North Shore-Long Island Jewish Health System

Sunrise Clinical Manager
Quick Reference Guide

General System Information

Patient List and Columns

Patient Info

Clinical Summary

Results

Orders

Documents

For additional help:
NSLIJ Help Desk
(516) or (718) 470-7272

Basic System Information

Log on/off SCM

Log On

1. Double-click the SCM icon. 
2. Type your user name and password.
3. Click OK.

Log Off 

1. Click the Log off icon (exit door) to properly exit the system.

Note: It is important to log off each time you step away from the system to ensure that the application closes properly. Remember that your electronic signature will act as your "signed" authorization for any activity in the system.

Change password

Whenever you are prompted or feel your security is compromised, do the following to change your password.

1. From the menu, select **Preferences** > **Change Password.**
2. Type the existing password in the **Old Password** field.
3. Type a new password in the **New Password** field, and then retype the same new password in the **Confirm New Password** field.
4. Click **OK**. A box displays confirming that the password has been changed.
5. Click **OK** to return to SCM.

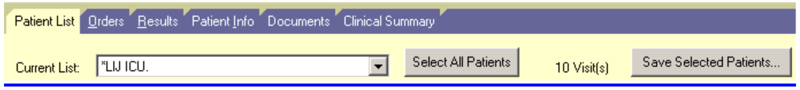
Screen Layout

1
2
3
4

1. Title bar	Displays the currently selected patient name and the system name.
2. Menu bar	Displays a menu of options for functions that may be performed within the application.
3. Toolbar	Provides shortcuts to functions frequently performed by selecting the appropriate icons.
4. Patient header	Provides patient demographic information such as patient name, MRN, account number, age, sex, room/bed location, attending physician, admit date and isolation indicator (if applicable).

Patient Chart Tabs

The chart tabs provide access to various sections of the patient's chart (similar to tabs in the paper chart).



Patient List	The Patient List provides access to patient charts and notifies you about new information regarding those patients.
Orders	Displays the orders (including statuses on available results) for a selected patient.
Results	Displays the results for selected patients.
Patient Info	Displays patient information including demographics, insurance, care providers, health issue(s), etc. Depending on your security rights, some data may be entered.
Documents	Displays patient care documentation. You may also edit documents from this tab, depending on your security.
Clinical Summary	Displays a summary of patient data documented elsewhere in the patient's chart.

Patient Lists

The Patient List is the entry point for access to the online patient charts. Each instance of a name on the patient list represents a patient visit and originates from the admission/registration system.

The default list(s) displayed will be based on user type:

Nursing, unit receptionist, PCA	Current unit location.
PT, OT, RT, dietitian, speech, social worker, case manager, spiritual care	User will see a list of patient lists by unit.
Physician	Patients for whom he/she is a care provider.
Non-clinical/other (lab, radiology, medical records)	User will see a list of patient lists by unit.

You may also create your own patient lists which are then saved and accessible each time you log in.

Find a patient and place on a temporary list

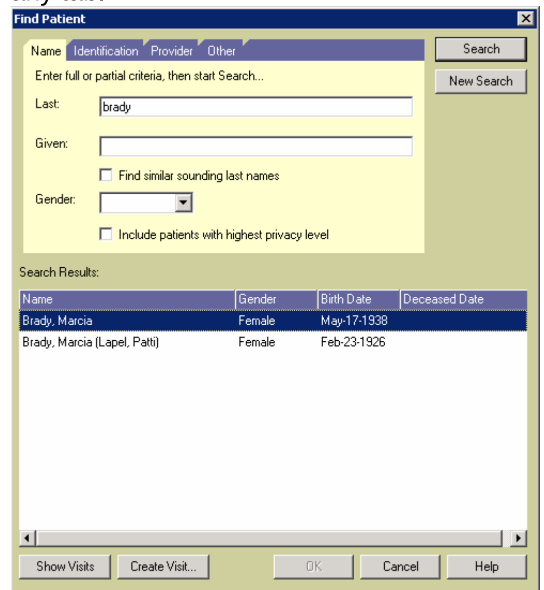
If you need to look up a patient who is not on your list, you can use the Find Patient function to select one or more of the patient's visits and place them on a temporary list. Note that temporary lists are **not** saved when you log off.

1. Click the **Find Patient** icon on the toolbar .

Patient Lists

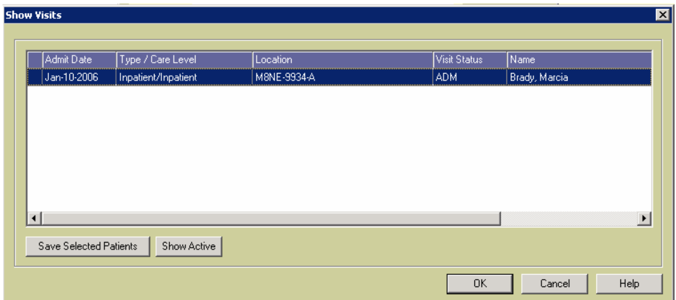
Find a patient and place on a temporary list (cont'd)

2. Enter the identifying information in the appropriate field on any tab.



3. Click the **Search** button.
4. Select the patient in the Search Results area.
5. Click **Show Visits** button.

Find a patient and put on a temporary list (cont'd)



6. Select the appropriate visit listed. (Use the override as needed.)
7. Click **OK**.

The name is assigned to your Current List (Temporary List). The chart is now able to be accessed, but is **not** saved when you log off.

Create a personal list

Personal lists contain only patients you want on the list. These lists are maintained by you. They are saved when you log off and are available the next time you log in.

1. Highlight one or several patients to put on to the personal list. To select multiple patients, do one of the following:
   - If in sequential order, press and hold the Shift key while clicking the last name in the list.
   - If not in sequential order, press and hold the Ctrl key while clicking the additional patients.

Patient Lists

Create a personal list (cont'd)

2. Click the Save Selected Patients button 

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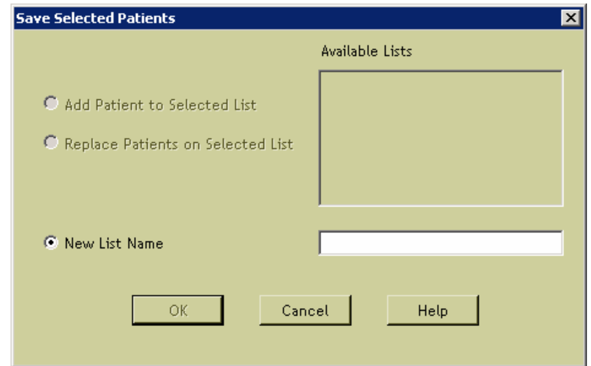
   The Save Selected Patients dialog opens.



3. Click the appropriate radio button for the type of special list.

   If you chose:

   a. Add Patient to Selected List, choose the list from the Available Lists window.
   b. Replace Patients on Selected List, choose the list from the Available Lists window.
   c. New List Name, type the name of the new list in the open field.
4. Click **OK**.

Your new list displays as one of the choices in the Current List box preceded by an asterisk.

Patient Lists

Remove a patient from a personal list

1. Highlight one of the patients on your personal list.
2. Click the Remove Patient button on the toolbar. 

The patient is removed from the list.

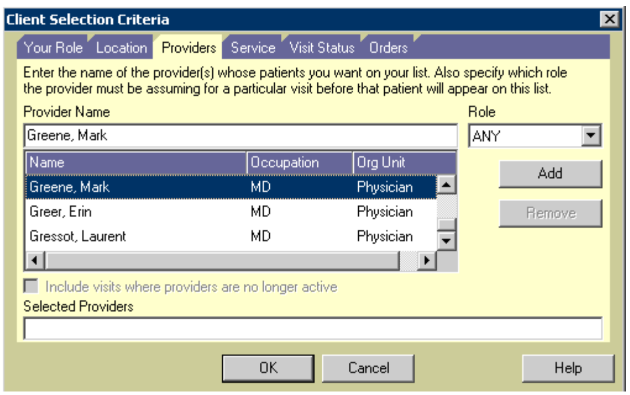
Delete a patient list

1. Display the Personal List you just created.
2. Click **Edit > Delete Current List**.
3. Click **OK** in the confirmation window.

Create a criteria-based list

These are permanent lists that the system automatically updates.

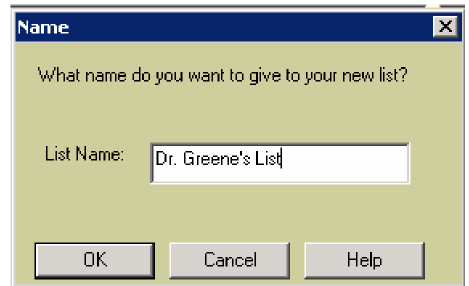
1. From the menu, select **File** > **Maintain Lists** > **New**. The Client Selection Criteria window opens.



Patient Lists

Create a criteria-based list (cont'd)

2. Click the criteria tab you want to search on.
3. Enter the appropriate criteria on the tab(s).
4. When finished, click **Add.**
5. Click **OK.**
6. Name the list.



7. Click OK.

The new list displays on the Patient List tab.

Turn flag notification on

To receive flag notification, it must be turned on.

Note: Flag notification will be automatically turned on. To turn flags on/off for:

A single patient	Double-click in the **Flag New** column for the selected patient.
All or multiple patients on your list	1. Select the patients to turn the Flag New column on or off. 2. From the menu, select Actions > Flag New On or Flag New Off.

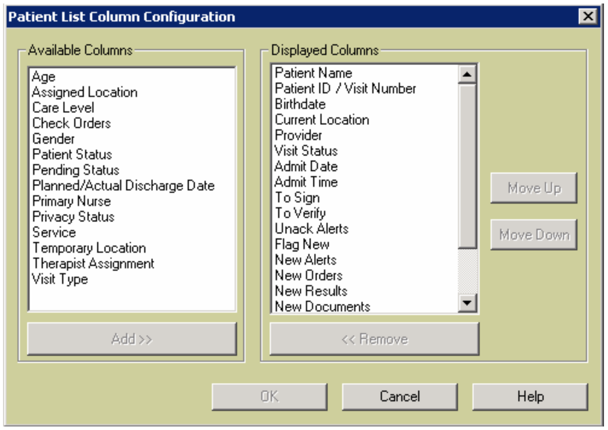
Columns on the Patient List

Columns display information or flags pointing to pertinent data about the patient. The columns you see are dependent on your job function.

Add column(s)

1. While on the Patient List tab, open the View menu.

2. Choose Column Selection.
3. Add columns from the **Available Columns** list or remove columns from the **Displayed Columns** list.



5. Click OK when finished.

Columns on the Patient List (cont'd)

Lock columns

You can lock selected columns so they remain visible when you scroll across the Patient List horizontally.

1. In the Patient List tab, right-click the last column you want to keep locked.
2. Select Lock Column. 

The shaded columns indicate the locked columns.

Unlock columns

1. Right-click a specific column.
2. Select Unlock Columns 

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Move Columns in the Patient List

You can move the position of columns in the Patient List using drag-and-drop functionality.

1. Select the column to move.
2. Drag the column to the desired position in the Patient List. A red arrow points to the current position of the column.
3. Release the mouse button when the red arrow is where you want the column moved to. The column is moved.

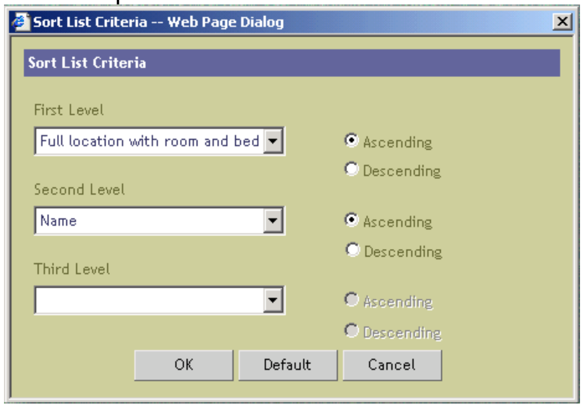
Columns on the Patient List (cont'd)

Sort data in the column(s)

After you define the columns in a Patient List, you can define the order in which you want patients to be displayed. You can select three different sort criteria, a level of priority for each criterion, and the sort order for each criterion (Ascending or Descending).

Saved column sort

1. In Patient List, select a list from the Current List field.
2. Click the Sort List icon on the toolbar. The List Sort Criteria window opens.



3. Select a sort criterion in the First, Second, and Third Level fields.
4. Select the sort order, Ascending or Descending, for each level.
5. Click OK.

Columns on the Patient List (cont'd)

Temporary sort of any one column

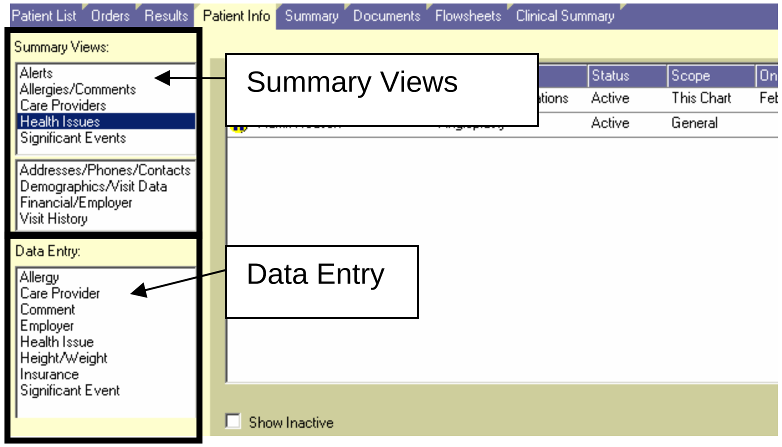
1. Click a column header (grey area). An arrow that is:
    - Up signifies that the column is sorted in ascending order.
    - Down signifies that a column is sorted in descending order. Clicking the header a second time changes the ascending/descending order.

The sort sequence is:

- Names: Alphabetically
- Flags: Red flag, green flag, no flag

Patient Info Tab

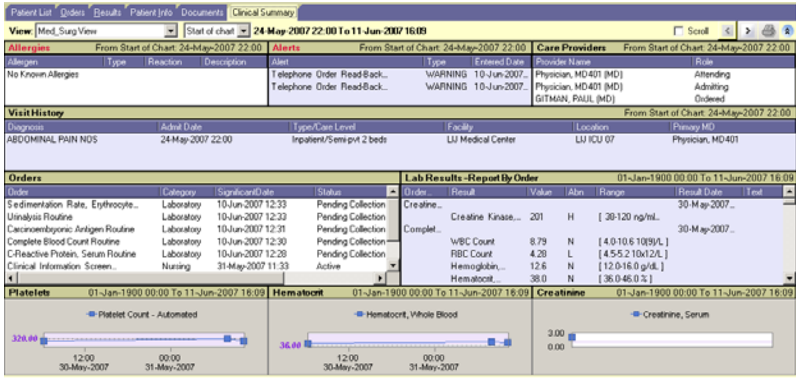
The Patient Information tab is divided into two sections: Summary Views and Data Entry.



Summary Views	View information such as alerts, allergies, care providers, health issues, etc. Active and inactive data can be seen in this tab.
Data Entry	Add patient information based on security rights. You can enter some information and some comes from the admitting system.

Clinical Summary Tab

The Clinical Summary tab can be used to quickly view orders, results, care providers, and clinical documents.



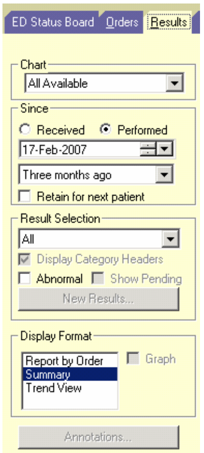
On this tab, you can:

- View and add new allergies
- View alerts
- View and add new care providers.
- View visit history
- View and enter orders.
- View results.

Results Tab

You can review results on a patient from the Results tab.

1. Select a patient.
2. Click the Results tab.
   - "This Chart" means the current chart. "All Available" displays the results from all the patient's charts, such as ED. The default setting is "All Available".
   - The "Since" section lets you choose how far in the past you want to display results from.



3. From the Display Format, select:
   a. **Summary –** A calendar-based grid that displays a summary of results by date and category.
   b. **Report by Order** – A comprehensive display of results by date.
   c. **Trend View** – A spreadsheet-like view of results for trending. Graphing can also be done with this view.

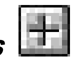
Results Tab

Results statuses

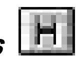
Final	Final results are posted.
Modified	Results have been modified.

Viewing abnormal results 

Abnormal results are noted by a single red arrow up (high) or down (low). Double red arrows mean critically abnormal.

Viewing text reports 

This indicates that there are some results that are in a textual format rather than numeric. Click the plus sign to read the results.

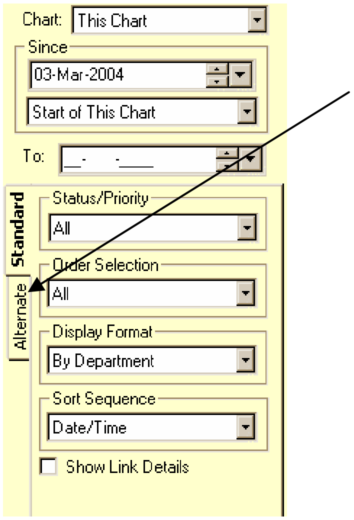
Viewing corrected results 

Click the "H" to view the history.

Orders Tab

You can view all orders for a patient for any time period.

1. Select a patient.
2. Click the Orders tab.
   - “This Chart” means the currently selected patient chart. “All Available” displays the orders from all the patient’s charts.
   - The “Since” section lets you choose how far in the past you want to display orders from.



Note:

You will not need to use the Alternate tab at this time.

When entering medication orders becomes active, you will find this tab useful.

   - With Status/Priority you can choose a status (Active, All, Discontinued, etc.) to filter on.
   - With Order Selection, you can choose an order type (Medication, Lab, Nursing, etc.) to filter on.

Orders Tab

3. From the Display Format, select:
   a. **By Department –** List in reverse chronological order by department. You can change it to chronological.
   b. **By Department/Status** – Displays all orders according to the department or type of order.
   c. **Requested By** – Displays all orders grouped according to the date and time they were entered. Sorted by entered date/time.
   d. **Requested By Details** Displays new orders and order maintenance activities (e.g., DC) based on the date and time they were entered. This view mimics the physician’s order sheet.
   e. **Show New Orders**… (button) A quick way to display only the new orders on the patient. **Note**: Only new orders that have come in since you cleared the flag on the Patient List tab will display.

Viewing order details

Double-click any order.

Viewing order status history

1. Right-click an order.
2. Choose History > Status.

Orders Tab

Review order status

Pending verification	The order requires someone to verify it's accuracy and/or appropriateness. The order will not be released from SCM until it is verified.
Available for Activation	The order was placed as conditional and requires activation when the condition has been met.
Completed Activation	A conditional order that has been activated.
Ordered	A test has been ordered.
Pending Collection	An order is awaiting a specimen to be collected, labeled, and sent to the ancillary department.
Active	Order can be carried out as instructed (this pertains to the Clinical Info tab and Chart Check orders).
Active Master Order	A repeat order that generates multiple occurrences
Repeat Generation Finished	All of the occurrences of a repeat order have been generated.
Specimen received by performing department	Indicates that the resulting department has accessioned the specimen in their system.
Performed	The resulting department has performed the exam or test.
Cancelled by performing department	A resulting department has cancelled an order.
Results available	Results have been posted by the resulting department.

Orders Tab

Review order status(cont'd)

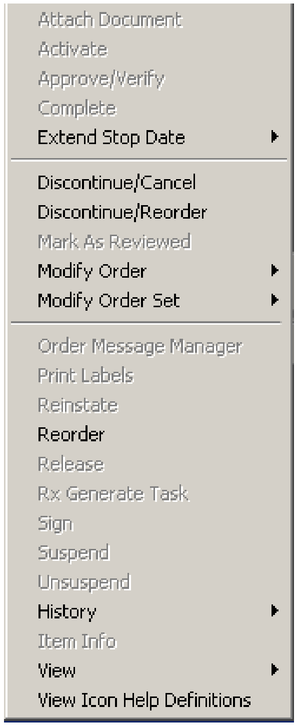
Modified results available	Results were modified by the receiving department.
Completed	A user has manually completed an order. Some tests and orders may require a manual completion.
Auto-Completed	Order was automatically completed by the system.
Discontinued	A user has discontinued an order.
Cancelled	A user has cancelled an order.

Orders Tab

Order maintenance

You can perform specific functions on an existing order to reflect what is happening with the patient.

When acting on one order only, you right-click the order to open the menu.



Orders Tab

Order maintenance (cont'd)

Function	Description	Used Now?
Attach Document	Attaches a document to an order using the Document Entry Worksheet.	No
Activate [a conditional order]	When the condition that was placed on a conditional order has been met, activates the order so that it may be processed.	Yes
Approve/ Verify	Approve and/or verify an order.	Yes
Complete	Changes the order's status to completed, records who made the change and when.	No
Extend Stop Date	Extend the stop date for an order without reordering it. This updates the order history.	No
Discontinue/Cancel	Discontinue an order that is no longer required or entered for the wrong patient.	Yes
Discontinue/Reorder	Use if you need to modify an order, you would use this function.	Yes
Mark As Reviewed	A review date has been set for an order indicating that it must be reviewed after a specified number of days.	No

Orders Tab

Order maintenance (cont'd)

Function	Description	Used Now?
Modify Order	Modify an existing order.	Yes
Modify Order Set	Modify items in an existing order set.	No
Print Labels	Print a label for a collected specimen.	No
Reinstate	Reverse a cancelled or discontinued order.	No
Reorder	Place the same order again.	Yes
Release	Release an order placed on Hold status to active status.	No
Rx Generate Task	Force the order to generate tasks even though the order has not been verified by the pharmacy.	No
Sign	Electronically sign orders entered by on your behalf by another.	Yes
Suspend	Put an order on temporary hold.	No
Unsuspend	Remove a suspended order from hold status.	No
History	Show the changes for an order in chronological order.	Yes
Item Info	Display additional information about an order.	No
View	Allows you to see the details of the order.	Yes

Orders Tab

Order maintenance (cont'd)

Function	Description	Used Now?
View Icon Help Definitions	Opens online Help's page of icons with their meanings.	Yes

Orders tab buttons

These buttons affect one or multiple orders.

Button	Description	Used Now?
Un/ Suspend	Suspend or unsuspend multiple orders.	No
Reorder	Place the same orders again.	Yes
Sign	Sign multiple orders entered on your behalf by another.	Yes
Approve/ Verify	Approve and/or verify an order.	Yes
Add Specimen	You have collected a specimen for a submitted order and print labels for the container.	No
Release	Release order(s) placed on Hold status may be released to active status once the patient event occurs.	No
DC/Cancel	Discontinue one or more orders that are no longer required or entered for the wrong patient.	Yes

Orders Tab

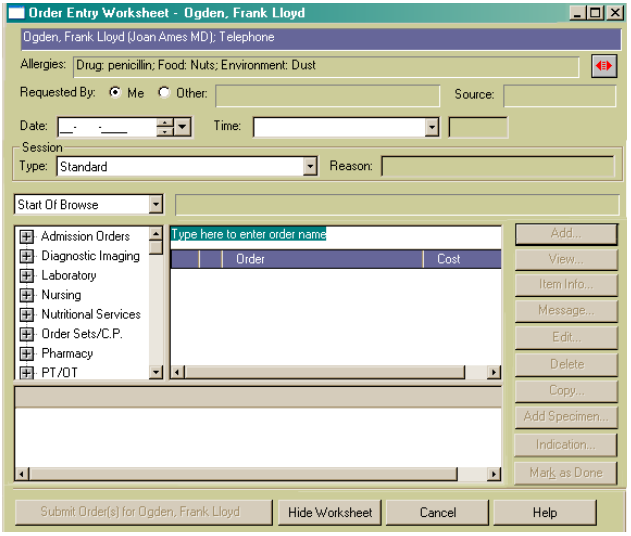
Label printing times

Requested Date	Priority	Time Label Prints
Today	Discharge	Immediately
	Routine	Immediately
	STAT	Immediately
	AM	2 AM before the next scheduled AM round
	Timed	One hour before the requested time
	Timed STAT	Immediately once the order is activated
Future date	Discharge in AM	2 AM on the requested date
	Timed	One hour before the requested date/time
	Timed STAT	Immediately once the order is activated
	AM	2 AM on the requested date

Order Entry

Entering Orders

1. **Select** the patient from the Patient List tab.
2. Click the **Enter Orders** button from the patient header (or the toolbar).



3. Use the Browse (see page 18) or Manual order item search (see page 17) methods to find the order.
4. Highlight the order you want.
5. Click **Add** (to add it) or **View** (if a blue grid displays or you want to change any of the default settings.)
6. Complete the ordering form.

Order Entry

(Order Forms cont'd)

7. Click **OK**.
8. When all ordering is finished, click Submit Order(s) for <patient name> (see page 20).

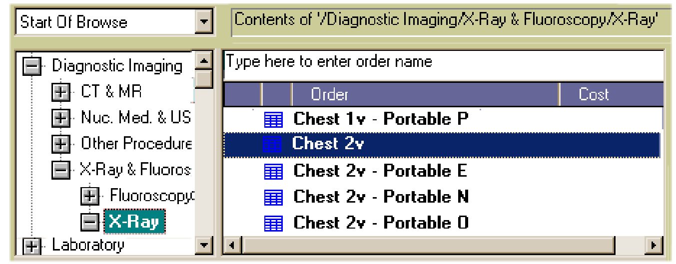
Order Item Search: Manual Search Method

Manual Method
Notice the area on the right side that reads "Type here to enter order name." *Notice that the text is selected*. ***No click is necessary to activate this area***.

1. Immediately type in the name or the partial name of the item to order. Pause a moment while the item is searched.
2. Names of the matching items display in the order window below your typing.
3. Select the order item by double-clicking the order item name or highlight the order, then click **Add**.

Order Entry

Order Item Search Browse by Category

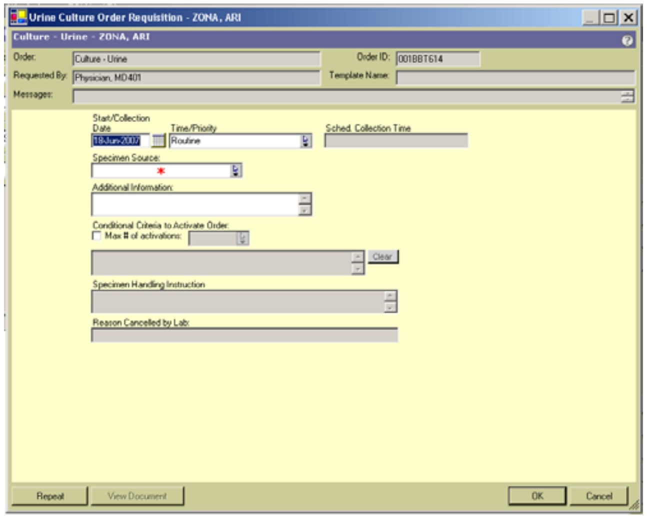


Start of Browse Method

Catalog-like list of items that can be viewed.

- A plus sign icon expands categories to display subcategories.
- A minus sign icon shows when there are no further subcategories to view.
- Individual order items within the selected category display to the right in the order window.
- Select the order item by double-clicking the order item name or highlight the order, then click **Add**.

Order Entry



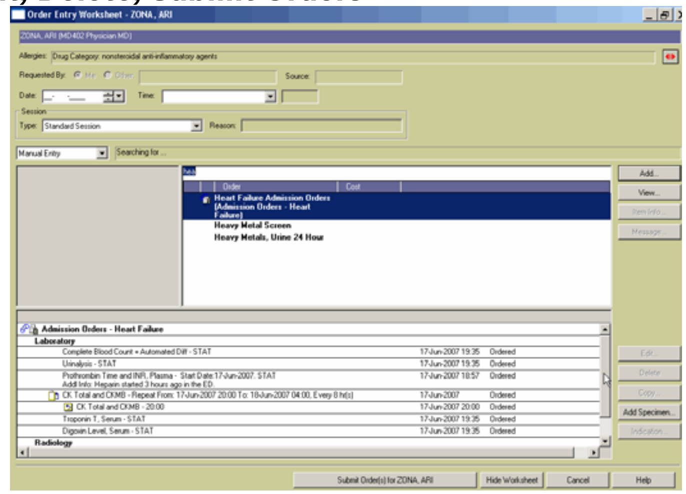
***Note**: Some order items will not need specific details. Any required fields will be indicated by a **bold** section title or a red asterisk (*****).*

1. Complete the required fields (indicated by a red asterisk).
2. Provide additional information as needed.
3. Click **OK**.

You return to the Order Entry Worksheet to add additional orders if needed.

Order Entry

Edit, Delete, Submit Orders



Note: Orders are not processed until submitted!

1. Review the order(s) in the order summary pane on the Order Entry Worksheet.

    - Edit an order by double-clicking the item in the summary pane or clicking the item, then clicking **Edit**.
    - Delete an order by right-clicking the item and choosing Delete or selecting item and clicking **Delete**.

2. After review and orders are correct, click **Submit Orders for <patient name>**.

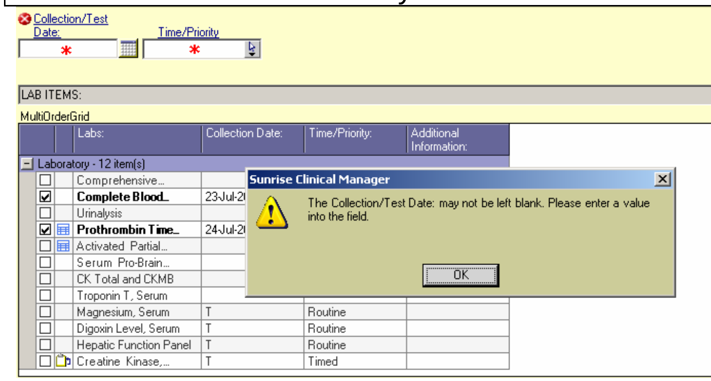
Order Entry

Acknowledging Alerts

Warning!!

ALWAYS review the clinical information available and exercise you own best judgment when placing orders on patients!

DO NOT rely on alerts to catch every potential problem that may arise!!

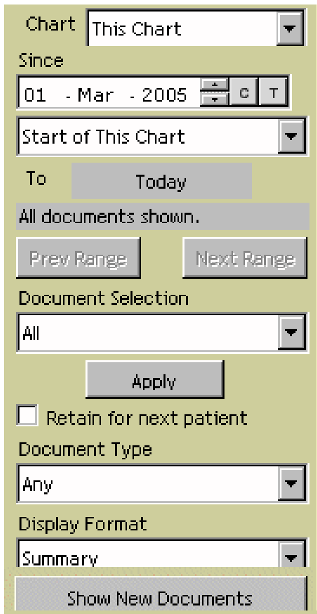


Acknow-ledge	Before proceeding with this order, an acknowledgement/comment can be entered.
View Actions...	Allows you to view the possible available actions to correct this alert situation (only available on certain alerts).
Proceed	After acknowledgement/comment has been entered, continue to enter the order that produced the alert.
Go Back	Cancels the current order and returns to the Order Entry Worksheet

Documents Tab

You can view all documents for a patient for any time period.

1. Select a patient.
2. Click the Documents tab.



- "This Chart" means this visit. "All Available" displays the documents from all the patient's charts.
- The "Since" section lets you choose how far in the past you want to display documents from.

3. With Document Selection, you can choose a view (nursing, physician, etc.) to filter on.

Documents Tab

4. Specify the Document Type.
5. Specify the Display Format:

- **Summary –** List in document types across a timeline.
- **Report** – List in hierarchical structure based on the selected sort sequence, then by timeline.