How to Use the Unposted Treatments report

- The purpose of the report is to provide staff the names of patients and dates for RTC or VM sessions that have been opened but not posted so that the user can determine whether the session needs to be posted or the session needs to be deleted in Checklist History.

- It is critically important to have all sessions properly posted by the end of the day to ensure patient medication orders advance correctly (those using Date of Next Dose or Dose Counter) and our EMR and Billing systems match.

How the report works

- The report looks in Checklist History to see if a RTC or VM checklist is listed but does not have a posted date (does not appear in Treatment History).
- Any changes made to an RTC or VM session will not show on the report until the next day.
- You will need to refresh the report each day you open it.
- You can set any Start and End dates you choose for a date range.
- You should set the Start date to at least the first day of the month in case a staff has created a junk checklist for a past date.

Definitions

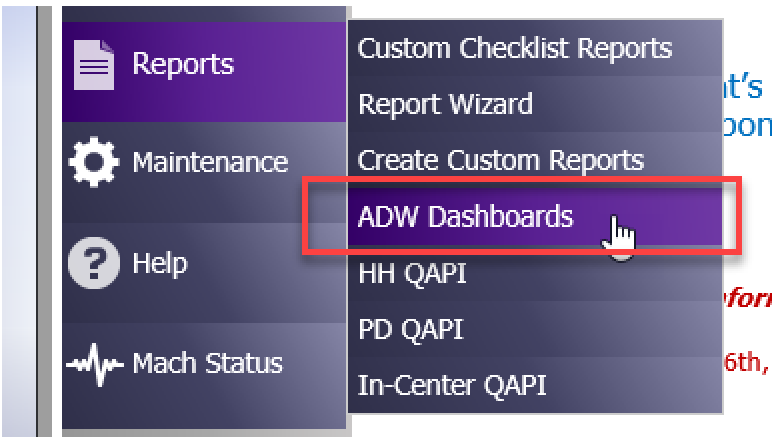
- **Unposted-** A Checklist that has been saved open and has a pre-weight documented. Think of this as a "truly" unposted session.
    - Rationale: we should only have a pre-weight documented if the patient actually showed up for a treatment and was weighed.

- **Abandoned:** A Checklist that has been saved open and has a Location selected but no PreWeight.
    - Rationale: Center staff routinely open RTC sessions and complete the Setup portion of the PreTreatment tab. If a patient does not show up for the appt, there should not be a pre-weight documented.

- **Junk:** A Checklist that has been partially opened but not saved open. Location will not be selected.
    - Rationale: If a user opens RTC and does not save any entries in the Location or Treatment Type fields but DOES look in/open the Medication/Imn tab or the Physician Rounding tab, the session will be open in Checklist History but not actually saved open.
    - Note: Looking in the Medications/Imn tab without saving the RTC open, will cause the med orders to be locked in that screen for that date.

How to get to the report:

- Go to Clarity>Reports>ADW Dashboards



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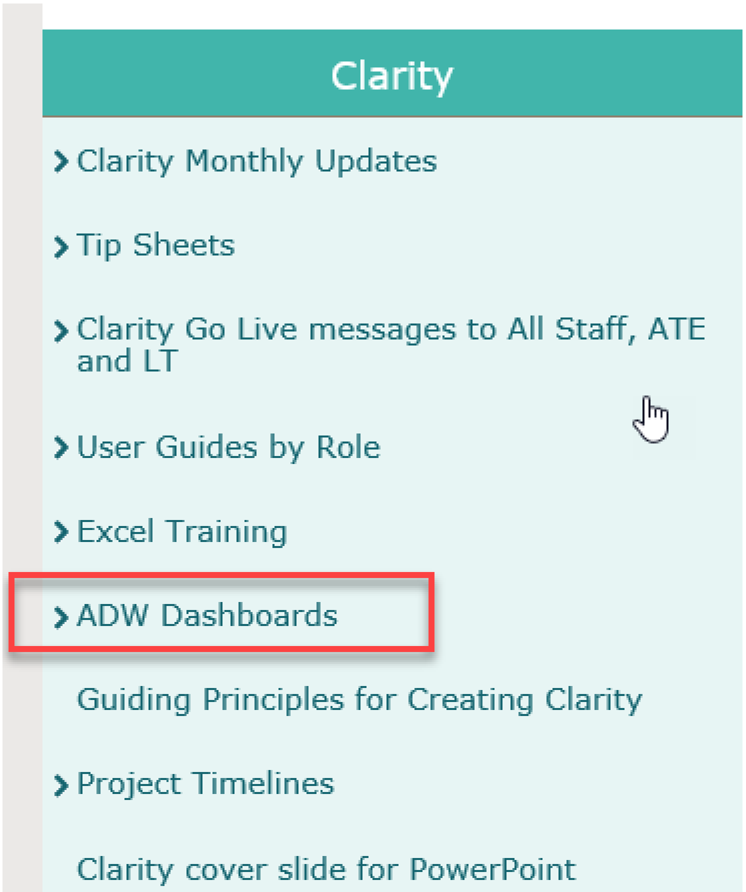
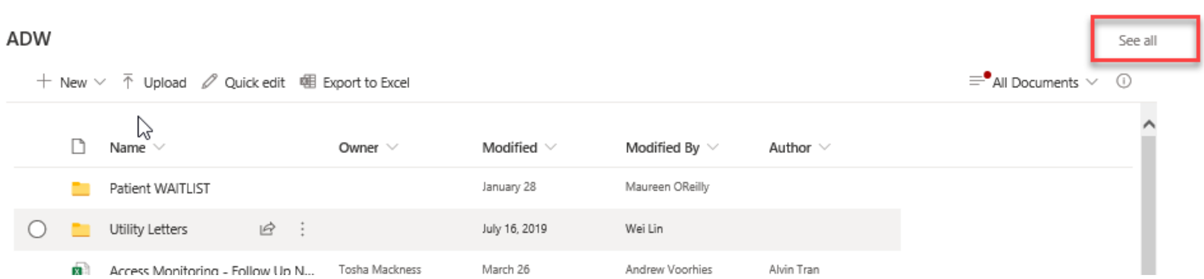
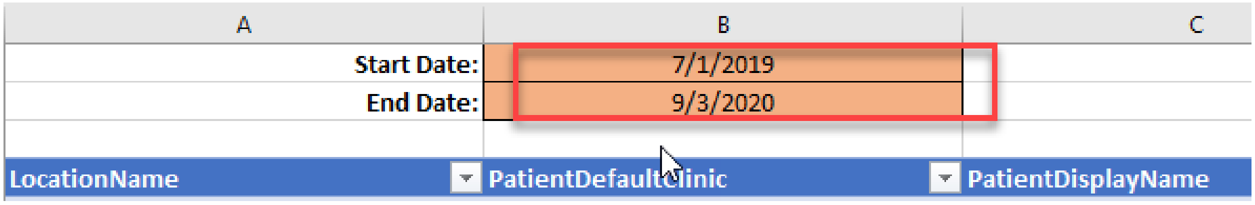
- Or go to KNET>Clarity>ADW Dashboards



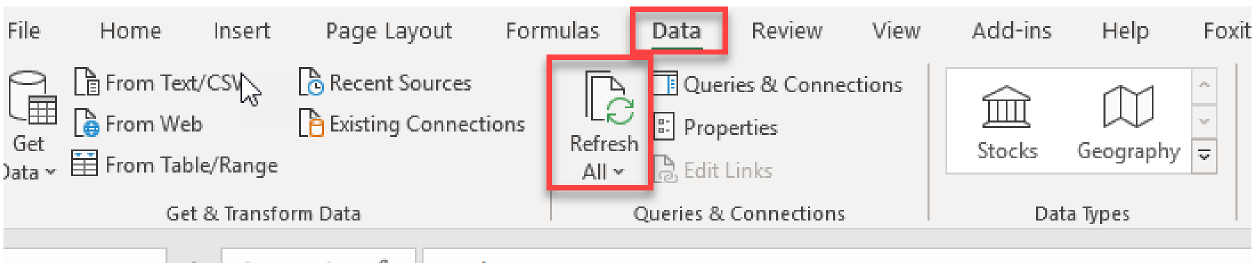
- If you do not see the Unposted Treatments ADW, click on See All



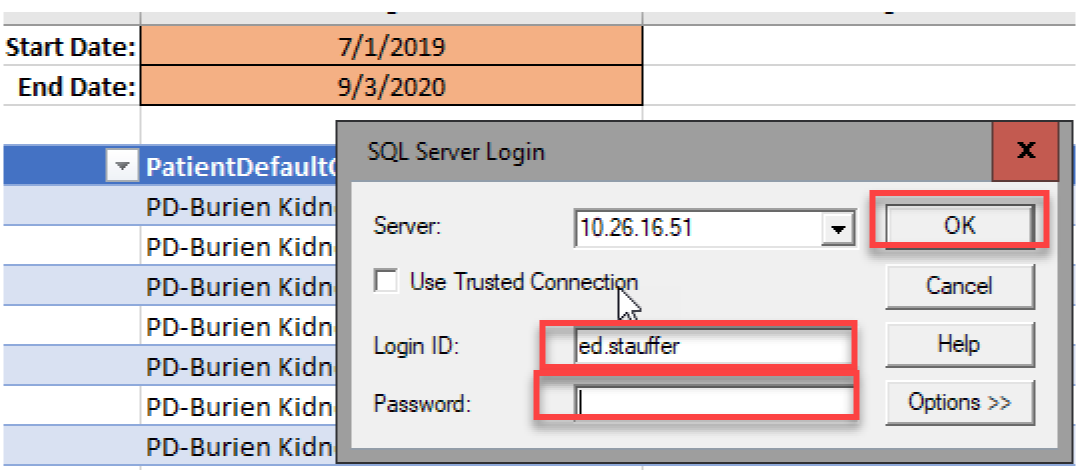
- Click on Unposted Treatments.xlsx
- Set the Start Date and End Date



- Refresh the data by clicking on Data and then Refresh All



- When the SQL Server Login box appears, enter your **Clarity** user name and password and then OK or Enter.



What you will see on the report by column:

- Location Name
  - The clinic where session was opened.
  - This is the clinic responsible for correcting the error.
  - If you sort by Junk, there will be no Location selected in RTC or VM so you will need to follow-up on any patients listed under your "PatientDefaultClinic."
- Patient Default Clinic
  - The patient's regular clinic.
- Patient Name
- Patient Status (patient's current status as of the day the report is refreshed).
- Tx Type
- Tx Date: Date the checklist will appear as in Checklist History
- Creation Date: date the checklist was created by the user.

- Pre Weight
- MRN
- Reason
    - Unposted
    - Abandoned
    - Junk
- Staff edited Weight
- Staff Created Treatment: MD names will appear as all capitals.

1	Start Date:	6/1/2021
2	End Date:	6/24/2021
3		

4	LocationName	PatientDefaultClinic	PatientDisplayName	Status	Patie	TxType	TxDate	CreatedDate	PreWeight	MRN	Reason	Staff_EditedWeight	Staff_CreatedTreatment	Pos
185	[redacted] Kidney Cer	[redacted] ey Center	[redacted]	Home Dialysis	Outpati	Real-Time Charting	2021-06-01	6/1/2021 7:16		691559	Abandoned		[redacted]	
186	[redacted] Kidney Cer	[redacted] e Kidney	[redacted]	Outpatient Chronic	Outpati	Real-Time Charting	2021-06-23	6/23/2021 6:04		608340	Abandoned		[redacted]	
187	[redacted] Kidney Cer	[redacted] e Kidney	[redacted]	Outpatient Chronic	Outpati	Real-Time Charting	2021-06-23	6/23/2021 10:53		692502	Abandoned		[redacted]	
189	[redacted] y Center	[redacted] ey Center	[redacted]	Outpatient Acute (AKI)	Outpati	Real-Time Charting	2021-06-19	6/19/2021 5:47		693408	Abandoned		[redacted]	
190	[redacted] y Center	[redacted] ey Center	[redacted]	Outpatient Acute (AKI)	Outpati	Real-Time Charting	2021-06-21	6/21/2021 5:16		693691	Abandoned		[redacted]	
191	[redacted] y Center	[redacted] ey Center	[redacted]	Outpatient Acute (AKI)	Outpati	Real-Time Charting	2021-06-19	6/19/2021 6:19	87.7	693662	Unposted	[redacted]	[redacted]	
194		[redacted] y Center	[redacted]	Outpatient Chronic	Outpati	Real-Time Charting	2021-06-21	6/21/2021 15:27		691220	Junk			
195		[redacted] nter	[redacted]	Outpatient Chronic	Outpati	Real-Time Charting	2021-06-21	6/21/2021 21:10		692514	Junk			

Workflow to reconcile unposted/abandoned/junk sessions.

- Unposted
    - Go to Patient>Checklist History and select correct patient.
    - Select "Click to View" to open the RTC or VM session and verify the session was a valid tx and needs to be posted.
    - If the session needs to be posted, go to the PostTreatment tab and Add Treatment. You may need to complete missing documentation to allow the tx to be posted.
    - If someone entered a PreWeight but the patient never actually showed up for the treatment, you may have an invalid tx that needs to be deleted from Checklist History.
    - **If the reconciliation is done after the second business day of the month after the date of the treatment, you will need to send an email to Hollie Rowlette and Kelsie Jas to reconcile the billing side because the charges will need to be processed.**

- Abandoned
    - Go to Patient>Checklist History and select correct patient.
    - Select "Click to View" to open the RTC or VM session and verify the session was abandoned and no machine data is present in the Treatment Tab and no Medications were given in Medications/Imn tab.
    - If the treatment was truly abandoned, delete the checklist from Checklist History.
    - Go to Treatments>Enter Treatments and enter the Missed Treatment if it is not already there.

- Junk
    - Go to Patient>Checklist History and select correct patient.
    - Select "Click to View" to open the RTC or VM session and verify the session has no treatment information and needs to be deleted.
    - Delete the checklist from Checklist History.