

# Physician/NP/PA Documentation



## Maneuvering Around Hummingbird

1. Along the top of the page, is the top **Tool Bar**. Hovering the mouse over any of the icons will display a small box with a description of the icon. This Tool Bar displays icons for the following functions:
  - a. Reporting a problem
  - b. Attachments (available only when in an individual patient chart)
  - c. Scheduler
  - d. External links (C2)
  - e. DocLink
  - f. Chartmeds (MAR if applicable)
2. Along the bottom **Navigation Menu** are the different SECTIONS of or MODULES of the Program. You may or may not have access to all. (Home, Patient Info, Reports, Admin)
3. There are drawers to the left and right indicated by perforated bars and one that will appear at the bottom that will allow you to open the Navigation Menu at the bottom when you are in the patient drawer or another area of the program.
4. Clicking the upper half of the left drawer will open the patient listing. What you see here is based on your permissions. You can filter for only the patients assigned to you by clicking the words “All Patients” at the top of the drawer and filtering to “My Patients”. You can filter patients by any header including the facility. (If you are working in the IPU for example)
5. Filter for the individual patient by typing the Patient ID, First, or Last name in the header fields and hitting the magnifying glass on the right or enter.
6. Select the patient by clicking on the name.
7. The patient drawer will open with the demographic header and tabs allow you to work within the patient chart.
8. On a day-to-day basis, you will be working within the SMARTCHART section of the patient listing drawer.

## SmartChart

The SmartChart is the clinical sections of the chart in widgets.

### Measures Widget

View or add vitals including things like PPS, weight, MAC, etc.

1. Expand the Measures Widget by clicking the four arrows in the top right.
2. For vitals already in the trend lines, you can add by typing in the box to the right and submitting at the bottom. For new results that have never been documented before, hit the plus sign at the

top and scroll to select from the list. (If a height is entered in the demographics screen, adding a weight will populate the BMI for you).

3. ESAS scores will populate from forms if added in a 0-10 scale. If captured by observation, click the toggle next to ESAS, select record by observation, select the numbers derived from observational means and submit.
4. Close the widget by clicking the check mark in the upper right corner.

## **Manifest Widget**

Allow you to view prior forms such as Initial Nursing Assessments, prior provider assessments.

1. Expand the Manifest widget by clicking the arrows in the upper right to view or print any items.
2. Filters at the top of each column allows you to filter for document, provider, or date.
3. Clicking on one or more items will highlight them and clicking the printer in the upper right will allow you to view them.
4. Clicking the printer to the left in open window will allow you to print those selected.

## **Certifications Widget**

1. Prior certs can be viewed here by clicking the blue back arrow within this widget.
2. Certs due can be completed here if desired.

## **Facesheet Widget**

1. Expanding this widget will allow you to view the FACESHEET, see addresses, caregivers, family info, PCP, etc.

## **Medications Widget**

The medications widget will allow you to view, add, modify, or print.

1. Expand the widget by clicking in the upper right corner.
2. All medications will display.
3. To add medications, review or add by history, add by prescription, and multiple other tasks, review the CLEARSCRIPTS manual.
4. When returning after changes, you will need to ensure all required fields are answered before closing the widget by clicking the checkmark in the upper right corner.

## **Progress Note Widget**

1. Add notes to the progress notes widget at any time for things like phone calls etc. Patient visits are always documented on a visit record, but general notes can be added here and only show here in the progress note section in chronological order.

## **Open a Visit**

Opening a visit allows you to capture the time spent on your visit.

1. In the top tool bar, click on the door to select CII. This will open an additional tab to this patient chart to document in. It will have the patient MR# displayed at the top of the tab.
2. Click the arrow to the right to open the right-hand drawer and select OPEN VISIT.
3. The date and time you open will populate, change if needed by clicking in the box, make changes, and hit the SET button.

4. Select the appropriate visit type and click on OPEN VISIT.

### Forms in CII for the patient visit

1. Click the plus sign to the right of the word FORMS
2. The forms displayed are mapped to your job description and to the Visit Type that you chose, as well as an option to choose “ALL FORMS”.
  - a. If you do not see the FORM you want to fill out, you may click “ALL FORMS” in the task bar and see all available forms.
3. Click on the form you need to complete and go through all sections to complete.
  - i. There is no need to save anything in this program, nor is there a save button. We suggest you Preview your documents when you have finished to ensure they appear the way you would like.
  - ii. Expand All and Collapse All. When a document opens, it will automatically open with most accordions Collapsed. Only areas with STICKY response open expanded. If you prefer to Expand all, click the arrow in the upper right and the first circular icon will expand all. Collapse the accordions or divisions of the document, by clicking the second circular icon. You may also Expand or Collapse individual accordions or divisions of the chart by clicking on the arrow icon in front of the Division Title. This allows for less scrolling.
4. Clicking back on the patient’s name in the top left will return you to the overview screen.

### Entering an order

1. If an order is needed for anything other than medications, click the plus sign to the right of the ALL ORDERS division and select your order to fill out.
2. Complete all areas, select your name as the ordering provider from the drop down, selecting if the order will be completed electronically or by hard copy and previewing your order from the gear on the right.
3. Click on the gear to the right again to resolve/sign.

### Closing the Visit

1. Close the visit by clicking the tab at the top with the patient medical record number.
2. When documentation is complete, close visit. This is done by clicking the arrow to the right and selecting CLOSE OR UNDO VISIT.
  1. Check time and date for accuracy. Click in the box to change if necessary.
  2. Complete NOTIFICATION question (NOTE: This button does NOT automatically notify anyone; it documents that you have notified your teammates appropriately and serves as a reminder for you.
3. Click on CLOSE in the bottom of the screen.

### Return to Smart Chart/Home/Check for open visits/Sign orders

1. Click back on the tab at the top labeled Hummingbird to navigate back.
2. Open the bottom drawer by clicking on the perforated gray line to open the bottom drawer and click on Home.
3. Access CII by clicking the top tool bar door icon and selecting CII. You will get a listing of all current patients. Patients with visits open (you have not closed and submitted your documentation of the visit) will display in red. Click the show all open visits toggle on the right to see all open visits. Click on each to complete documentation and close visits.
4. Clicking the hamburger icon in the upper left will open a left drawer.

5. Select all unresolved orders. Go through each order in your list, clicking the gear to the right of each to view, resolve, and close the visit. You will automatically return to the listing each time until all are complete.

## **DocLink**

Click the stamp icon in the top tool bar from the home screen to open DocLink in a separate tab.

1. A list of all patients with certs due will display, click on a patient in the list to complete the narrative.
2. Click the certify button to complete your certification and have it fall off of your list.
3. Click unsigned verbals to see patients with unsigned medication changes. Click the dot under the meds column and click approve in the upper right to approve all changes since last electronic sign off and the name will fall off the list.
4. Click the red dot next to your name in the top if one is available to sign off on all prescriptions.

## **Preparing IDG Narratives**

1. IDG narratives can be added at any time by clicking on IDG TEAMS in the bottom section of the left-hand patient drawer.
2. Select the appropriate IDG team by clicking on the team names in the upper left and clicking the team name your patient belongs in.
3. Refresh the agenda by clicking the circular arrows up in the upper right next to START MEETING to pull in any patients and recent status changes.
4. Select the patient from the list by clicking on their name. The IDG REVIEW tab will open.
5. Scroll to find the Physician Discipline area.
6. Type your narrative in the small box at the bottom of the physician section and click outside when complete.
7. The narrative will move to the top and have the date and your email stamp.
8. Add additional information at any time prior to or during IDG and during IDG, be sure to click the box in front of the statement, "I electronically certify that I have reviewed the care plans for changes to include medication changes, side effects, drug interactions, contraindications and duplicate therapies since last IDG meeting" to complete your electronic signature statement. This will also sign off any unapproved meds for this patient in DocLink.