating Well, Living Well Nutrition Education <input type="checkbox"/> Medical Nutrition Therapy (MNT) <input type="checkbox"/> MNT Follow Up <input type="checkbox"/> Next Step Transplant Education <input type="checkbox"/> Next Step Home Hemodialysis Education <input type="checkbox"/> Next Step Peritoneal (PD) Education <input type="checkbox"/> Patient Finance Consult		<input type="checkbox"/>		
Unable to reach patient to schedule	<input type="checkbox"/> MD notified		<input type="checkbox"/>		

User Name Password

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.**

CKD Education Services					
Item	Value	Notes	Not Done	Time	User
Patient received the following	<input type="checkbox"/> Choices Modality Education <input type="checkbox"/> Crisis Consult (Urgent) Modality Education <input type="checkbox"/> Eating Well, Living Well Nutrition Education <input type="checkbox"/> Medical Nutrition Therapy (MNT) <input type="checkbox"/> MNT Follow Up <input type="checkbox"/> Next Step Transplant Education		<input type="checkbox"/>	<input type="checkbox"/>	
Class Location	Select Value		<input type="checkbox"/>	<input type="checkbox"/>	
No Show to appointment	<input type="checkbox"/> Patient was a "no show" to the appointment		<input type="checkbox"/>	<input type="checkbox"/>	
Patient requests the following, referrals made	<input type="checkbox"/> Choices Modality Education <input type="checkbox"/> Eating Well, Living Well Nutrition Education <input type="checkbox"/> Medical Nutrition Therapy (MNT) <input type="checkbox"/> MNT Follow Up <input type="checkbox"/> Next Step Transplant Education <input type="checkbox"/> Next Step Home Hemodialysis Education <input type="checkbox"/> Next Step Peritoneal Dialysis (PD) Education <input type="checkbox"/> Patient Finance Consult		<input type="checkbox"/>	<input type="checkbox"/>	

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)**.

Item	Value	Notes	Not Done	Time	User
MD Concerns (if any)			<input type="checkbox"/>		
Diagnoses			<input type="checkbox"/>		
Renal Disease	<input type="checkbox"/> AKI <input type="checkbox"/> Amyloidosis <input type="checkbox"/> CKD related to contrast dye <input type="checkbox"/> CKD related to Lithium use <input type="checkbox"/> CKD related to NSAID use <input type="checkbox"/> Diabetic nephropathy <input type="checkbox"/> FSGS <input type="checkbox"/> Glomerulonephritis <input type="checkbox"/> Goodpasture Syndrome <input type="checkbox"/> Gout <input type="checkbox"/> IGA Nephropathy <input type="checkbox"/> Kidney cancer		<input type="checkbox"/>		

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

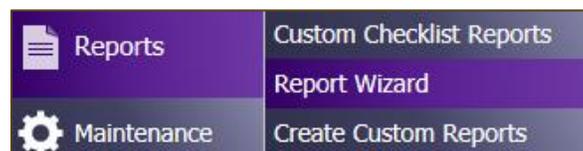
Upon completion of the assessment, enter your **Username** and **Password**, and click **Save Changes**.

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**.

Report Wizard

Advanced Mode

Clinic Patient Custom Batch Reports

Report:

* Indicates a Clinic Report

Output Type:

Run Report

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

Report Wizard

Basic Mode

Clinic Patient Custom Batch Reports

Category	Report Name	More Info
<input type="button" value="Add"/>	Vascular Accesses *Access Flow Rates	More Info
<input type="button" value="Add"/>	Medications *Allergies by Patient	More Info
<input type="button" value="Add"/>	Anemia *Anemia Adjustment	More Info
<input type="button" value="Add"/>	Treatments *Average Post Weight by Month	More Info
<input type="button" value="Add"/>	Treatments *Average UFR Over Threshold	More Info
<input type="button" value="Add"/>	Treatments *Average Weight Gains	More Info
<input type="button" value="Add"/>	General Clinic *Case Mix Adjustment Factors	More Info
<input type="button" value="Add"/>	General Clinic *Census	More Info
<input type="button" value="Add"/>	Custom *Clinic Anemia Trends	More Info
<input type="button" value="Add"/>	Trends *Clinic Average Blood Pressure Trends	More Info

Selected Reports:

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 of 15 [Next >](#) [Last >>](#)

* Indicates a Clinic Report

Next

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

Report Wizard

Basic Mode

Clinic

Select Value:

- Pending Admissions
- Auburn Kidney Center
- Broadview Kidney Center
- Burnien Kidney Center

Only display events from chosen clinics.

Shift

Select Value:

- 1st Shift: Mon-Wed-Fri
- 1st Shift: Tue-Thu-Sat
- 2nd Shift: Mon-Wed-Fri
- 2nd Shift: Tue-Thu-Sat

Patient Status

Select Value:

- OKD
- No Admit
- Outpatient Acute (AKI)
- Pending Start
- Outpatient Chronic
- Transient Active
- Home Dialysis
- Outpatient Acute (AKI)

Care Provider

Select Value:

-
-

Group

Select Value:

-
-

Selected Patients:

Output Type:

Run Reports

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

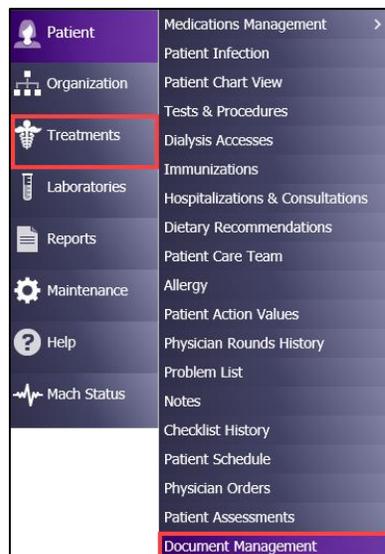
1. Clearance Trends
 - a. This report contains two graphs, which display trends for URR and Kt/V. Values for these labs are provided for the past year. Report displays prescribed BFR, DFR, treatment time and membrane type. There is also a section with Total Rx Time, Total Tx Time, and Total Variance.

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.

The screenshot shows a software interface with several tabs: Pre Treatment, Nurse Assessment, Treatment, Medications / Imm, Phy Rounding, and Post Treatment. Below the tabs, there are dropdown menus for 'Broadway Kidney Ct' and 'Last, First', a date field set to '5/10/2019', and a 'History' dropdown. A 'Close Window' link is visible. Below this is a 'User:' field and a 'Logout' button. A table with columns 'Item', 'Value', 'Notes', 'Not Done', 'Time', and 'User' is shown. The 'Document Management' row has a red box around the 'Patient Documents' link. The 'Setup' row has a red box around the 'Location' dropdown, which is currently set to '* Broadway Kidney C'.

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

The screenshot shows the Northwest Kidney Centers logo and the tagline 'Live. Learn. Hope.'. Below the logo is a search bar with a red box around it containing the text 'Search patient by name, MRN' and a dropdown arrow.

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

The screenshot shows a table with columns: Document Date, Document Type, Document Name, Upload By, Upload Date, Edited By, Edited Date, and a red box around the 'Upload New Document' link. A red arrow points from this link to the next screenshot.

This is a close-up of the 'Upload New Document' link, which is highlighted with a red box. Below it is a 'Clear' button.

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

The screenshot shows a dialog box titled 'Update New Document'. It has several fields: 'Document Date' (with a calendar icon and a red box around it), 'Document Type' (dropdown), 'Document Name' (dropdown), and 'Upload File' (with a 'Browse...' button). At the bottom, there are 'Submit' and 'Cancel' buttons and a note: '* All fields are required.'

- 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
<input type="text"/>						

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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	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**

Document Date	Document Type	Document Name	Upload By	Upload Date	Edited By	Edited Date
<input type="text"/>						

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).

Patient Chart View

Patient name...

Registration	Medications	Lab Results	Infections	Hospitalizations	Treatment History
Dialysis Accesses	Orders	Immunizations	Problem List	Notes	Reports

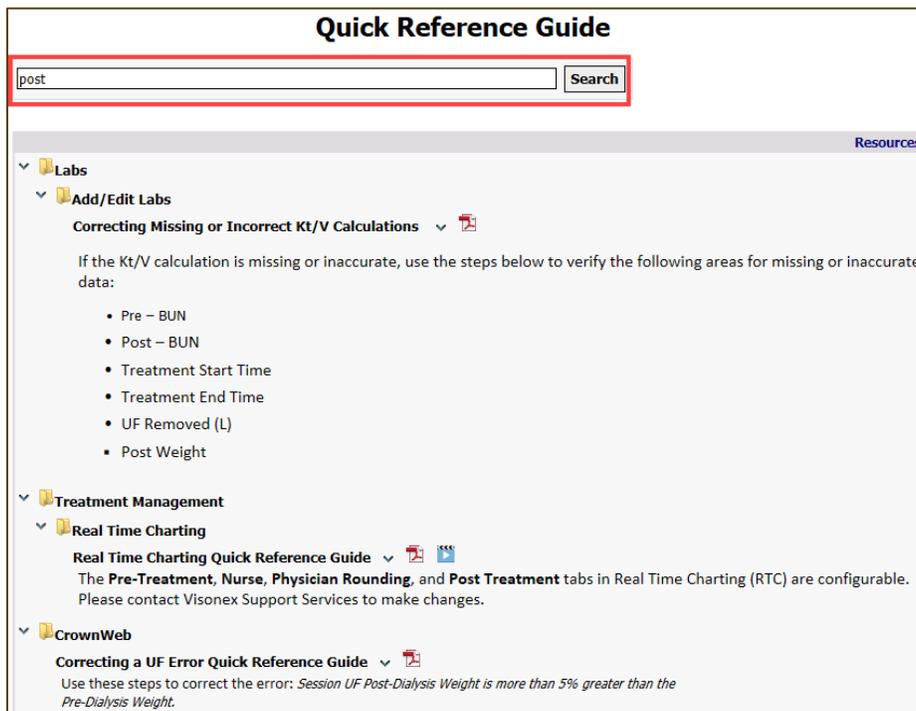
2. From here, you can review Registration Information, Lab Results, Treatment Results, etc.
3. Click through the various tabs to see how the information is displayed
4. If you are in Patient Chart View and need to start documenting on a assessment, you will go back to the “main” Clarity tab. From here,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

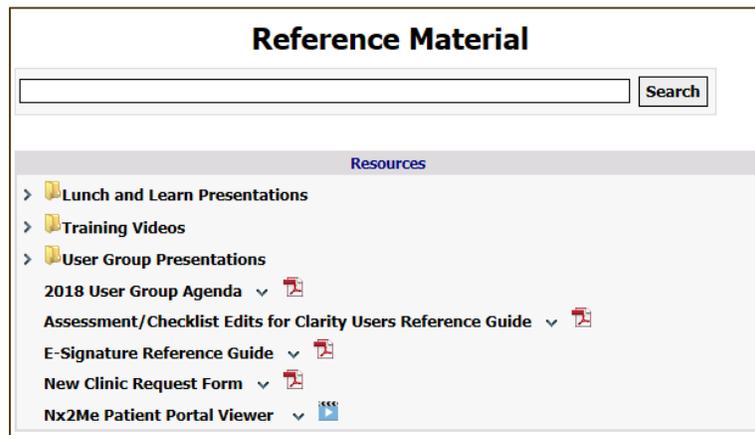


To find the Quick Reference Guide you are looking for you, you can open the category folders to find the topic you are looking for or search for keywords in the Search box.



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.