Home Health and Hospice Field User/Aide Mobile Exploration

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By completing the exercises in this Exploration Guide, you'll gain practice doing your day-to-day workflows and gain exposure to your organization's Epic content prior to go-live. This is your opportunity to practice in a safe, controlled setting, and will help to identify any questions or issues before go-live.

Write down the following key information to use for your exercises:

Environment: DEMO

This is where you can practice with fake patient data, logged in as a practice user (not with your own credentials). DEMO refreshes regularly, so it does not save your documentation.

Complete the following steps to ensure you're logged into the DEMO environment:

1. Open the Rover app on your phone.

2. At the top of the screen, tap the environment banner.
   Insert screenshot

3. Tap DEMO to switch to the practice training environment. When you're done with the exercises below, follow the same steps as above to switch the environment to PRD, which is where you will complete your real patient documentation.

Login credentials:

When you come to the session, you'll be assigned a username based on your discipline and the name of a practice patient. *If you would like to re-do the exercises or practice after the session, you may use the following usernames:*

- Home Health usernames:
  - Aide: hha
  - Nurse: hhrn
  - PT: hhpt
  - OT: hhot
  - SLP: hhslp
  - Social worker: hhmsw
- Hospice/QoLA usernames:
  - Aide: hspca
  - Nurse: hspcrn or qolarn
  - Social worker: hspcmsw
  - Chaplain: hspccp
  - Child Life Specialist: qolacls
- Password for all users: epic

Use the section below to mark off the workflows you complete. Write down any questions or issues that come up as you work through these workflows. Include your top three questions in the Questions section below.

Complete a routine home visit

Document driving and visit times

SCENARIO:

You are about to embark on a routine home visit with your patient. Before you start the visit, you want to review your schedule and capture your driving time and visit start time.

TRY IT OUT:

1. Sync your schedule so it's available even if you lose connection:
    - Tap the three vertical dots.
    - Then, tap **Sync Schedule**.
2. From the schedule, locate your patient and update your transit and visit times:
    - Tap **Open Time Log**.
    - Tap **Directions**.
        - When asked if you'd like to start the visit, tap **Yes** to prompt the system to record time and mileage**.**
        - If you don't need directions, you could also tap **Start Transit** instead of Directions**.**
    - Now, imagine you arrived at your destination and are starting the visit right away. Tap **Start Visit.**
        - If you have a gap between ending your transit and starting the visit, you can tap **End Transit** before starting the visit.
3. Select a **Type of Service** for your visit.

Document the visit

SCENARIO:

Now that you're in your patient's home, it's time to do your visit documentation. *Skip any steps that don't apply to your discipline.*

TRY IT OUT:

1. Document vitals, assessments, and wounds:
    - From Esperanza's chart, tap **Flowsheets** and document vitals.
    - To document wounds, tap the **LDAs** tab. Practice adding and removing wounds and other LDAs.
    - Assess an LDA and include a photo.

2. Document a care plan intervention:
    - Tap **Care Plan**, review the problems and goals, and check off completed interventions.
    - Imagine you didn't complete one of the interventions. Document a **Variance**.
    - If your discipline updates the care plan problems, goals, and interventions, you will use Remote Client on your laptop instead of your mobile phone to make any care plan updates. You can still document interventions on the phone.
3. Write your note:
    - Tap **Notes Entry**, then write your note and sign.

Work offline

SCENARIO:

During your visit, you lose your network connection. While you're offline, you'll have access to your core documentation tools, but several activities are only available with a connection. Explore which features are available while you're offline.

TRY IT OUT:

1. Work offline:
    - Tap the **Epic** button.
    - In the upper right, tap the down arrow next to Log Out.
    - Tap **Work Offline.**
    - Note: If you lose connection while you're in the field, you'll see a banner that prompts you to work offline.
2. Explore offline mode:
    - Tap the **Epic** button in a patient's chart. Most of your basic documentation tools, including everything you explored in the previous section, are available offline. Activities that require a network connection, like **Encounters**, are grayed out.
        - If you work with wounds or other LDAs, go to **Flowsheets** and the **LDA** tab. Notice there's no option to add new LDAs in offline mode. You'll see this feature again when you return online.
    - Close the patient's chart. Notice you can see a sync status for each patient, and you can see everything on the schedule that you saw when you were online.
    - Tap the **Epic** button. Notice which activities are available when you are offline, and which are grayed out and unavailable.
3. Reconnect to the network:

- Tap the banner that says **Connection detected. Tap to work online.**
- Wait for your device to sync.

Send a Secure Chat message

SCENARIO:

During your visit, you'd like to send a quick message to another member of the care team. You don't need to include a lot of detail and you'd prefer an urgent response, so you'll send a Secure Chat message.

TRY IT OUT

1. Create a message:
   - Tap the **Epic** button, then tap the message icon .
   - Tap the pencil icon.
   - Tap **Attach Patient**.
   - Search for your patient, then tap their name.
2. Add recipients:
   - Care team members: When you attach a patient, members of their care team appear. You can add them to the message by tapping.
   - Search for an individual:
     - Home health providers: For this activity, you can search "hh" for a list of home health providers.
     - Hospice providers: For this activity, you can search "hspc" for a list of hospice providers.
3. Write and send your message:
   - Type your message.
   - Tap to send.

Send an In Basket message

SCENARIO:

You'd like to send another message to a colleague. This time, you don't need an urgent response, so you'll send your message to your colleague's In Basket. You can do this two different ways in Dorothy Mobile:

- Most often, you'll use the Case Communication activity in the visit to send a Home Care Case Comm message. These messages automatically include a short summary of the visit.
- When you're not working in a specific visit, you'll send a Staff Message directly from In Basket.

TRY IT OUT: CASE COMMUNICATION

1. Create a message:
   - Tap the **Epic** button, then tap **Case Communication.**
   - Tap the plus sign.
2. Add recipients:
   - Care team members: In the **To** field, tap the plus sign, then tap the recipient.
   - Search for an individual:
     - Home health providers: For this activity, you can search "hh" for a list of home health providers.
     - Hospice providers: For this activity, you can search "hspc" for a list of hospice providers.
3. Write and send your message:
   - Type your message.
   - Tap  to send.

TRY IT OUT: IN BASKET

1. Create a message:
   - Tap the **Epic** button, then tap the **X** to close out of the patient visit.
   - Tap the **Epic** button again, then tap **In Basket.**
   - Tap the pencil icon.
   - Tap **Compose Staff Message.**
   - Tap the plus sign next to **Patient**, then tap your patient.
2. To add recipients, tap the plus sign next to **To**:
   - Home health providers: For this activity, you can search "hh" for a list of home health providers.

- Hospice providers: For this activity, you can search "hspc" for a list of hospice providers.

3. Write and send your message:
    - Type your subject and message.
    - Tap  to send.
4. Return to your visit documentation:
    - Tap the **Epic** button, then tap **Schedule**.
    - Tap your patient.

End the visit

SCENARIO:

You've finished documenting your visit and you've confirmed you have an active connection. Now it's time to wrap up:

- All disciplines will document an end time for the visit.
- Aides will sign the visit directly from Dorothy Mobile.
- Other disciplines will use the Remote Client to wrap up documentation and sign the visit.

TRY IT OUT:

1. Aides only: Try to sign a visit before you've documented an end time.
    - Tap **Sign Visit** and review the warnings.
    - Red stop signs mean you're required to document something before signing.
    - Yellow yield signs mean it's recommended, but you can still sign the visit without it.
    - You have a warning that your visit needs an end time, so let's add one now.
2. All disciplines: Document an end time for your visit.
    - Tap **Time Log** to return to the form you filled out at the beginning of your visit.
    - Tap **End Visit** to pull in the current time.
3. Aides: Sign your visit.
    - Tap **Sign Visit**.
    - You're done!
    - If you didn't have an active connection, you could sign the visit later.

The following exercise is for hospice/QoLA clinicians who schedule their own visits. If that does not apply to you, you've completed the exercise booklet! Remember to switch the environment from DEMO to PRD using the steps on page 1. You will do your real documentation using your MLH credentials in PRD at go-live.

Hospice/QoLA: Schedule a visit

SCENARIO:

You'd like to see your patient again tomorrow, so you're going to schedule a new visit. *Skip this activity if you don't schedule yourself with patients.*

TRY IT OUT:

1. Create the appointment:
    - From the Schedule header, tap the forward arrow to see your schedule for tomorrow.
    - Tap the plus sign, then **Appointment.**
    - Search for your patient.
    - Tap your patient.
2. Fill out the appointment details:
    - Tap the default department and search for your scheduling department.
    - **Provider**: Type ".me" to search for yourself.
    - **Contact type:** Tap and choose a contact type relevant for your discipline.
    - Review the date and time, making any adjustments as needed.
    - Tap **Create.**
- Check your work:
    - Your newly created appointment should be on your schedule for tomorrow.

Reminder: When you complete your exercises, switch the environment from DEMO to PRD using the steps on page 1. You will do your real documentation using your MLH credentials in PRD at go-live.

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