

## **Form Documentation**

There are 2 common types of forms: Normal and Date/Time forms.

1. Normal Forms-Display the most recently recorded data.
2. Date/Time Forms-Display data for the specific/displayed-date/time. Users may select the time and date of previously recorded data in order to access and view that information.

### **General Principles for charting forms:**

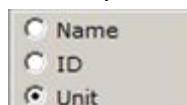
Forms are compromised of a series of items. There are five types of items on forms:



1. Date and Time items:
  - a. For current date and time, CLICK OK. This screen will be displayed.
  - b. If the date requires changing, CLICK the arrow to the right of the date and a calendar will be displayed.
    - i. To change the month, CLICK on the single arrow to the right (to advance the month) or the left (to select a previous month).
    - ii. To change the year, CLICK on the double arrow to the right (to advance) or the left (for previous year).
    - iii. After the correct month and year have been selected, CLICK on the desired day. This will also close the calendar. The selected date will be displayed.
  - c. TAB to the time section.
    - i. Either type in the time (in 24-hour format) or use the up and down arrows to the right of the item to change the time.
    - ii. Once the hour is set, TAB to the minute section and complete it in the same manner.
  - d. Click *OK*.
  - e. When documenting for a new date and time, CLICK *New Admission*. A pop-up box will appear to enter a date as described above.
2. *Text or numeric items*: These required information to be typed in the boxes provided.



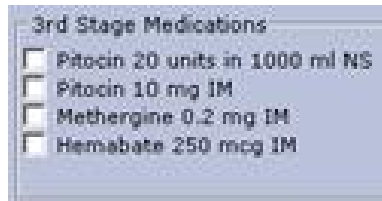
3. *Coded Items*: These items only allow one choice to be made. Choices may be selected in one of two ways:
  - a. CLICK on appropriate choice. A dot will appear in the circle. To remove the choice, click on a different choice or highlight the item until a faint box surrounds the item, then press *Delete* on the keyboard.



- b. CLICK on the down arrow, revealing a list of selections. CLICK on your selection. To correct an error, select another choice from the drop-down list or backspace to remove the selection.



4. *Multicoded Items:* These items allow more than one choice or multiple answers. Each item is represented by a square box. CLICK on the appropriate box and a check mark will display next to each choice.



5. *Computed Items:* These items are grayed out cannot be directly charted on. The system will calculate the values based on other values that have been entered.

Temperature (F)	98.9
Temperature (C)	37.2

To chart on the form, move through the form using the following methods:

- \*CLICK on the desired item and complete it as previously discussed.
- \*TAB from one item to the next, and complete the item.

There is no "save" key on forms. Once all the appropriate items have been completed on the form, proceed to the next form or chart in one of two ways.

- \*CLICK on the Quick Key or CLICK on the Subcomponent Key.

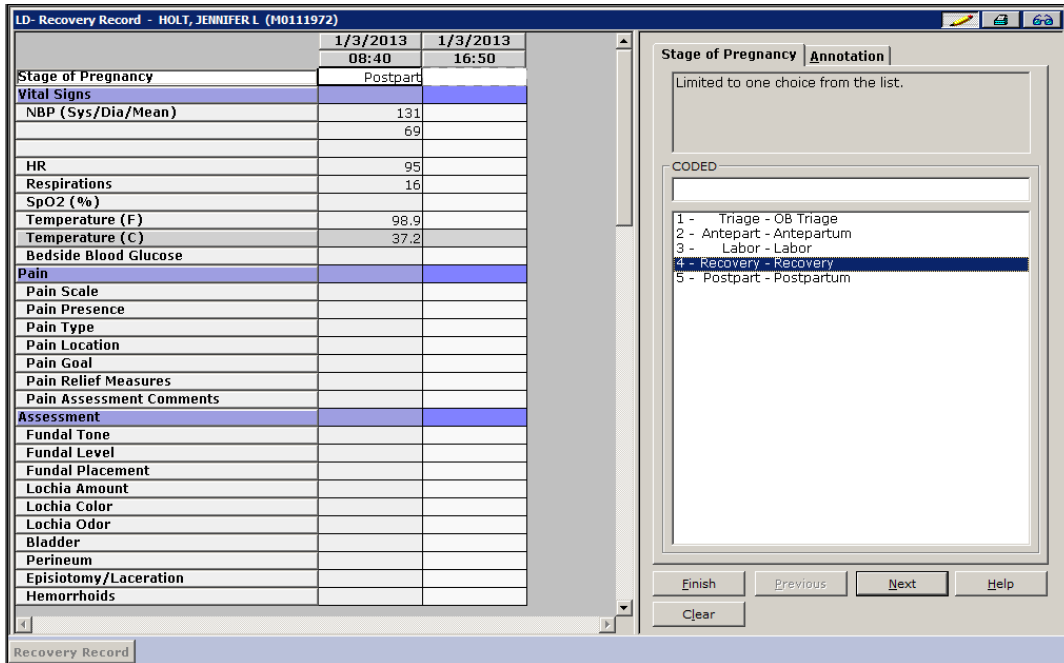
### **Documenting on Charts**

A chart is generally used to chart information that changes over time. Charts are also called flowsheets in CPN.

1. *In Review Mode:* Displays previously recorded information. This can be recorded either on a chart or form, allowing review of several time intervals of documentation.
2. *To enter new information.* CLICK on the pencil in the upper right corner of the display.
  - a. When the chart is accessed, CLICK on yellow pencil. The Record Option screen will appear.
  - b. Set the date as discussed above in the date/time item discussion. Shortcuts can be used to set the date:

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- i. T = today's date
  - ii. Y = yesterday
  - iii. W = tomorrow
  - iv. N = Now (time)
3. Select the desired Record Option. Select the date/time you are documenting on. This will provide a blank column for charting. Click OK to open the documentation screen.
  4. The documentation screen has two sections:



- a. The list of items for documentation is on the left. The currently selected item has a faint dashed line around it
  - b. The actual documentation area is on the right. The majority of all documentation should be done by selecting choices within CPN. This section displays the following areas:
    - i. The currently selected item is on the left tab at the top of the screen. An annotations tab for free text documentation is the right tab, only in emergent or unusual situations. In order to pull statistics, items must be charted from the pre-existing choices.
    - ii. Explanation and directions on completing the item (coded vs. multicoded)
    - iii. Charting area
    - iv. List of choices for coded or multi-coded items.
5. The item type determines how the charting is completed
    - a. Text and numeric items – type in the information
    - b. Coded items – allow one answer to be selected. Type in the number of the choice in the white charting area or click on the choice to highlight it.

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- c. Multicoded items – allow multiple answers to be selected. Type in the number of the item, plus sign, number of the next item, plus sign...until completed or click on the choices to select them. (0+1+2+5, then click finish)
  - d. Date/time items: type in the date and time as discussed above.
  - e. Computed items: The items will be listed on the left side of the screen. The cursor will automatically skip over these items. Values will be computed and displayed in the review screen.
6. CLICK *Next* at the bottom of the right side of the screen once you have completed charting on the current item to bring you to the next item on the list.
  7. The items that do not need to be charted on may be skipped over, CLICK *Next*.
  8. Individual items may be selected for documentation from the item list on the left side of the documentation screen. Users may point and click to bring that item into focus for documentation.
  9. When a mistake is made, the item can be corrected.
    - a. CLICK on the desired item on the left of the screen. This will immediately return the focus to that item.
    - b. CLICK *Correct* on the bottom of the right side of the screen to correct the mistake.
    - c. CLICK *Clear*. This will erase the prior entry.
    - d. Once the entry is cleared, proceed to chart on the item as previously described.
  10. Once the charting is completed on this chart, CLICK *Finish*. This will revert the chart to the review mode.
  11. Users may make Corrections or Additions to a column of documentation after CLICKing on *Finish*. To re-open the column, Double CLICK on the column time. The Record Options screen will appear with the column time displayed. Select OK. This will bring you back to active charting. Select the item you want to correct. Note the item will be grayed out. Highlight the item and click on *Correct*, make your correction and CLICK *Finish*.

### **Charting on the Fetal Strip (Annotating on the Fetal Strip)**

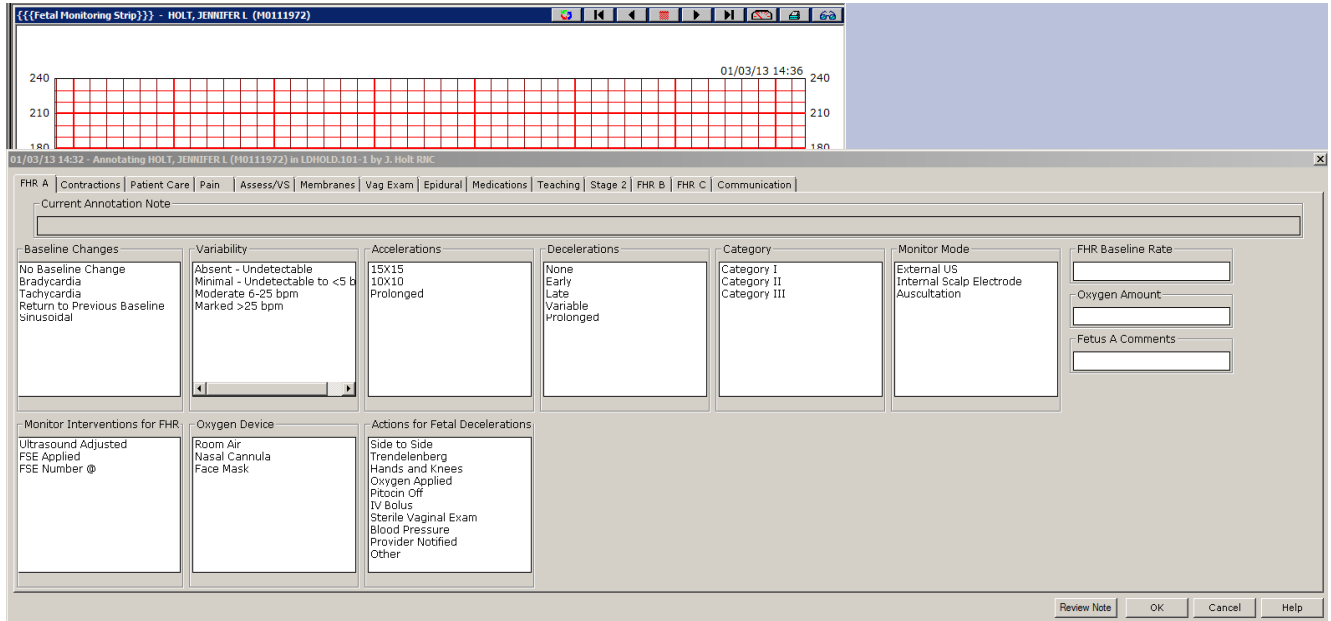
1. You can chart on an active fetal monitoring strip while double clicking on the time you want to chart on. If the time you want to document has passed out of the active viewing window, you need to access the stored strip for your patient.
2. To access a stored strip after you have logged in:
  - a. Select the desired patient. Make sure the correct name is in your patient banner bar.
  - b. CLICK the *Stored Strip* quick key or CLICK F-9.



3. You can navigate with the buttons on the right side of the stored strip.
  - a. You can use the *recycle symbol* to go to an episode (to review prior visits), to a note, to a status, or a time.

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- b. The scroll back and forward buttons may be used to scroll to a specific portion of the strip. CLICK the red square to stop movement on the strip. There is a speedometer to determine how fast or slow the strip will scroll.
4. Double CLICK on the strip at the documentation time. The Annotation screen will appear.



5. Items are organized under tabs. CLICK on the desired tab (FHR A, Contractions, and Pain). Though the specific items are under different within each tab, they are arranged in a similar way.
  - a. Coded or multi-coded item form the first three columns on the left side of the screen.
  - b. Text and numeric items (“fill-in the blanks”) are arranged in one column on the right.
6. CLICK on your choices in each desired coded or multi-coded item. It is not necessary to make a selection for each item on the screen.
7. As you make your selections for Coded and Multi-coded items and type in your responses for Text and Numeric items, they are displayed at the top of the Annotation Screen under the Current Annotation Note.
8. An annotation is limited to 5000 characters. You can review your annotation at any time by clicking Review Note. If satisfied with the note, CLICK *OK* or CLICK *Cancel* to continue charting.
9. After CLICKing *OK*, the note will be entered on the strip, visible at the selected time when you are logged into the system. This will not display on surveillance screens or in the patient’s room if no one is logged into the system.
10. Data entered by Fetal Strip Annotation will be seen in the *LD Flowsheet* under the time column that the charting was done. Information entered on the *Flowsheet* will NOT “fly” to the strip.