Documentation & Validation in EHR

Workflow For:
Student Nurse
Nurse Tech
Nurse Instructor
CSM Staff RN

Updated 6/18/15
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TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Page</th>
<th>Content Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Roles and Requirements</td>
</tr>
<tr>
<td>4-7</td>
<td>Documentation &amp; Validation in EHR:</td>
</tr>
<tr>
<td>4</td>
<td>I View</td>
</tr>
<tr>
<td>5</td>
<td>PowerForms</td>
</tr>
<tr>
<td>6</td>
<td>Progress Notes</td>
</tr>
<tr>
<td>7</td>
<td>MAW</td>
</tr>
<tr>
<td>8-11</td>
<td>Uncharting Student Nurse Documentation</td>
</tr>
</tbody>
</table>

For questions, please contact Jill Kortebein, jkortebe@columbia-stmarys.org
Effective January 1, 2014, the EHR security team has updated the Student Nurse, Nurse Tech, and Nurse Instructor roles. The title of “Student Nurse” includes all levels of students, unless otherwise noted.

**Student Nurse, Nurse Tech**
- AHMI_ED_OE_BC_Student Nurse/Nurse Tech
- AHMI_Hosp_OE_BC_Student Nurse/Nurse Tech
- AHMI_Hosp_OE_BC_WH_Stud Nur/Nur Tech
- AHMI_Hosp: Surgery Tech/Student RN

**Nurse Instructor**
- AHMI_Hosp_OE_BC_Nurse Instructor
- AHMI_Hosp_OE_BC_WH_Nurse Instructor

**Requirements/Responsibilities**
- All Student Nurses must login as themselves in EHR
- The primary person working with the Student Nurse/Nurse Tech will be the CSM Staff RN/Nurse Instructor.
- All Student Nurse/Nurse Tech charting is documented by themselves, under their own login, placed in Pending Validation and signed off by the CSM Staff RN/Nurse Instructor.

- Medication Administration and Documentation on MAR:
  - CSM Staff RN/Nurse Instructor will supervise Student Nurse/Nurse Tech administering medication, using the eMAR and/or the Medication Administration Wizard (MAW), as appropriate [Nurse Technician I & II and LPN Role Policy #324414 and Medication Policy #562954].
  - The Witnessed by: functionality is used only with Student Nurse/Nurse Tech administration of those medications requiring a double check [Medication Policy #562954].
  - Medication chart verification should be completed before the Student Nurse/Nurse Tech leaves the hospital for the day.
  - Future doses of PRN medications cannot be administered if left in Pending Validation status.

- Patient Assessment and Other Documentation in EHR (I View, PowerForms, Progress Notes):
  - Student Nurse/Nurse Tech will perform and document his/her own assessment of the patient.
  - CSM Staff RN will perform his/her assessment and then authenticate Student Nurse/Nurse Tech patient assessment in I View
  - Nurse Instructor will document Progress Note-SN/NT/Instructor stating they have reviewed and approve clinical Student Nurse documentation
Interactive View (I View)

- **Student Nurse/Nurse Tech, under own login**, charts and signs documentation in I View. Authenticate icon displays in upper right corner of documentation, indicating unauthenticated results.

- **CSM Staff RN, under own login**, opens I View.
  1) Click **Authenticate** icon from toolbar. Authenticate window displays.
  2) Review results. Be sure to scroll through and review the entire list. Verify all entries are the same **Student Nurse/Nurse Tech** entries
     - If any discrepancies, deselect those item(s).
     - To modify a result and add documentation, select result and click
       - I View displays to add documentation. Sign when finished.
       - Click on **Authenticate** icon to continue verifying results.
  3) When review complete, click **Save** to verify the results.
  4) **Have Student Nurse/Nurse Tech** review and modify any unverified items in I View.
  5) Repeat authenticate steps to verify remaining results.
  6) View results history from Flowsheets to see **Student Nurse/Nurse Tech** documentation and **CSM Staff RN**’s signature.
  7) **Nurse Instructor** (clinical Student Nurses), under own login, reviews Student Nurse documentation and then creates a Progress Note from the Documents tab to document that review.
     - Select note type **Progress Note-SN/NT/Instructor**
     - Enter a statement of review and approval and click i.e. “I have reviewed “(student’s name)” documentation.”
PowerForms

- **Student Nurse/Nurse Tech**, *under own login*, charts and signs PowerForm. PowerForm then populates Form Browser in an **Unauth** status, indicating unverified results.

- Either the **CSM Staff RN** or **Nurse Instructor**, *under own login*, opens Form Browser.

  1) Locate appropriate PowerForm to review. Select **Modify**. Review the documentation for accuracy.

  ![Image](image1.png)

  2) Click ✓ to sign the form. PowerForm converts to a **Auth (Verified)** status.

  ![Image](image2.png)

  3) To view the action list for the PowerForm, right click on the form and select **History**.

  ![Image](image3.png)
**Progress Note**

- **Student Nurse/Nurse Tech**, *under own login*, adds a progress note, selecting note type of *Progress Note-SN/NT/Instructor*.

  - When note completed, submit note for verification by clicking **Submit**.
  - Note status should be in an *Unauth* status and display as *Preliminary Report*.

- Either the **CSM Staff RN** or **Nurse Instructor**, *under own login*, opens Documents
  1. Locate appropriate Document to review. Right-click and select **Review**.
  2. Review content for accuracy. Right-click and select **Sign**.
  3. Right-click on document and select **Modify**.
  4. Enter a statement of review and approval and click **Sign**.

  i.e. “I have reviewed “(student’s name)” documentation.”

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Updated: 06/18/15
Student Nurse/Nurse Tech Documentation of **Routine Meds** from the MAW

**Current workflow steps to document and validate routine meds from the MAW:**

- **Student Nurse, under own login,** scans and signs medications on the MAW
  
  - This puts them into a Pending Validation status on the eMAR.

- Either the **CSM Staff RN** or **Nurse Instructor** (whoever observes Student), **under own login**, clicks on the medication task from the eMAR and *only* clicks on the green checkmark.
  
  - This completes the medication until refreshed. Once refreshed, medication administration will be authenticated.

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Do not use the Witness functionality on the MAW for validation of **routine** medication administration by the Student Nurse or Nurse Tech (*exception noted below).

**Note: Do not enter your name in the Witnessed by: box unless the medication requires a double check per policy or is a Continuous IV Infusion. Pending Validation does NOT work with Continuous Infusions. For any Continuous Infusion, the Nurse Instructor or CSM Staff RN must enter his/her name in the Witnessed by field within the charting window.

Student Nurse/Nurse Tech Documentation of **Meds that Require a Double Check** from the MAW

**Witnessed by:** is meant for all meds indicated by policy that require a double check (i.e. subcutaneous insulin, therapeutic drips, etc.). [Medication Policy #562954]

1) **CSM Staff RN/Nurse Instructor** enters name in Witnessed by: box.

2) **CSM Staff RN/Nurse Instructor** enters password in Verify user box and clicks **OK**.

3) **Student Nurse** signs medications on the MAW.

4) This completes the medication on the eMAR until refreshed. Once refreshed, the medication will display as authenticated.
Student Nurses do not have the ability to unchart their own I View, PowerForm, or Progress Note documentation once it has been authenticated by the CSM Staff RN or Nurse Instructor. The only documentation Student Nurses can unchart is medications. The CSM Staff RN does not have the ability to unchart the Student Nurse’s I View, PowerForm, or Progress Note documentation after it has been authenticated by either the CSM Staff RN or Nurse Instructor.

The Nurse Instructor is the only one who is able to unchart a Student Nurse’s I View, PowerForm, or Progress Note documentation after it has been authenticated by either the CSM Staff RN or the Nurse Instructor. The CSM Staff RN/Nurse Instructor should carefully review the Student Nurse’s documentation prior to authentication.

Nurse Instructors should only unchart their own Student Nurse’s documentation.

Workflow steps to unchart authenticated Student Nurse Documentation:

I View:

1) Right-click on the value you wish to unchart and select Unchart.

2) Indicate the reason for uncharting from the Reason dropdown and click Sign.

3) The uncharted result will display in Error in I View. Hover over the black triangle in the upper right hand corner of the field to see additional details.
Nurse Instructors should only unchart their own Student Nurse’s documentation.

Workflow steps to unchart authenticated Student Nurse Documentation:

**PowerForm:**

1) Right-click on the PowerForm you wish to unchart and select **Unchart**.

2) Specify a reason for uncharting in the **Comment** box. Click the green checkmark to complete uncharting of the PowerForm.

3) The PowerForm will display as **In Error** status with a red line struck through the name.
**Nurse Instructors should only unchart their own Student Nurse’s documentation.**

**Workflow steps to unchart authenticated Student Nurse Documentation:**

**Progress Notes:**

1) Click on the Documents tab from the Venue menu.

2) Locate the appropriate document from the Navigator.

3) Double Click on the document you wish to unchart. The document will display in the view area on the right side of your screen.

4) Right click within the body of the document and select **In Error** or click on the red X from the toolbar.

5) Enter a reason for uncharting in the **Comments** box and click OK.

6) Document will display as **In Error**.

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