

TheraDoc End User Training Guide - Pharmacy

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Section 1: Important Information about TheraDoc

1. Data is sent to TheraDoc and processed in real-time.
2. TheraDoc is a web-based tool and does not require software download. Internet Explorer (version 11) is the supported browser. You can access TheraDoc from any computer where you have access to your hospital.
3. Your TheraDoc application IP address: <http://10.160.160.112/theradoc>
 - a. You can also access Theradoc using a link from the Magic Menu in Meditech or from the link within FormWeb.
4. Your username and password are the same as your CHI system username and password. The password for TheraDoc will automatically change when your system password changes.

Section 2: Initial Set-up and Navigation Overview

1. Log-in to TheraDoc.
2. Notice the links in top right corner of TheraDoc

[about](#) | [user settings](#) | [feedback](#) | [logout](#)

- **About:** indicates your current version of TheraDoc and the modules available for your hospital. You can also see when the last message was sent by your hospital to TheraDoc, which can be useful for troubleshooting.
- **User Settings:** Allows you to set defaults – THIS HAS ALREADY BEEN DONE FOR YOU. Please don't modify these settings UNLESS you primarily work at Hixson and would like to change your institution default to "MNP".
- **Feedback:** Do not use this button. Send all issues or questions regarding Theradoc to Patrick or Jeff and they will send these on to the appropriate CHI IT team.
- **Logout:** securely log-out of TheraDoc

3. Understand the Table of Contents (ToC)
 - Located on the left side of the screen, the ToC allows you to navigate between the different panels/pages in TheraDoc.
 - Your name, current date and default facility display at the top of the ToC. Everyone will have access to both campuses (MH & MNP). Your

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CHI Patient Page
Alert Review
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Rounds Assistant
Patient Search/PID
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Lab Review
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current default facility will be MH but everyone will have access to both facilities. All workflows (alert review, pharmacy assistant, intervention assistant, etc.) will work WITHOUT the need to change your facility. The only exception is the “Patient Search/PID” panel. The correct facility must be chosen for this to accurately search for a patient by name. Steps for changing your default facility are discussed in step 4 below.

- You can minimize the ToC for more viewing space by clicking the X. Click the minimized blue bar to reopen the ToC.






4. Modifying your default institution

- Click User Settings in the top right corner of the screen. Please do not modify the “Default Page” or “Patient Page” defaults.

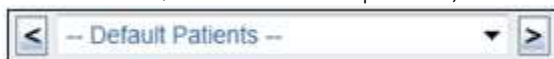
User Settings Sections	Description/Notes
Default Institution	If you have access to more than one hospital, you want to set your primary hospital as your default
Default Page	The first page that displays after logging into TheraDoc
Patient Page	The page that displays after clicking on a patient name anywhere in TheraDoc.

- Click Save after making any changes.

5. Panel Icons

Panel Icon	Description
 Documentation	Opens a user guide relevant to the given panel
 Reset	Reverts the panel back to your last saved default View
 Print	Allows you to print the contents of the panel
 Pop-up	Opens the panel in a new window
 Panel Settings	Allows you to edit various settings relevant to the given panel

6. Understand the Quick Selector drop-down, located at the top center of the page



The Quick Selector is a way to quickly navigate between patients included in one of your Rosters (Rosters explained in section 6 of this manual).

Section 3: Utilizing Views

Concept

- A View is a saved template of selected criteria for a panel and the organization system for our workflow. A view can be a collection of alerts, rosters, patient care units, interventions, etc. Views have already been set up for each of the panels that we will use within Theradoc and added to your user profiles.
- View categories:
 - System Views: always display in View drop-downs for all users (do not have to be ‘checked out’) and can only be created by System or Facility Admin users. System Views cannot be removed by end users and are created and can only be modified by CHI super users. ***We will not be using system views. We have created custom views for all of our clinical workflow needs.***
 - My Views: Views you created (unlikely that you will need to create personal views)
 - Library View: Views that have been created by someone else and then shared with the Library. You have already been assigned the library views that will be utilized for our own workflow and you should not need to utilize the library to “check out” views.

Default Views are denoted with a double asterisk icon **

Section 4: Rosters/Pharmacy Rounding Workflow

Concept

A Roster is a list of patients who meet a defined set of criteria.

- Dynamic rosters are most commonly used and provide lists of patients based on location, service, a medication order or a lab value.
- Rosters can be manually created for unique use cases such as following study patients or for students who wish to create their own roster for rounding purposes (manual rosters).

TheraDoc provides four types of rosters:

1. Location-based
 - Provides a list of patients in a specified location – this roster is dynamically populated.
 - Useful for unit-based rounding.
 - These have all been created for ALL patient care units and are ready for use.
2. Service-based
 - Provides a list of patients assigned to a specified service – this roster is dynamically populated but not a reliable method for tracking patients within a service.
 - Note: if you choose to use a service-based roster, spend time validating the data as service changes are typically not frequently updated in data received by TheraDoc.
3. Targeted Patient List (TPL)
 - Provides a list of patients on specific drug(s) or with specific lab results – this roster is dynamically populated.
 - TPLs are not customizable, which means you can utilize the default TPLs but cannot modify them or create new ones.
 - TPLs will be covered in more detail in the next section.
4. Manual
 - A list of patients maintained manually by an end user.
 - Manual rosters are rare, but may satisfy unique use cases such as following study patients or non-unit based rounding (following a particular Hospitalist's patients).
 - Note: Patients remain on manual rosters until removed by an end user.

Roster Type	Dynamically populated?	Customizable?
Location-based	Yes	Yes: units
Service-based	Yes	Yes: services
TPL	Yes	No
Manual	No	Yes: user defined

Observe

1. Click on the Roster panel from your ToC.
2. Select a Roster from the Roster drop-down.
3. View the Patient data that displays on the page
4. Click on a patient's name to drill down to your default CHI Patient page to further work-up your patient. *Note: the patient page will be covered in detail in an upcoming section of this training manual.*
5. If you wish to create a new roster (manual roster, etc.) please see a super user who can assist you in creating a roster to meet your needs.
6. Modifying your default roster using the Roster Manager within the Roster panel:
 - Set a default View by clicking the 'Default Roster' check-box: The default View will

ROSTER SETTINGS

Available Fields		Displayed Fields
MPI #		MRN
Isolation Flag(s)		Name
Organism Flag(s)		Sex
Institution		Age
		Birthdate
		Attending
		Admit
		Location
		Last Discharge
		Service
		Other Flag(s)

Order by: -Default Order- Descending

Save Cancel

automatically load each time you come to the Roster panel.

7. Review the remaining Rosters available in the Roster drop-down of the Roster panel. Notice the Roster called Recent Patients. This Roster provides an easy way to find the last 20 patients you have reviewed in TheraDoc. This is everyone's current "default" roster.

Section 5: Targeted Patient Lists (TPLs)/Patient Flag Report Panel

Concept

***** Note: Utilizing Patient Flag Reports and adding manual flags will likely NOT be part of our daily clinical workflow although this concept will be used for stewardship in a limited capacity.**

- Flags are a way to label patients who meet a set of clinical criteria.
- TPL flags are not customizable but are dynamically applied and removed based on changing patient clinical criteria.
- Once a patient meets the defined clinical criteria for a TPL, a flag will automatically be applied to the patient. Examples may include certain medications a patient is on or certain lab results. Once a patient no longer meets the criteria for a TPL, the TPL flag is automatically removed as long as the following stipulations have been met:
 - A patient will remain on a medication TPL for up to 24 hours after an order has been discontinued.
 - A patient will populate a lab TPL if the specified result was collected within the last 24 hours.
 - Supporting data, such as specific medications or lab results, is automatically attached to TPL flags.
- Manual flags must be manually added to and removed from patients (think of sticky notes that can be applied but must be manually removed).
 - Use cases for manual flags may include following patients with cystic fibrosis, on dialysis, quadriplegic, etc. Manual flags can only be created by Patrick so please see him if you have an idea for a manual flag that would be beneficial to our clinical workflow (see the next section for instructions on how to add a flag).
 - We currently are not planning to utilize manual flags although understanding their potential use will be explained.
- You can use either the Patient Flag Report panel or the Roster panel to view patients with specific flags. Because the Patient Flag Report panel provides additional information such as supporting data and provides the ability to group by patient location, TPL flags are best viewed here. Currently, Patient Flag Report will ONLY be utilized for stewardship purposes.
- Active flags also display in the top right corner of a patient page. A flag history link will display for any patients who previously had a flag.

Section 6: Rounds Assistant/Patient Page

The purpose of this section is to:

- Review the CHI Patient Page, which includes the following panels: Alert Review, Rounds Assistant, ID Summary, ID Medication Summary, and Intervention Assistant.
- Assess the data that displays in the patient banner.
- Discuss the Rounds Assistant in detail, which is the panel that provides a patient's clinical information, such as medication orders, microbiology and lab results (similar to a patient profile).


Concept

- TheraDoc presents patient information from several different data sources in one location called the Rounds Assistant, which allows you to assess the patient's entire clinical profile.

Observe

- Click on a patient's name from a Roster or the Quick Selector.
- View the patient information in the top right corner of the patient page and the banner.

1. Medical record number for the patient (note: this is not the patient's account number)
2. Any current flags for this patient display here. The “Flag History” link will display for any patients who previously had a flag.
3. SCr: Click the SCr hyperlink to view and graph previous values if desired
4. CrCl: Review the creatinine clearance calculation
5. Allergies: Click the Allergies hyperlink to view more information
6. Icons to left may include: IA (to start an intervention) and ADE which will not be used by our facilities.

- Review the various panels included in your CHI Patient Page.
- Focus on the data available in the Rounds Assistant panel section of the patient page:
 - **Pharmacy team notes & Antimicrobial Stewardship Team notes:** these are useful for communication. They may be edited, but not deleted. These notes are only visible in the Rounds Assistant and no reporting functionality exists to capture this data. Think of using these sections for internal communication such as any notes that you normally would have kept for yourself (related to reports, etc.) or other pharmacists while working in the ICUs or any notes not specifically related to a clinical intervention.
 - **Labs:** click on a hyperlinked lab name to trend the results
 - **Medications:** click on a hyperlinked medication name to see additional information about that order
 - **Microbiology:** click on a hyperlinked microbiology result to see additional information
- Click on the Views drop-down to analyze any additional Rounds Assistant Views.
- Review the process for setting a default View by clicking on Panel Settings icon  within the Rounds Assistant panel of a patient page, selecting the desired View name from the drop-down and then selecting which pages you would like to set the View as default for and click Save:

Pages with this Panel	Default View on Page	Don't Auto-Run
Patient Page	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Please do not create new Rounds Assistant Views. If you think that a new section would be helpful (additional labs, charts, etc.) please see Jeff or Patrick and we can discuss these potential changes for incorporation into an existing view or creation of a new view.

Section 7: Manual Flags – *this will not initially be part of our day to day workflow*

To add a manual flag, you have to select a patient first, either from a roster or the Quick Navigator.

1. Once you have your patient selected, you can add a flag by clicking on Patient Flags panel in ToC or by clicking on an existing flag in the patient banner. Next click on the Add Patient Flag button.

THERADOC USER
04/17/2012
UMC

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- ADE Reporting
- Admin Tools
- Alert Review
- AntiCoagulation Assistant
- Antibiogram
- Cost
- Dashboard
- EZ Alerts Assistant
- Intervention
- Patient Flags**
- Patient Panel

Admit Diagnosis: UNSTABLE ANGINA (04/06/2012)
SCR: 1.1 mg/dL (04/16/2012)
CrCl: 101 mL/min(Cockcroft-Gault; weight used=100 kg)
Height: 72 in (183 cm) (04/06/2012)
BSA: 2.25 m²
Admit Date: 04/06/2012 19:05
Allergies: No known allergies (04/15/2012)
Attending: Harty, Bill (04/06/2012)

ALL INSTITUTION DATA

PATIENT FLAGS

[Add Patient Flag](#)

No Active Flags.

- Choose the Flag Category and the Flag you want to add to the patient.

PATIENT FLAG MANAGER

[Add Flag](#) [Delete Flag](#) [Finish](#) [Patient Data Review](#)

No active flags.

New Patient Flag

Post Date: 04/17/2012 07:06

Flag Category: Select a Category

Flag: No Category Selected

Start Date: 04/17/2012

Stop Date:

Flag Reported Location/Institution: Select a Location UMC

☐ Apply to Flag Reported institution only.

Comments: [Add](#)

- If you want to restrict the display of this flag to just the reporting institution, click the **Apply to Reporting Institution Only** checkbox. Clicking this checkbox does not restrict flag display in the patient header.
- If you want to add a comment to the flag, click the blue **Add** link in the **Comments** field. Your added comments can be "Internal" or "Public". An internal comment is a note to yourself and fellow practitioners. A public comment can go out to all users of TheraDoc on the flag report.

Comments: [Hide](#)

☒ Internal ☐ Public

[Add Comment](#)

Save the comments by clicking **Add Comment**.

- If you want to associate other data ([Supporting Data](#)) along with this flag, use the **Patient Data Review** drop-down list to select the option you want to link to this flag.

PATIENT FLAG MANAGER

[Add Flag](#) [Delete Flag](#) [Finish](#) [Patient Data Review](#)

New Patient Flag

Post Date: 04/17/2012 07:35

Flag Category: Select a Category

Flag: No Category Selected

Start Date: 04/17/2012

Stop Date:

Flag Reported Location/Institution: Select a Location UMC

☐ Apply to Flag Reported institution only.

Patient Data Review

- Alert
- Bed Trace
- Devices
- Encounters
- Flag
- Lab
- Medication
- Micro Results
- Radiology
- Vital Signs

- Click **Finish**.

Section 8: Alert Review Panel/Pharmacy Alert Workflow

Concept

- Alerts provide notification for patients who meet a defined set of clinical criteria.
- Patient data is constantly monitored; when certain criteria is met, an alert fires.
- The older an alert gets, the less relevant it may become.
- There are two types of alerts: prebuilt alerts and custom alerts (called EZ alerts). The EZ Alerts tool allows national super users (Patrick) the ability to create custom alerts if the pre-built alerts do not meet our surveillance needs. If you discover a need for a new EZ alert please see Patrick and he can help determine if a new EZ alert may be beneficial.
- Prebuilt alerts may retract if a patient no longer meets the criteria for the alert.
- Suppressing and dismissing alerts have different outcomes:

Suppress:

- Suppressing an alert removes it from your Alert Review panel. That alert will remain on other pharmacists' Alert Review panels.
- You may suppress an alert if you need to remove it from your view because you know another pharmacist will be taking care of that alert or if it something relevant to your unit and you would like to reassess this alert at a future time (24 hours, etc). Example: you might also suppress an alert if it's something you want to follow-up on the next day, in which case you would suppress the alert for 24 hours.
- Important consideration: If you suppress an alert and the patient meets the criteria for that alert again, you will not get a new alert until the suppress time frame you selected has been met.

Dismiss:

- Dismissing an alert will cause that alert to go away from everyone's Alert Review panel.
- You will dismiss an alert if you have taken care of that alert and no other pharmacist needs to view it.

Observe

- Click on the Alert Review panel from your ToC.
- Select a pre-built View and review the alerts that return.
- Analyze the data that displays within an Alert:

Patient Information: RAY, MARK | MRN: 22867028 | Location: EMC4 - IMR 2606 01 | Attending: Morfel, Krystal | Account #: 10277739

Alert Time: 06/01/2015 19:02

Alert: INR: High > 3 | Admit Diagnosis: N/A | Demographics & renal function

This patient has an International Normalized Ratio greater than 3.0.

Order/Culture	Result	Source	Collected	Result Status (Date/Time)	Specimen #	Ordering Provider
PT, International Normalized Ratio	International Normalized Ratio = 3.2 ratio	See ESP	03/27/2014 07:09	F (03/27/2014 08:08)	90588836	Lo, John
PT, International Normalized Ratio	Prothrombin Time = 32.2 sec H (12.0-15.5)	See ESP	03/27/2014 07:09	F (03/27/2014 08:08)	90588836	Lo, John

Recent Coagulation Modifier Orders:

Drug	Dose	Start	End	Status	Pat Class
WARFARIN	5 mg PO HS	03/19/2014 21:00		HOLD	1
WARFARIN 2.5MG TAB	2.5 mg PO HS	03/19/2014 21:00		HOLD	1

Lab Review | Medications | Microbiology Review

1. Click on the information icon beside the Alert title to view criteria for that Alert.
 2. Review the patient information that displays within the Alert. Hyperlinks listed at the bottom of an alert open that specific panel (i.e. Medications opens the Medications panel where you can view Medications for that patient). It is best to navigate to the CHI Patient Page (by clicking the patient name hyperlink) rather than using these hyperlinks.
 3. Review the data that displays within an Alert and practice dismissing and/or suppressing alerts. Consider when you might want to document an intervention from an alert. The intervention creation process will be covered in detail during the next section of training.
 4. Discuss the difference between active and retracted alerts.
- Click on a patient's name within an alert to evaluate the patient data on the CHI Patient Page.
 - To return to the Alert Review panel, close the patient page.

- Please do not modify the default Alert Review settings within the CHI Patient Page or Alert Review panels. These have already been set up for you.

Section 9: Intervention Workflow

Concept

- Interventions can be created from:
 - The Intervention Assistant panel, which is part of the CHI Patient Page and on your ToC
 - The IA icon within the banner at the top of a patient page
 - An alert - *Note: this data is reportable so it is best practice to document an intervention from an alert if applicable.*
 - The Pharmacy Assistant panel
 - The Anticoagulation Assistant panel (we will not be using this panel)
- There are two types of interventions: Clinical Activity and General
 - CHI has chosen to use Clinical Activity interventions.
- Pending and completed interventions can be edited, but cannot be deleted (keep this in mind while practicing).
- Pending interventions can be found in the Intervention Review panel.

Observe

Creating an Intervention

1. Click on the Alert Review panel from your ToC.
2. Review the alerts that display for your default View. Identify an alert you would intervene on.
3. Navigate to the patient page to further work-up the patient if necessary.
4. From the alert, click the Intervention button. Select the **Clinical Activity** hyperlink.
5. View the data displayed on page 1 of the intervention form and then select a relevant activity:
 1. Intervention Date defaults to the current date/time
 2. Location defaults to the patient's current location - if the patient is discharged, the last inpatient location shows
 3. Review the Clinical Activity categories and specific activities within each
6. Add any additional information on page 2 including comments to a team member and/or comments to the provider. NOTE: If you wish to print the intervention as a chart communication tool you will need to add Provider Comments so these will display when printed.
7. Canned text will no longer be included in the text of the clinical interventions. However, we have added a link to the default rounds assistant which will link to a FormWeb page that will allow you to cut and paste common canned text comments to any of your interventions – see screen shot below.

8. View a summary of the intervention on page 3. Change the follow-up and intervention status if desired.


Clinical Activity Review Data: General Labs GO Generate Note Cancel << Back Submit

Summary 3 of 3

Please review and click 'SUBMIT' to SAVE the Intervention.

Patient	ABRAMSON, OREN JR (#3-1117734)
Intervention Date	06/26/2015 12:39
Sender	JADIN, SARAH
Assigned To	JADIN, SARAH
Receiving Clinician	
Intervention Location	MMC3 - HCHS
Activities	Major ADE Prevention
Follow-up Status	Pending
Intervention Status	Undetermined
Comments to Team	
Comments to Provider	

9. Click submit. Note: keep in mind that interventions cannot be deleted.

10. If you need to document an intervention that is not associated with an alert, you may do so using the IA icon  that is a part of the patient banner section at the top of a patient page. You can also use the Intervention Assistant panel if this panel is included in your ToC.

Reviewing Pending Interventions

- Click on the Intervention Review panel from the ToC (or within the CHI Pharmacy Page) to access and follow-up on any pending interventions:
 - From the drop-down at the top left of the panel, select a pending intervention View.
 - Click Preview. Close the criteria box to increase viewing space.
 - Review the pending interventions that return. You may change the display columns included by clicking the Panel Settings icon at the top right of the panel.

INTERVENTION REVIEW

Pending Interventions edit new delete 6 Print View

Mark selected as: Intervention Status: Follow-up Status:

	DATE ENTERED	PATIENT	CURRENT LOCATION	INTERVENTION TYPE	ASSIGNED TO	INTERVENTION LOCATION	ENTERED BY	INTERVENTION STATUS	FOLLOW-UP STATUS	ASSOC ALERT	COMMENTS TO TEAM
<input type="checkbox"/>	06/16/2015 10:51	ABRAMSON, OREN JR	MMC3 - HCHS SS22 01	Clinical Activity • Clarify Drug Order	TYSON, NICKI	MMC3 HCHS	TYSON, NICKI	Undetermined	Pending		
<input type="checkbox"/>	05/12/2015 10:43	ACKMANN, ELIA	EMC4 - UNIRCC 1004 01	Clinical Activity • Pain Consult	ECKMAN, ROBERT	EMC4 5W	ECKMAN, ROBERT	Undetermined	Pending		
<input type="checkbox"/>	06/26/2015	ANTOLIN,	EMC4 -	Clinical Activity	ECKMAN,	EMC4 CVMU	ECKMAN,	Undetermined	Pending		

- Click the hyperlinked Date Entered for an intervention to access and review or edit the intervention if necessary.
- Change the Intervention Status and Follow-up Status for one or more interventions by selecting the check box (es) to the left and selecting the appropriate options from the drop-down boxes at the top center of the panel.
- If necessary, you can also access completed interventions from this panel by changing the view criteria and then clicking "Preview".

Section 10: Pharmacy Assistant Panel

The purpose of this section is to:

- The Pharmacy Assistant panel can be used to supplement your Alert Workflow and/or Rounds Workflow to identify additional patients you may need to assess.
- Understand actions you can perform on a list of patients within the panel including marking a medication as reviewed and starting an intervention on a patient.

Concept

- The Pharmacy Assistant panel provides another workflow option for pharmacists to find patients who may need clinical review.
- It is similar to a Roster in that it provides a dynamic list of patients currently meeting a defined set of clinical criteria. A benefit over Rosters is that the criteria are more customizable.

- There are three Surveillance Contexts, or sections, in the Pharmacy Assistant panel that contain Views. The contexts determine the data source that will be queried to find a select list of patients.
 - Medication(s) and/or Lab(s): dynamic list of current patients based on medication orders written within the last 30 days and
 - Micro: dynamic list of patients based on microbiology/serology results
 - Patient Search: dynamic list of current patients based on criteria such as current location, age, admission diagnosis and flags

Observe

- Click on the Pharmacy Assistant panel from the CHI Pharmacy Page or the ToC.
- Under the Context drop-down, select Medication and Lab and then select a prebuilt View.
- Evaluate the patient information that displays on the screen:

PHARMACY ASSISTANT

Context: Medications View New View

Date Range06/08/2015 00:00 to 06/08/2015 23:59

156 Patient Records Found

	Actions	Recent Actions	MRN	Patient Name	Current Location	Med Status (Current)	Medication
	Mark Reviewed Add Intervention		11098646	ANNABLE, JULIETTE	HCBMT	Active	Acyclovir
	Reviewed Add Intervention		11098646	ANNABLE, JULIETTE	HCBMT	Active	Fluconazole
	Mark Reviewed Add Intervention		50951085	AURES, KORTNEY L	MNBC	Active	Cefazolin
	Mark Reviewed Add Intervention		4943867	BALDASSARE, DONNA	ITUE	Active	Clotrimazole

- Review the Actions options and hyperlinked patient name
 - Mark Reviewed/Add Intervention
 - Recent Actions
 - Click on a patient's name to open the patient page to further work-up the patient if necessary. To return to the Pharmacy Assistant panel, close the patient page.
- Under the Context drop-down, select Micro. Select a prebuilt View and evaluate the patient information that displays on the screen.
 - Under the Context drop-down, select Patient Search. This will unlikely be utilized as part of our clinical workflow.

Section 11: Memorial Pharmacy Workflow

All of our pharmacy clinical workflow will be completed using the following panels

- Alert Review
- Pharmacy Assistant
- Roster
- Intervention Review & Intervention Assistant
- Rounds Assistant

CHI Patient Page will expedite individual patient review while using the above panels

- CHI Patient Page – *contains the following*
 - Alert Review
 - Defaults to *Current Pt Daily Alerts* to help quickly identify ANY active interventions for your selected patient
 - Rounds Assistant
 - ID Summary
 - ID Medication Summary
 - Intervention Assistant

CHI Pharmacy Page – groups together multiple panels that will enable most workflow to be consolidated to one panel instead of being forced to toggle between multiple panels from the ToC

- CHI Pharmacy Page – *contains the following*
 - Patient Search
 - Alert Review
 - Defaults to *Daily Alerts* which will contain ALL alerts for both facilities sorted by location and facility
 - Roster
 - Pharmacy Assistant
 - Intervention Review

Workflow Organization

When logging in, all users will be directed to the CHI Pharmacy Page

- The CHI Pharmacy Page can then be used to begin your daily clinical workflow using the below panels

Intervention Review

The intervention review should be the first thing reviewed each day to review any interventions that may require follow-up. This will replace the CI's that currently print to the main pharmacy each day. This panel can be accessed within the CHI Pharmacy Page (last item included on the CHI Pharmacy Page) or from the ToC.



- To review the pending interventions select the “Pending Interventions” view from the drop down menu and the pending interventions will load per unit as shown below. Review these and you may close them out or modify them as described in the training material outlined previously (see screen shot below).

INTERVENTION REVIEW

(1-MH/MNP) Pending Interventions

edit

new

delete

close

General

(1-MH/MNP) Pending Interventions

Intervention Status

Follow-up Status: Pending

Intervention Status:Any

Intervention Location

Location(s): All

Patient Selection

Location(s) All

Sender

any

Receiving Clinician

any

Assigned To

any

Time Range Selection

Last 60 Day(s)

Sorting/Grouping

Sorted by: INTERVENTION LOCATION (A-Z),
INTERVENTION TYPE (A-Z), PATIENT (A-Z)

Grouped by: INTERVENTION LOCATION, INTERVENTION
TYPE

Save

Save As

Preview

Mark selected as: Intervention Status:

1-MH 1SO (1)

1-MH 2SO (1)

1-MH 5SO (2)

1-MH 6NO (1)

Alert Review

The alert review is a real-time surveillance tool and this should be checked multiple times throughout the day (when beginning your clinical work, after lunch, and prior to the end of your shift). This allows new alerts to also be addressed if they appear after your initial review which is a major benefit of using a real time surveillance tool such as Theradoc.

- Critical Care
 - Mostly the same as the Daily Alerts view with a couple of additional alerts specific to ICU such as delirium monitoring, etc.
- Current Pt Daily Alerts
 - This is the default view for the CHI Patient Page and will only be used within the CHI Patient Page. This will allow you to see ANY active alerts for the patient that you are viewing within the CHI Patient Page.
- Daily Alerts
 - This will be what all pharmacists will utilize when staffing non-ICU areas and contains all necessary alerts for daily workflow needs (IV to PO, renal dosing, ADE prevention, drug interaction monitoring, etc.)
- Weekend Coag
 - This view will be utilized for the pharmacist that is managing all “coag” related activities and consults on the weekends. This view only includes the alerts from the “Daily Alert” view that are relevant to anticoagulation surveillance for weekend anticoagulation monitoring.
- Weekend General
 - This view includes all alerts that are not anticoagulant related. There are a couple of exceptions (example: fondaparinux) that are included in some renal adjustment alerts in this view instead of the above mentioned “Weekend Coag” view.
- All other listed views

Select a View

(1-MH/MNP) Critical Care

(1-MH/MNP) Current Pt Daily Alerts

(1-MH/MNP) Daily Alerts **

(1-MH/MNP) Weekend Coag

(1-MH/MNP) Weekend General

(1-MH/MNP) zExtra Do Not Use

CHI Antimicrobial Stewardship View (SYSTEM)

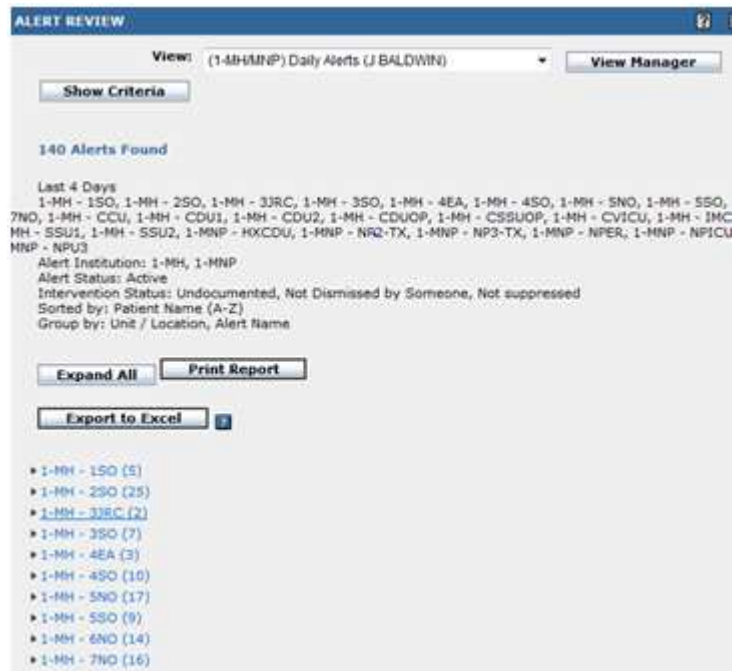
CHI Daily Alerts (SYSTEM)

CHI Daily Alerts - Current Patient (SYSTEM)

New View

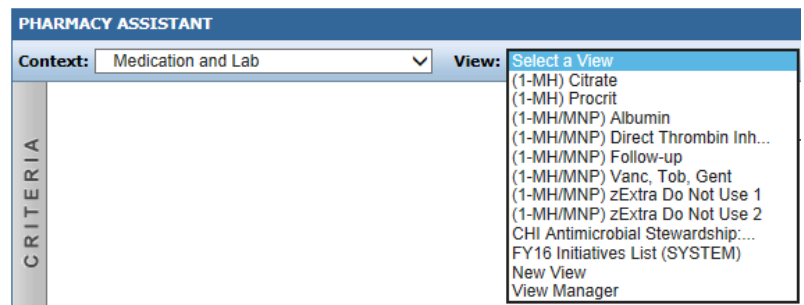
- Disregard all the other views that are included on your profile as these will not be part of our clinical workflow.

When you have selected the appropriate view, you may review the active alerts (sorted by location and institution) and dismiss them, suppress them, and/or document interventions directly from the alert as described in the training material outlined previously.



Pharmacy Assistant

The Pharmacy Assistant is a tool that we will utilize along with Alert Review to monitor patients on a day to day basis. This panel provides a roster of patients that are on a specific medication or medications. This can be reviewed once per day and the views are outlined below



- Citrate & Procrit
 - This view was created to provide an alternative way to review daily ordering needs for trisodium citrate and dialysis doses of Procrit.
- Direct Thrombin Inhibitors
 - This view will display any patients on direct thrombin inhibitors to allow review of their dosing to ensure the protocol is being appropriately titrated.
- Albumin
 - For ICU and floor pharmacists to review patients on albumin for appropriateness.
- Follow-up
 - View to be utilized to review any active “NFU” orders.
- Vanc, Tob, Gent
 - This view should be reviewed daily and compared to your active consult list for your units to identify any patients with ONGOING orders (not surgical prophylaxis orders) that are not being dosed by pharmacy. This is to ensure that the dosing is appropriate per the patient’s age, condition, etc. (see screen shot below).

PHARMACY ASSISTANT

Context: Medication and LabView: (1-MH/MNP) Vanc, Tob, Gent (J ...

Medication Date Range: 06/22/2016 12:00 to 06/22/2016 13:13

54 Patient Records Found

Expand All

1SO (2)

2SO (6)

		Current Location	Patient Name	Order Stop Date/Time	Medication	Med Status (Current)
<input type="checkbox"/>		2SO	MCHONE, JOHN PARIS		Vancomycin	Active
<input type="checkbox"/>		2SO	BOOTH, GEORGE ROBERT		Vancomycin	Active
<input type="checkbox"/>		2SO	WILLIAMS, STEVEN EUGENE		Vancomycin	Active
<input type="checkbox"/>		2SO	GREEN, LARRY ALAN		Vancomycin	Active
<input type="checkbox"/>		2SO	DANIELS, THOMAS NEVIAN		Vancomycin	Active
<input type="checkbox"/>		2SO	MCHONE, JOHN PARIS		Vancomycin	Inactive

3JRC (1)

3SO (2)

		Current Location	Patient Name	Order Stop Date/Time	Medication	Med Status (Current)
<input type="checkbox"/>		3SO	CHISM, SHELBA STARR	06/22/2016 12:11	Vancomycin	Inactive
<input type="checkbox"/>		3SO	MCDANIEL, BRIDGETT APRIL		Vancomycin	Active

CHI Patient Page

When reviewing any patient within any panel (Alert Review, Pharmacy Assistant) you will need to click on the patient's name hyperlink which will open the CHI Patient Page which contains the information as outlined above. This is the most efficient way of comprehensively reviewing your patients. One of the panels that is included in the patient page is the Rounds Assistant described below.

Rounds Assistant

Various views have been created within Rounds Assistant to assist with quickly locating clinical information.

(1-MH/MNP) ANTICOAG
 (1-MH/MNP) CRITICAL CARE
(1-MH/MNP) DEFAULT ROUNDS ASSISTANT **
 (1-MH/MNP) KINETICS
 (1-MH/MNP) TPN
 (1-MH/MNP) ZEXTRA DO NOT USE 1
 (1-MH/MNP) ZEXTRA DO NOT USE 2
 AMS VIEW (SYSTEM)

- Anticoag
 - This view can be used when reviewing anticoagulant medications and any anticoagulation related labs.
- Critical Care
 - Medication and labs pertinent to critical care patients.
- Default Rounds Assistant
 - Shows all medications and all available lab data.
- Kinetics
 - Displays all vancomycin and aminoglycoside orders, pertinent labs, medications, microbiology results, and administration times for vancomycin or aminoglycosides.
- TPN
 - Displays all pertinent lab information related to TPN management.

Intervention Assistant

Please see the training material above regarding how to document interventions within Theradoc as these can be entered from a variety of ways (alerts, ToC, "IA" icon within the patient header, etc.)

Local Super Users

Please see any of the below local super users for any Theradoc related questions

- Patrick Ellis
- Jeff Baldwin
- Shea Hall
- Rachel Kile
- Leisha Carroll
- Jenny Parnell
- Jamie Barrie
- Amy Quinn
- Angie McGhee
- Danny Marsh
- Linda Johnson

Appendix A: Common TheraDoc Terminology and Definitions

Alert	<ul style="list-style-type: none">○ Notification to a patient who met a defined set of clinical criteria at any point in time○ Examples include patients with duplicative antimicrobials, elevated drug levels, bug-drug mismatches, IV to PO conversion opportunities○ A documented intervention can be tied to a patient-specific alert
Alert Review Panel	<ul style="list-style-type: none">○ Panel where alerts display
Anticoagulation Assistant (ACA) Panel	<ul style="list-style-type: none">○ Provides a dynamic list of patients on anticoagulants○ Additional information such as relevant labs, medications, alerts and interventions is provided
Context	<ul style="list-style-type: none">○ A grouping of data or functionality○ Example: the Pharmacy Assistant panel contexts determine the data source that is queried to find a select list of patients and include Medications, Micro and Patient Search
Date Range Selections	<ul style="list-style-type: none">○ Today: midnight of the given day to present time○ Now minus 24 hours: midnight of the given day to present time plus 24 hours prior○ Today plus 1 day: midnight of the given day to present time plus 24 hours prior
EZ Alert	<ul style="list-style-type: none">○ A user created alert
Flag	<ul style="list-style-type: none">○ A way to label a patient based on a set of clinical criteria○ TPL flags are automatically applied to and removed from a patient○ You may also manually apply flags to patients (examples may include patients with cystic fibrosis, on dialysis, with a pharmacy consult)
Intervention	<ul style="list-style-type: none">○ A documented activity based on a recommendation for improving patient care○ Interventions may be created from an alert, a patient page or the Intervention Assistant (IA) panel○ To enhance report data, it is recommended to document an intervention from an alert when applicable○ Intervention panels include: Intervention Assistant (create an intervention), Intervention Review (access pending interventions) and Intervention Reports (create reports from documented interventions)
Module	<ul style="list-style-type: none">○ A section of data that may be inserted in a View○ Examples for the Rounds Assistant panel include: a lab result graph, a list of medication orders, and a list of lab results
Page	<ul style="list-style-type: none">○ A viewing screen that is comprised of one panel or multiple panels which present data and/or functionality in TheraDoc○ Example: your patient page may include several different panels such as the Alert Review panel, Intervention Assistant panel, Rounds Assistant panel

	<ul style="list-style-type: none"> ○ Pages are accessed from your Table of Contents ○ You may give any Page you create a custom name (i.e. you may name your patient page simply 'Patient Page' or 'Patient Profile'). ○ If you include several panels when creating a page, the default name will be the name of the first panel you add. Best practice is to give this page a new, relevant name.
Panel	<ul style="list-style-type: none"> ○ A viewing screen that presents data and/or functionality in TheraDoc ○ One panel or multiple panels make-up a page, which can be accessed from your Table of Contents ○ Some panels provide information a specific patient (i.e. Rounds Assistant panel, ID Medication Summary panel, ID Summary panel) ○ Some panels provide information on multiple patients (i.e. Anticoagulation Assistant panel, Pharmacy Assistant panel, Roster panel) ○ Some panels can provide information for multiple patients or may be modified to be patient specific (i.e. Alert Review panel, Intervention Assistant panel) ○ Some panels provide set-up and configuration options (i.e. View Library panel, View Manager panel, Admin Tools panel)
Patient Flag Report Panel	<ul style="list-style-type: none"> ○ Provides a dynamic list of patients who have a flag ○ The Supporting Data column provides relevant clinical data pertinent to the given flag, such as specific medications or lab results
Pharmacy Assistant Panel	<ul style="list-style-type: none"> ○ Provides a dynamic list of patients currently meeting a defined set of clinical criteria, such as current location, a medication order or a microbiology result ○ Provides similar functionality as a Roster but includes a larger set of customizable criteria
PID	<ul style="list-style-type: none"> ○ Patient identifier ○ Unique number assigned to a patient by TheraDoc to allow for HIPAA compliant email correspondence
Quick Selector	<ul style="list-style-type: none"> ○ A drop-down located in the top center of every TheraDoc page ○ Allows you to quickly navigate between patients included in one of your Rosters ○ To navigate between patient pages for various patients, you must first select a patient page and then use the Quick Selector ○ You may select the Recent Patients Roster to find a list of the last 20 patients you have reviewed
Reset	<ul style="list-style-type: none"> ○ Icon within a panel that reverts the panel back to your last saved default View
Roster	<ul style="list-style-type: none"> ○ A list of patients that is dynamic or manual ○ Dynamic rosters are based on location, service (not recommended) or medication/lab value (TPL) and update based on a patient's current criteria ○ Manual rosters do not update automatically; patients must be manually added or removed
Rounds Assistant Panel	<ul style="list-style-type: none"> ○ Similar to a patient profile, provides clinical information, such as medication orders and administrations (if sent), microbiology and lab results
Table of Contents (ToC)	<ul style="list-style-type: none"> ○ Located on the left side of the screen, the ToC allows you to navigate between the different panels/pages you have access to ○ Your name, current date and default facility display at the top of the ToC ○ You can add new panels/pages by clicking the new button at the bottom of the ToC; the panels you see depend on your User Group access
Targeted Patient List (TPL)	<ul style="list-style-type: none"> ○ A list of patients driven by either a select medication order or lab value ○ TPLs are a type of roster populated by flags that are auto-applied based on either a select medication order or lab value ○ TPLs are best viewed in the Patient Flag Report panel, but also may be viewed in the Roster panel ○ TPLs are not customizable by end users
View	<ul style="list-style-type: none"> ○ A saved template of selected criteria for a panel

	<ul style="list-style-type: none"> ○ You may use prebuilt Views or create and save your own Views ○ Views created by others may be checked out from the View Library and/or the View Manager (which you use depends on the panel) ○ You may set a default View for each panel so that it automatically loads when you navigate to that panel ○ System View – pushed out to all users ○ Library View – available for check-out by all users
View Library Panel	<ul style="list-style-type: none"> ○ A panel where you can share and check-out Views ○ The View Library is used to access the Rounds Assistant panel and Intervention Review panel Views
View Manager Panel	<ul style="list-style-type: none"> ○ A panel where you can share and check-out Views ○ The View Manager can be used to access the Views of most panels