

IBM Micromedex® CareNotes Instructor Guide

March 2021

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PREFACE

CUSTOMER RESOURCE CENTER

Technical & Customer Support

At IBM Watson Health, our staff of technical and service experts have one goal - to quickly take care of your needs so that you are back to optimal performance with our solutions.

Our Customer Resource Center is available to all of our customers free of charge, and can be your single point of contact for the following services:

- Customer Service
- Account or Subscription Validation and Changes
- Product and Technical Support
- Clinical Content Requests
- Technical Support Requests
- Product Use Support
- Product Enhancement Request

24/7 Phone Support

United States & Canada:

Phone: **1-877-843-6797**

Select option 3 for the Support Services menu. For urgent technical inquiries select 3,3

Outside the United States & Canada:

Phone: 1-734-786-5401

Email Support (Business Hours Only)

mdx.techsupp@us.ibm.com

Requests are answered during normal business hours.

Requests received outside of normal business hours are answered the next business day.

Normal Business Hours

Monday through Friday: 8:00 am through 8:00 pm (Eastern Time Zone), excluding IBM Watson Health holidays.

TOTAL SUPPORT SOLUTIONS

We stand behind our products and our customers and believe that the *total* customer- experience is what differentiates us from the competition. Our total support solution offers top-notch service, training, and support to ensure you are able to realize all the benefits our products offer.

As part of our total support solution we will:

- **Provide flexible training** opportunities, such as webinars, on-site classes, eLearning, and more to help users at your site stay current on Micromedex solutions.
- Solve questions and issues promptly with our **24/7 technical support**
- **Ask you for your input** on how we can continue to improve our products and services
- **Make it easy to do business with us** - on all fronts

Ask your Client Success Manager or Sales Executive how we can help you.

CHAPTER 1: INSTRUCTOR PREPARATION

GETTING THE MOST FROM THE INSTRUCTOR GUIDE

This course is developed by IBM Watson Health to help IBM Micromedex® training managers conduct effective and concise training sessions for the end users at their facility.

This guide presents scenarios and solutions using IBM Micromedex® CareNotes® that will be relevant and informative to end users of the application.

Content in the Instructor Guide is limited to instruction and direction the instructor needs to effectively conduct the course and specific, key points that reinforce information found in the IBM Micromedex® CareNotes User Guide.

Feel free to utilize any or all of the suggestions and modules or customize the information and presentation to suit your specific training needs.

This course is developed by IBM Watson Health to help patient education training managers conduct effective and concise training sessions for the end users at their facility.

CLASSROOM SETUP

It is recommended to hold training sessions away from the normal work areas. Training in the everyday work environment often encounters distractions and interruptions.

Other recommendations:

- A room equipped with at least one PC with access to Micromedex is required for this course.
- Giving attendees access to their own workstations can enhance the exercises described at the end of this guide.
- A projector (and screen) connected to the Instructor's PC or laptop is optimal.
- A flip chart for notes and questions (see [THE 'PARKING LOT'](#) on Page 7) is not required but can be helpful.
- Smaller class sizes (less than 16 attendees) are desirable and more manageable, however, it is recognized that class size cannot always be mandated.

TIPS USED IN THE INSTRUCTOR GUIDE

The following table describes the various instructions used throughout this course in the left column.

INSTRUCTION	INDICATES
Time = x Minutes	The approximate amount of time required. General purpose of the module is presented in the right side column.
Type - or - Click	Serves as a cue to the Instructor to either type or click on something as directed in the column on the right side of the page.
Show	Presents information to the Instructor about what items should be pointed out or discussed.
Instructor Say...	<i>Information that can be presented verbatim by the Instructor to attendees. Once an Instructor becomes familiar with the training, the script can be used as an informal guide or reminder of the concept to be presented to participants.</i>
<i>(Instructor Notes)</i>	<i>(Indicates information or instructions for the Instructor's information or use. Text shown here is NOT intended to be said aloud.)</i>
Ask for Questions	Ask for questions before continuing.
Parking Lot	Check the Parking Lot (see the following page) for questions and issues yet to be resolved.

THE 'PARKING LOT'

Managing Lesson Flow

It is natural for adult learners to inject their own experiences and specific work-related issues into the class. Many times, the Instructor will deliberately encourage and facilitate the sharing of such information to engage participants, and to make useful insights and information available to the rest of the class. However, it is not uncommon for a participant to lead the class astray while pursuing information about a work-related issue that is specific only to him or her. Perhaps the individual raises a question that is ill-timed but will come up later in the lesson or course. Perhaps their issue has little or nothing to do with the lesson or course objectives. Left unchecked, these departures from the lesson plan waste time and can cause confusion for other participants. In such cases, the Instructor must be careful to maintain the flow of the lesson without causing the individual to shut down.

A 'parking lot' is an effective device for keeping the class focused on the task at hand, while showing respect and concern for the individual's unique concerns. Typically, a parking lot is a sheet of flipchart paper taped to the wall or a designated space on a whiteboard. After determining that a participant's concern is premature or off-track, tactfully refocus them, but offer to record their issue/question on the Parking Lot. Gain agreement with your participant to return to the issue during the appropriate lesson or offline during a break or after the class.

If the participant agrees to 'park' the issue for now, record it on the Parking Lot. Check with the participant to ensure that you recorded it correctly. The Instructor Guide includes reminders to clear the Parking Lot at the end of each section.


COURSE AGENDA

This agenda can be used as a handout for your participants. Times are approximate

TIME	LESSON
5 minutes	Welcome and Introductions
2 minutes	Accessing IBM Micromedex® CareNotes®
5 minutes	Common Elements & Navigation in CareNotes
20 minutes	Keyword Search
15 minutes	Printing CareNotes
5 minutes	Searching for Care and Condition Titles
5 minutes	Searching for Medication Titles
5 minutes	Searching for Lab Titles
10 minutes	Hot Lists
10 minutes	Group Exercises

PREPARATION CHECKLIST

Before class begins make sure you have completed the items on the preparation checklist below. Feel free to adjust the timing based on your experience and circumstances.

	ITEM
One Week Prior to Training:	
<input type="checkbox"/>	Publicize the Training or send out invitations to potential participants. Send e-mails, post on bulletin boards, etc.
<input type="checkbox"/>	Reserve classroom and all equipment (see Classroom Setup on page 4).
<input type="checkbox"/>	Review the Instructor Guide.
One Day Prior to Training:	
<input type="checkbox"/>	Verify the CareNotes application is available from the Instructor's PC.
<input type="checkbox"/>	Verify that the Username and Password gives access to the application (if required at your facility).
<input type="checkbox"/>	Remind participants that training occurs tomorrow.
Day of Training:	
<input type="checkbox"/>	Connect PC to projector and test.
<input type="checkbox"/>	Gather all training materials, handouts, and this Instructor Guide.

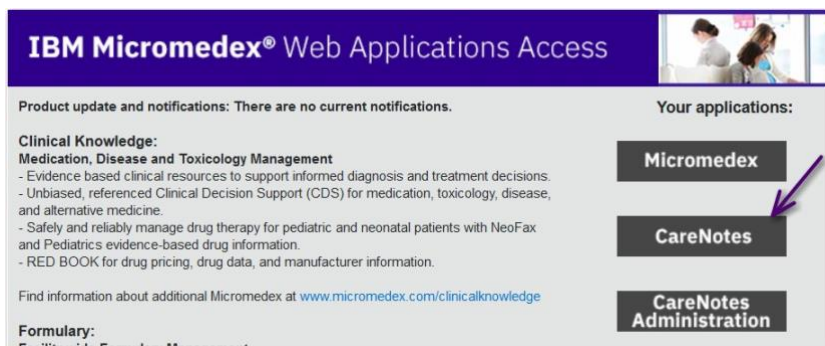
CHAPTER 2: CARENOTES TRAINING MODULES

WELCOME AND INTRODUCTIONS

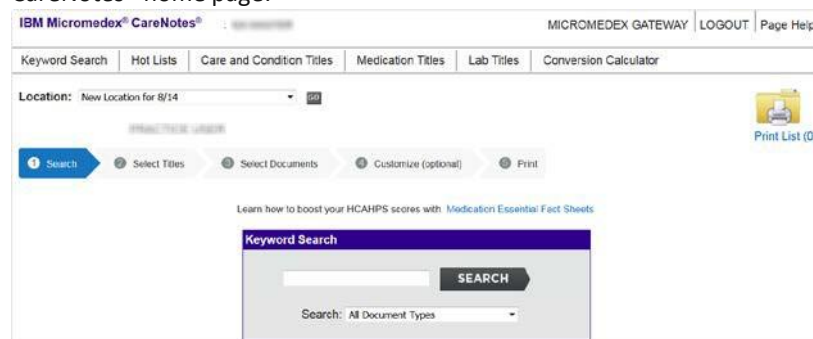
INSTRUCTION	INDICATES
Time = 5 Minutes	It is always recommended to relay a welcome message and conduct introductions for participants who may not know everyone in the class.
<i>(Instructor Notes)</i>	<i>(Introduce yourself.)</i> <i>(Welcome the participants to the class.)</i> <i>(Have participants introduce themselves.)</i>
Instructor Say...	<p>“The purpose of this course is to ensure that you understand how Micromedex CareNotes can help you find the patient education materials you need for your patients.”</p> <p>“Common scenarios will be presented to simulate typical situations where CareNotes can be used to find this information.”</p>

ACCESSING MICROMEDEX CARENOTES

Micromedex Solutions Gateway page:

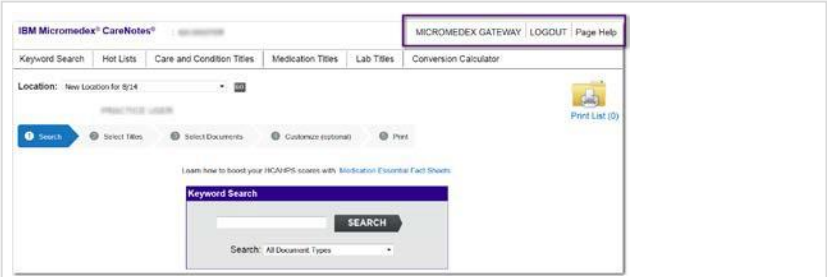



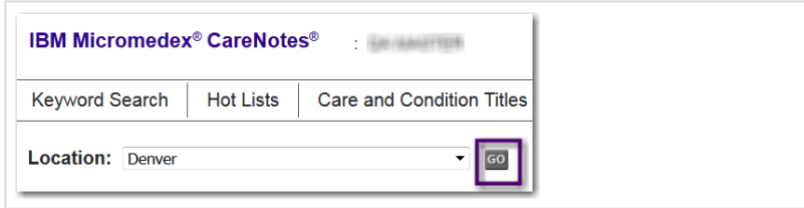
CareNotes® home page:



INSTRUCTION	INDICATES
Time = 2 Minutes	The purpose of this module is to familiarize participants with the steps required to open The CareNotes application.
Click	Demonstrate how end users access CareNotes patient education at your facility. (Via a link on their PC desktop, username & password, etc.)
(Instructor Notes)	(Some sites use IP authentication, which means that User/Password are not required. Other sites do require User/Password for access to CareNotes.)

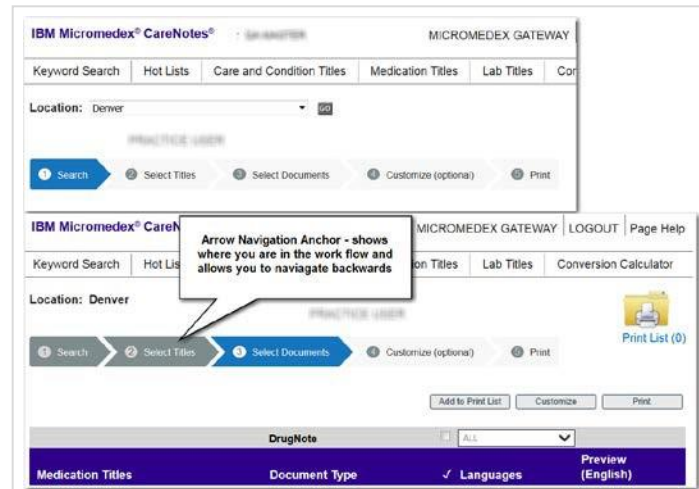
COMMON ELEMENTS & NAVIGATION IN CARENOTES

INSTRUCTION	INDICATES
Time = 5 Minutes	The purpose of this module is to familiarize users with the common navigation used throughout the CareNotes application.
Click	Open CareNotes to the Keyword Search page.
Instructor Say...	"The first page you see when you enter the CareNotes application is the Keyword Search page, also known as the Home page ."
Show	Point out the common elements located in the upper right of the page as you describethem. 
Instructor Say...	<p>"The MICROMEDEX GATEWAY link allows you quick access to other applications available to you from IBM Watson Health."</p> <p>"The LOGOUT link logs you out of the IBM Watson Health applications."</p> <p>"Page Help opens online help specific to the page or topic you are on at the time. It also provides a link to the User Guide in PDF format."</p>
Show	Point out the tabs located below the CARENOTES® heading. 
Instructor Say...	"The following tabs are available on every page."

	<p>"Keyword Search can be used to perform a search in both the care and condition and drug document databases."</p> <p>"Hot Lists give you quick access to your most often used patient education documents."</p> <p>"Care and Condition Titles is used when you want to search for care documents either by medical category or alphabetically by document title."</p> <p>"The Medication Titles tab is used to search for drug documents alphabetically by drug name."</p> <p>"The Lab Titles tab is used to find patient education documents on common lab tests."</p> <p>"The Conversion Calculator can be used to quickly convert in either direction: Pounds and Kilograms, Inches and Centimeters, as well as Fahrenheit and Celsius."</p> <p>"We will take a closer look at these tabs in later lessons."</p>
<i>(Instructor Notes)</i>	<i>(Demonstrate Location only if you have more than one Location for your site defined by the CareNotes Administrator.)</i>
Instructor Say...	<p>"The Location drop-down box located under the tabs allows you to select the area, department, or facility relevant to your workflow."</p> <p>"Select your location from the drop-down menu, and then click the GO button"</p>
Click	<ol style="list-style-type: none"> 1. Click on the drop-down then on a Location name. 2. Click the GO button. 
Instructor Say...	<p>"The Arrow Navigation Anchor shows where you are in the Keyword Search workflow. As you progress through the search and select titles or documents, you can also step backwards using this icon."</p>

Show

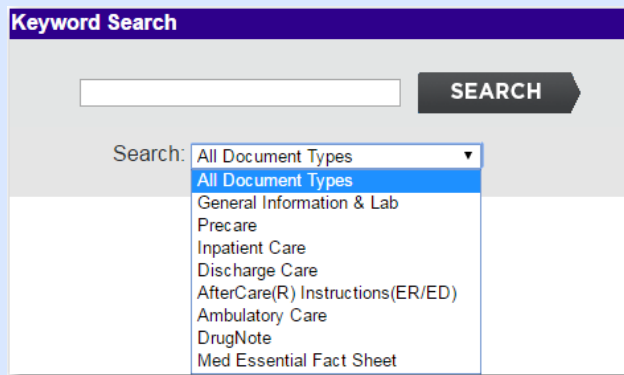
Point out the **Arrow Navigation Anchor**.



Instructor Say ...

"When you are searching for education materials for your patients, you will most likely do so from the Keyword Search – also known as the home page of CareNotes. It is quick, easy, and searches through all of the content available in CareNotes."

"Searching is as easy as typing a keyword and hitting the **SEARCH** button. But there are a few tips to point out as well."

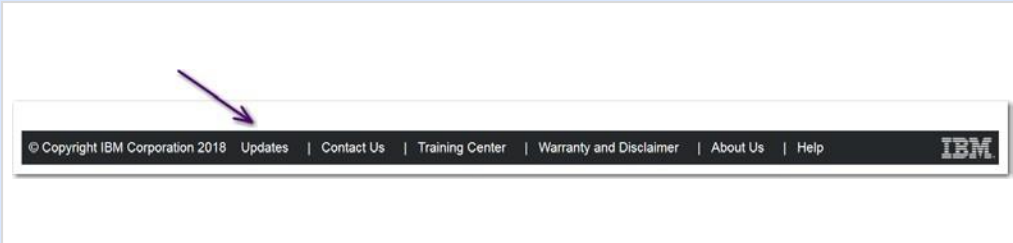


"Each topic or title in CareNotes could have many closely related documents. The documents are all written for the patient at a specific point and time in their care continuum."

"So – the standard document types available from Micromedex are: "


Click


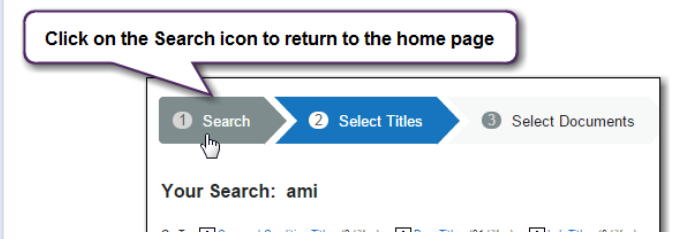
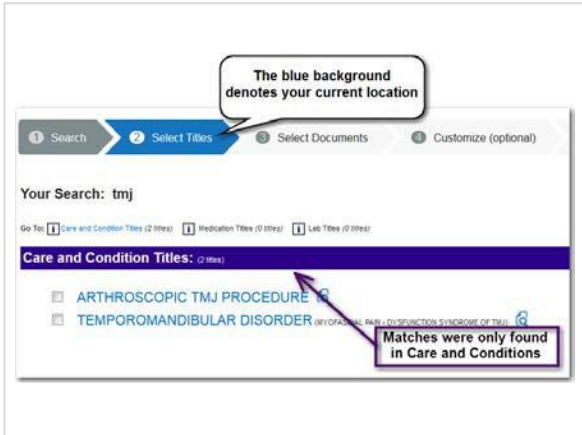
Click on the Search drop-down to show the document types available.


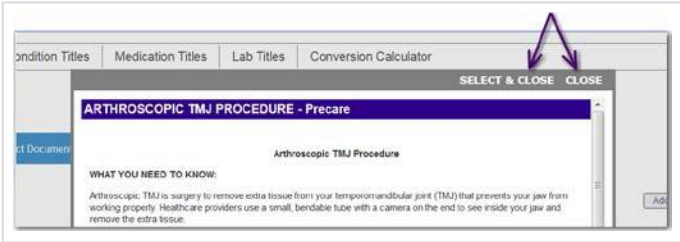
Instructor Say ...	<ul style="list-style-type: none"> • "General Information – summarized information and care instructions of the injury, illness, common lab test, or procedure." • "Precare – preparation and pre-procedure or pre-surgical information." • "Inpatient Care - Information about diagnostics/treatment/processes during hospitalization." • "Discharge Care – Brief, bulleted follow-up care instructions written specifically for patients discharged from a hospital or clinic." • "AfterCare Instructions – Brief, bulleted discharge documents written specifically for patients seen in an emergency department setting." • "Ambulatory Care - Information and follow up care instructions for illnesses, injuries and procedures that are treated or performed in an ambulatory setting." • "Medication Information – Indication, contraindications, usage instructions, precautions, interaction warnings, and side effects for prescription and nonprescription drugs. " • "Med Essential Fact Sheet - Brief DrugNote with indication, interaction warnings, and side effects for prescription and nonprescription drugs." <p>"Using this drop-down allows you to construct and perform a very focused keyword search."</p>
Instructor Say...	<p>"There are several links at the bottom of every page. "</p> <p>"Click these links to find out about new features and updates, training opportunities, and information about IBM Watson Health."</p>
Show	<p>Point out the links at the bottom of the page.</p>  <p>The screenshot shows the footer of the IBM Watson Health website. It includes the copyright notice '© Copyright IBM Corporation 2018' followed by a series of links: 'Updates', 'Contact Us', 'Training Center', 'Warranty and Disclaimer', 'About Us', and 'Help'. The IBM logo is positioned on the right side of the footer.</p>

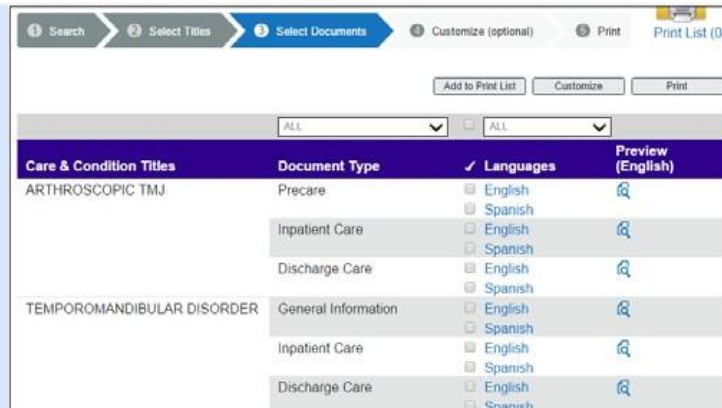
Instructor Say...	<p>"The Updates link describes new features as well as a list of all new or updated documents. Check this link regularly to stay abreast of new application functionality as well as new content available in CareNotes."</p> <p>"Use the Contact Us link to contact IBM Watson Health with questions, suggestions, requests for additional content, changes or additions."</p> <p>"The Training Center link opens information about online educational materials and training services available by request."</p> <p>"The Help link differs from the page-specific Help link because all Help Topics are listed. It also provides a link to the User Guide in PDF format."</p>
Show	Point out the links at the bottom of the page as you discuss each one.
Ask for Questions	Ask for questions on this subject before continuing with the next module.
Parking Lot	Check the Parking Lot for questions and issues raised but not resolved.

KEYWORD SEARCH

INSTRUCTION	INDICATES
Time = 20 Minutes	The purpose of this module is to familiarize users with the most common search method used in the CareNotes application - the Keyword Search .
Show	Verify you are on the Keyword Search page (the Home page) in CareNotes.
Instructor Say...	<p>"The Keyword Search searches across all 3 content types: Care and Condition, Drug, and Lab – so it is the fastest and most effective way to perform a search."</p> <p>"Keywords are terms which describe the information you are looking for."</p> <p>"You can enter one or more keywords in the search box."</p> <p>"The application looks for matches to your keywords in the title or in associated synonyms."</p> <p>"In general, the broader the term or keyword, the more results will be found."</p> <p>"For example – searching on the keyword characters 'ami' yields many more results than searching on amiodarone."</p>
Type	Type ami into the search field and then click the Search button (or hit the Enter key).
Instructor Say...	<p>"A search can produce matches in many content areas and Document Types. When more than one match is found, you see the Select Titles page."</p> <p>"The Go To: speed links allow you to go directly to the content area - Care & Condition, Drug, or Lab - you are looking for. The "i" icon indicates there is information available as hover text. Simply place your cursor over the icon to see the information available."</p>
Show	<p>The Go To: speed links are located just above the Care and Condition bar, near the top of the page.</p>  <p>Point out that the search for ami resulted in matches in all 3 content types (Care and Condition, Drug and Lab).</p> <p>Point out that the letters ami were found in either the title or as a synonym.</p>

	Place your mouse cursor over the  icon to demonstrate the informational text that is displayed.
Click	Click the Search icon in the Arrow Navigation anchor to return to the Home Page. 
Instructor Say...	"Let's try another Keyword Search: If you were looking for information on Arthroscopic Surgery on the Temporal Mandibular Joint, you could search on any of the keywords arthroscopic, temporal, or mandibular ... or even on the commonly used acronym, TMJ."
Type	Type TMJ in the search box, and then click the Search button (or hit the Enter key).
Show	Verify you are on the Select Titles page for the TMJ search. (The background color for Select Titles is blue in the Navigation Anchor when on the Select Titles page.)
Instructor Say...	"Searching on TMJ found matches only in Care and Condition Titles."
Show	Point out that the search for TMJ resulted in matches only in Care and Condition titles. 
Instructor Say...	"Titles are shown as links. When you are on the Select Titles page you can: Preview the General Information document, select titles for your patient, or click a title link to see what languages and types of documents are available for the title."

"To preview the General Information document, click the preview icon."	
Show	Click the  icon next to a title
Instructor Say...	"After reviewing the document in the preview window, you can choose to include the title in your patient handouts by clicking the SELECT & CLOSE link shown in the top right corner of the window. If you don't want to select this title, simply click the CLOSE link."
Show	 <p>Point out the two links in the top right corner of the Preview window.</p>
Click	Click SELECT & CLOSE .
Instructor Say...	"Notice that the title is now selected. You can select any or all of the titles on the Select Titles page and proceed to the Select Documents page."
Click	Click the checkbox to the left of the 2 nd title (Temporalmmandibular Disorder) then click the Select Titles button.
Instructor Say...	"The Select Documents page displays all of the Titles selected previously. From this page you can see the document types and languages available for each title."
Show	Point out the blue Select Documents icon to reinforce where you are in the workflow. Point out the various document types and languages available for the two titles selected.

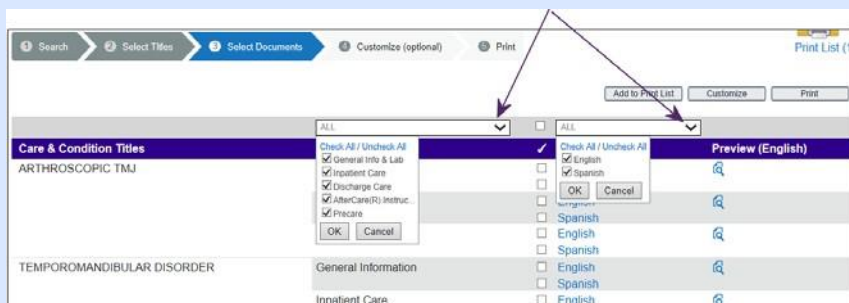


Instructor Say...


"You can:


1. **Preview** any of the documents shown with the preview icon;
 - a. You can **select** the document **from the preview** or close the preview; or ...
2. You can **select** any of the documents shown on this page, by **clicking the checkbox** for the language and document type you want to give to your patient; or...
3. You can tailor the type and amount of information displayed on this page using the drop-down **filter** boxes. Let's look at how the filters can help show us exactly what we are looking for."

Click



1. Click the filter drop-downs.
2. Point out that by default, ALL document types and ALL languages are selected.
3. Click the **Uncheck all** document types link, then click **Discharge Care** checkbox and the **OK** button.
4. Click the **Uncheck all** languages link, then click **English** checkbox and the **OK** button.

Instructor Say ...	<p>"This example demonstrates how you can easily tailor your view to see just the documents you are interested in providing for your patient.</p> <p>Now that I am only seeing my English Discharge Care documents – I can click both and proceed to the appropriate print option."</p>
Click	Click both checkboxes.
Instructor Say ...	<p>"When the documents have been selected, you have three options available:</p> <ol style="list-style-type: none"> 1. Customize the documents (adding information such as patient and/or caregiver name, special instructions, etc.); or 2. Add the selected documents to the Print List; or 3. Print the selected documents now (using the default print options)."
Show	Point out the three buttons: Add to Print List , Customize and Print .
Instructor Say ...	"The print workflow will be demonstrated in detail in the next module. For this example we will add these documents to the print queue by clicking Add to Print List ."
Click	Click the Add to Print List button.
Instructor Say ...	<p>"Notice that you see confirmation that you just sent these documents to the print list – and –that the print list icon now shows 2 in the parentheses."</p> <p>"Let's say we want to gather a few more documents to give to our patient. We will return to the Keyword Search page and search on the brand name Tylenol."</p>
Click	<p>Click on the Search arrow navigation anchor to return to the home page.</p>  <p>Type Tylenol in the search field and press the SEARCH button.</p>
Instructor Say ...	"We will click in the first checkbox to select the acetaminophen/codeine – Tylenol w/Codeine drug and then click the Select Titles button."

Click	<p>Click the first checkbox to the left of the first title (acetaminophen/codeine) then click the Select Titles button.</p> 
Instructor Say ...	<p>"Notice that for this title 13 languages in addition to English and Spanish are available. A subset of the documents in CareNotes have been translated into these languages."</p> <p>"Studies have shown that 20% of the U.S. population over the age of 5 speak a language other than English at home. This is a 140% increase over the last three decades. In addition to the existing English and Spanish documents, a subset of CareNotes - discharge instructions for the most common conditions and procedures - and drug information for the most frequently prescribed medications are available in 13 additional languages."</p> <p>"For this demonstration however, we will select the English DrugNote document and then click the Add to Print List button."</p>
Click	Click the checkbox next to the English DrugNote document and then click Add to Print List .
Instructor Say ...	<p>"As you can see from the confirmation message, we now have 3 documents waiting to be printed.</p> <p>We have conducted 3 keyword searches for ami, tmj, and tylenol and selected the documents we want to provide our patient. The next step in the workflow would be to print the documents.</p> <p>Print options and workflow are covered in the next module."</p>
Exercise	<p>If participants have access to their own workstations in the classroom, lead them through some keyword search group exercises.</p> <p>If you have SaveNotes* (documents that have been customized by the CareNotes Administrator at your site), direct them toward a search that will find a SaveNote in the search results. Point out how SaveNotes appear with the asterisk and description.</p>
Ask for Questions	Ask for questions on this subject before continuing with the next module.


Parking Lot Check the Parking Lot for questions and issues raised but not resolved.

NOTE: SaveNotes are patient education documents that have been created by a CareNotes Administrator at your hospital.

PRINTING CARENOTES FOR YOUR PATIENTS

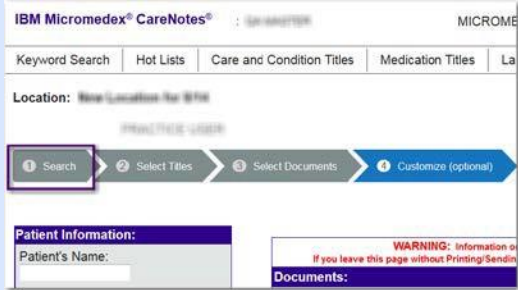
The workflow and options available to end users allow for various needs and workflows. You can:

1. Print selected documents immediately using default print settings;
2. Send documents to the print queue to print in aggregate later;
3. Customize the print settings for the currently selected documents and print now. In addition, the Print List icon always lets you know how many documents you've sent to the print queue.


INSTRUCTION	INDICATES
Time = 15 Minutes	The purpose of this module is to familiarize users with the three print workflows available in the CareNotes application.
<i>(Instructor Notes)</i>	<i>If you are presenting this training module separate from the previous (Keyword Search) module, you will need to perform some setup of the application before getting started. Perform the searches and add the documents to the print queue as described in the Keyword Search lesson. Have the Keyword Search (home page) open when you begin.</i>
Instructor Say ...	<p>"A typical workflow is to gather the various CareNotes documents by adding the desired items to the Print List until you've aggregated the full complement of patient instructions."</p> <p>"In the last module, we sent a total of 3 documents to the print list. I'll quickly add more."</p>
Click	<p>Click in the Keyword Search and type, "how to" and then click SEARCH.</p> <p>Scroll down and check the "HOW TO USE A PEAK FLOW METER" checkbox and then click Select Titles.</p> <p>Click the Discharge Care – English checkbox and click Add to Print List.</p>
Instructor Say ...	"Now I'm ready to print this complete set of documents for my patient. I can go to the Print List by clicking the Print List link or icon or by clicking on the Print List link in the confirmation message."
Show	<p>Show the Print List icon  and the link in the confirmation message</p> <div> <p>Document was added to the Print List. There are now 4 documents in the Print List.</p> </div>
Click	Click on either the print list icon or the link .

Instructor Say ...	<p>"The Print List shows the documents currently waiting to be printed." "From this window you can:</p> <ol style="list-style-type: none"> 1. Update the list – by clicking the checkbox to de-select a document then clicking Update List, the document is removed from the document set. 2. Customize – when you click the Customize button you will proceed to the print setup dialog where you can: Add special instructions for this patient, add or remove headers and footers, change the font size, etc. 3. Print – print the documents using the default print settings." <p>"Let's first demonstrate how to remove a document from this list. Let's say I have changed my mind and I don't want to send the HOW TO USE A PEAK FLOW METER document with this patient. Simply uncheck the box and press Update List."</p>
Click	Click the checkbox beside the HOW TO USE A PEAK FLOW METER document, then click Update List .
Instructor Say ...	"I'll confirm my request by clicking OK. The document has been removed from the list."
Click	Click OK
Instructor Say ...	"Now we are ready to print this set of documents for the patient. But first, I want to add some special instructions, so I will click the Customize button."
Click	Click the Customize button.
<i>(Instructor Notes)</i>	<p><i>The items and settings you see are completely dependent on how your CareNotes Administrator has set your print options. Print settings can be configured to allow the end user the ability to change the default, - or – the administrator can lock down the options, making their setup mandatory.</i></p> <p><i>A description of all of the settings is included below, so you may need to tailor the classroom presentation to follow your settings.</i></p>
Instructor Say ...	<p>"The default print options, as configured by the CareNotes administrator, are shown."</p> <p>"Starting on the left, in Patient Information you can add the patient's and/or caregiver's name and a signature line."</p> <p>"In the Headers and Footers area we see the headers and footers that have been setup for us. If a checkbox is shown checked, but grey, it means that the</p>

	<p>item has been configured as a mandatory item. If it is not disabled and either checked or unchecked, it means you can choose to use or not use the item in this set of documents."</p> <p>"Document Options allow you to change the font size, include/exclude any images, or pictures, and the number of copies."</p> <p>"Special instructions for your patient can be added to the relevant document in the Documents section. Additionally, you can choose to print those instructions in bold font."</p> <p>"The Patient Education Record is a one page summary listing the date and document titles plus any of the following information: Patient name, Caregiver name, and Special instructions. This is not meant to be included in the handouts for the patient. Rather, the patient education record printout should be retained for the chart to show proof of what was given to the patient."</p>
<i>(Instructor Notes)</i>	<p><i>eCopy Customers Only:</i></p> <p><i>If you are an eCopy CareNotes customer (email notification with patient access to your hospital patient portal allowing them to retrieve their patient education documents electronically), you should describe your authentication credentials and print/send options.</i></p>
Click	Demonstrate this functionality by entering/selecting some of the fields described above.
Instructor Say ...	"At this point you would typically click the Print button, but for purposes of demonstration, I'm going to click Preview ."
Click	Click the Preview button.
Show	Scroll through the preview to show how the customization will be included in the printout for the patient. Close the window by clicking the 'x' (top right corner of the page) when done.
Instructor Say ...	"The Print option bypasses the Customize page and goes directly to print, using all of the default print options as configured by our CareNotes administrator. Let's do a quick demo of the default Print."
<i>(Instructor Notes)</i>	<p><i>eCopy Customers Only:</i></p> <p><i>If you are an eCopy CareNotes customer you cannot bypass the Customize workflow step.</i></p>
Click	Click on the Search arrow navigation anchor to return to the home page.


	
Click	<p>Click in the keyword search field and type "DIET" (or a search of your choice)</p> <p>Scroll down and select REGULAR DIET, then click Select Titles.</p>
Instructor Say ...	"With one or more documents selected at this point, I can click the Print button, which will open a preview of the document and the print dialog box."
Click	Select any combination of documents and then click the Print button.
<i>(Instructor Notes)</i>	<i>You may want to move the print dialog box out of the way to show how the default print options (e.g., patient education record, headers/footers, etc.) have been included/excluded automatically according to your default print settings.</i>
Instructor Say ...	"The default print options are automatically applied to this set of documents for the patient and you can simply click the Print button to print the documents for your patient."
Ask for Questions	Ask for questions on this subject before continuing with the next module.
Parking Lot	Check the Parking Lot for questions and issues raised but not resolved.

SEARCHING FOR CARE AND CONDITION TITLES

INSTRUCTION	INDICATES
Time = 5 Minutes	<p>The purpose of this module is to familiarize users with the Care and Condition Titles Search; compare and contrast it to the Keyword Search.</p> <p>Upon completion of this module, users will be able to:</p> <ul style="list-style-type: none"> • View documents by specialty • View documents alphabetically
Click	<p>Click the Care and Condition Titles tab.</p> 
Instructor Say...	<p>"Use the Care and Condition Titles tab to:</p> <ul style="list-style-type: none"> • search for documents by specialty • browse a list of titles by specialty • browse an alphabetical list of titles" <p>"Drug and Lab titles are not included in searches from the Care and Condition tab."</p> <p>"This tab may be useful as a backup search if the search term or keyword did not produce the expected results. Let's say for example you have a patient that needs to know proper cast care. You searched on the term CASTING and didn't find any matches"</p>
Click	<p>Scroll down and click the ORTHOPEDICS link.</p> <ol style="list-style-type: none"> 1. Scroll down and point out the CAST CARE title. 2. Click on the CAST CARE link to show the documents and languages available. 3. Click on the Care and Condition Titles tab to return to the Care and Condition title search. 4. Click the View Titles Alphabetically button.

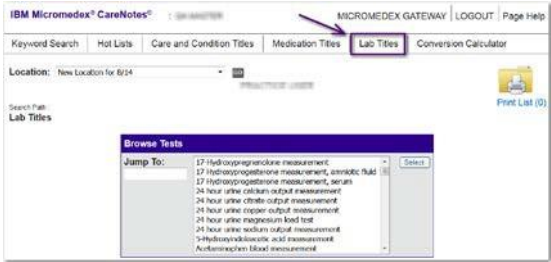
Instructor Say...	"To scan an alphabetical list of Care and Condition titles, click the View Titles Alphabetically button, and then click any link on the Go To: speed link menu."
Click	Click the C hypertext link and scroll down to CAST CARE, showing another way to find a title.
Instructor Say ...	"When you find the title you are looking for, click the link to view the document types and languages available for that title."
Click	Click on the CAST CARE title link.
Instructor Say...	<p>"View the document by clicking the language link, or preview the English version using the preview icon."</p> <p>"Select the language desired by clicking the checkbox, then select the desired print option: Add to Print List, Customize or Print."</p>
Show	Point out the preview icon and print option buttons and then open a document by clicking the English link.
Ask for Questions	Ask for questions on this subject before continuing with the next module.
Parking Lot	Check the Parking Lot for questions and issues raised but not resolved.

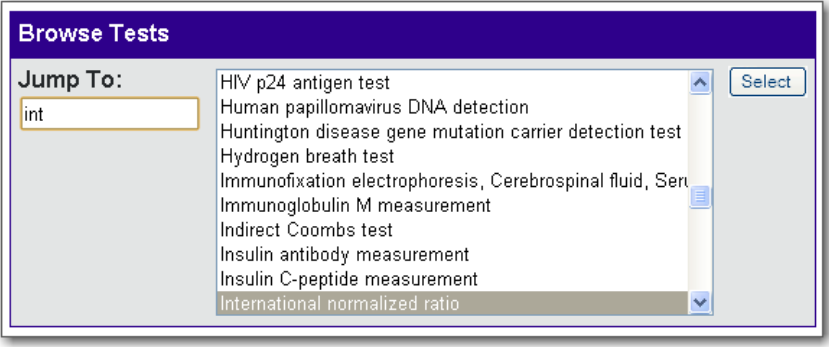
SEARCHING FOR MEDICATION TITLES

INSTRUCTION	INDICATES
Time = 5 Minutes	<p>The purpose of this module is to familiarize users with the Medication Titles Search and compare and contrast it to the Keyword Search.</p> <p>Upon completion of this module, users will be able to:</p> <ul style="list-style-type: none"> • Search for drugs by generic name • View drug documents alphabetically
Click	<p>Click the Medication Titles tab.</p> 
Instructor Say...	<p>"Only drug information will be found when using the Medication Titles tab. The biggest difference between the Keyword Search and the Medication Titles tab is that from Medication Titles you must search for drug information using the generic name. If you are looking for a trade name drug, there will be no results found here."</p>
Show	<p>Point out the Medication Titles page.</p>
Instructor Say...	<p>"Just like the alphabetical search option for Care and Condition titles, you see the letters and numbers 0-9 shown as links to the titles."</p> <p>"Click a letter to show the generic drug documents that begin with the selected letter."</p>
Click	<p>Click any linked letter to show the list of drug documents.</p>
Instructor Say ...	<p>"Click a drug title link to show the available documents and languages."</p>

Instructor Say...	<p>"View the document by clicking the language link, or preview the English version using the preview icon."</p> <p>"Select the language desired by clicking the checkbox, then select the desired print option: Add to Print List, Customize or Print."</p>
Show	Point out the preview icon and print option buttons, and then open a document by clicking the English link.
Ask for Questions	Ask for questions on this subject before continuing with the next module.
Parking Lot	Check the Parking Lot for questions and issues raised but not resolved.

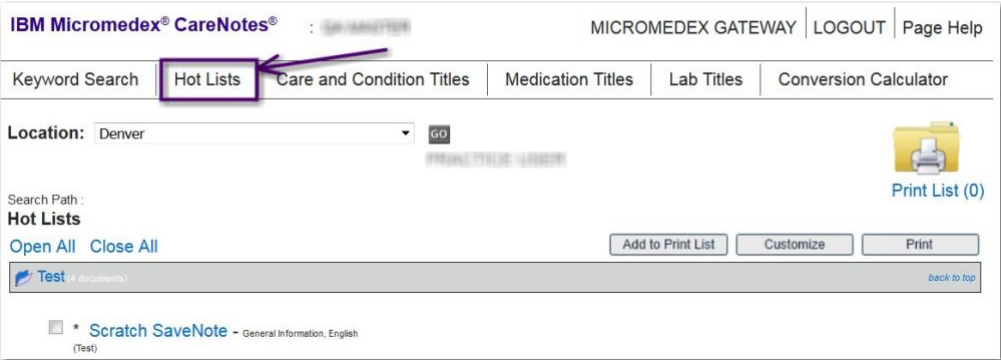
SEARCHING FOR LAB TITLES

INSTRUCTION	INDICATES
Time = 5 Minutes	<p>The purpose of this module is to familiarize users with the Lab Titles Search; compare and contrast it to the Keyword Search.</p> <p>Upon completion of this module, users will be able to:</p> <ul style="list-style-type: none"> • Search for laboratory test and procedures by name • View lab documents
Click	<p>Click the Lab Titles tab.</p> 
Instructor Say...	<p>"Only laboratory test and procedure information will be found when using the Lab Titles tab."</p> <p>"Searching Lab Titles can be done using the word wheel located in the center of the Lab Titles page. The list of lab titles is shown. You can either scroll down until you find the desired document or use the Jump To field to type in the lab name."</p> <p>"As you type in the Jump To field, the list re-positions to the closest match to what you've typed."</p>
Type	Demonstrate using the scroll bar, then type INTER in the Jump To: field.

Show	 <p>Point out the scroll bar and the Jump To field.</p> <p>Show how the list moves to the closest match to the letters as you type.</p>
Instructor Say...	<p>"This example demonstrates a search for International Normalized Ration - or - INR. As you can see, the word wheel jumped to the lab document after typing just the first 3 letters of the lab test and continues to the best match as you type."</p> <p>"Lab Panels cannot be searched via the Lab Titles tab. Use the Keyword Search to find patient education lab information on common panels."</p> <p>"Matches may not be found from the Lab Titles tab for many of the common lab test name abbreviations, such as, CBC, INR, etc. However, the Keyword Search queries across all of the content types and will often find a matching document for common abbreviations."</p> <p>"Once the appropriate lab is found single-click the title and then click the Select button to view the available languages."</p>
Click	Click international normalized ratio and then click the Select button. The Search Results page is shown.
Instructor Say...	<p>"View the document by clicking the language link, or preview the English version using the preview icon."</p> <p>"Select the language desired by clicking the checkbox, then select the desired print option: Add to Print List, Customize or Print."</p>
Show	Point out the preview icon and print option buttons, and then open a document by clicking the English link.

Ask for Questions	Ask for questions on this subject before continuing with the next module.
Parking Lot	Check the Parking Lot for questions and issues raised but not resolved.

HOT LISTS

INSTRUCTION	INDICATES
Time = 10 Minutes	The purpose of this module is to familiarize users with the Hot List concept and demonstrate how Hot Lists can save clinicians time by collecting commonly used documents into one area for quick and easy distribution to patients.
<i>Instructor Notes</i>	<p><i>(If you do not have any Hot Lists published at your facility your Hot List page will be blank.)</i></p> <p><i>(You may want to give an overview of the concept of Hot Lists and then ask for feedback from attendees. Your attendees can be an excellent resource for input and ideas on how Hot Lists could be used at your site.)</i></p>
Click	<p>Click the Hot Lists tab</p> <p style="text-align: center;">HOT LIST SETUP EXAMPLE YOUR PAGE WILL SHOW HOT LISTS DEFINED AT YOUR SITE BY YOUR CARENOTES ADMINISTRATOR</p> 
Instructor Say...	<p>"Hot Lists are not provided as part of The CareNotes System. They are created and maintained by the designated CareNotes Administrator at your site."</p> <p>"The Hot List tab shows folders that have been created by the CareNotes Administrator for our facility."</p> <p>"Folders shown on the Hot List tab contain documents that have been placed there as a shortcut when searching for patient education documents."</p> <p>"Often the same sets of documents are provided over and over for patients upon discharge, or when undergoing a procedure, normally requiring multiple searches."</p>

	<p>"The most important thing to know about Hot Lists is that when implemented and used, Hot Lists can save you time by putting all the often used patient education documents into one spot for you to pick up and print. -- <i>One</i> search rather than many."</p> <p>"For example: When discharging a patient after hospitalization for asthma, oftentimes clinicians send the patient with information on: general information on their condition; their drugs/medications; and information on how to use an inhaler."</p> <p>"To gather all of the above-mentioned information would require multiple searches. By placing these documents into a Hot List, you can access the group with a single mouse click."</p> <p>"Using the example mentioned, a Hot List called Asthma Discharge could include all of the typical patient education documents used when discharging your patient."</p>
Exercise	<p>If you don't have Hot Lists at this time, this would be an excellent opportunity to ask for input from attendees – ask if they can identify possible uses for or good examples where Hot Lists (new or additional) could be useful at your hospital.</p> <p>If you have Hot Lists published at your facility, review them with your attendees.</p>
Parking Lot	Check the Parking Lot for questions and issues raised but not resolved.

CHAPTER 3: GROUP EXERCISES

GROUP EXERCISES

Time = 10 Minutes

Optional Modules

The purpose of these modules is to allow attendees to have some 'hands on' practice with CareNotes® using typical scenarios.

Group Exercise #1

Scenario:

A patient in a Cardiac Catheterization Lab has just had a heart catheterization and will be discharged home.

During the procedure the doctor found that the patient had a buildup of plaque in one of his coronary arteries and decided to place a coronary stent.

The patient has been a heavy smoker for several years.

In order to educate him about preventing future plaque buildup in his arteries, and give him instructions for care after the procedure, you would give him the following CareNotes:

Instructor Notes & Key	<div><i>Attendees should perform a keyword search on heart or heart catheterization</i><ul style="list-style-type: none">Select HEART CATHETERIZATIONSelect Ambulatory and a languageSelect Add to Print List</div> <div><i>Attendees should then perform a keyword search on stent</i><ul style="list-style-type: none">Select CORONARY INTRAVASCULAR STENT PLACEMENTSelect Ambulatory and a languageSelect Add to Print List</div> <div><i>Attendees should perform a keyword search on “how to” or smoking</i><ul style="list-style-type: none">Select HOW TO STOP SMOKINGSelect Ambulatory and a languageSelect Add to Print List</div> <div><i>Attendees should then Print:</i><ul style="list-style-type: none">Select the Print List icon (or link)Select to Customize the documents – or – to PrintAnswer prompts – then preview</div>
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Group Exercise #2

Scenario:

55 y/o female presents to ED with SOB and lower extremity swelling

Patient has a history of:

- Atrial Fib
- DVT

Currently taking coumadin

Dx: CHF – patient started on lasix, metoprolol, and placed on a low-sodium diet; orders placed for an echocardiogram as an outpatient

Family wants more information on all of the above

Instructor Notes & Key

Attendees should perform keyword searches on:

- CHF
- LASIX
- METOPROLOL
- DIET
- ECHO

Select the appropriate titles, document types, and language.

Select a Print workflow option (Add to Print List) until all documents have been found.

Then go to the Print List – select to Customize or Print.

Group Exercise #3

Scenario:

32 y/o Vietnamese speaking male comes to ED with chest pain

Dx: GERD – patient started on Pantoprazole

Patient wants more information on diagnosis and prescribed medication

Instructor Notes & Key

Attendees should perform keyword searches on:

- GERD
- PANTOPRAZOLE

Select the appropriate titles, document types, and language (Vietnamese). Select a

Print workflow option (Add to Print List) until all documents have been found.

Then go to the Print List – select to Customize or Print.