QUICK START GUIDE

Treatment Board

Patient Monitoring

The Treatment Board is setup to allow employees to easily monitor patients and track treatment progress.

Viewing Patients & Events

There are several options to view patients and events within the Treatment Board. All events will be **color coded** to help you easily identify what the item is and when it is due:

Gray
- Unscheduled Labs and Services
- Events that are due in more than 15 minutes

Amber
- Events that are due within the next 15 minutes
- Incomplete tasks

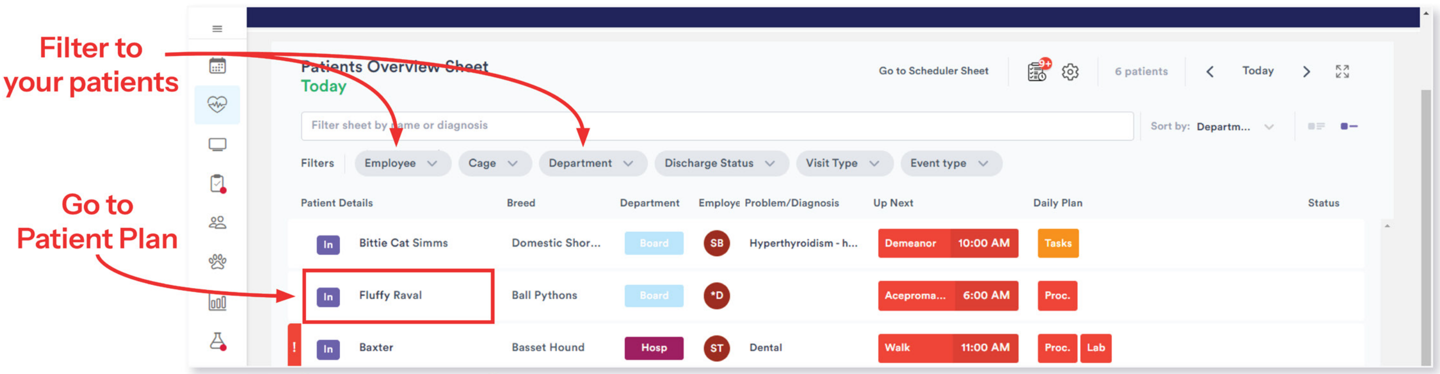
Red
- Events that are overdue or urgent
- Outstanding tasks

Green
- Completed Events
- Completed tasks

Patient Overview Sheet

Easily view all patients assigned to you via the **Patient Overview Sheet**.

- To open the **Patient Overview Sheet** select **Treatment Board** from the left navigation menu.
- Use the **Employee and/or Department filters** to view only patients assigned to you and your department.
- Click on the **patient's name** to open their Patient Plan.



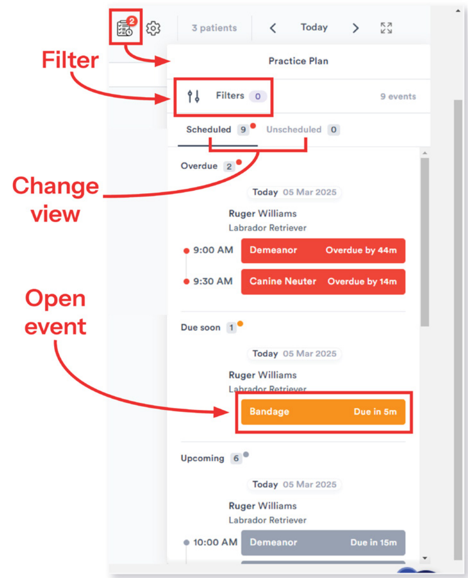
Treatment Board

Patient Monitoring

Practice Plan

The **Practice Plan** offers a chronological view of events, including scheduled assessments and activities as well as scheduled and unscheduled services, labs, and tasks.

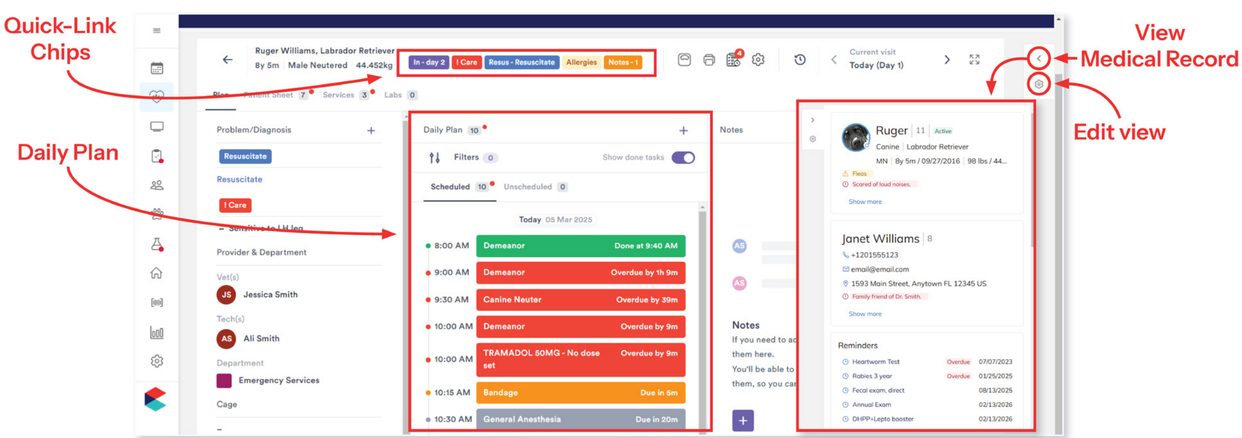
- To access the **Practice Plan**, click the icon at the top of the Treatment Board page.
- Use the **Filters** to narrow the results to only show events assigned to you or your department.
- Events will be sorted by **status** *(Overdue, Due soon, Upcoming, and In progress)*, and then further grouped by patient.
- Use the sections at the top to toggle between **Scheduled** and **Unscheduled** events.
- Click on the **event** to open the patient sheet to view details.



Patient Plan

The **Patient Plan** includes details about that patient's treatment and offers a chronological view of events, including both scheduled and unscheduled items.

- From the Patient Overview Sheet, click the **patient's name** to access their **Patient Plan**.
- Important care, precautions, and instructions will be displayed as **chips** at the top of the page.
- You can view a timeline of events for that specific patient under the **Daily Plan**.
- Click the < to the right to open the **Patient Highlights** slide-out and the to edit your view.



Completing Events

There are several types of events that can be assigned and completed within the Treatment Board.

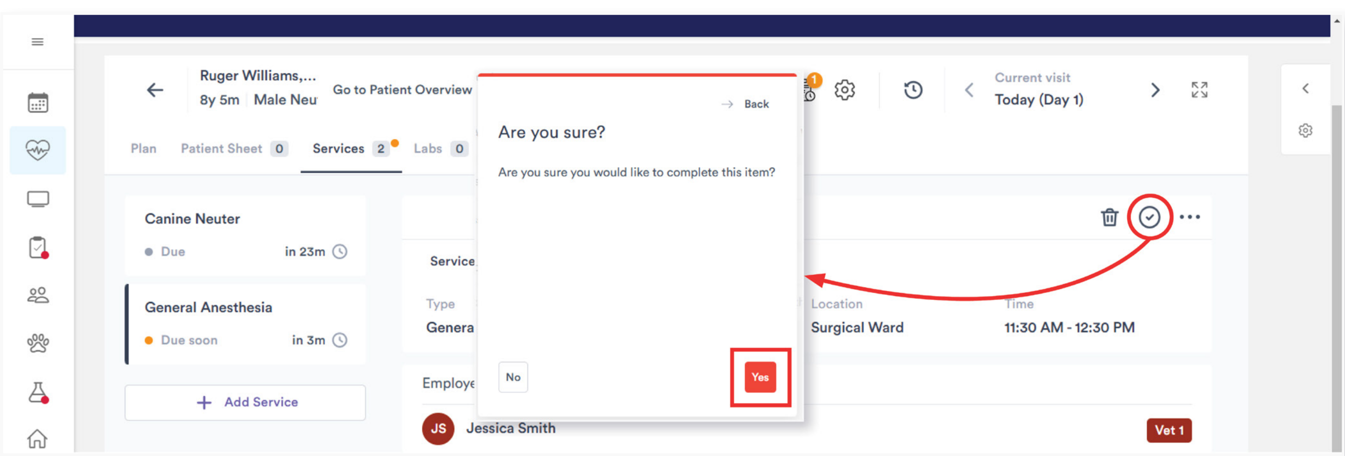
Once an item has been completed, it <u>cannot be edited</u>.

Services & Labs

Services and Labs can be viewed within both the **Practice Plan** and the patient's **Daily Plan**.

To mark a service or lab as complete:

- From the **Practice Plan** or **Daily Plan**, click on the **event**.
- Click the check mark.
- Select Yes to proceed and mark the item complete.



Treatment Board

Patient Monitoring

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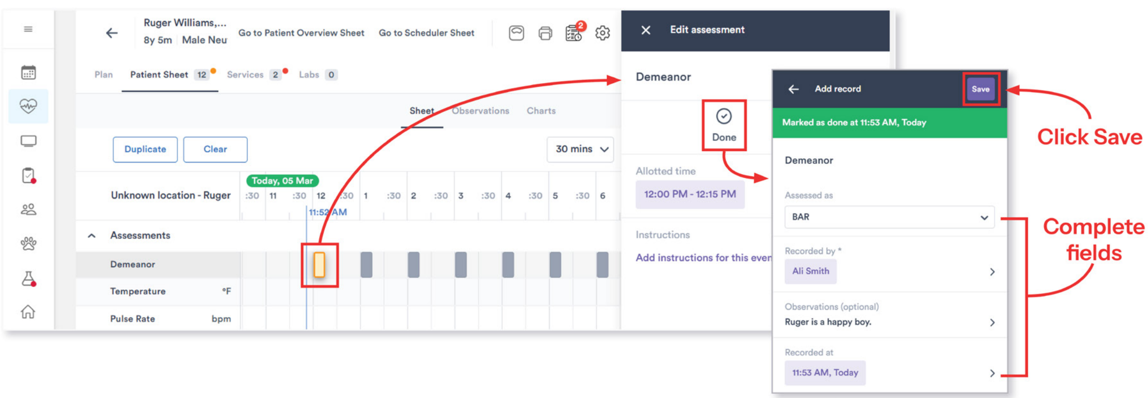
Assessments & Activities

Scheduled Assessments and Activities will appear in the Practice Plan and the patient's Daily Plan, additional items can be completed as needed from the Patient Sheet.

Scheduled

To mark a scheduled Assessment or Activity as complete:

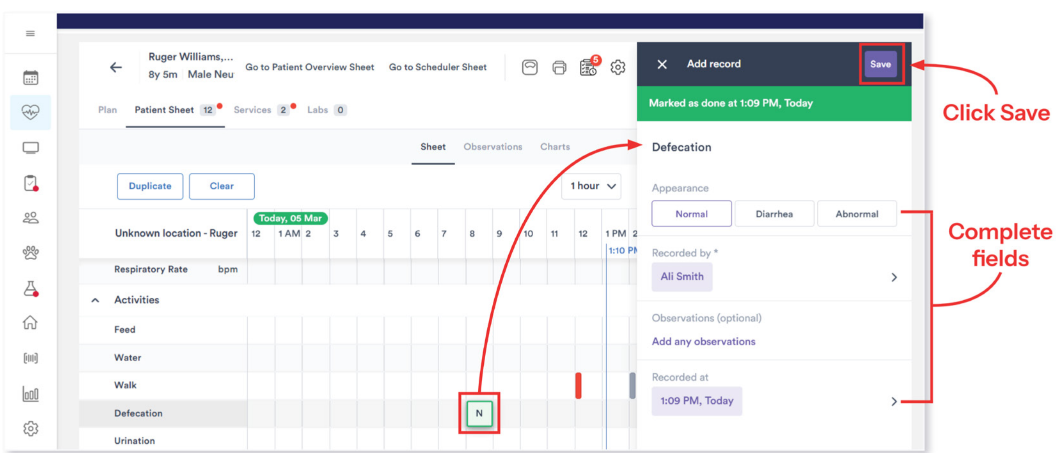
- From the **Practice Plan** or **Daily Plan**, click on the **event** to open the **Patient Sheet**.
- From the **Patient Sheet**, click on the **event**.
- To mark the item as completed, click **Done**.
- Complete any **required** fields, add additional notes under the **Observations** field, and click Save



Nonscheduled or As Needed (PRN)

There are some instances when an Assessment or Activity may not be scheduled. For example, noting when the patient has defecated or urinated. These items can be completed as needed from the Patient Sheet.

- From the **Patient Sheet**, click on the **cell** that corresponds with the event and time it took place.
- Complete any **required** fields, add additional notes under the **Observations** field, and click Save



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Medications

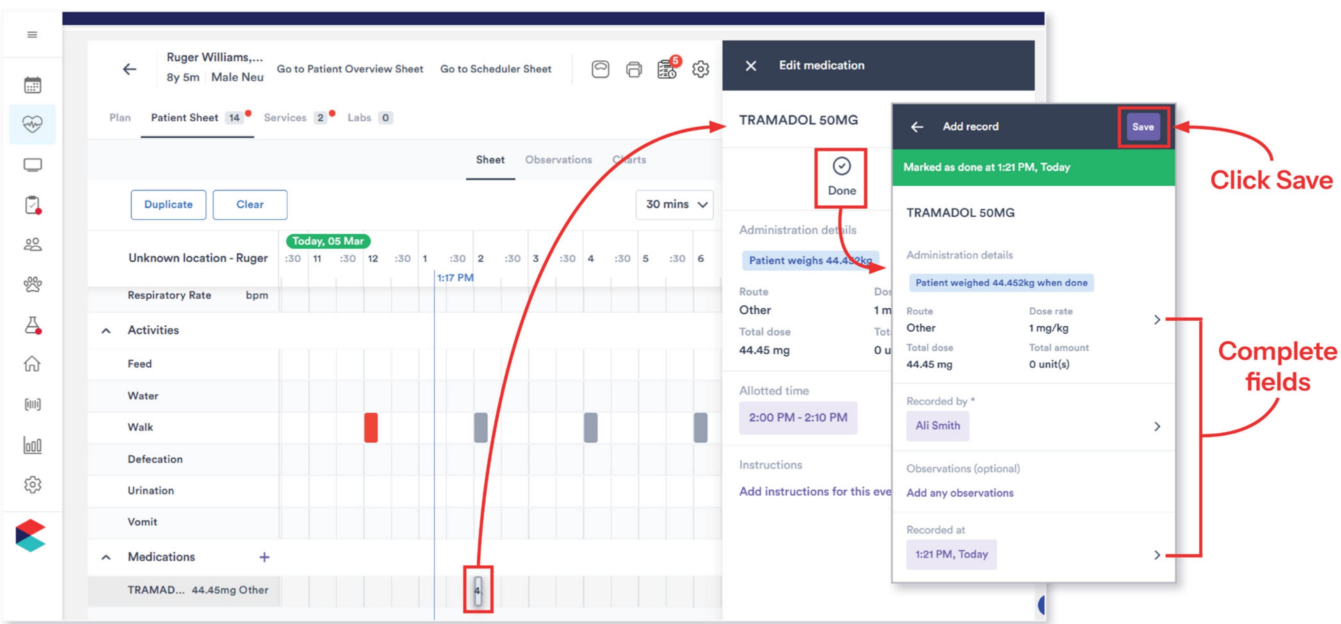
If a patient receives medications as part of their treatment, you can note them on the **Patient Sheet**.

Scheduled

Some medications may be scheduled as a part of the patient's treatment plan. Scheduled medications will appear in both the **Practice Plan** and the patient's **Daily Plan** as well as the **Patient Sheet**.

To mark a scheduled medication as complete:

- From the **Practice Plan** or **Daily Plan**, click on the **event** to open the **Patient Sheet**.
- From the **Patient Sheet**, click on the **event** to open.
- To mark the item as completed, click **Done**.
- Complete any required fields.
- Add additional notes under the **Observations** field.
- Click Save



Treatment Board

Patient Monitoring

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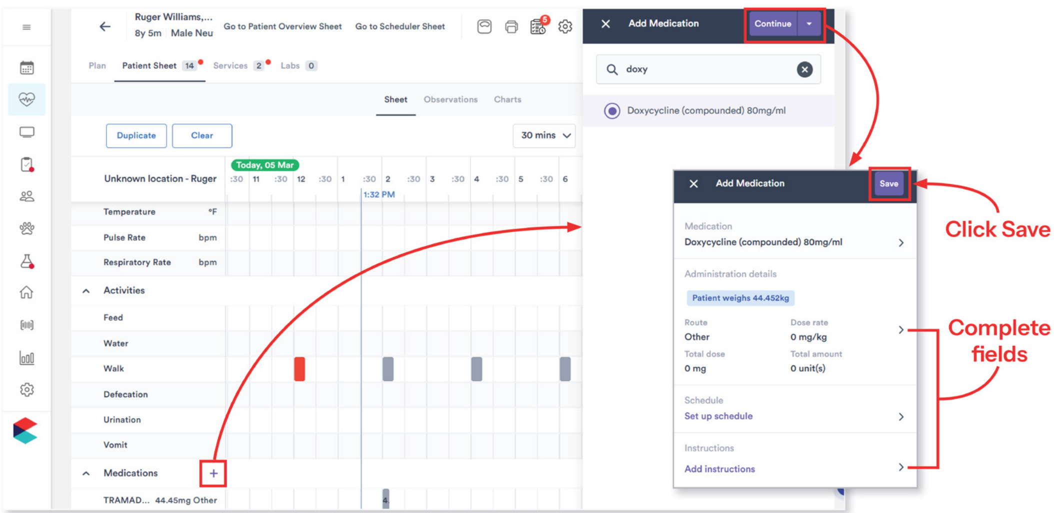
Nonscheduled or As Needed (PRN)

In some cases, you may need to add a medication to patient's treatment. If you need to administer a medication that was not previously scheduled:

- From the **Patient Sheet**, click the + next to the **Medications** section.
- Search for and select **medication**, and then click Continue to proceed.
- Enter **dosage** and then set a **schedule** and add **instructions** if necessary.
- Click Save



Tasks

Tasks are unscheduled to-do items and are visible from both the **Practice Plan** and patient's **Daily Plan**.

To complete a task:

- From the **Plan Details** on the left-hand side of the **Patient Plan**, click on the **task**.
- Check the box under **Done**.
- Click Save