Radius eCase 5.0 Training Guide – HCA

Contents

Introduction:

Overview:

eCase is a care canvas, which allows users to complete and monitor all set tasks and activities related to resident care.

Objective:

By the end of this training session you will be able to competently complete basic tasks within the eCase system.

Content:

Message Board (MB):

➢ MB will appear on logging into eCase
➢ How to read a sent message
➢ How to create a new message/send to role/individual
➢ How to bring up read messages – using the unread box

Passwords:

➢ How to change a password

Logging out buttons:

➢ Using the green banner
➢ Using the Menu tab – reminder to log out after every use
➢ You must log out of eCase when you leave your device.
➢ Your Login is your signature in eCase – anything done on eCase with your login will be tracked back to you.

Hot Keys:

➢ eCase (Main Search page, locate residents in system > filter by different fields)
➢ Solutions for Health & Wellbeing (Work log for all residents/operations within facility)
➢ Health Metrics (Resident Profiles > filter by Wing/First/Last Name)

Green Banner:

➢ Point of Care (POC)
➢ Message Board (MB)

➢ Resident Tokens – Quick link to recent resident profiles you have entered
➢ Staff Tokens – Manager quick link to recent staff files reviewed (Managers Only)

Searching for a Resident:

➢ Via entering resident name in Hot Keys (eCase & POC) – Problem shooting i.e. Name spelled incorrectly/refresh/ ways to search for a resident.

TABs in Resident Profile (POC):

1. Top Green Tab = **Resident Tab** (about the resident)
2. Bottom Green Tab = **Resident Functions Tab** (key documenting tabs)

TABs Description Breakdown:

Resident Tab

1. Resident = Details about the Resident, Name, DOB, Facility Wing/Room/Bed admitted to, Cultural Background, NHI etc.
2. Clinical = Medical Hx/Risks/Allergies/Diagnosis of the Resident (Data populates into reports)
3. About me = Social Information (Populated from About Me Assessment)
4. Life History = Social Information (Populated from Life History Assessment)
5. Finance Tab = Change Level of Care for a Resident *(Admin)* to manage financial changes
6. Contacts = Holds all contact information for Resident Incl. Primary/Family contacts
7. Graphs = BGL, Weight, BMI, BP will automatically be uploaded as a graph format when you complete these charts on eCase. Quick reference for GP visits.
8. Gallery = All scanned documents are uploaded here. E.g. Previous Assessment/Care Plans, Hospital Discharge Letters, Pathology Reports, Appointment Letters.
9. Other Tab = Additional Information about the Resident

Resident Functions Tab (HCA Specific)

1. Registers = Weight Tracking/Resident Incident/Med Incident/ Infection Register
2. Prog. Notes = Progress Note reporting
3. Assessment = Where RN Assessments are located which trigger Care Plans
4. Care Plan = All published Care Plans are located/ Care Plan/Interim Care Plan/ Summary Care Plan
5. Charting = Charts are located and activated by the RN/EN to appear on the Work log
6. Work log = The individual residents required activity/task list

Work Log:

- Two ways of viewing Work log (Solutions for Health Wellbeing/ Individual Work log)
- Define the Work log (resident task lists for the shift/day)
- Work log columns:
    1. Resident = Residents Name/Photo/W/R/B/Allergies
    2. Activity = Required activity/task to be completed
    3. Status = Status of the current activity (Not Doing/In Progress/ Not Started/ Completed)
    4. Time = Allocated time task/activity has requested to be completed
    5. Role = Who is responsible for completing the task/activity
    6. Charts/Registers/Assessments = Quick link for documenting/logging the tasks.
- Work logs are generated and manged by RN/EN. It is the responsibility of these roles to ensure work logs are correctly managed to the acuity needs of the resident.
- You must check your Work logs are completed before end of shift
- When logging work logs on Shift 3, you will filter the work log by the date you were employed on shift and will work on this work log across the whole of your shift. When the clock turns to 00:00hrs and a new day ticks over you will filter by the previous date and cont. to work off this work log. When documenting in the charts you will put the correct date/time (new date) in the chart.

- How to Filter Data Fields:
    1. Expand > Filter via Date/Facility/Wing/Bed Group/Role/Shift and Activity

- Work Log Tasks

(View Chart > View Allocated times > View Directive > Scroll down to open up new field > select Grey + > complete fields > Select Save > Documents have been saved > Documents which may need to be closed > Tick box > Back to Work log)

1. Complete a Bowel Chart using Work Log
2. Complete a Pressure Care Chart using Work log
3. Complete a Checks for Resident Chart using Work log
4. Complete a Personal Care Chart (Shower/Sponge) using Work log
5. Complete a Social Activity Chart using Work log

- Complete a Weight Chart
    1. Via Register
    2. Back to Work log
    3. Manually Mark Complete

Status Column in Work Log:

➢ Not Doing > Document why you cannot complete the task
➢ In Progress > More designed for RN/EN > Tasks which are in progress remain on the Work log.
➢ Complete > Task/Activity is marked as completed
➢ Not Started > All tasks/Activity's appear as not started – Task not yet completed

Charting:

➢ Select your Residents profile
➢ Scroll down to the Resident Tab > Select > Charting
➢ Discuss Charting > Directives > Linkage into Work logs when Active > RN/EN Activate charts.
➢ Complex Health Care Procedures > hosts additional charts to appear on work log, view options available.
➢ HCA role in charting > for additional documentation only. RN/EN are responsible for managing Charts and ensuring these remain current to the reflected needs of the resident.
➢ How to hide inactive charts
➢ Complete an additional Bowel Chart via Charting

Activity Viewer:

➢ Menu > Care > Logs > Activity Viewer (Filter by Wing/Activity/Status)
➢ How to check you have completed your task list for your shift and ensure all other roles have completed their work logs (end of shift follow-up)
➢ Managers review using Activity Viewer (expectations of work log documentation)
➢ Shift 3 Work logs: Before 00:00hrs staff will filter the day of their shift to view Work Log activity – After 00:00hrs staff will filter the next day by shift 3 to view work log activity in Activity Viewer.

Short Break:

- Any questions so far?

- Have a play around on eCase for 10/15 Minutes

 - Break 10-15 minutes depending

Progress Notes:

➢ How to access Prog. Notes
➢ <u>Add a Progress Note</u> – Check that you are writing a Progress Note on the right resident by looking at their profile & photo above. – Hot links Prog. Notes/Diagnosis
➢ Using the Filter Box – type in "ADL" – This brings up often used Progress Notes HCA will document – auto populates when you tick the box to the Subject Box
➢ Complete the fields & Save.
➢ Back to Prog. Notes
➢ Select your Progress Note – How to view a/your Progress Note
➢ Select your Progress Note - How to send your Progress Note as a message via (MB)
➢ Select your Progress Note - How to Remove your Progress Note
➢ Select your Progress Note – How to view all Progress Notes
➢ <u>Add a Progress Note</u> - Using the Filter Box > type in "verbal aggression" > tick option
➢ Create a note (Prog. Note) regarding "verbal aggression".
➢ Tick Show Activities –Discuss auto populate to Policy & Procedure triggered onto Work log for completing/ roles/ times that are triggered.
➢ Work log > Complete Behaviour Chart via link > Manually Mark Complete > Save
➢ <u>Add a Progress Note</u> - Filter > Incidence (Discuss triggered tasks associated with incidence) > Select Fall > Select Show Activities > Complete fields and Save > Work log review of triggered tasks > Incident Register link
➢ Incident Register – Access via Link > complete Fields > Back to Work log Manually Mark Complete

Registers:

1. Review of all Registers – those specific for the HCA role
2. Weight Tracking > How to log a Residents Weight
3. Resident Incident Form > Add New > How to complete all fields of incident report
4. How to manually log an Incident form/Register if not triggered via Prog. Notes

Handover Report:

➢ Menu > Reports > Clinical > Handover Report > Discuss fields to complete
➢ When to access report on handover

Drinks List:

➢ Menu – Reports > Clinical > Drinks List > Filter fields > discuss list > auto populates from completed Dietary Assessment

Resident without Progress Notes:

➢ Menu > Reports > Operational > Resident without Progress Notes
➢ Handover sheet can assist in current progress Note identification/ specify role of progress notes documented

Maintenance Log:

➢ Menu > Care > Logs > Maintenance Log > How to complete a log for Maintenance & House Keeping

Quality:

➢ Menu >Quality >For Facility >New
➢ Discuss/Review > Health & Safety Risk Form
➢ Discuss/Review > Complements/Complaints/Suggestions Form
➢ Discuss/Review > Staff Incident Report

Closing:

➢ When you come on shift where are the first places are you will go in eCase?
➢ When finishing up your shift, what do you need to check?
➢ How do you check/know you have completed your work logs & documentation for your shift?
➢ What are the required reporting streams?
➢ Are there any questions around managing your Work logs?
➢ Where do you/who do you go to for support in navigating eCase?
➢ Would you like to go over/cover any of the content again?

eCase Skills Checklist

Skill/Task	Completion Date	Needs more training	Assessors Role/Signature
Use Message Board (MB)			
Password/Logging out			
Identify Hot Keys			
Search for a Resident in eCase			
Identify key functions of the Resident/Functions Tab			
Filter & Manage Work Log			
Identify the Status options in the Work Log			
Document Charts off Work Log			
Document Charts in Charting			
Able to use Activity Viewer			
Progress Note Management			
Able to use Registers			
Able to use Handover Report			
Able to use Maintenance Log			
Understanding of Quality			

Assessors/ Manager Final Sign off	Date