



Wave 5 Go-Live Super User Handbook

St. Mary's Health Care System

Updated 10/13/2022

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Thank You

Dear Super User,

We cannot thank you enough for your commitment to the success of the TogetherCare implementation. Super Users have been and continue to be central to the success of this program. You are Trinity Health's invaluable internal TogetherCare experts. And, we are grateful.

Thank you for taking time from your personal lives and loved ones to help ensure a successful Wave 5 go-live. You've inspired us all!

Sincerely,

A handwritten signature in black ink that reads "Jennifer Wallace".

Jennifer Wallace

Vice President and
TogetherCare Transformation Officer

A handwritten signature in black ink that reads "Laura Williams".

Laura Williams, M.D.

Vice President and
TogetherCare Transformation Officer

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This information applies to super users providing support during the soft go-live period only.

Soft Go-Live begins two weeks prior to go-live and is the go-live for ambulatory and acute Patient Access. The purpose of the soft live is to schedule and preregister patients in Epic for appointments occurring after go-live. During soft live, both the legacy and Epic systems are used for scheduling and registrations based on the date of the appointment:

- Appointment before go-live: use legacy system
- Appointments after go-live: use Epic

Super User Role at Soft Go-Live

Super users support the end users as they practice scheduling and registering patients in Epic. You are there to assist with questions and give tips if necessary.

Arriving at Soft Go-Live

Report directly to your shift location. If you need help finding where to go once on site, stop at the hospital information desk or inquire at the front desk of an ambulatory location.

Meals During Soft Go-Live

- **Hospital Locations**
Super users will receive a badge buddy to use at the cafeteria.
- **Non-hospital Locations**
If you are located at an ambulatory location, please plan on ordering food for delivery. You will receive reimbursement as outlined in the travel policy.
- **All Super Users**
If you prefer to bring your own food, you may. However, access to refrigeration or microwaves may be limited.

As a super user, your role at go-live is to be dedicated, at-the-elbow support for our end users. When on the floor during your shift, you will:

- Introduce yourself to the department leader and colleagues upon arrival.
- Be visible.
- Actively offer help - some colleagues aren't as willing to ask for help and need the proactive offer of support.
- Stay positive and encouraging.
- Answer end users' questions as they use the system.
- Troubleshoot and report any error messages, printing issues, security problems.
- Be the link between end users and the Command Center Help Desk for issues and problem resolution.
- Identify and report workflow and/or system configuration improvements
- Observe as the colleague goes through the workflow and offer support when:
 - The colleague is stuck.
 - The colleague has done something incorrectly.
- There may be times during go-live that are slow—either because the staff is not as busy or because the users are navigating more easily. At these times:
 - Continue to observe how colleagues use the system.
 - Let them know you're watching to learn about their workflow.
 - Offer tips for efficiency.
- If the area you are assigned is slow, please check in with the local leader. That leader will contact the Command Center when necessary and they will determine if another location might need additional assistance or whether support staff should be redeployed.

Tips and Reminders

- Explain to users the “why” behind the workflow in addition to showing them “how.”
- Don't estimate how long you think a ticket will take. We do not want to set unrealistic expectations.
 - Fixes need to be triaged, corrected, tested and approved through change control.
 - Some changes will also require governance review.
- Carry pen and paper with you to take notes of observations and issues
- It is not appropriate to read, talk on the phone, check email or do other work while on the floor assisting end users.

Shift Check-in Super Users

Acute Super Users

All super users should check-in at the Welcome Center at their location. At the Welcome Center, you will receive a vest that will identify you as a super user.

There is a Welcome Center at:

- St. Mary's - Athens – Main Entrance Atrium
- Good Samaritan - Greensboro – Administrative Conference Room – Enter through ER Entrance
- Sacred Heart - Lavonia – Private Dining Room – Enter through Wellness Center Entrance

Ambulatory Super Users

For clinics not on a hospital campus, you will be welcomed by the Clinic Manager upon arrival to the clinic.

Dress Code

- Wear your normal work uniform or attire.
 - This includes scrubs.
 - If you do not have a uniform, please wear business casual attire.
- A mask is required to enter the building. You will receive additional PPE as appropriate to use during your shift, if needed.
- Denim and open-toed shoes are not permitted.
- Super users will be provided a vest to wear, so you are easily visible to end users in need of assistance. They are **black & white stripped Referee Vests**. Please always wear this vest when providing super user support.

Daily Shift Reminders

- Check into the Welcome Center daily. On your first day, you will receive a Super User Vest and a tote bag. You will also receive a meal voucher if you are scheduled for the last week of go live.
- Give yourself enough time to get to your location and to connect with outgoing super users.
- Remember to bring your super user vest. You will need to wear it for all shifts.
- Upon arrival to your unit/department, please check in with the front desk or nursing station. The designated leader will orient you to the location.
- Touch base with any super users leaving from the previous shift, if applicable.
- If you are reporting to a locked unit, please use the doorbell or buzzer to gain access.
- Before your shift, review the command center Top 10 information and service line operational huddle notes in the super user [website](#) or on the [TogetherCare Go-Live OneSource](#) page.
Note: You can now access OneSource from a mobile device. [Learn more](#)

COVID-19 Screening

Please follow all SMHC infection prevention protocols such as wearing a mask, proper hand hygiene, social distancing, etc.

What to Do in an Emergency

If you are sick or cannot get to your shift due to another unexpected situation, please call the Athens Command Center at **706-389-3680**. Please also inform your Health Ministry's super user coordinator via email of your absence at that shift.

Super users from St. Mary's Health Care System should call their manager if they are unable to fulfill their shifts.

Time Tracking and Reporting

Super users should follow their home Health Ministry's standard time tracking system. Please work with your manager if you have questions about performing these tasks while off site. Super users reporting to their home ministry will punch in at the beginning of their shifts as usual.

How to Identify Third-Party Super Users

Super user support from third-party vendors Deliver Health, Healthrise and CSI will wear their company lanyard and a super user vest. These super users also can help our internal super users who get stuck while assisting an end user. Epic employees will also be rounding.

Meals and Breaks

- **Hospital Locations**

Main cafeterias at all three sites are open and are available for use. The Superuser badge buddy identification tag will be used for food service while at the sites. These will be distributed by the Welcome centers during check in and can be used in the cafeterias at Good Samaritan, Sacred Heart and on the Sister Sarah's patio in Athens. *The cafeteria hours are available at the Welcome Center and no overnight food service (accept external delivery services) are available at the sites.*

- **Non-hospital Locations**

If you are located at an ambulatory location, please plan on ordering food for delivery. You will receive reimbursement as outlined in the travel policy.

- **All Super Users**

If you prefer to bring your own food, you may. However, access to refrigeration or microwaves may be limited. Please check with the Welcome Center or local colleague at an ambulatory site regarding options available to you.

End of Shift

- Allow time to hand off to new super users coming on the next shift.
- After your shift, you are free to return to your hotel or home.
- There is no formal check-out process.
- **Travelers:** Hospital locations have a room for secure luggage storage if you need to check out of the hotel before your last shift. Check with the Welcome Center for location.

Roles, Responsibilities and Processes

When Should I Contact the Help Desk?

All end users should find a super user to triage and assist with their issues. This will help ensure issues are prioritized appropriately, and try to work with you first to answer the question prior to submitting the issue to the Help Desk.

If you call in an issue, you must provide the end user's phone number. Whenever possible provide the phone number that goes directly to the end user that is reporting the issue or their manager.

For non-critical issues follow the process on the next page.

What Tools Are Available to Super Users?

- [Go-Live Resources](#): Here, users will find resources like training materials, the super user handbook, logistical information, and more.
- [Tip sheets](#) are available on the TogetherCare Training Page and also linked directly from each user's Learning Home Dashboard.
- Daily email communication with summary of new tip sheets and important information.
- The [super user website](#) has tip sheets, update meeting presentations and location information available for you. This site is available off the Trinity Health network.

Command Center Logistics

Centralized Support: TogetherCare Command Center

The TogetherCare project team leadership will be at the TogetherCare Command Center at System Office in Livonia. A single, centrally located command center is most common for go-lives involving multiple applications or multiple sites, as it allows collaboration between project team members, clearer issue communication and resolution, and a centralized pool of talent to address prioritized issues. This structure will rely heavily on local support to identify and communicate issues and requires service desk staff to triage issues effectively.

How to get assistance with Epic during the TogetherCare implementation

During the first three weeks following the TogetherCare go-live, there will be several resources available to support you. In order to get the most out of each of these resources, it is important to understand when to engage them. To ensure the most efficient resolution to your TogetherCare-related issue, review the following support details and end user expectations for critical and non-urgent issues:

CRITICAL ISSUES – Immediate patient care impact or workflow stoppage – Look for Super User / At-the-Elbow support before calling TogetherCare Help Desk

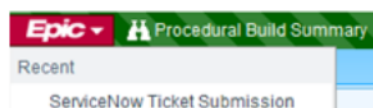
If you are facing an urgent issue or a workflow stoppage, look for a super user or other at-the-elbow support in your area. **This is the best option to resolve your issue quickly.**

If at-the-elbow support cannot resolve your issue, and there is critical impact to patient care, a call should be placed to the TogetherCare Help Desk by calling **762-234-4357 or Ext. 24357 from an internal phone.**

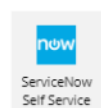
NONURGENT ISSUES – No immediate patient care impact and no workflow stoppage – USE ONLINE FORM

To help ensure the phone lines and help desk staff are available for critical issues, staff must utilize the online [TogetherCare Wave 5 Go-Live Incident Reporting form](#) for non-critical Epic related issues and system change requests. The online form can be launched from several locations including:

1. Directly within the Epic application (from Help menu)



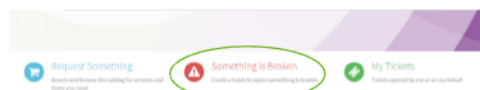
2. Using the ServiceNow Self Service icon in ZENworks window on desktop



3. From the [TogetherCare Go-Live Resources site](#) menu

TogetherCare Go Live Resource Center

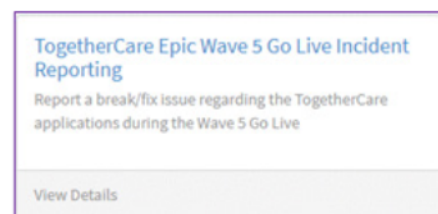
Once in the ServiceNow Self-Service Portal, select "Something is Broken":



Choose the "TogetherCare Epic Go-Live Incident Reporting Catalog Item ONLY! Use of this Catalog Item will ensure the correct routing of your issue and the highest priority.

- Complete all fields in the form
- Provide a screenshot of error messages
- Provide at least one direct call back number for any necessary follow up

For more information on the issue submission process during Epic go-live, visit the [TogetherCare Go-Live Resources site](#).



Regional/Local Support: Local Command Center, Welcome Center, and Operational Hubs

In addition to the centralized TogetherCare Command Center, on-site command centers will be located at sites going live. This setup allows for easy access to users and computers to troubleshoot issues. There are three types of centers:

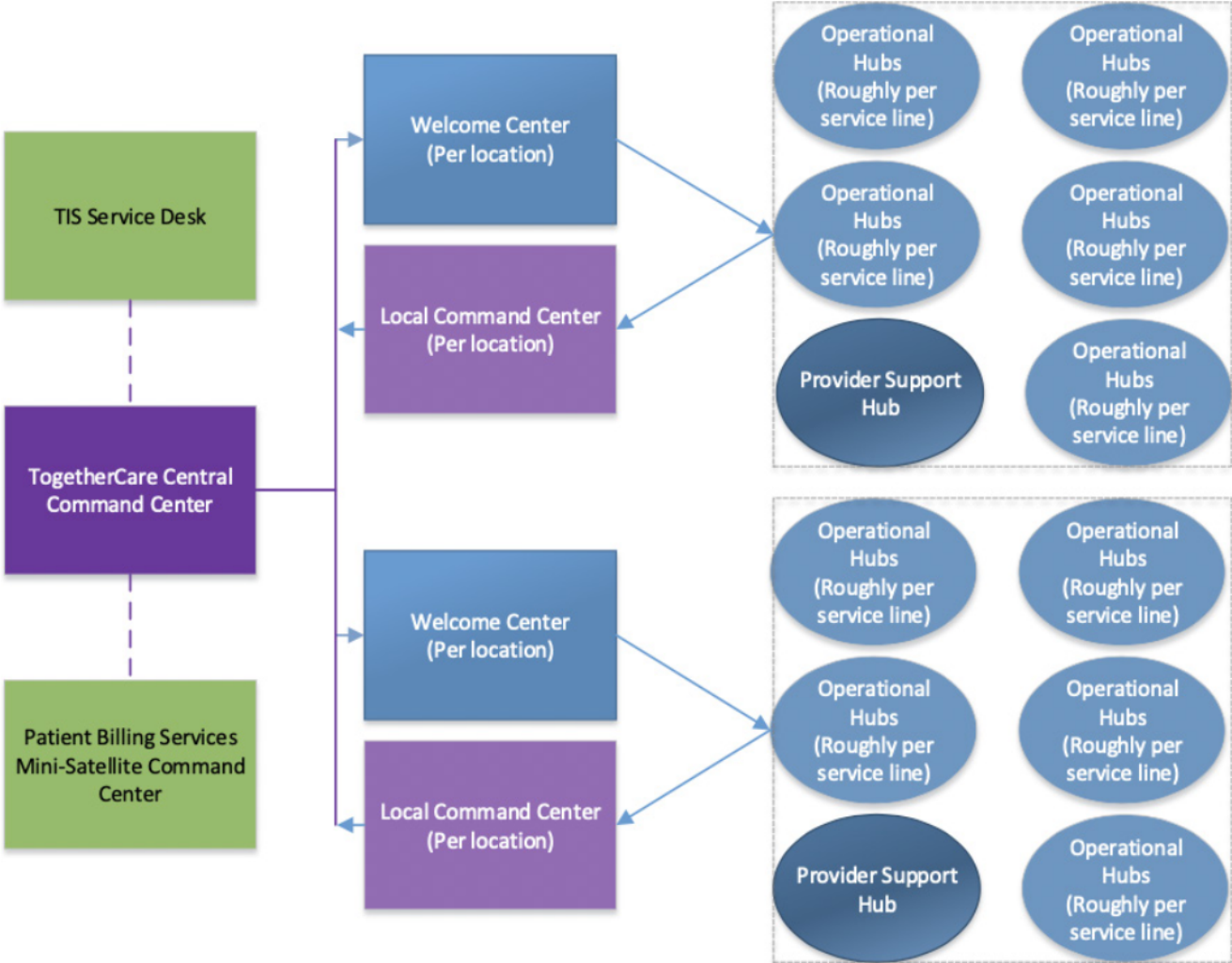
Local Command Centers will be used as a “home base” for TogetherCare team members and third party vendors who need direct access to users, hardware, workstations, and local leadership. This includes local TIS and device/hardware support. One Local Command Center will be stood up per major location or billing office to support triage of issues, and rapid deployment of resources to users.

Welcome Centers will be used as a “home base” for Super Users to check-in, collect any welcome materials/vests, receive location instructions, and receive any critical communication. Super users are essential to ensure end users understand workflows and tools and should be the first point of contact for an end user experiencing an issue. Welcome Centers will be staffed by local colleagues. One Welcome Center will be stood up per major location or billing office.

Operational Hubs will leverage operational leaders to support process and workflow change questions. A virtual Operational Hub will be stood up per service line, per location to help address questions, mitigate process changes, and help the TogetherCare team prioritize issues based on operational, user, and patient impact. Operational Hubs will leverage the Readiness Adopters who have been engaged throughout the Readiness and Activation periods of the TogetherCare project, including their front line process knowledge.

Health Ministry operational lead will host a daily prep meeting with department resources to identify key issues and overall status for the day. These Operational leads will attend a TogetherCare team hosted Operational Huddle to work with all wave Health Ministries to discuss overall operational status and agree on top issues and successes.

Overall Structure





Help Desk Number

762-234-4357 or ext. 24357

After dialing this number above:

- **Press 7 to reach the Command Center Help Desk**
- Additional prompts
 - **Physicians** – press 1
 - **Security** or access issues – press 2

Command Center

St. Mary's Hospital Athens: 706-389-3680

St. Mary's Sacred Heart Hospital Lavonia: 706-389-3680

St. Mary's Good Samaritan Hospital Greensboro: 706-389-3680

Security

In an emergency call 111



Can I take a Lyft to the airport, so that I do not have to pay for parking?

This is an allowed expense if mileage (less daily commute mileage) & long-term parking is more than the round-trip transportation to and from the airport. It must be clearly documented each time.

Example - you go on a 4-day business trip and your daily commute to work is 30 miles RT.

Round-trip mileage to airport = 70 miles

Less 4 days commute X 30 miles = 120 miles

No mileage allowed (70-120)

Parking 4 days @\$18 = \$72

Total parking and mileage = \$72.

How do I sign up for Lyft?

STEP
1

Create your Lyft business profile

To sign up, please go to our [Lyft Business](#) Profile Signup page and enter your work email address.

STEP
2

Download the Lyft app

Check your Lyft app on your phone to find your new business profile.

STEP
3

Enjoy smoother business rides

Make sure to select your business profile in the Lyft app when riding for business.

Trinity Health colleagues receive a special rate when using Lyft business. Taxi and other ride share services are reimbursable if used. When possible, schedule transportation a day in advance to limit delays.

I am driving to go-live, can I use my own vehicle, or do I need to rent a car?

Please refer to the Trinity Health Travel Policy section below:

Auto/Car Rental – appropriate if the total cost of the rental including gas is less than mileage reimbursement cost for use of a personal vehicle. If a rental is more expensive than alternative means (e.g., mileage, cab, hotel shuttle, etc.) reimbursement may be limited to the least expensive option. Colleagues using personal automobiles on company business are required to carry the liability and auto/no-fault insurance limits required by the state in which the car is registered. Gasoline, auto repair, and towing are not reimbursable.

I am flying to go-live, how do I get to my hotel?

Trinity Health will not be scheduling shuttle service for airport transportation. Ground transportation to and from shifts will be shared through email and the super user app.

What should I do if I do not have a corporate credit card for incidentals, meals, etc.?

Utilize personal payment methods including credit card, debit card, cash, and submit for reimbursement, completing the form that you use at your ministry. If you are uncomfortable/unable to utilize a personal card, please contact your director.

What is the refueling rental car policy?

Pre-purchase of fuel should be declined. Colleagues are expected to refill the gas tank before returning a car to avoid surcharges and higher gas prices.

Do I need to pay for parking at the hotel?

No. Parking at all hotels is on-site and included in the room rate.

Are tolls and parking expenses reimbursable?

Yes. Note: Rental car toll packages are not approved. You must travel with change to pay for tolls.

Will I have to provide a deposit at the hotel upon check-in?

No. All deposits have been waived by the hotel so you will not be required to provide a credit card upon check-in. However, you will need to utilize a personal credit card for any incidental expenses. Examples of incidental expenses include food at hotel restaurant, alcohol, gift shop expenses, etc.

Is there a shuttle from my hotel to my go-live support location?

Shuttles will not be provided for shifts. Ground transportation updates will be available through the super user app.

Where do I park at the ministry/ambulatory location if I have a rental car?

Parking maps for the hospitals are included in the location specific information in this handbook. All other locations, please park in an available spot. There is no fee for parking.

Does Trinity Health provide breakfast and lunch?

Travel has negotiated complimentary breakfasts at some hotels and grab-and-go options for purchase at others. Please check with your hotel's front desk on what options are offered.

Who do I contact in the event of a travel emergency?

In case of a flight-related emergency, please contact our Travel Management Company, Conlin Travel 8:00 AM - 5:00 PM Eastern at: **1-800-783-9559; Conlin Travel Emergency after-hours: 1-800-823-1189**

Other travel-related emergencies, please contact Gina Bono at bonog@trinity-health.org or 1-810-516-6285

For non-emergent issues that can be addressed during business hours, please e-mail raegan.movinski@trinity-health.org.

Where can I find recommendations for local dining options?

Ask hotel staff for local restaurant recommendations. Travel websites or Yelp can also be used as a resource.

What are the rules for food stipend, alcohol, and other travel expenses?

Please see the Trinity Health Travel Policy for details.

- An original itemized receipt is required. Must list all food and beverages purchased. A receipt that only includes the total cost is not accepted.
- Alcohol is not a reimbursable expense.
- For business travel, Trinity Health has established daily meal maximums based on IRS published daily rates. These rates are for three meals daily and cannot exceed this limit.

Colleagues should use discretion when some meals for a given day are provided. For example, if breakfast and lunch are provided, you should not spend your full stipend on dinner.

What happens if my super user shift is shorter than scheduled?

If your Super User shift ends earlier than scheduled, or you are asked to come in later than scheduled, you will be paid for your scheduled time, as well as for your actual travel time.

How do I log time or “clock-in” while traveling?

Follow the remote clock-in process for your Health Ministry. Non-exempt colleagues should clock-in using their ministry’s local number. You will need your colleague number.

How will travel and compensation approval occur?

Your manager will review and approve travel hours and reimbursements submitted to ensure the time seems accurate/appropriate and that all expenses are consistent with the travel reimbursement policy.

How do I submit reimbursement for travel expenses?

Contact your super user coordinator or manager for your health ministry’s expense reimbursement form and follow your health ministry’s reimbursement procedures.

How are exceptions handled?

All exceptions are handled on a case-by-case basis. If you have a special circumstance or issue that arises, exceptions will require the approval of the HM Accountable Executive (AE), or appropriate HM TogetherCare leadership member deputized by the AE.

If I am out of town for an extended period as a super user, can I charge laundry?

Although the Trinity Health Travel and Business Expense Reimbursement Procedure does not provide for reimbursement of laundry or dry-cleaning services, exceptions may be granted for extended travel.

Trinity Health will reimburse super users for laundry services incurred as follows:

- Any super user out-of-town in excess of seven (7) nights will be allowed reasonable reimbursement of laundry.
- Every effort should be made to utilize self-service laundry at the hotels, if available. In these instances, please retain receipts if available. If receipts are not available, please document amounts for reimbursement.
- Reasonable charges for laundry services provided by hotel or dry cleaners will be reimbursed with a detailed receipt of items processed.

I got in an accident with my rental car, what do I do?

In the event of an accident:

- Always contact the police and file a police report.
- Vehicle registration and proof of insurance are located in the glove box of each rental vehicle.
- Do not discuss fault or assign blame to other parties or yourself.
- Seek medical attention for yourself and other injured parties.
- If other vehicles are involved, make sure you write down all other parties' information including their names, addresses, telephone numbers, insurance carriers, policy numbers, agents name, insurance carrier's telephone numbers, as well as their vehicle's year, make and model.
- Write down the names and telephone numbers of any witnesses to the accident.
- Report the claim to the branch you rented from (brand specific).

Include as much information as possible

If branch is unavailable, contact Emergency Road Service:

National U.S. 800-367-6767

Enterprise 800-307-6666

- Return the vehicle to the rental office as soon as possible. If the vehicle is not drivable (or was towed), provide the tow company information to the rental location or Emergency Road Service.
- Contact your immediate supervisor and your Risk Manager to report the accident and to report whether or not you were injured in the accident.
- Collaborate with your risk manager to report the accident to ESIS.

Welcome to the St. Mary's Health Care System TogetherCare go-live!

At St. Mary's, we are dedicated to our mission to be a compassionate and transforming healing presence in the communities we serve.

St. Mary's is much more than a hospital. We are a health care ministry that includes three hospitals, numerous physician practices, our region's first medical residency program, one of the state's pioneering home health care/hospice services, a retirement community, extensive outpatient services, and much more.

We are proud to be part of Trinity Health, one of the nation's largest Catholic healthcare organizations. Partnering with Trinity, we not only are able to bring the strength of a national healthcare ministry to our communities, but we are also on the leading edge of helping to develop best practices that will have an impact across America.

There are three acute care locations, St. Mary's Hospital (Athens), Sacred Heart Hospital (Lavonia), and Good Samaritan Hospital (Greensboro), as well as over 25 clinic locations within these markets. To find information on a specific location, use the link below.

[Find a Location | St. Mary's Health Care System](https://stmaryshealthcaresystem.org) (stmaryshealthcaresystem.org)

Emergency Alerts and Codes

Emergency Line: 111 on campus or 911 off campus

24-Hour Integrity Alert Line: 866-477-4661

The following codes or alerts may be paged overhead:

Code Name	Definition
Facility Alert	<ul style="list-style-type: none">• Utility / Technology Disruption• Evacuation / Relocation• Hazardous Material Spill• Mass Casualty Incident• Severe Weather Warning or Watch
Security Alert	<ul style="list-style-type: none">• Missing Person• Person Threatening Situation• Intruder / Active Shooter / Hostage Situation• Bomb Threat• Controlled Access• Disturbance
Code Blue	Medical Emergency
Code Red	Fire Alarm

St. Mary’s Hospital

1230 Baxter Street
Athens, GA 30606

Command Center	706-389-3680
Main Hospital Number	706-389-3000
Security	Emergency: 111

Welcome Center

Atrium Lobby
Oct. 29 – Nov. 18
6:00 - 9:00 a.m. and 6:00 - 9:00 p.m.
On-call 8:00 a.m. - 4:00 p.m.
Enter through Main Entrance on Baxter Street
side of hospital

Entrance Hours

Emergency Entrance 24/7

[Campus and Parking Map](#)

[Location Information](#)

St. Mary’s Sacred Heart Hospital

367 Clear Creek Pkwy
Lavonia, GA 30553

Command Center	706-359-7910
Main Hospital Number	706-356-7800
Security	Emergency: 111

Welcome Center

Private Dining Room
Oct. 28 – Nov. 11
6:00 - 9:00 a.m. and 6:00 - 9:00 p.m.
On-call 8:00 a.m. - 4:00 p.m.
Enter through Wellness Center Entrance

Entrance Hours

Wellness Center open 24/7

[Campus and Parking Map](#)

[Location Information](#)

St. Mary’s Good Samaritan Hospital

5401 Lake Oconee Parkway
Greensboro, GA 30642

Command Center	706-453-5001
Main Hospital Number	706-453-7331
Security	Emergency: 111

Welcome Center

Conference Room – First Floor near Café
Oct. 28 – Nov. 11

6:00 - 9:00 a.m. and 6:00-9:00 p.m.
On-call 8:00 a.m. - 4:00 p.m.

Enter through Emergency Department
ambulatory entrance

Entrance Hours

ER Ambulance Entrance open 24/7

[Campus and Parking Map](#)

[Location Information](#)

Epic is an integrated system with many users. To keep order among the many parts, there are locks to control who can edit certain data at a given time. While being locked out of a patient's chart can be frustrating, especially if it interrupts your workflow, knowing how and why a lock happens is crucial.

Epic uses locking to prevent conflicting information from being documented (e.g. two users changing the same order at the same time) and to prevent potential duplicate entries and clinical errors (e.g. two users filing information to the same flowsheet row at the same time)

- Avoid keeping the patient's chart open unless you are actively documenting on the patient, as this best prevents locking others out of the chart.
- As long as a locked chart area is still open, you will retain the lock. For each open patient chart, the lock remains active, even if you are not actively working on that chart.
- When part of a chart is locked by another user, you can still see that part of the chart and document in other parts.
- If you are finished actively documenting on a patient, close the chart by clicking the X on the tab with the patient's name.

Locking Groups

Area	Activity or Navigator Section	How Does it Lock
Allergies	Both	Updating allergies in either the Allergies activity or navigator section will lock other users from editing allergies.
Annotated Images	Activity	Opening this activity to edit will lock other users from editing.
Care Plan	Activity	Multiple users can be in the care plan documenting on problems, goals and interventions at the same time. However, if a user is modifying a problem another user cannot edit a goal attached to that problem. If a user is editing a goal, it is locked and no one else can edit or document against it.
Care Teams	Activity	Opening this activity to edit will lock other users from editing.
Continued Care and Services Coordination	Navigator Sections	Opening these sections to edit will lock other users from editing them. Users can be updating different sections (Destination, DME, etc.) at the same time but only one person is allowed in each section at one time.
Demographics	Activity	Opening this activity to edit will lock other users from editing.
Discharge Milestones & Expected Discharge Date	Navigator Sections	Opening either of these sections to edit will lock other users from editing either of them. These Sections do not auto-close when leaving them, so be sure to close them after editing. Registration, case management, and bedside clinical users are likely to use these sections so they can commonly be in the same patient chart at the same time.
Doc Flowsheets	Activity	Flowsheet locks are very rare as it requires two users to be trying to file information into the same row at the same time. Multiple users can access and document in the same template at the same time without issues.

Area	Activity or Navigator Section	How Does it Lock
Document List	Activity	Opening this activity to edit will lock other users from editing.
Episodes of Care	Activity	Opening this activity to edit will lock other users from editing.
Follow-Up	Navigator Section	Opening this activity to edit will lock other users from editing.
Health Maintenance	Activity	Opening this activity to edit will lock other users from editing.
History	Both	Updating patient history in either the History activity or navigator section containing history information will lock other users from editing history.
Level of Service	Both	Opening this activity to edit will lock other users from editing.
MAR	Activity	MAR locking is limited to multiple users trying to administer the same medication at the same time. Multiple users can be in the MAR activity to view information or document against different meds but a medication will lock for other users when the admin window is opened.
Media Manager	Activity	Opening this activity to edit will lock other users from editing.
Notes	Activity	Two users cannot be documenting in the same note at the same time. Multiple users can be in the Notes activity and writing different notes at the same time, but not editing the same note. Example: If a resident is editing their note, the attending cannot open that note to edit and cosign at the same time.
OB History	Navigator Section	Updating obstetric history in either the History activity or navigator section containing history information will lock other users from editing.

Area	Activity or Navigator Section	How Does it Lock
Patient Education	Activity	Opening this activity to edit will lock other users from editing.
Patient Instructions AVS Sections	Navigator Sections	Opening these sections to edit will lock other users from editing them. Users can be updating different sections (Medications, Activity, etc.) at the same time but only one person is allowed in each section at one time.
Problem List	Both	Updating problems in either the Problem List activity or navigator section will lock other users from editing. Note: When someone is editing a patient's problem list, no one can edit that patient's history.
Utilization Review	Utilization Review	Opening this activity to edit will lock other users from editing.
Visit Diagnoses	Navigator Section	Opening this section to edit will lock other users from editing.
Visit Info	Navigator Section	Opening this section to edit will lock other users from editing.
Vitals (ambulatory)	Navigator Section	The ambulatory vitals navigator section will lock when it is being edited. It will also lock the history activity when history items in the vitals section are edited. Note: This does not apply to the flowsheet navigator section used by inpatient. Both of those support multiple users editing at the same time (see flow-sheet locks for more info).

Patient Merges

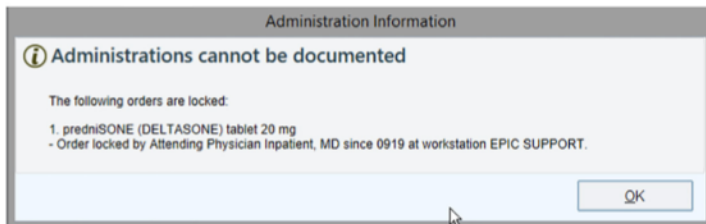
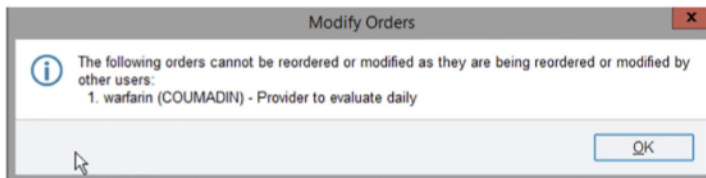
Require an entire lock on the patient record. This includes merging temporary patients with a real patient. No user can have any lock on the patient for a merge to occur.

Orders Specific Locks

Locks regarding orders, both procedure and medication orders, can be fairly complicated and vary depending on which activity you are using to review, place, or modify orders.

Modifying Orders

- Multiple users can place orders for a patient at the same time without the chart locking. A patient lock is initiated when a user is signing orders for a patient, so multiple users cannot sign orders at the same time, but they can simultaneously queue up orders.
- Editing a single order (to reorder or modify the order) will lock other users from editing that order. This will also lock a medication order from being administered on the MAR.



Order Review and Reconciliation

- Ambulatory users typically use the Medication Review and Meds & Orders sections to review home and active orders during the visit. These sections are limited to one user accessing it at a time and will lock the section once someone opens it and adds an order.
- Because there are not many different users trying to access the chart simultaneously in the outpatient setting, this is not generally an issue, as long as users remember to close the chart and log out when they walk away from a workstation.

Medications & Orders

Medications & Orders is currently read-only.
The section is still being used by someone else.
Patient record is being used elsewhere by user Attending Physician Inpatient, MD since 12/19/2017 10:42 AM CST on workstation CLISUP.
Department: EMC Cardiac Rehab
Telephone: 555-555-5555

- Inpatient users opening the PTA Meds section or the Admission, Transfer, or Discharge Order Reconciliation navigators to edit will lock other users from editing those same activities at the same time

Review Home Medications **1. Review Current Orders** 2. Reconcile Home Medications 3. Order Sets

Review Current Orders

Patient record is being used elsewhere by user Attending Physician Inpatient, MD since 12/19/2017 10:56 AM CST on workstation CLISUP.
Department: EMC Cardiac Rehab
Telephone: 555-555-5555
Please try again later.

Try Again