

# Intro Level SimEMR® Use Cases

## 4.5 ADVANCED PROVIDER PROGRAMS

### Introduction

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This lesson will introduce learners in advanced provider roles (MD/PA/NP) to the inner workings of an electronic medical record system while reviewing and managing a patient case. Learners will review basic order entry, data review, and clinical assessment documentation. The forms and documents within SimEMR®, a system designed exclusively for charting in a clinical simulation context, are a representation of charting elements included in real-world EMR systems.

### Learning Objectives

- Navigate components of SimEMR®
- Engage with common medical terminology in an EMR
- Perform basic documentation in an EMR
- Practice basic Provider Order entry
- Incorporate diagnostic testing and review to support clinical decision making

### Resources Needed

- SimEMR® login
- Internet access
- Web capable device

### Content

- Introduction to common healthcare provider documentation using SimEMR®
- Patient case review

### Teaching Strategies

- Tutorial review
- Review of information
- Hands on practice
- Documentation of clinical data

### Time

- *15-20 minutes:* Administration: Patient Profile creation
- *20 minutes:* Learner practice
- *10-15 minutes:* Review & evaluate learner work

# Patient Case & Scenario Overview

## ADVANCED PROVIDER PROGRAMS

**Patient Profile Name:** Anthony Palermo    **DOB:** 06/01/1959

**Scenario:** Mr. Palermo is a 61-year-old male who presents with possible gastroenteritis. He reports a 3-day history of nausea, vomiting (occurring occasionally) and watery diarrhea (occurring at least 4-5 times daily). He and his wife attended a local outdoor gathering recently and he thought he had gotten food poisoning. Symptoms have not relented; upon arising today, he became lightheaded, and his wife insisted he be seen. He states he did continue his anti-hypertensive as able. He presents to the Emergency department for evaluation.

**Profile Overview:** The following patient case includes an overview of the scenario, an overview of learner objectives, and administrative steps required to get started. As you review these materials, bear in mind some similar terms. Patient Profile refers to the electronic patient in SimEMR®. Patient case refers to your overall scenario that uses that patient profile.

**Profile Objectives:** Acclimate the Advanced provider learner to common documentation practices within an Electronic Medical Record, SimEMR®.

**Applications for learners, will include, but are not limited to:**

- a. Introduction to an EMR: Identifying the importance of using one as well as safety factors
- b. Navigate the components of SimEMR®
- c. Engage with common medical terminology in an EMR

### Patient Profile - Anthony Palermo

#### Getting Started

1. Review the Patient Kit Addendum on pages 10 – 12.
2. Create the Patient Profile in SimEMR®.

Refer to the How To: Create a Patient Profile guide for more detailed directions. Overview instructions to create a patient profile are as follows:

- a. At the SimEMR® login screen enter your username and password. Select **[LOGIN]**.
- b. On the dashboard, select either the **[PATIENT PROFILES]** button, or **[PATIENT PROFILES]** in the left side menu.
- c. Click **[+ CREATE NEW PATIENT PROFILES]** in the top right.
- d. Enter Anthony Palermo information. Select **[CREATE]**.
- e. Navigate to your newly created patient, and select the **[⚙]** on the patients row. Select **[PERMISSIONS]** from the dropdown menu.
- f. Uncheck the *Locked* box. Select **[SAVE]**.

- g. Navigate back to Anthony, and select the [⚙️] on the patient row. Select [ EDIT].
- h. Select [ ADD NEW FORM]. to add all forms according to Anthony's Patient Kit.
3. Identify learner objectives.
4. Create a course to assign the newly created profile to. If you are adding it to an existing course, move to step 5.
- Refer to the SimEMR® Quick Start guide pages 2 – 4 for more detailed directions.  
Overview instructions to create a course are as follows:
- On the dashboard, select either the [**MANAGE COURSES**] button, or [**MANAGE COURSES**] in the left side menu.
  - Click [ CREATE NEW COURSE] in the top right.
  - Enter relevant course information and select [**CREATE**].
  - Navigate to the newly created course, and select the [⚙️] on the course row. Using this menu, you can add learners, instructors, and edit the course.
5. Assign the patient profile to learners.
- Refer to the SimEMR® Quick Start guide pages 10 – 14 for more detailed directions.  
Overview instructions to assign a patient profile to learners are as follows:
- On the dashboard, select either the [**PATIENT ASSIGNMENTS**] button, or [**PATIENT ASSIGNMENTS**] in the left side menu.
  - Select the course you are assigning Anthony to. Click [**SELECT COURSE**].
  - Locate Anthony and select [**CONTINUE TO NEXT STEP**].
  - Select simulation time. Click [**CONTINUE TO NEXT STEP**].
  - Add any additional goals and options to the profile. Click [**CONTINUE TO NEXT STEP**].
  - Select [**CONFIRM ASSIGNMENT**].
6. After learners have completed the assigned patient, review their work.

Refer to the SimEMR® Quick Start guide pages 17 – 18 for more detailed directions.  
Overview instructions to review learner work are as follows:

- On the dashboard, select either the [**LEARNER'S WORK**] button, or [**LEARNER'S WORK**] in the left side menu.
- Click [**REVIEW BY PATIENT**] to review all learners in the course at once.  
Click [**REVIEW BY LEARNER**] to review individual learners.

**Be sure to provide learners with the 4.5 - Diagnostic Strip under Attachments on the SimEMR® COVID-19 Relief Effort page!**

# Learner Assignment: Patient Profile - Anthony Palermo

This lesson will introduce the advanced practice learner to diagnostic testing order entry and review in SimEMR®. Common terminology and experiences will be provided. The forms and documents within SimEMR®, are a representation of charting elements included in real-world EMR systems.

Learners will be able to incorporate foundations of common test order entry and data review to increase clinical judgment and decision-making. The ability to integrate appropriate therapeutics into the patient plan of care is paramount for patient safety and cost-effectiveness. Utilization of the best diagnostic options available enhances patient care and provides a foothold for clinician response accuracy.

## Learning Objectives

- Identify the importance of using an EMR
- Safety factors required of an EMR
- Navigate the components of SimEMR®
- Engage with common medical terminology in an EMR
- Perform basic documentation in SimEMR®

## Resources Needed

- SimEMR® login
- Internet access
- Web capable device

## GENERAL INFORMATION

### EMR BENEFITS

Clinical documentation and record retention are critical facets of health care. The ability to easily locate information is often hampered by inability to locate past data, missing pages in the chart or legibility issues when confronted with a paper medical record.

One of the key benefits of using an electronic health record is the ability to find information centrally located in one document, rather than through multiple paper records in various locations. The development of Computerized Physician Order Entry (CPOE) has enhanced expediency and accuracy of care, but still has some limitations based on the providers capability of utilizing the system to its best benefit.

While real EMR documentation programs are variable in format and presentation, the ability

for learners to practice the process of data search and documentation inclusion into an electronic record will provide basic repetitive practice which can be used in any format.

### EMR REQUIREMENTS

Patient safety and security of data are two key variables required in any EMR format.

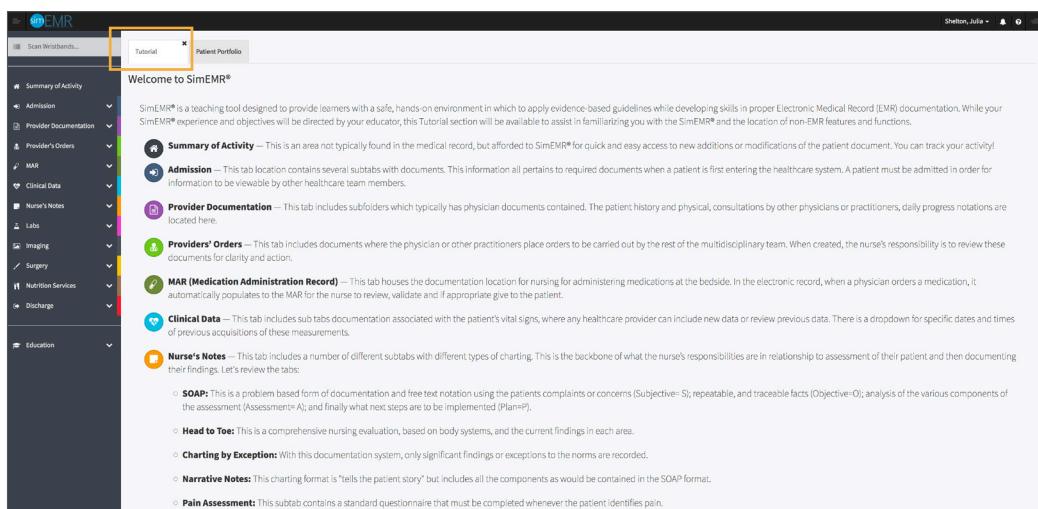
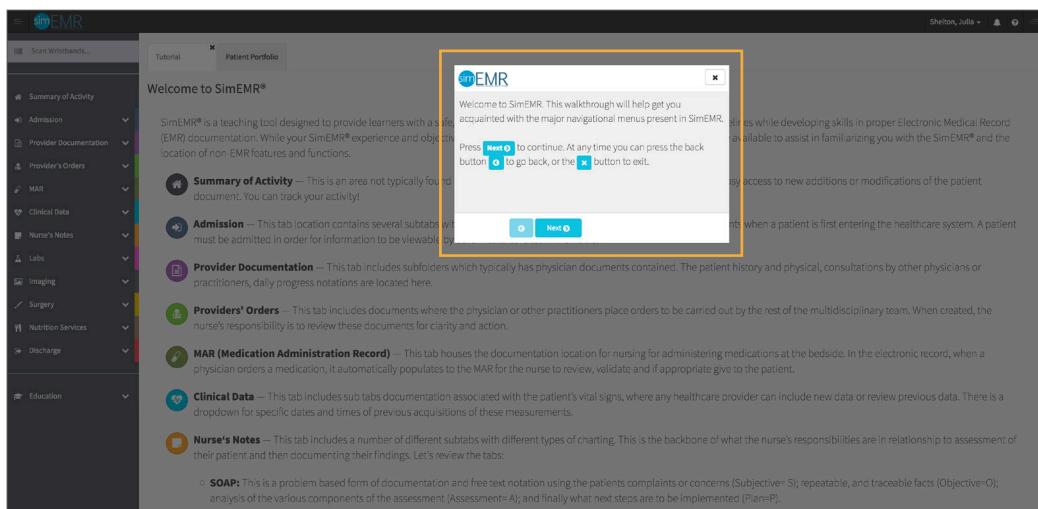
The ability to maintain patient confidentiality is critical. The U.S. Congress enacted the Health Insurance Portability and Accountability Act (HIPAA) in 1996 in order to protect private healthcare and medical information for patients.

Some required safety factors included in any EMR include access restrictions to the program, individual logins, and timeouts for inactivity in attempts to limit inappropriate access to a person's personal information.

## Learner Actions: Introduction to Diagnostic Testing

Following your instructor's guidance, you will proceed to gain access to SimEMR® to investigate medical record information. Prior to moving forward your instructor will have provided you instructions on how to create your account as a new user in SimEMR®. You must have an individual account to access the product (this is a security feature).

1. Open SimEMR® in a web browser.
2. At the login screen, enter your username and password. Select **[LOGIN]**.
3. If needed, review the tutorial options presented in the *Tutorial* tab.
4. Review and familiarize yourself with the interface and content.



5. Locate the *Patient Portfolio* tab. This will house any patient profile records assigned to you. Current assignments will be presented at the top of the page, any past completed assignments will be located at the bottom of the page for reference and review at any time.

The screenshot shows the Patient Portfolio page of the SimEMR software. At the top, there is a search bar labeled "Scan a patient barcode:" with a placeholder "Scan Wristband..." and a magnifying glass icon. Below it is another search bar labeled "Search:". A table titled "Currently Assigned Patients" lists one entry: Palermo, Anthony, with Record No. 1000343499 and Course NUR101-Nursing 101. There are buttons for "Show Instructions" and "Go To Patient". At the bottom, it says "Showing 1 to 1 of 1 entries".

6. Locate Anthony Palermo and select [**GO TO PATIENT**].

This screenshot is identical to the previous one, but the "Go To Patient" button for Anthony Palermo has been highlighted with an orange box.

7. You will be redirected to the *Summary of Activity* page, which includes any recent changes or additions to the patient profile history. To review a new piece of data, click the [**VIEW**] hyperlink at the far right on any document listed.

The screenshot shows the Summary of Activity page. At the top, there is a yellow banner with patient information: Name: Palermo, Anthony, Record No.: 1000343499, Isolation Status: Standard Precautions, Attending Physician: A Johnson, MD, Current Simulation Time: Thursday, 06/01/2020 14:29, Mid Rec: 1000343499, Admin. Date: 06/08/2020, Allergies: Carboxyl, BSA: 2.1036 m<sup>2</sup>, Weight: 89 kg, and DOB: 06/01/1959. Below this is a table titled "Summary of Activity" with columns "Form Name", "Form Date", and "URL". The "View" link for the "Insurance" row has been highlighted with an orange box.

Form Name	Form Date	URL
Insurance	06/08/2020 15:21	<a href="#">View</a>
Diagnostic Strip	06/08/2020 15:21	<a href="#">View</a>
Advance Directives	06/08/2020 15:21	<a href="#">View</a>
History & Physical	06/08/2020 15:21	<a href="#">View</a>
Consent for Treatment	06/08/2020 15:21	<a href="#">View</a>
Admission	06/08/2020 15:21	<a href="#">View</a>
Progress Notes	06/08/2020 15:21	<a href="#">View</a>
Providers' Orders	06/08/2020 15:21	<a href="#">View</a>
Labs	06/08/2020 15:21	<a href="#">View</a>
Labs	06/08/2020 15:21	<a href="#">View</a>
Labs	06/08/2020 15:21	<a href="#">View</a>
Vital Signs	06/08/2020 15:21	<a href="#">View</a>

8. Validate Anthony Palermo is the chart you are working in.

Note that Mr. Palermo was recently admitted to the Medical Surgical Unit and may not have a full healthcare record as of yet.

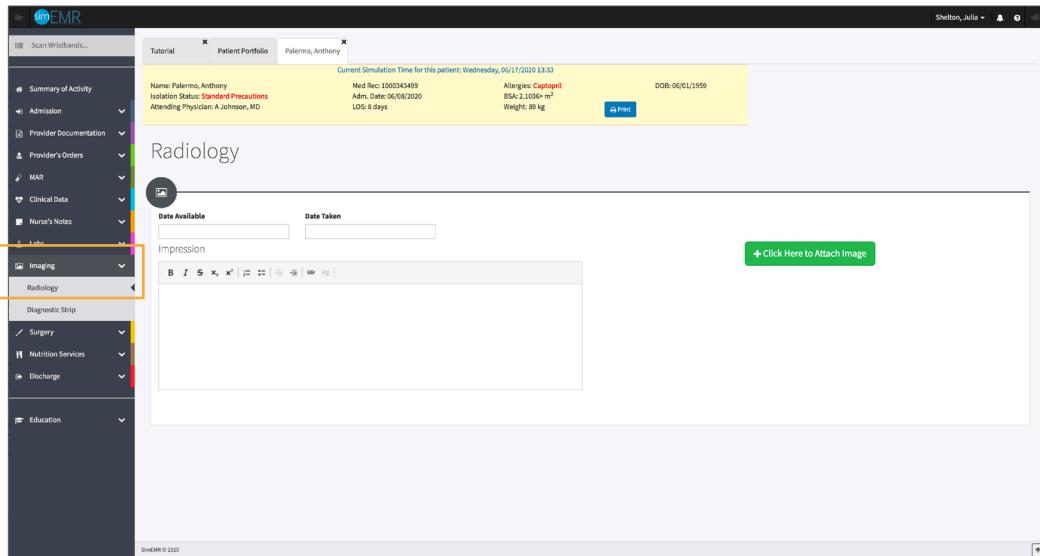
9. Click **[IMAGING]** from the left menu and then select **[RADIOLOGY]**. The form reveals a blank document in Mr. Palermo's case as he has not had a radiologic test ordered to date.

**Date Available:** the date of image order initiation, defaults to current date and time, but can be used to create future radiologic test orders

**Date Taken:** this can be utilized for current or future date options, may or may not be consistent to the date available

**Impression:** this free text box is included so that the provider learner may review the associated patient document image file and render impression on findings; in some patient cases in SimEMR®, an Impression has been provided

**Image:** an area to include an image file by clicking **[+ CLICK HERE TO ATTACH IMAGE]**, while Mr. Palermo has no image to view, if he did, you would click on it to expand it



10. Click **[IMAGING]** from the left menu and then select **[DIAGNOSTIC STRIP]**. This area can house any number of static or motion files that add to the patient case history, most commonly Electrocardiograms (ECG's), Fetal Tracings, Electroencephalograms (EEG's), and telemetry monitor strips.

**Date:** a selectable field depending on the number of files that may be present in the patient chart, clicking the dropdown will reveal additional studies for review

**Date Available:** the date of diagnostic strip order initiation, defaults to current date and time, but can be used to create future radiologic test orders

**Date Taken:** this can be utilized for current or future date options, may or may not be consistent to the date available

**Impression:** this free text box is included so that the provider learner may review the associated patient document image file and render impression on findings; in some patient cases in SimEMR®, an Impression has been provided

**Image:** an area to include an image file by clicking **[+ CLICK HERE TO ATTACH IMAGE]** if there is no image present, however, Mr. Palermo has an ordered image available for review, you may click on it to expand it.

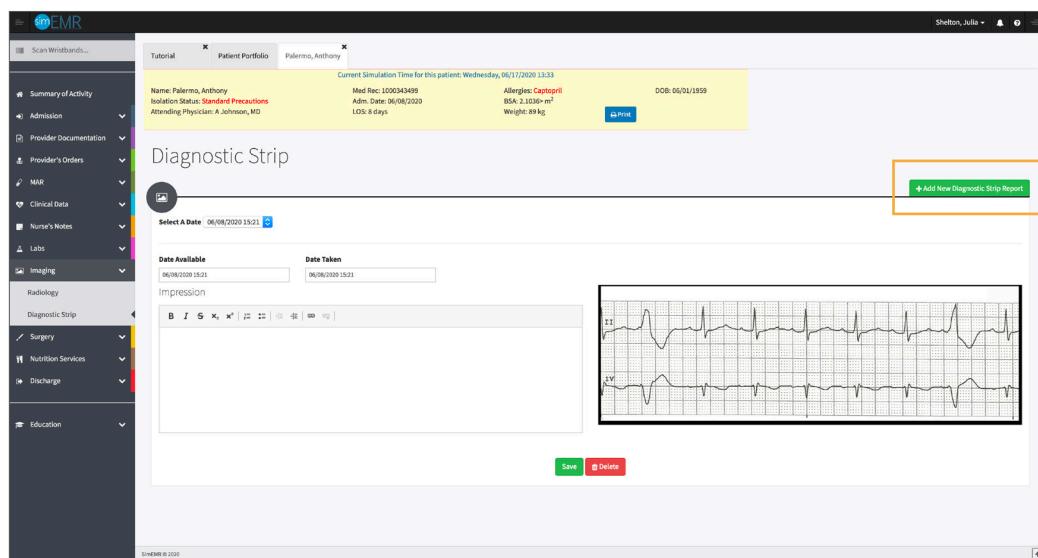
11. Click **[+ ADD NEW DIAGNOSTIC STRIP]**.

**Date Available:** this indicates when the test is completed and able to be reviewed

**Date Taken:** this indicates when the test was obtained from the patient, recall that it may be different from the date available

**Impression:** this free text box to include review information of the image presented

**Image:** an area to include an image file



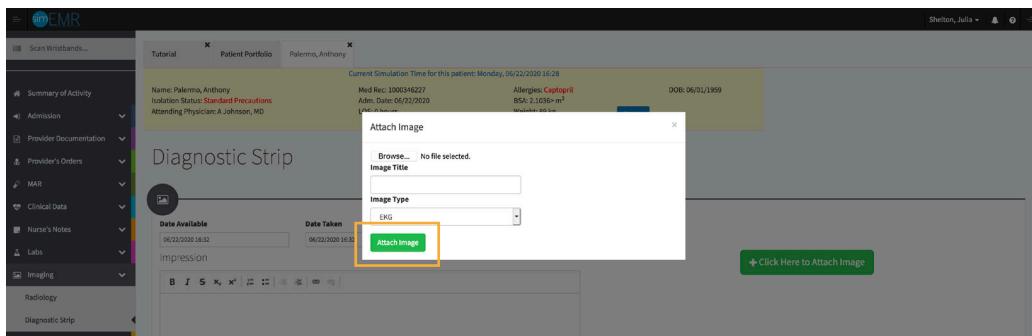
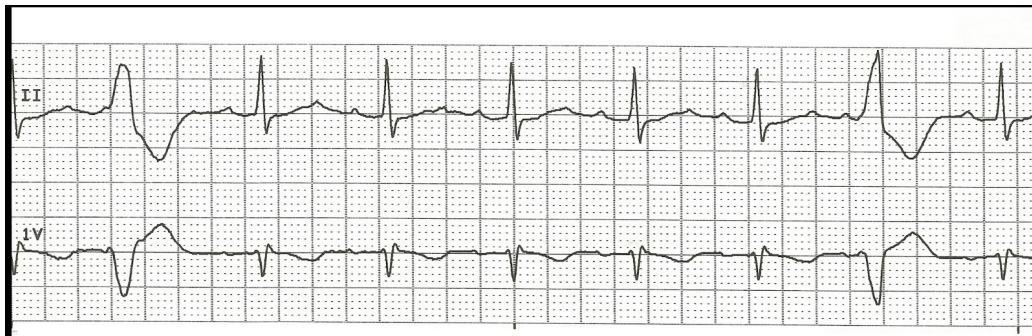
12. Enter the following information:

**Date Available:** current date and time

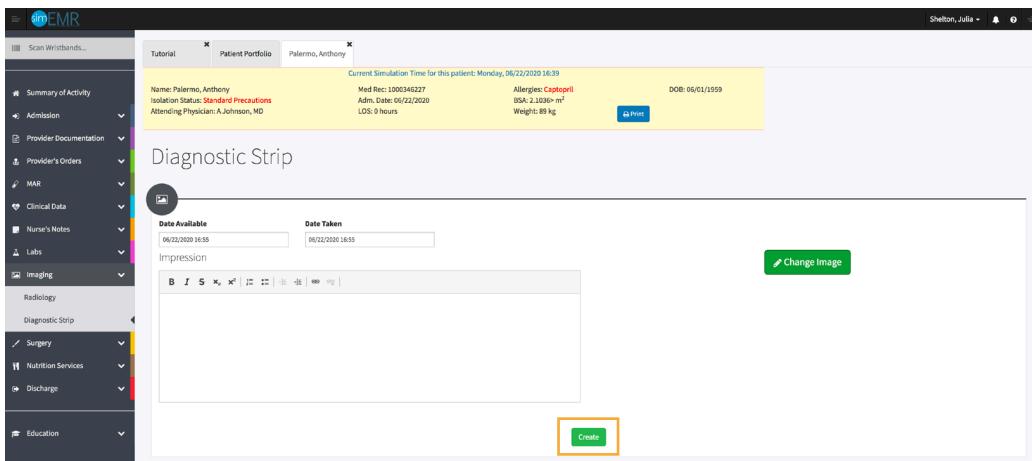
**Date Taken:** current date and time

**Impression:** review information you found from the image

**Image:** upload the image attached to this lesson by selecting **[+ CLICK HERE TO ATTACH IMAGE]**, in the box that appears upload the file as an EKG image type and select **[ATTACH IMAGE]**



13. Click [CREATE].



14. For any forms discussed, add new tests to gain comfort.
15. Close the patient chart by clicking the X on the *Anthony Palermo* tab.
16. Logout by locating the dropdown with your name at the top right of the page, select *Sign Out*.

# Patient Kit Addendum

## ANTHONY PALERMO

<b>Name:</b> Anthony Palermo	<b>DOB:</b> 6/01/1959	<b>Gender:</b> M <input checked="" type="checkbox"/> F <input type="checkbox"/>	<b>Age:</b> 61
<b>Race:</b> Caucasian	<b>Weight:</b> 89 kg/195.8 lbs	<b>Height:</b> 179 cm/5'10"	
<b>Religion:</b> Methodist	<b>CODE STATUS:</b> Full	<b>Advance Directive:</b> Y <input checked="" type="checkbox"/> N <input type="checkbox"/>	
<b>Major Support:</b> Josie, wife	<b>Phone:</b> 654-999-0000	<b>Isolation Status:</b> Std Precautions	

**Allergies & Reactions:** CAPTOPRIL: Shortness of breath and tongue swelling.

**Immunizations:** Childhood only

**Attending Physician/Team:** Andrew Johnson, MD

**Primary Diagnosis:** Gastroenteritis, hypovolemia

**History of Present Illness:** Patient states 3-day history of abdominal pain accompanied by nausea, occasional vomiting, and watery diarrhea. States no dietary changes recently, but did attend an outdoor gathering where food was served. He thought it was food poisoning and would pass, but symptoms have not relented.

**PMH:** Hypertension, Osteoarthritis

**Surgeries/Procedures:** NONE

**Social History:** Married to wife Josie Palermo for 39 years, 2 children not living in the home. Denies tobacco and drug use. Rare social alcohol use, "2 beers monthly." Couple live in a single story home in local area.

**Data:** Blood pressure: 98/50, Heart Rate: 100, Respirations: 20, Temp: 38.8° C

### Review of Systems:

**CNS:** PERRLA, follows commands. Denies visual or auditory changes recently. No fall history. Ambulation not tested but patient walked into triage on his own. Hand grasps and pedal pushes = in strength. Admits to some occasional hip & knee pain due to arthritis. **Pt became lightheaded this am when arising**, prompting wife to bring him in for evaluation. No history of lightheadedness prior to this event.

**Cardiovascular:** Regular rate and rhythm, extrasystoles noted. Peripheral pulses = throughout and weak. No edema noted. Denies chest pain prior to event or current. Skin intact without abrasions. Capillary refill delayed at 3+.

**Pulmonary:** Lungs clear to auscultation, no oxygen in use presently. Denies cough or shortness of breath during event.

**Gastrointestinal:** Abdomen rounded, slightly tender to palpation in lower quads. Hyperactive bowel sounds noted in all quads. States initial event started with nausea, and progressed to frequent watery stools 4-5 x day. Tolerating small fluids initially and has been taking his antihypertensive when able. Attended picnic and anticipated food poisoning was cause of this, but that was 4 days ago.

**Hepato/Renal:** States voids without difficulty

**Endocrine:** No history of diabetes or thyroid issues

**Hematologic:** Non-contributory

**Musculoskeletal:** Hand grasps = and full strength, dorsi-plantar flexion is equal and full.

**Integumentary:** Skin is warm and dry, intact without bruising or abrasions noted

**Developmental:** N/A, well developed male, behavior is appropriate to situation

**Psychological:** Noncontributory at present

## Current Medications:

Patient verbalized medications

Medication (Generic/Trade)	Dose Available	Dose Ordered	Route	Frequency	Parameters/ Instructions	Provider Ordering
Metoprolol (LOPRESSOR)	25 mg	same	PO	2x Daily		Johnson
Aspirin (baby)	81 mg	same	PO	Daily		Johnson

## Laboratory Values, Radiology, or Diagnostic Testing:

Arterial Blood Gas	Chemistry	Chemistry	Hematology	Microbiology	Toxicology
pH:	Na:	AST:	WBC:	Blood C/S:	Dig:
paO <sub>2</sub> :	K:	ALT:	Hgb:	Urine C/S	ETOH:
pcO <sub>2</sub> :	Cl:	Amylase:	Hct:	Sput C/S	Opiods:
HCO <sub>3</sub> :	Co <sub>2</sub> :	Lipase:	Platelets:	VRE:	Coc:
BE/D:	BUN:	Tot Prot:	ESR:	MRSA:	Amph/Meth:
Lactate:	Cr:	Albumin:	Other:	C-Diff:	PCP:
PA Sat:	Ca:	LDL:		GNR:	THC:
<b>Coagulation</b>	<b>Mg:</b>	<b>HDL:</b>	<b>Other Tests</b>	<b>MDRO:</b>	<b>Lidocaine:</b>
PT:	Phos:	Trig:	CBS:	VDRL:	MetHgb:
PTT:	Gluc:	CPK total:		GBS:	
INR:	HgA1C:	CPK MB:			
d-Dimer	Lactate:	Troponin:			

CXR:

CT/MRI:

US:

EEG:

ECG: Pending Order

Other:

# SimEMR® Forms

Below contains an explanation of how the patient is entered into SimEMR®, as well as the reasoning behind each of the patient forms created as a part of that process.

LAB TIP	i
<p><i>Simulation Start</i> is the time the student first begins the encounter. This notation is part of SimEMR's innovative SimTime™ system. <i>Simulation Start</i> will be replaced in the patient's chart by whatever time the encounter begins, and all other dates are described relative to that time. For example, if an encounter begins 04/15/2017 at 13:00, an event with a time of 1 day before simulation start would display a date of 04/14/2017.</p>	

## At Simulation Start

**Purpose:** All activities are designed to allow the learner to evaluate initial findings

### Insurance

**Description:** All insurance information is documented including the patient name, address, employer and employer phone

### Diagnostic Strip

**Description:** A Diagnostic Strip report is available

### History & Physical

**Description:** All *Past Medical History*, *Review of Systems* and *Social History* fields are complete

### Consent for Treatment

**Description:** Shows the patient and witness have signed the form

### Admission

**Description:** Info selected include *Standard Precautions* check box under Isolation Status, the admitting physicians and diagnosis, as well as *Patient Information*

### Progress Notes

**Description:** The patient's status is documented

### Provider's Orders

**Description:** Order for 25 mg Demo Dose® Lopre 25mg Tablet BID PO Scheduled Hold for SBP < 90, or apical HR < 50., 1000 mL Normal Saline 0.9% Solution 1000mL IV ONCE IV Continuous Infusion, and 4 mg Demo Dose® Ondansetron (Zofrn) 2mg Injection 12 HR IV PRN Nausea

### Labs

**Description:** Chemistry, Hematology, and Coagulation labs were all documented

### Vital Signs

**Description:** Vital inputs for include *Temperature* (38.2° C), *Temperature Method* (Tympanic), *Blood Pressure* (98/50), *Blood Pressure Method* (NIBP), *Pulse* (88), *Pulse Location* (Apical), *Oxygen Saturation* (99), *Oxygen Device* (Room Air), *Respirations per Minute* (20)