oneChart Electronic Health Record Orientation Manual For Graduate Nursing Students

Beaumont



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Overview of oneChart/Epic Training

oneChart is **Beaumont Health-Oakwood's** electronic medical record (EMR) powered by Epic. You will complete your oneChart training on-line in Beaumont Health-Oakwood's learning management system, HealthStream. This is an interactive electronic learning (eLearning) lesson.

- If you have not completed this training: Please follow the instructions beginning on Page 2.
- If you already have completed this training, you do not have to repeat it.

oneChart/Epic Training for Nursing Students in HealthStream

In order to receive the appropriate access to oneChart (Epic), you need to complete training in HealthStream, Beaumont Health-Oakwood's learning management system. You will need to complete your online training at <u>least two days prior</u> to beginning your rotation or you will not have access to oneChart/Epic.

The Nursing Students curriculum contains several pieces, <u>all of which must be completed to get your</u> oneChart/Epic access:

- 1. eLearning Course
- 2. Assessment/Test
- 3. Evaluation

Please note, if you have completed oneChart/Epic learning modules at any of the following the Beaumont Health Hospitals, you are still **required** to complete Beaumont Health-Oakwood HealthStream modules to obtain oneChart/Epic access to the Beaumont Health-Oakwood Health System.

- Beaumont -Grosse Pointe
- Beaumont -Royal Oak
- Beaumont -Farmington Hills
- Beaumont -Troy

There are special instructions for nursing students who are also Beaumont Health employees. If you are a Beaumont Health employee, please be sure to carefully read this information in the yellow box on Page 9.

If you experience any problems with computer training or access...please contact

Laura Zahm at Laura.Zahm@beaumont.org

or Sandy Schmitt at Sandra.Schmitt@beaumont.org

***PLEASE CALL US FIRST IF YOU EXPERIENCE ANY PROBLEMS.
DO NOT CALL THE HELP DESK FIRST!****

Nursing faculty and student EMR access is set up in a special way and the Help Desk is unfamiliar with this unique set up. We will direct you to the Help Desk, if needed.

In most cases, we can remedy the problem for you promptly.





Accessing HealthStream

Please Note: HealthStream requires the following:

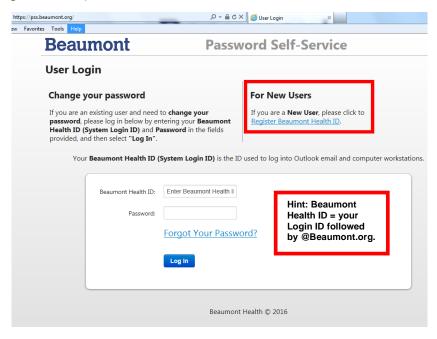
Internet Explorer 8.0 or higher Adobe Flash 7.5.1 or higher Turn off Popup Blocker

Obtaining your User ID:

Your Healthstream User ID will consist of your oneChart/Epic User ID followed by
"@Beaumont.org". (Please note: This will not be a valid email address but serve only as your
Healthstream User ID.) The Healthstream User ID and the oneChart/Epic User ID will be provided
to Faculty via email on the "Profile Completion Report". Students will receive this from their Faculty
or from the site coordinator.

Creating a Password:

- 1. Visit Password Self Service at https://pss.beaumont.org.
 - If you have never completed modules in Healthstream before at Beaumont, you will create a new password as a new user. (see screenshots and step-by-step instructions below and on Page 3)
 - o If you have been a previous student at Beaumont, you can attempt to login with your previously assigned User ID & Password. If it has been over 90 days since you accessed oneChart/Epic, you will need to reset/change your password. You will log in with your User ID and previous password. If you do not remember your password, you can click on "Forgot your Password" and reset it. (see screenshots and instructions on page 3 and 4)







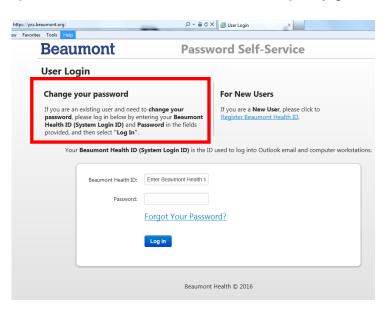
New User:

- 1. Open the Password Self-Service Tool: https://pss.beaumont.org
- 2. Click on "Register Beaumont Health ID" under For New Users.
- Enter your Beaumont Health ID which is your oneChart/Epic Login ID followed by @Beaumont.org
- 4. Enter your date of birth, last four of social security number and zip code you indicated in ACE.
- 5. New users will be required to answer five challenge questions that they select.
- 6. PSS Registration can occur from your home pc, cell phone or work pc by accessing https://pss.beaumont.org from the internet.

Please note: **Every 90 days** your password will need to be changed. If you are not here for 90 days and you come back to Beaumont Health, when you try to login you will be notified your password has expired. You will then go to the PSS website and answer your security questions; this will allow you to create your new password. Passwords can be changed on your home pc, cell phone or work pc by accessing https://pss.beaumont.org from the internet.

How to Change/Reset Your Password

- 1. Open the Password Self-Service Tool: https://pss.beaumont.org
- 2. Log in by entering your Beaumont Login ID followed by @Beaumont.org, Password & click Log In
- 3. Type in any additional personal data and/or answers to challenging questions when prompted
- 4. Create your new password which meets the Beaumont policy guidelines



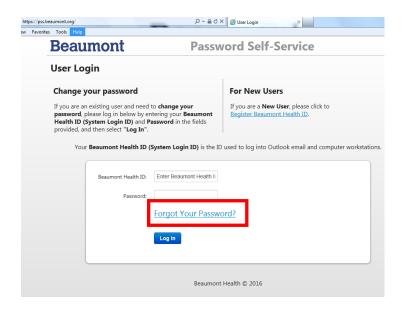
If You Forget Your Password

- 1. Open the Password Self-Service Tool: https://pss.beaumont.org
- 2. Enter your Beaumont Login ID followed by @Beaumont.org.
- 3. Click the Forgot Your Password hyperlink.
- 4. Type in any additional personal data and/or answers to challenging questions when prompted.
- 5. Type in your new password which meets the Beaumont policy guidelines.





If You Forget Your Password (cont.)



Signing into Healthstream:

- 1. Go to https://employee.beaumont.org.
- **2.** Click on *Healthstream* under "Mandatory Education" section in the top left corner.
- **3.** Sign in with your login ID followed by the @Beaumont.org (example: bh123fox@Beaumont.org).
- **4.** Click "Next" and *Healthstream* will appear.
- **5.** Verify that your name is displayed in the upper right corner. *If your name is not listed, log out*. Repeat steps 1-5.

Accessing the Training Modules

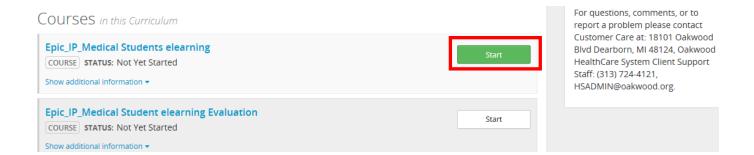
Once you have logged in to HealthStream, you will automatically be under the **To Do** tab and your assigned modules will be listed. Click on the assigned **Module** link – *Epic_IP_Medical Students* eLearning. Graduate Nursing students are assigned the same oneChart/Epic training as Medical Students.







When the Course elements are listed, click the **Start** button to review the module and then take the post-test. There are a total of 2 modules that **you must complete** to move onto the next step.



Helpful Hints

- Contact your student placement clinical site coordinator for your HealthStream ID# if you have not received it.
- If you need to exit the course in the middle of the eLearning Module, click the Exit button to save your progress.

Notice: It takes 24 to 48 hours for your User ID to be ready after completing your Healthstream modules.





Signing on to oneChart/Epic

- 1. From your Desktop double click on Beaumont Health Apps Icon
- 2. Log in with your User name and Password
- 3. Double click oneChart- oneContact Icon



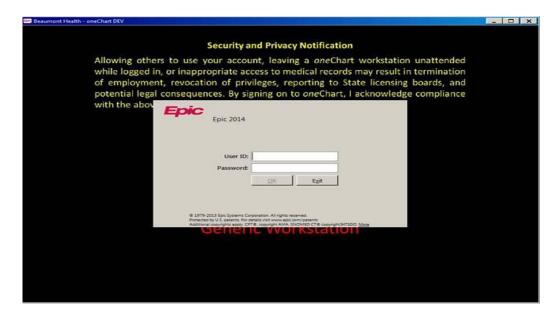




IMPORTANT NOTE: oneChart/Epic must be opened from the Beaumont Apps icon on your desktop to access the IV/IVP Guidelines and other links in the MAR.

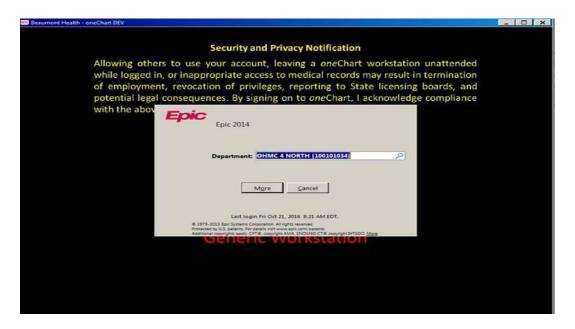


Enter Your User ID and Password



If you are at a Beaumont Health - Oakwood acute care site: type in the acronym for the acute care site you are assigned to for clinical. Hit "Enter".

- OAH = Annapolis (Wayne)
- OHH = Heritage (Taylor)
- OHMC = Oakwood Hospital and Medical Center (Dearborn)
- OSMC = Oakwood Southshore Medical Center (Trenton)
- "VIEW ONLY" department will appear upon initial login.
- Use the magnifying glass to search for the unit you are assigned to for clinicals.
- Choose the unit you are assigned to from the drop down list by highlighting it and hitting "Enter".

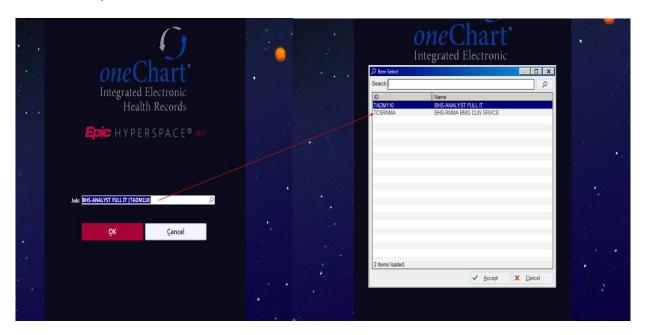


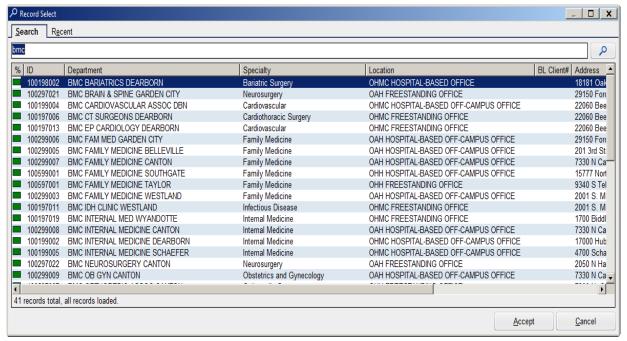




If you are at a Beaumont Health - Oakwood ambulatory site or physician clinic:

- After logging into Epic, if you are prompted with a "Job" selection screen, choose the TCSRNMA template.
- Use the magnifying glass to search for the location you are assigned to for clinical.
- Choose the location you're assigned to from the drop down list by highlighting it and hitting "Accept".







Dual-Role (Student and Beaumont Employee)

Special Instructions

<u>Signing On To OneChart/Epic For Nursing Students Who Are Also A Beaumont Health</u> Employee

If you are a Beaumont Health Employee, please follow these steps:

- 1. As a Dual Role (Student and Beaumont Employee) you will be assigned a unique oneChart/Epic User ID for your student access. It is referred to as an "SN#".
- 2. This SN# will be provided to the Faculty via email or on the "Profile Completion Report".
- 3. Use your "Employee User ID" and Password to log on to the computer.
- 4. From your Desktop Double Click on Beaumont Health Apps Icon.
- 5. Double click OneChart Icon.
 - a. This should automatically open your oneChart employee access. Log out of oneChart and log back in with SN# and the same password you use as an employee or
 - b. If the Log In screen appears, sign in to OneChart using SN# and the same password you use as an employee.

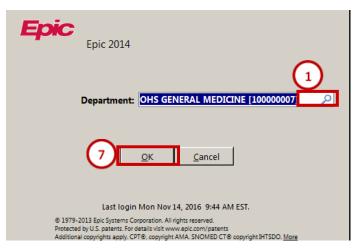
NOTE: Please ensure you type in "SN" as part of your SN#!

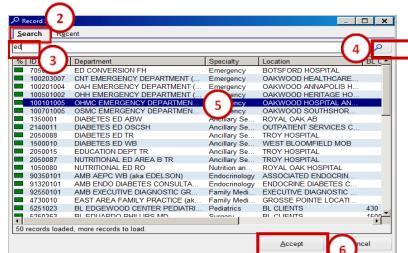


Changing Context to a Different Department for all Users

When Logging On:

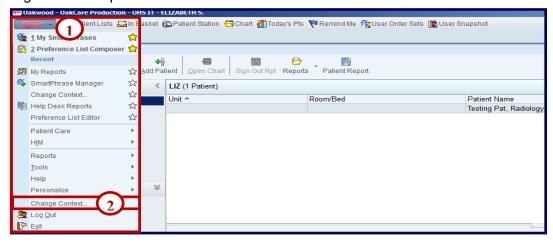
- Click the Selection button
- 2. Click Search tab
- 3. Type in department; for example: ED
- 4. Click Selection
- 5. Click the ED Department Location
- Click Accept.
- 7. Then, click OK.





After Logging On:

- 1. Click the Epic Menu
- Click the Change Context Option

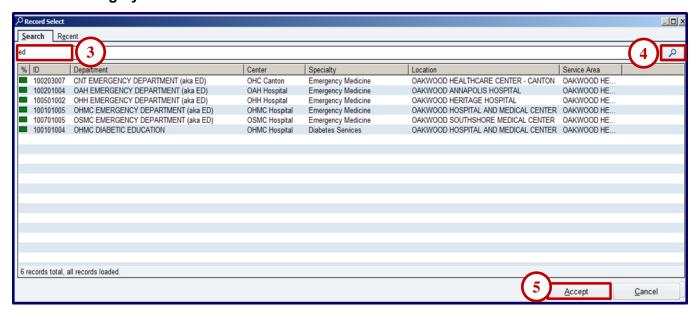


- 3. **Type** in the **department specialty** and **click Selection** in order to display departments that meet these criteria. For **example**, type **ED** in order to display all of the **ED departments**.
 - Or, type in the hospital abbreviation to display all departments: OAH, OHH, OHMC, or OHSC
- 4. Click Selection
- Click on your department, and click Accept. In this example, the ED template including the Track Board view will now be displayed.
 - Additional templates include: OB (Obstetrics)





- RAD (Radiology departments)
- General Medicine
- Surgery



Locate your previously selected departments from the 'Recent' tab:

- 1. Click the Recent tab
- Click on your selected department
- 3. Click Accept







Cosigning

All notes and orders must be cosigned by your preceptor. It is your responsibility to ensure your notes and orders are cosigned before the end of each shift.

Directions for preceptor:

- How to cosign graduate student nursing notes-see page 20
- How to cosign graduate student nursing orders-see page 21

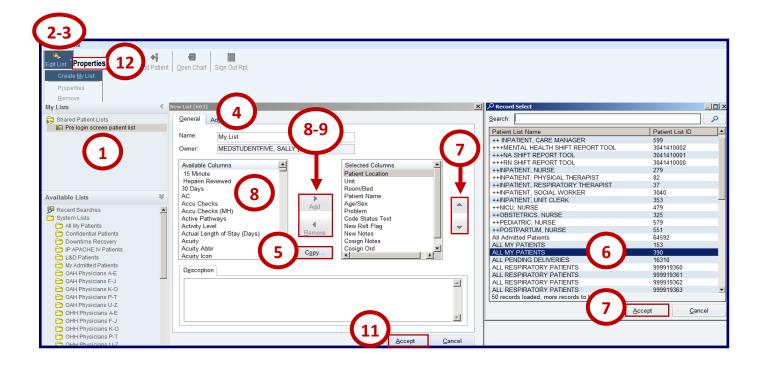
Key Functions in oneChart/Epic

Below is a list of key functions which are commonly used by graduate nursing students.

Creating a Patient List Folder

- 1. Select your patient list folder. For this example: Shared Patient Lists or Pre login screen patient list
- 2. Click the down arrow next to Edit List
- 3. Click Create My List
- 4. There will be a **stop sign** in the **Name field** where you will type in the name of your patient list folder.
- 5. Click the **Copy** button.
- 6. Click the All My Patients, ID 390 template which will import all of the most common headers
- 7. Click Accept
- 8. Highlight additional columns you wish to add from Available Columns and click Add
- 9. **Highlight columns** you wish to **remove** from the **Selected** Columns and click **Remove**
- 10. To move column headers, simply highlight your selections and click the up and down arrows
- 11. Click **Accept**. The new Patient List will now show in the Patient List Tree. You can also copy and paste a system list; or add individual patients to this list.
- 12. To edit your list at any time, highlight your list and click Properties.



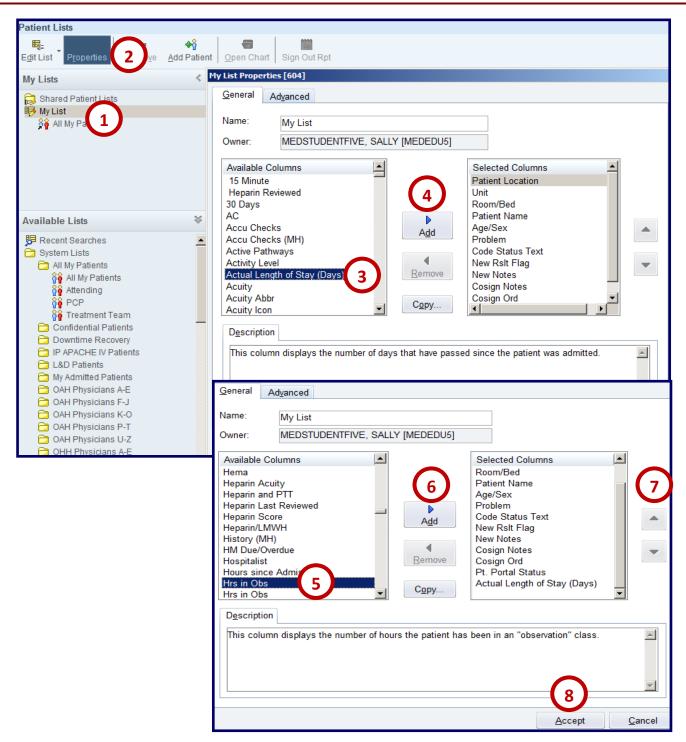


Adding Actual Length of Stay (Days) and Hours in Observation

- 1. Select your patient list you wish to modify
- Click Properties.
- 3. Select Actual Length of Stay (Days) from Available columns
- 4. Click Add
- 5. Select Hrs in Obs from Available Columns
- 6. Click Add
 - Actual Length of Stay (Days) & Hrs. in OBS will now be added as columns to your list.
- 7. To move column headers, select the column header and click the up/down arrows
- 8. Click Accept.











Adding & Removing Individual Patients

- 1. Select the patient list
- Click the Add Patient option
- Type in the patient name or MRN
- 4. Click Find Patient
- Select correct patient and Accept.

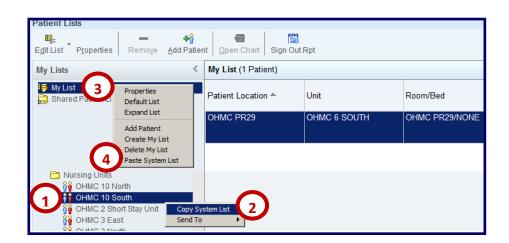


- 6. The patient is now added to your list, and will remain there until you remove as follows:
 - a. Select Patient
 - b. Click the **Remove** option in the toolbar.

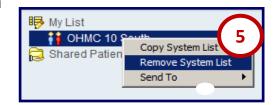


Adding & Removing a System List

- 1. Right-click on the System List
- 2. Select the **Copy System List** option from the shortcut menu
- Right- click on the patient list folder
- Select the Paste System List option from the shortcut menu.



- 5. The **list** is now **added** to your **folder**, and will **remain there until** you **remove** as follows:
 - a. Right-click on the list
 - b. Click the **Remove System List** option from the menu.

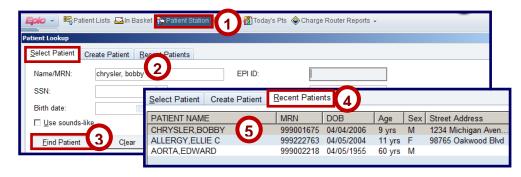






Using Patient Stations to Open a Discharged Patient's Hospital Chart

- 1. Click Patient Station
- 2. Defaults to: Select Patient tab:
 - a. Type in Patient name or MRN;and any additional data such as Birth Date
- Click the Find Patient Or:
- Click the Recent Patients tab which displays recently opened patient charts



- 5. Click on the **Patient Name** to open their chart and list their encounters. You will only be able to review their results
- 6. If you need to **open** the <u>patient's hospital chart</u> in order to <u>print</u> a <u>facesheet</u> or <u>add</u> a <u>note</u> (for example), click <u>All</u> to display <u>all</u> of <u>their encounters</u> (each time they received care at the hospital)
- 7. Double-click on the selected encounter to open their hospital chart with all available activities listed, including Summary (to print a facesheet); and Notes (to add a note).

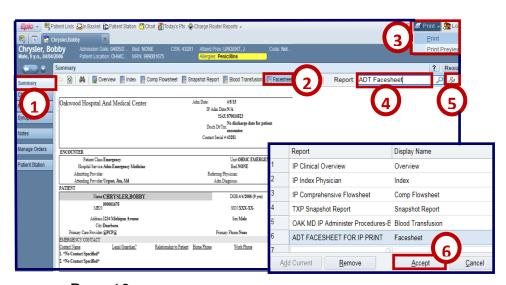


Printing a Facesheet

- 1. Select Summary
- 2. Click **Facesheet** shortcut.
- Select Print.

Adding a Facesheet Shortcut

- 4. Type ADT Facesheet
- 5. Click Wrench
- Click Accept



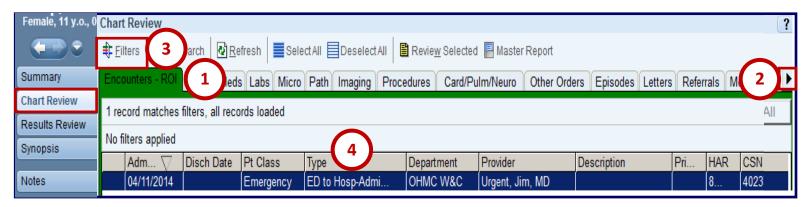




Reviewing a Patient Chart

Review historical patient information

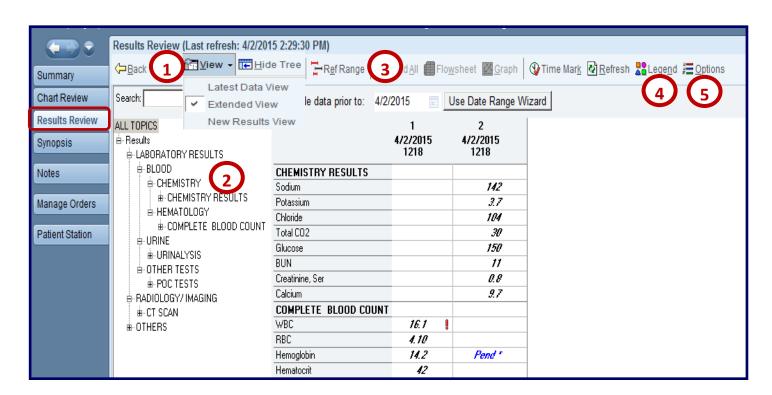
- 1. Select any tab to **display** key **patient data** (encounters, labs, imaging, notes)
 - a. Scanned documents appear in the Media tab
- 2. Click the horizontal scroll arrow to display all options
- 3. Use the filters to further sort information
- 4. Click on any column header to sort data accordingly.



Reviewing Patient Results

Review key data including labs and imaging:

- Select the Extended View to display results in columns by date:
- 2. Narrow Results by highlighting specific results or typing the test in the Search field.
- 3. Place mouse over results, or select the Ref Range option to display reference ranges
- 4. Click the **Legend** option to **display legend definitions**.
- 5. Select **Options** to customize the view (such as trending dates in reverse chronological order so that the most current results are displayed in the first column).



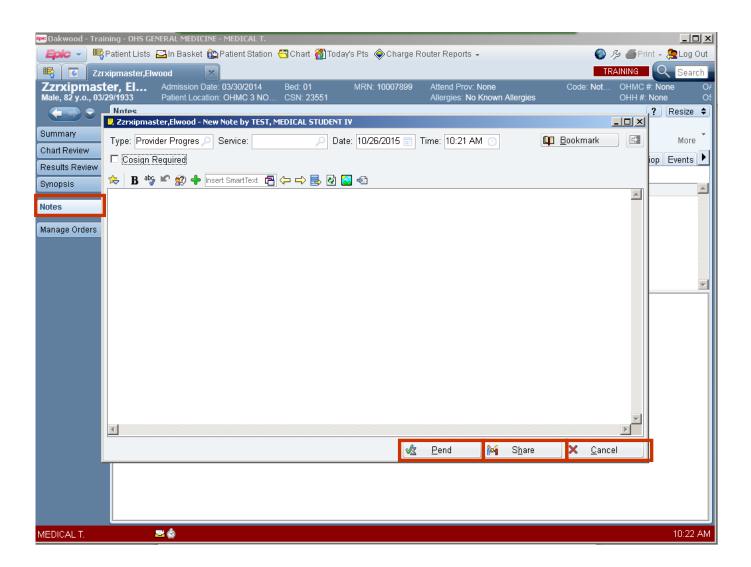




Entering Notes

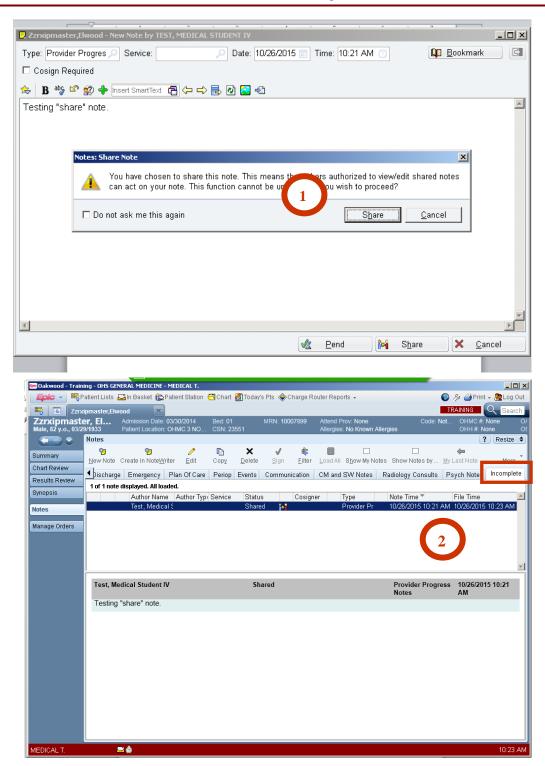
Create a note using NoteWriter, or your own customized template. Be sure to select your preceptor cosigner.

- **Sign** Your note will be displayed in the Notes activity. The status displays that your cosigner's signature is needed. The **preceptor** cosigner will **review** your **note**; apply any **edits**, and then **Sign**.
- Pend—Saves as a draft, only original author can see the note
- **Share**—Saves as a draft. This means that others are authorized to view/edit shared notes can act on your note. This function cannot be undone.
- Cancel—Deletes draft









1. Click "Share".

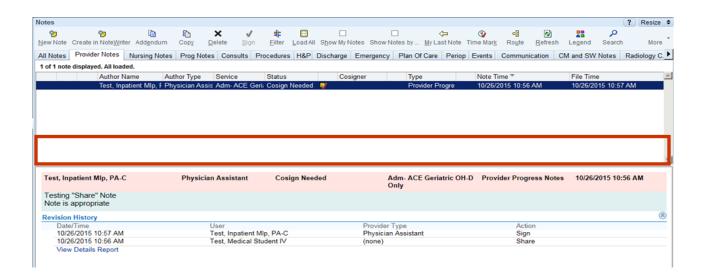
- Again, this saves the note as a draft. This means that others are authorized to view/edit shared notes can act on your note. This function cannot be undone.
- 2. The note is stored in the incomplete note folder.
 - Your preceptor cosigner will views the note from the active note page in the patient record.
 - The preceptor may make edits or not and then clocks the "Sign" button.
 - The note is now active in the patient record. The note will indicate that the student wrote the note and that it has been reviewed and approved by the preceptor.





Directions for Preceptor: How to Cosign Graduate Nursing Student Notes

- Access the patient record in the EMR.
- Access patients Notes and identify the "Incomplete" tab.
- Click on the note and hit "Edit".
- Enter your cosigner name, if applicable. (MLPs would enter their associated physician name.)
- You are now able to edit the note as needed.
- Click on the "Sign" button.
- The note is now active in the patient record.
- The note is now active in the patient record. The note will indicate that the student wrote the note and that it has been reviewed and approved by the preceptor.

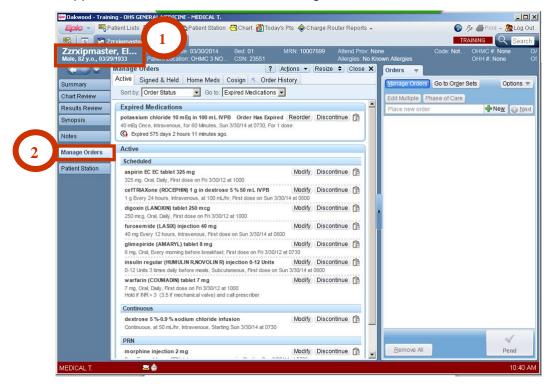


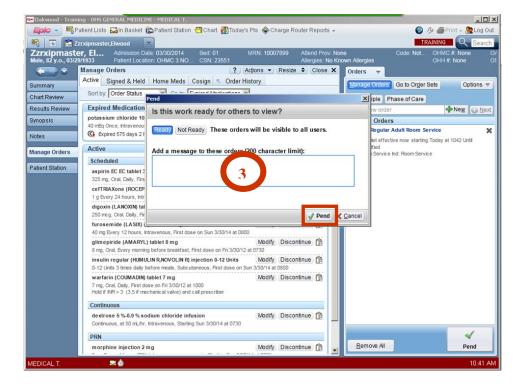




Entering Orders

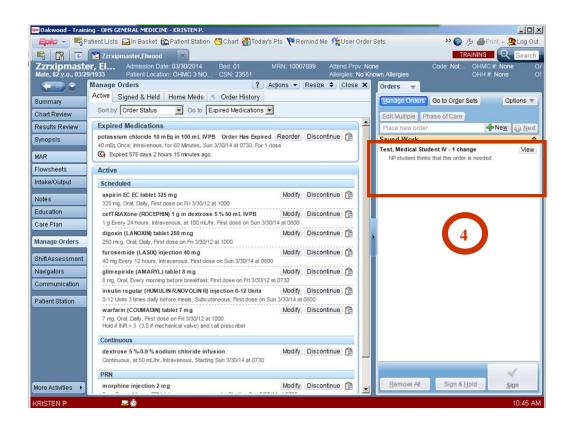
- Access the patient record in the EMR.
- 2. Click on "Manage orders"
- 3. Enter the order. You may add a message to the order if your wish. Click "Pend".
- The note will appear under the saved work on the right.











Directions for Preceptor: How to Cosign Graduate Nursing Student Orders

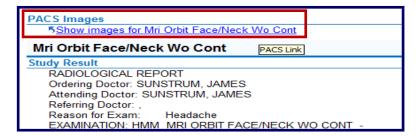
- Access the patient record in the EMR.
- Click on "Manage orders"
- View the "Saved Work" section.
- Click on "View".
- You may delete the order or manage thus unsigned work which is the edit function.
- Click on "Sign".
- The order is now active in the patient record.

Using PACS

Picture Archive Communication System: PACS enables radiology images such as x-rays and scans to be stored electronically and viewed on screens.

Launching PACS

Click the PACS Image Link within the patient's radiology report. The image is automatically displayed.



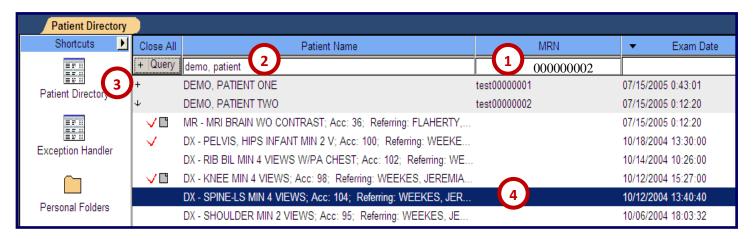
From SSO: Click the PACS option from the toolbar or toolbar menu.

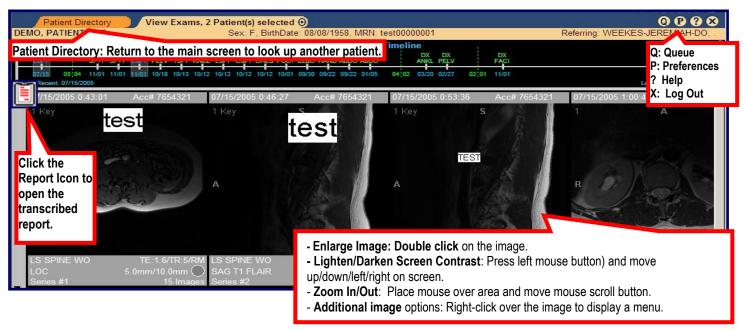




Locating and Viewing Radiology Images

- 1. By MRN: Enter Medical Record Number in MRN field and press Enter
- 2. By **Name**: Enter patient's last name and first name in Patient Name field separated by a comma. (e.g.: Smith, John) and press **Enter**.
- 3. Click the **plus (+)** sign next to the patient to display studies.
- 4. Double click the study to display.









Using MuseWeb

The **MUSE Web** Cardiology Information System consists patient data, including **EKG patient tracing** reports. Only tracings labeled as **CONFIRMED** have been read by an attending **cardiologist**.

You can access reports the following 2 ways: From the EMR:

- 1. Click the following hyperlink located in
- 2. the patient's procedure report:

Show images for EKG 12 Lead Tracing Only

3. The confirmed report will display. Select the options from the toolbar to save, print, decrease or increase the image size.

From the SSO Toolbar:

- 1. Click the MUSE Web icon on the SSO toolbar.
- 2. Enter the Patient ID which is their MRN in the EMR.

Or, Enter the Patient Last Name and First Name

- 3. Click the drop down arrow and select the Site.
- Click the Submit Query button.
 NOTE: Only the reports that were conducted at the hospital site selected will be displayed.
- 5. Click the patient Name to display their list of EKGs.

Click the EKG Report for the specified date to display the tracing and the physician interpretation.

The digitized EKG tracing will appear.

- 7. To **print** a copy, click the **printer** button located on the toolbar.
- 8. Additional view options are available in the Toolbar including **zoom** to increase and decrease the image view.

