Clarity – Unit Coordinators

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.

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.

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.

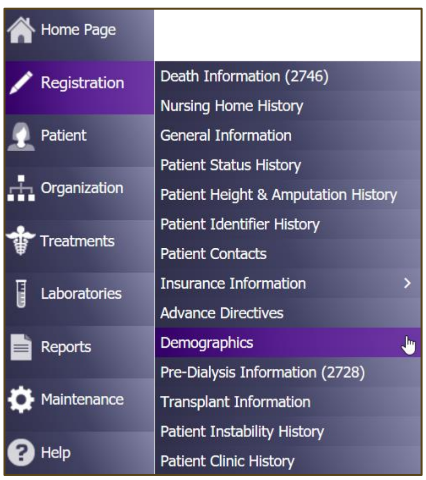
Under the Home Page on the left-hand side, you will see a list of menus. As you click through each menu, sub-menus appear.

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

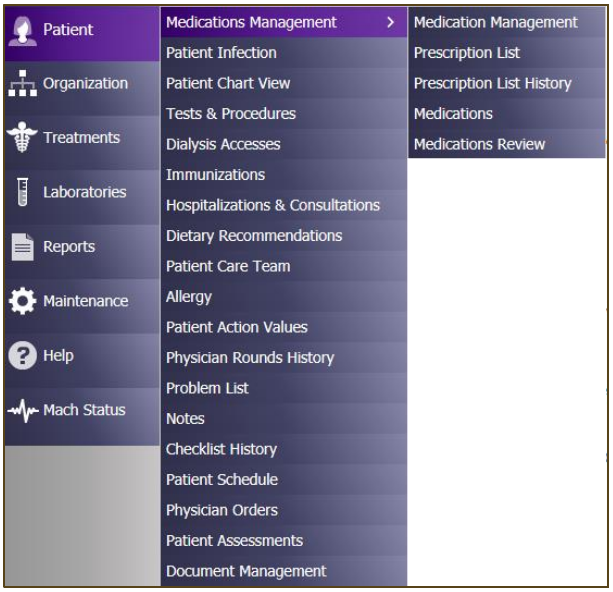
Patient registration will still be done in TIME. TIME will interface with Clarity and you will see that information populate to the appropriate screens within this menu.



- 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

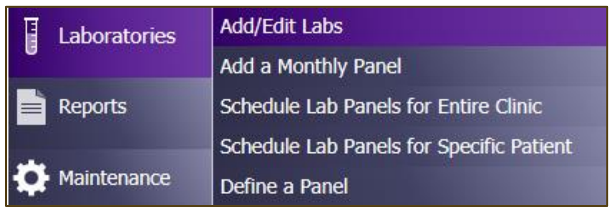
The Treatments menu is where you will find the information regarding a patient's Dialysis Prescription, Treatment documentation (In-Center = Real Time Charting (RTC) & Home = Visit Management), and Treatment History. Use RTC Status to track unentered treatments.

- 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

You can use **RTC Status** to track unentered treatments (as a first step) prior to running the **Missed and Unentered Treatments** report. You will walk through how to run this report in the **Reports** section.

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

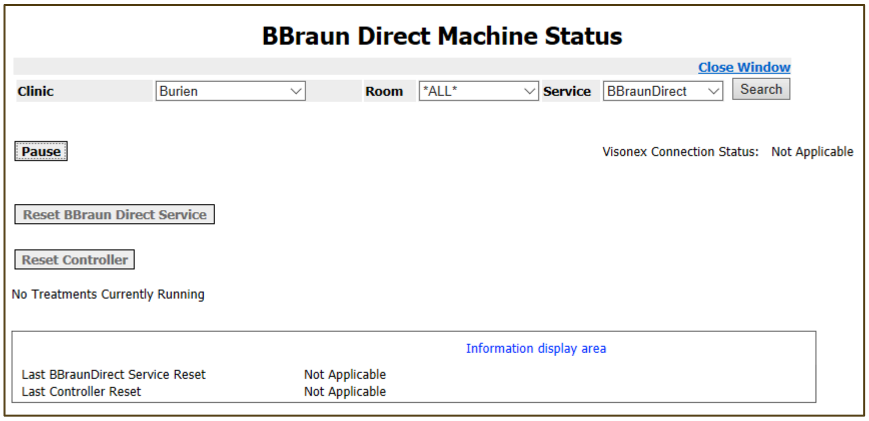
Reports are found with Report Wizard. You will be able to run Clinic reports and Patient reports. We will talk more about reports and how to run them later.

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 having 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.

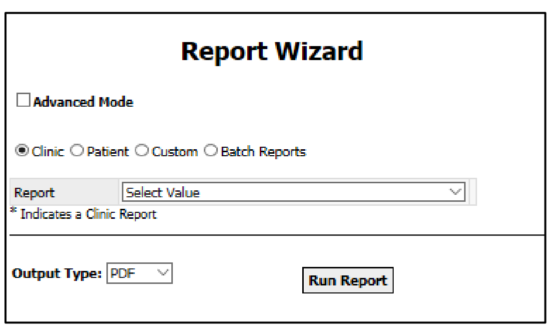


Reports

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. 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.**

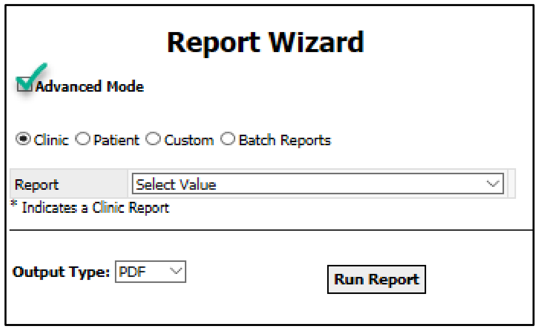
Select the **Clinic** or **Patient** radio button (depending on what type of report you want to run).



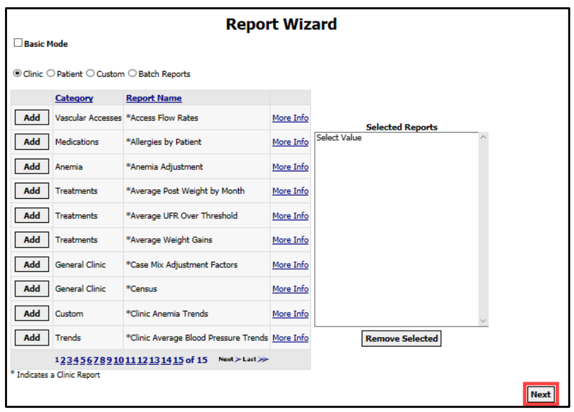
In the drop-down menu, select the desired report. Select the appropriate **Patient Shift/Patient**, as needed.

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

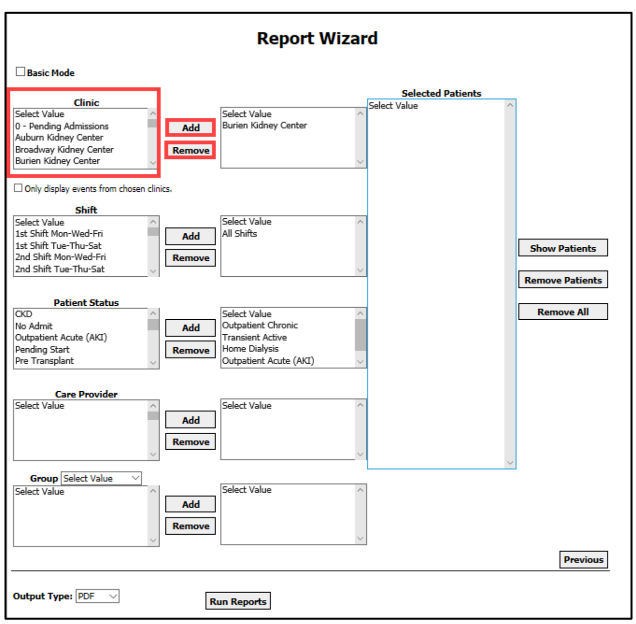
If you would like to run a **Clinic** report for multiple clinics, you can do so using **Advanced Mode**.
To use **Advanced Mode**, check the checkbox in **Report Wizard**.



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**.



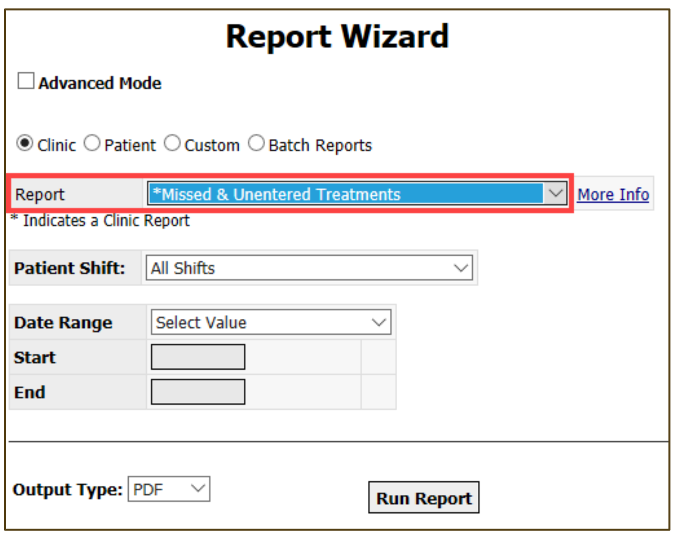
If desired, click **Show Patients** to verify the list of patients.

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

Daily Reports

Let's continue our discussion about reports by walking through the different reports that you will run on a daily or as needed basis.

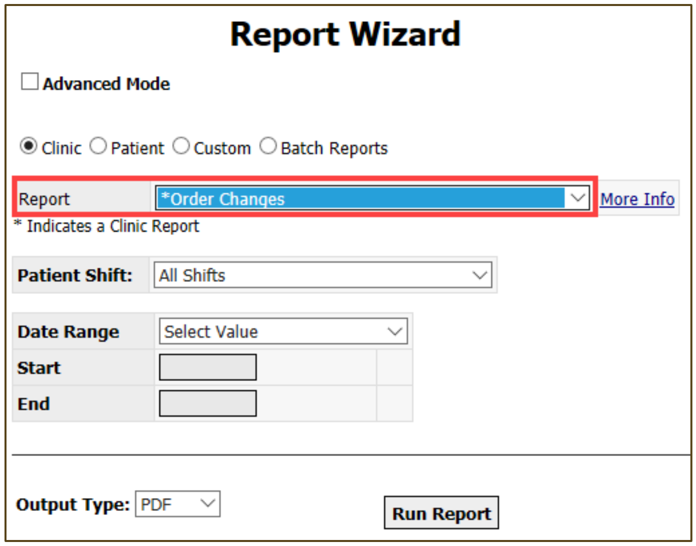
1. Run **Missed and Unentered Treatment** report
    a. Go to **Reports > Report Wizard**
    b. Select the **Clinic** radio button
    c. In the drop-down menu, select the **Missed & Unentered Treatments** report
    d. Select the appropriate **Patient Shift** and **Date Range**
    e. Click **Run Report—**the report will be in a separate web browser window



2. Communicate with RN as to which treatments have not been submitted

Daily Order Changes

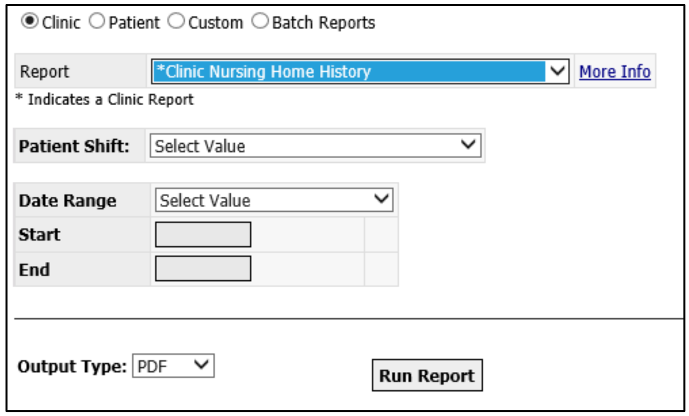
1. Run **Order Changes** report
    a. Go to **Reports > Report Wizard**
    b. Select the **Clinic** radio button
    c. In the drop-down menu, select the **Order Changes** report
    d. Select the appropriate **Patient Shift** and **Date Range**
    e. Click **Run Report—**the report will be in a separate web browser window



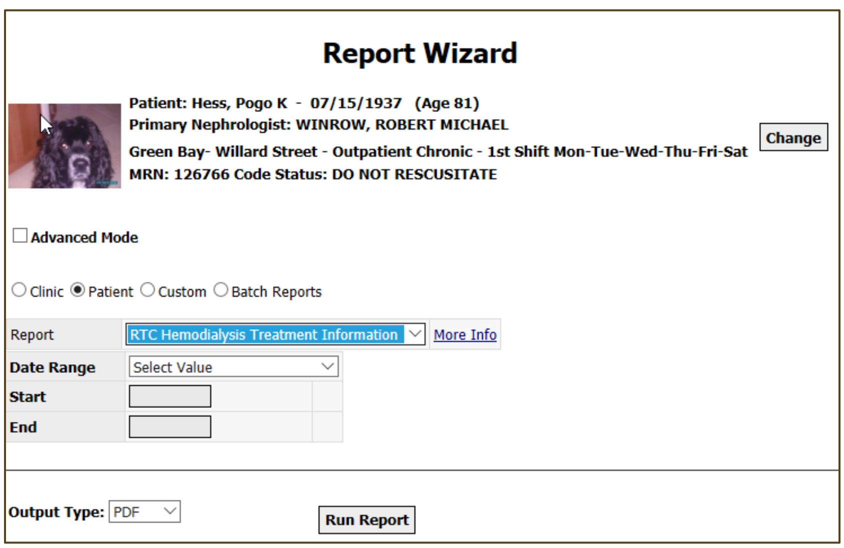
2. Print **Treatment Flowsheets** report for ***patients with changes*** to update the patients' binder
    a. Go to **Reports > Report Wizard**
    b. Select the **Patient** radio button
    c. In the drop-down menu, select the **Treatment Flowsheets** report
    d. Select the appropriate **Patient** and **Date Range**
    e. Click **Run Report—**the report will be in a separate web browser window

Nursing Home Collaboration

1. Run **Clinic Nursing Home History** report
    a. Go to **Reports > Report Wizard**
    b. Select the **Clinic** radio button
    c. In the drop-down menu, select the **Clinic Nursing Home History** report
    d. Select the appropriate **Patient Shift** and **Date Range**
    e. Click **Run Report—**the report will be in a separate web browser window.



2. Run **RTC Hemodialysis Treatment Information** report for any nursing home patients that ran during date range
   a. Go to **Reports > Report Wizard**
   b. Select the **Patient** radio button
   c. In the drop-down menu, select the **RTC Hemodialysis Treatment Information** report
   d. Select the appropriate **Patient** and **Date Range**
   e. Click **Run Report—**the report will be in a separate web browser window



Important Note about RTC Hemodialysis Treatment Information: To get this report, the treatment must be posted. The nurse will have to ensure that documentation has been completed (as appropriate) and post the treatment.

3. Fax **RTC Hemodialysis Treatment Information** report to Nursing Home

Medic 911

Medic is contacted via 911. Follow the following steps to gather the appropriate information:

1. Print RTC Hemodialysis Treatment Information
    a. Go to **Reports > Report Wizard**
    b. Select the **Patient** radio button
    c. In the drop-down menu, select the **RTC Hemodialysis Treatment Information** report
    d. Select the appropriate **Patient** and **Date Range**
    e. Click **Run Report—**the report will be in a separate web browser window

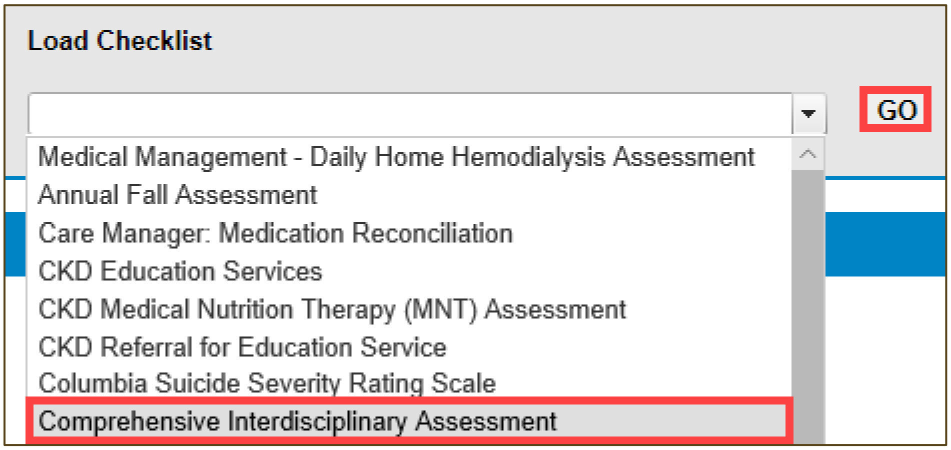
Important Note about RTC Hemodialysis Treatment Information:
To get this report, the treatment must be posted. The nurse will have to ensure that documentation has been completed (as appropriate) and post the treatment.

2. Print Patient Summary report and POLST
    a. Go to **Reports > Report Wizard**
    b. Select the **Patient** radio button
    c. In the drop-down menu, select the **Patient Summary** report
    d. Select the appropriate **Patient** and **Date Range**
    e. Click **Run Report—**the report will be in a separate web browser window
    f. POLST will be found in Docuware, as this document is scanned. Before looking for the document in Docuware, check the **Registration > Advance Directives** to see if there is a copy on file. If it is on file, you can find the link to Docuware under **Patient > Documentation Management** or in **Patient Chart View**.
3. Give reports to medic

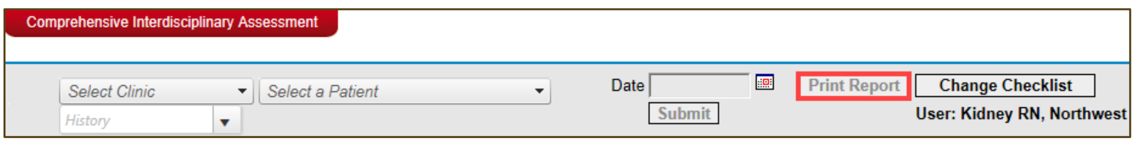
Travel

A patient requests a copy of their vaccinations.
1. In **Reports > Report Wizard**, select and print the **Immunizations** report (patient report).
2. Print the **H&P** and **2728** from Docuware (**Patient > Document Management)**.
3. Select and print current Dialysis Prescription from **Report Wizard > Patient Reports > Dialysis Prescription**
4. Print **Comprehensive Interdisciplinary Assessment (CIA)**

a. You can get this from **Patient > Patient Assessments** > **Comprehensive Interdisciplinary Assessment**



b. Select the correct **Clinic, Patient,** and **History/Date**
c. Print the CIA from your web browser

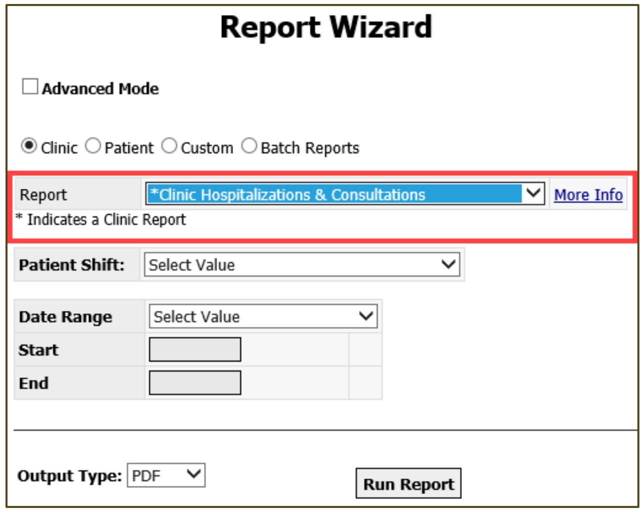


5. Print Monthly Labs for the patient by going to **Reports** > **Report Wizard** > select the **Patient** radio button > **Monthly Labs: All** report
    a. A separate browser window will pop up with your report.

Additional Reports

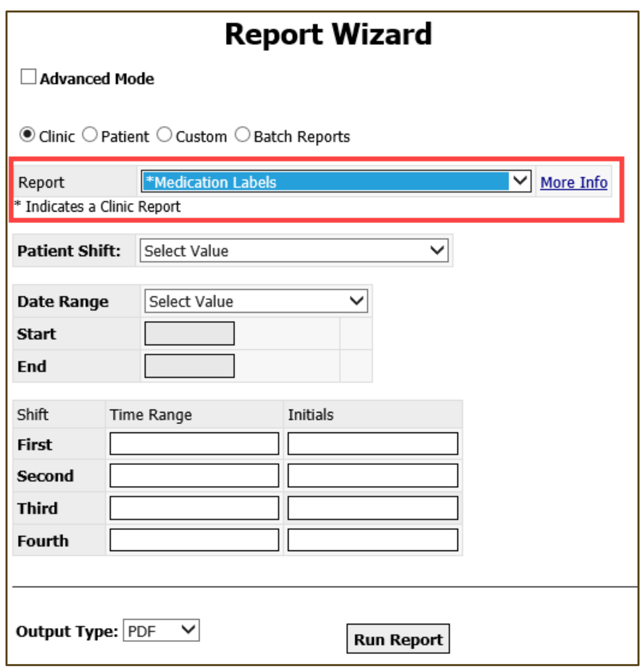
Clinic Hospitalizations & Consultations

1. Print **Clinic Hospitalizations & Consultations**
    a. Go to **Reports > Report Wizard**
    b. Select the **Clinic** radio button
    c. In the drop-down menu, select the **Clinic Hospitalizations & Consultations** report
    d. Select the appropriate **Patient Shift** and **Date Range**
    e. Click **Run Report—**the report will be in a separate web browser window



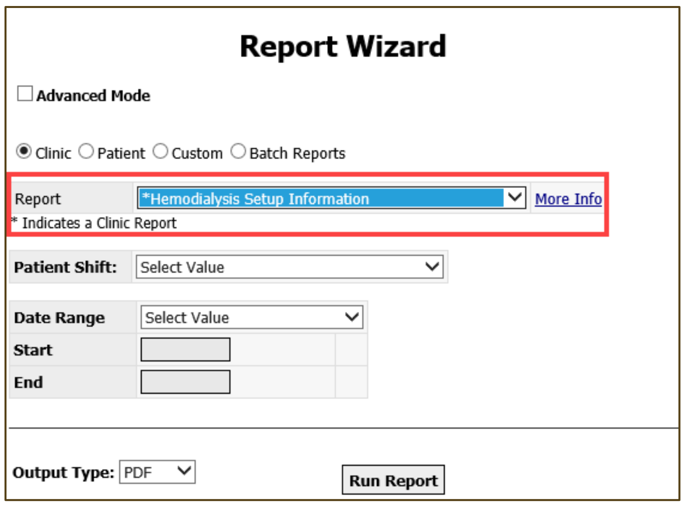
Medication Labels

1. Print **Medication Labels**
    a. Go to **Reports > Report Wizard**
    b. Select the **Clinic** radio button
    c. In the drop-down menu, select the **Medication Labels** report
    d. Select the appropriate **Patient Shift** and **Date Range**
    e. Click **Run Report—**the report will be in a separate web browser window



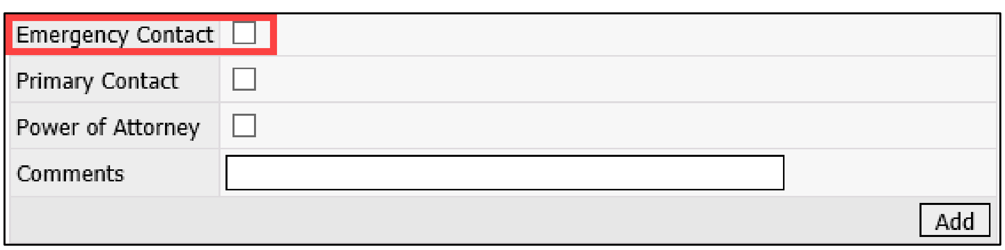
Hemodialysis Setup Information

1. Print **Hemodialysis Setup Information**
    a. Go to **Reports > Report Wizard**
    b. Select the **Clinic** radio button
    c. In the drop-down menu, select the **Hemodialysis Setup Information** report
    d. Select the appropriate **Patient Shift** and **Date Range**
    e. Click **Run Report—**the report will be in a separate web browser window



New Patient Workflow

1. Under **Registration > Patient Contacts**, select the patient's emergency contact. Check the **Emergency Contact** checkbox on the patient's emergency contact.



    a. This will ensure that the emergency contact shows up in the appropriate reports and assessments.
    b. If the contact does not have a phone number, enter 000-000-0000

2. Scan consents into Docuware.
3. Update the patient's schedule

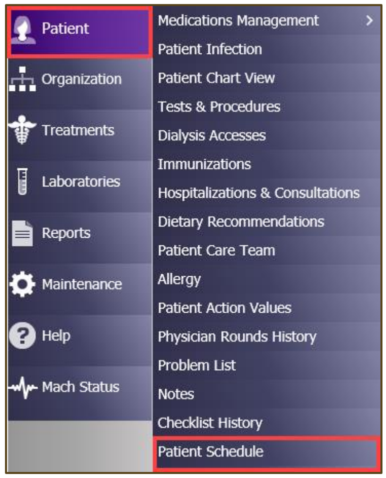
a. When a patient is admitted in Clarity, the patient's schedule will default to a MWF 1st shift Outpatient Chronic schedule.

Let's discuss the details of scheduling in Clarity.

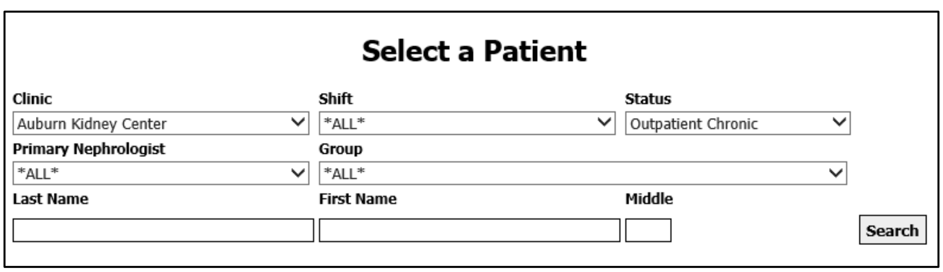
Schedule Workflow

Updates to Patient Schedule

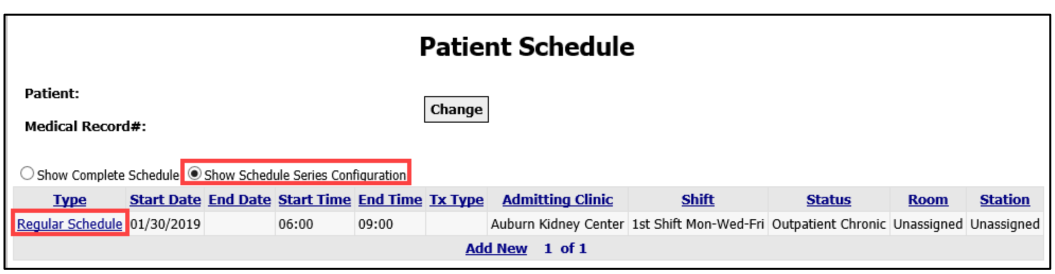
To make updates to a patient's schedule, go to **Patient > Patient Schedule.**



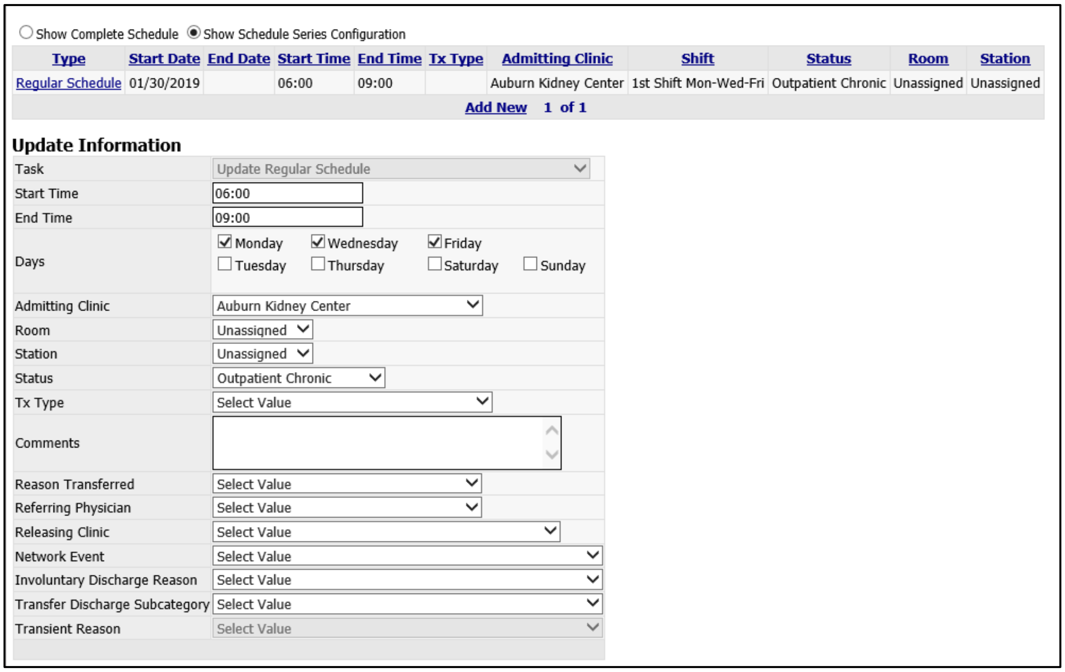
Select the appropriate **Patient**—either by searching with their first/last name or by selecting the **Clinic/Shift/Status** using the drop-down menus.



Once you have clicked on the appropriate patient, select the **Show Scheduled Series Configuration** radio button.



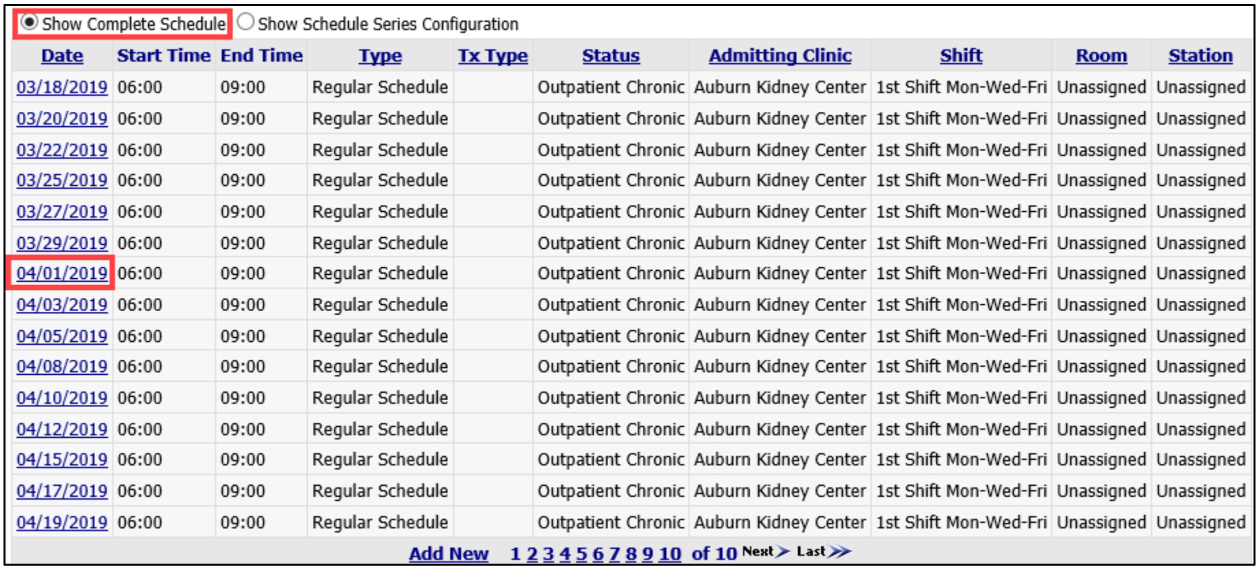
Click the **Regular Schedule** hyperlink. Update the schedule as necessary (example—from MWF to TTS or TTS to MWF). You would make this type of update for new patients or patients that are changing their regular schedule.



Reschedule a Treatment

Let's say you have a patient who needs one treatment rescheduled. We will follow the same path we took before—**Patient > Patient Schedule**. Once you have selected the correct patient, click the **Show Complete Schedule** radio button.

This will show all of the patient's upcoming treatments. Select the date of the treatment to be rescheduled.

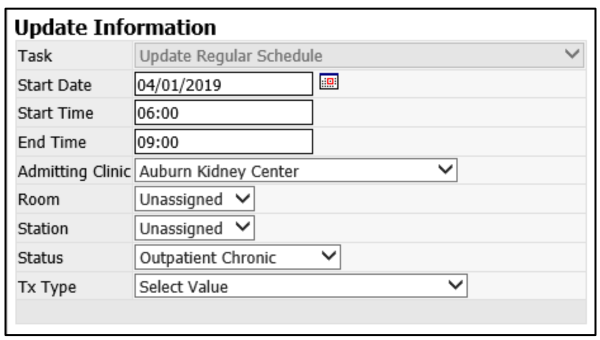


Show Complete Schedule | Show Schedule Series Configuration

Date	Start Time	End Time	Type	Tx Type	Status	Admitting Clinic	Shift	Room	Station
03/18/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
03/20/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
03/22/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
03/25/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
03/27/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
03/29/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
04/01/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
04/03/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
04/05/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
04/08/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
04/10/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
04/12/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
04/15/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
04/17/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned
04/19/2019	06:00	09:00	Regular Schedule		Outpatient Chronic	Auburn Kidney Center	1st Shift Mon-Wed-Fri	Unassigned	Unassigned

Add New 1 2 3 4 5 6 7 8 9 10 of 10 Next > Last >>

Once you select the date to be rescheduled, update the treatment, as appropriate. Click **Submit**.



Update Information

Task	Update Regular Schedule
Start Date	04/01/2019
Start Time	06:00
End Time	09:00
Admitting Clinic	Auburn Kidney Center
Room	Unassigned
Station	Unassigned
Status	Outpatient Chronic
Tx Type	Select Value

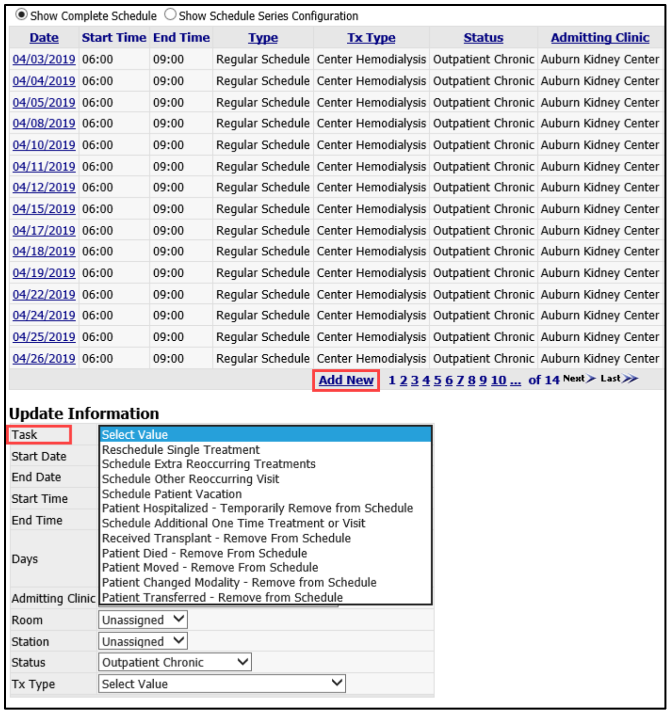
You would follow these steps if you needed to change the clinic for a one treatment. When you change the clinic, all of the orders for that day will be transferred to that clinic for that treatment only.

Other Scheduling Situations

We have a patient that will be on vacation next week. Staying in the **Patient Schedule** screen, select the patient we wish to document when they will be out on vacation.

Click the **Show Complete Schedule** radio button.

Click **Add New** at the bottom.



Show Complete Schedule Show Schedule Series Configuration

Date	Start Time	End Time	Type	Tx Type	Status	Admitting Clinic
04/03/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/04/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/05/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/08/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/10/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/11/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/12/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/15/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/17/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/18/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/19/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/22/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/24/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/25/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center
04/26/2019	06:00	09:00	Regular Schedule	Center Hemodialysis	Outpatient Chronic	Auburn Kidney Center

Add New 1 2 3 4 5 6 7 8 9 10 ... of 14 Next > Last >>

Update Information

Task	Select Value Reschedule Single Treatment Schedule Extra Reoccurring Treatments Schedule Other Reoccurring Visit Schedule Patient Vacation Patient Hospitalized - Temporarily Remove from Schedule Schedule Additional One Time Treatment or Visit Received Transplant - Remove From Schedule Patient Died - Remove From Schedule Patient Moved - Remove From Schedule Patient Changed Modality - Remove from Schedule Patient Transferred - Remove from Schedule
Start Date	
End Date	
Start Time	
End Time	
Days	
Admitting Clinic	
Room	Unassigned
Station	Unassigned
Status	Outpatient Chronic
Tx Type	Select Value

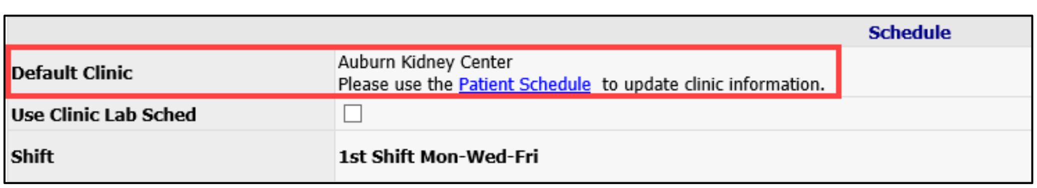
Select the task the **Schedule Patient Vacation**. Enter the **Start Date** and **End Date**. Once you have completed the dates, click Submit.

Changes to Clinic Location, Modality, Primary Nephrologist, and Transplant Information

Clinic Location

If you have a patient that will be changing from one in-center clinic to another or from home hemodialysis clinic to an in-center clinic, you would make the updates in TIME (the registration system) and they would then flow into Clarity.

To ensure that your changes to the patient’s clinic location have been updated, you can go to **Registration > General Information**. If you scroll to the bottom of the page, you will the Schedule subheading and **Default Clinic.**



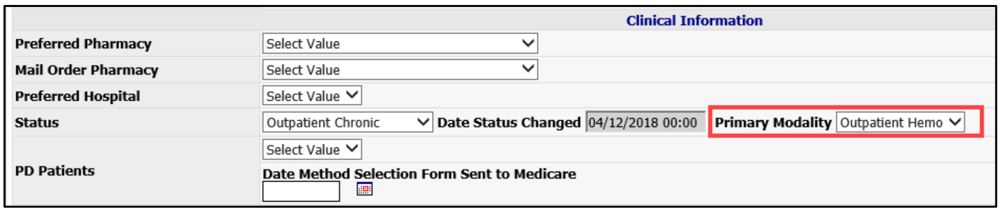
	Schedule
Default Clinic	Auburn Kidney Center Please use the Patient Schedule to update clinic information.
Use Clinic Lab Sched	
Shift	**1st Shift Mon-Wed-Fri**

You will also be able to see the location change in **Clinic History** (**Registration > Patient Clinic History**).

Modality

If a patient's modality changes (for example from PD to Hemodialysis), you will make those changes in TIME first. Once those changes have been made, make the same changes in Clarity by going to **Registration** > **General Information.**

Scroll down to the Clinical Information section and select the drop-down menu for **Primary Modality** and select the appropriate value.



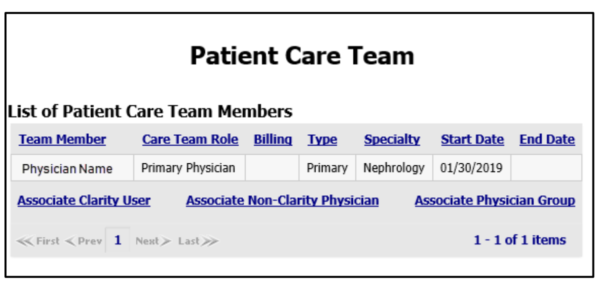
You should be able to see any previous changes by going to **Registration > Patient Status History**.

IMPORTANT NOTE: A patient's **Status** flows from **TIME** to **Clarity**, but the **Modality** does not.

Primary Nephrologist

If you have a patient that will be changing to a different primary nephrologist, you would make the updates in TIME and they would then flow into Clarity. (This is the only registration item that does not go to the **Registration > General Information** screen).

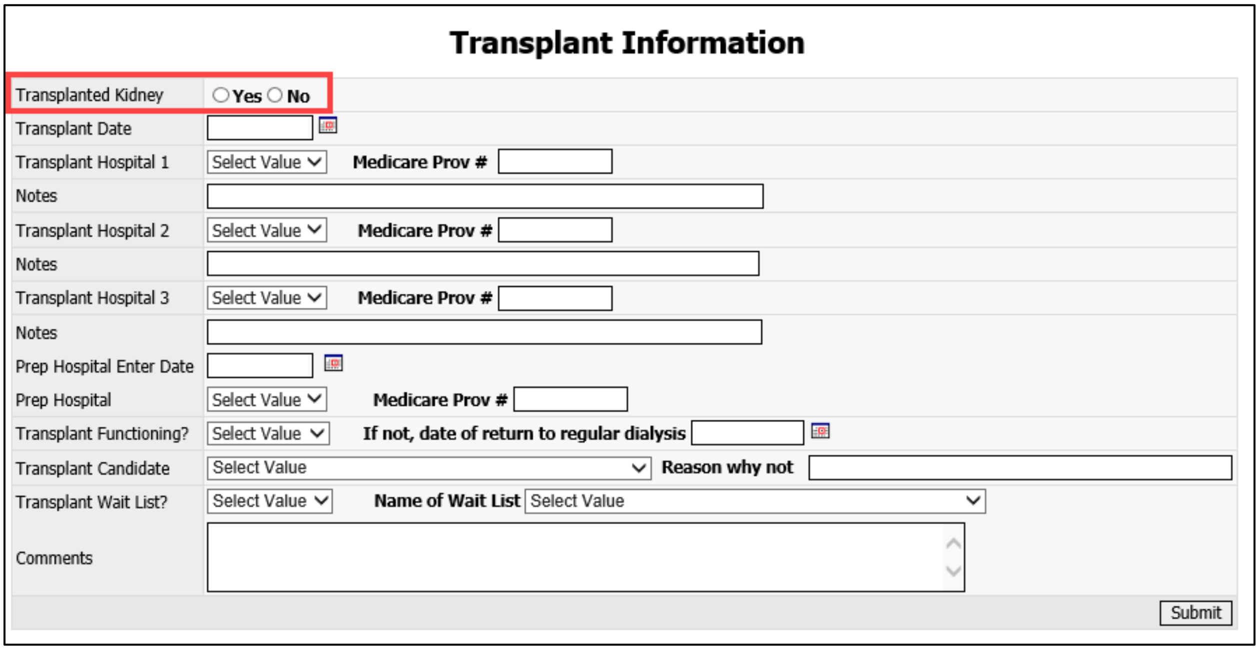
To ensure those changes have been made in Clarity, go to **Patient > Patient Care Team**.



Transplant Information

If you are notified that a patient has received a transplant, go to **Registration > Transplant Information.**

In the **Transplanted Kidney** field, select the **Yes** radio button and click **Submit.**



Patient Care Team

In order to receive notifications of a patient's hospitalization, you will need to be a part of the **Patient Care Team**. To add yourself as member of the Patient Care Team, go to **Patient > Patient Care Team**.

Be sure you select the correct patient. Click the **Associate Clarity User** link

Select your name from the **Clarity User** drop-down menu. Enter a **Start Date** and select the **Care Team Role** of **Unit Coordinator**.

Scanning Records into Clarity

To scan documents in Clarity, you will have a couple of options of where you can scan documents depending where you are.

If you are already in a patient's chart, you can select the **Document Management** link (Patient Chart View, RTC, Visit Management). If the document is already digital, select **Upload New Document** in Docuware. Complete all of the fields—Document Name, Document Type, Date of Document.

If the document is not digital, you would start by scanning the document (not different from your current workflow). You would then click the **Document Management** link (Patient Chart View, RTC, Visit Management) and upload the newly scanned document. Complete all the fields—Document Name, Document Type, Date of Document.

If you not in a patient's chart, navigate to **Patient > Document Management** within Clarity. You search for your patient—either by MRN or first/last name. Just like we saw before, if you already have the document scanned, you would upload the document from here. If the document needs to be scanned, you would follow your current workflow and then follow the steps to upload.

Finding Scanned Documents in Clarity

To find documents that you have scanned into a patient's chart, you can go a couple of different places depending on where you are in the patient's chart.

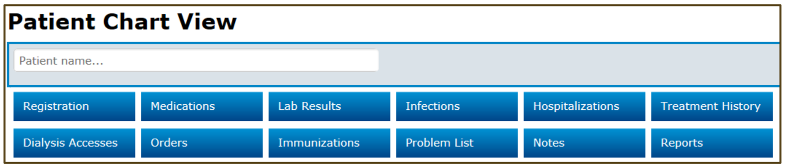
If you are in a patient's chart (RTC, Visit Management, Patient Chart View), you click the Document Management link. You can search for the patient by MRN or first/last name and then filter based on the Document Type to find a specific document.

If you are not in a patient's chart, go to **Patient > Document Management**. Search for your patient (MRN or first/last name) and filter based on the Document Type you are looking for.

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)

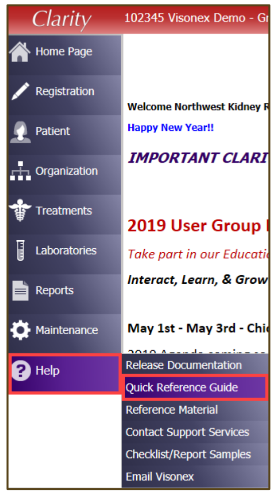


2. From here, you can review Registration Information, Lab Results, Treatment Results, etc.
3. Click through the various tabs to see how the information displayed
4. If you are in Patient Chart View and need to start documenting a treatment in RTC or document a visit in Visit Management (for home patients),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

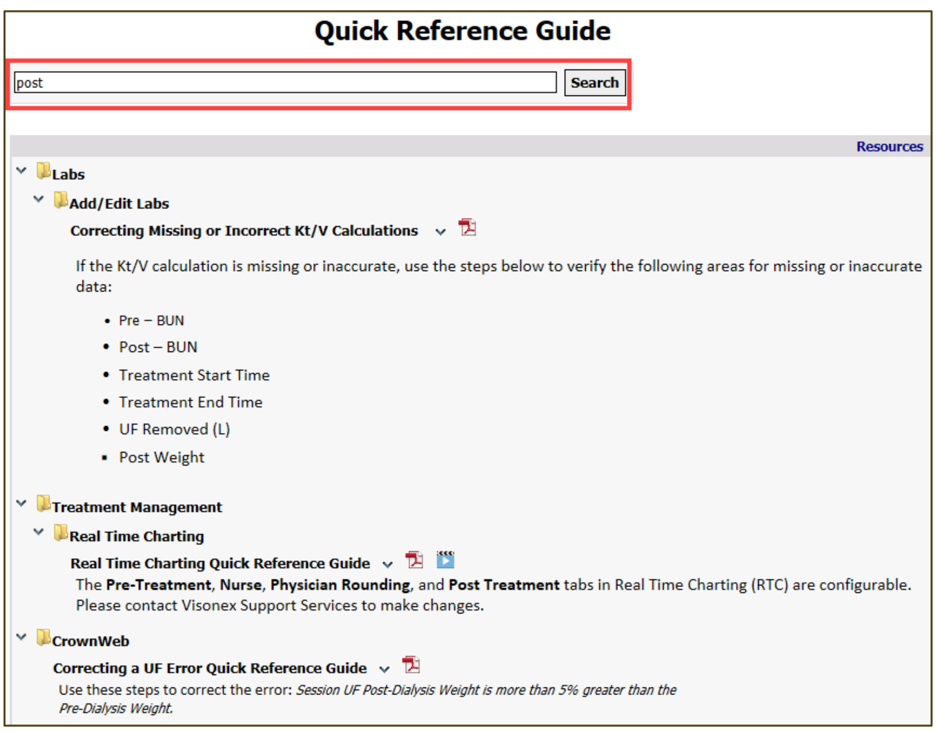
5. You will also notice that depending on the tab you are in (for example—Medications), you can click the **Medications** button at the bottom and it will bring you to the **Medications** screen. This is where you can update and/or make any changes.

Help

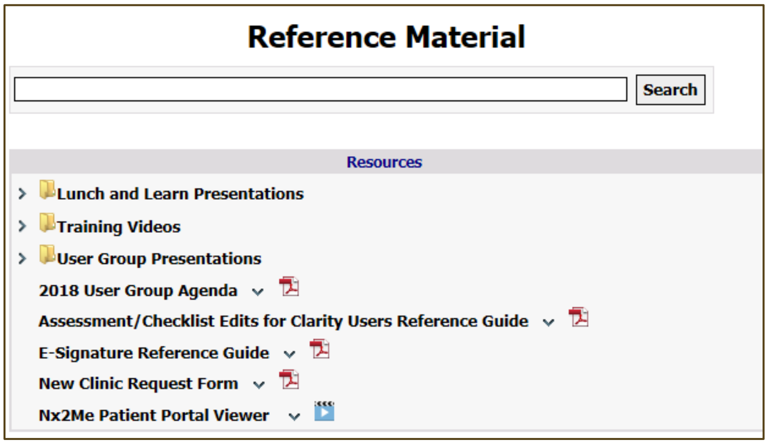
Within Clarity, there are several available resources to help guide and troubleshoot. These **Quick Reference Guides** cover a multitude of topics and are available under the **Help > Quick Reference Guides.**



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.