Electronic Whiteboard Implementation Simplified

Use this powerful tool to help manage inpatient care and capture charges
Electronic Whiteboard Implementation
Simplified

Presented By:

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Electronic Whiteboard Implementation

Today's Agenda

- Understanding the Electronic Whiteboard/Patient Visit List relationship
- Set up in three manageable steps
- Prepare for staff training
- The basics of using the Whiteboard
- Cornerstone® 8.2 Electronic Whiteboard highlights
- Planning worksheet
Understanding the Electronic Whiteboard/Patient Visit List Relationship
The PVL is central to all activity
The EWB is simply an extension of the PVL
Unperformed PVL items can be ordered to the EWB
Completed treatments send charges to the PVL
The Three Parts of the Electronic Whiteboard

- PVL
- Orders
- Treatments
- Main View
EWB billing to the PVL is based on frequency.

<table>
<thead>
<tr>
<th>Billing Type</th>
<th>Frequency</th>
<th>Number of Days</th>
<th>Quantity Charged</th>
<th>Total Invoice Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Line Each Time</td>
<td>Twice daily</td>
<td>2</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>1 Line Each Day</td>
<td>Twice daily</td>
<td>2</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>1 Line Each Visit</td>
<td>Twice daily</td>
<td>2</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>No billing or inventory reduction</td>
<td>Twice daily</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Set up in Three Manageable Steps
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The Steps

1. Security and defaults
2. EWB settings
3. Nonbillable & dispensing items
Set up—Step 1: Security and Defaults

- Patient hospital status information
- Ward/Loc information
- EWB menu options
  - Information items are set up: management only
  - Posting an override: clinic decision
  - Remove from EWB: clinic decision
  - Undo treatment: clinic decision
- EWB order and treatment reports (patient reports)
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Set up—Step 1: Security and Defaults

- Refresh rate
- Discharged patients
- Doctor to use on PVL
- Invoice settings
- Uncompleted treatment settings
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Set up—Step 2: EWB Settings

- Categories
- Frequencies
- Patient Hospital Status
- Areas and Ward/location
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Set up—Step 2: EWB Settings—Categories

Use categories to:
- Assign per Patient Order
- View patient treatments
- Filter EWB reports
- Default categories:

<table>
<thead>
<tr>
<th>Default categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication/Discharge</td>
</tr>
<tr>
<td>Daily care</td>
</tr>
<tr>
<td>Diagnostics</td>
</tr>
<tr>
<td>Medications</td>
</tr>
<tr>
<td>Procedures</td>
</tr>
<tr>
<td>Treatments</td>
</tr>
<tr>
<td>Vital signs</td>
</tr>
</tbody>
</table>
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Set up—Step 2: EWB Settings—Areas

- Use to filter main view and EWB reports
  - Location in hospital
    (Boarding, ICU, Treatment)
  - Task-type list
    (Lab work, Radiology, Exams)
  - Staff to complete treatment
    (Technician, Doctors, Assistants)
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Set up—Step 2: EWB Settings—Frequencies

- Customize to fit practice hours
- Modify frequency descriptions to include times
- Twice daily: 8:00 a.m., 5:00 p.m.; every 2 hrs (odd)
- Set order of dropdown
- Default frequencies (based on 24-hour cycle):
  - Every 4 hours
  - Every 6 hours
  - Every 8 hours
  - Every 12 hours
  - Every 24 hours
  - Until completed
  - One time
  - Continuous
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Set up—Step 2: EWB Settings—Statuses

- Readily visible from:
  - EWB
  - Census List
  - Patient Clipboard

- Default statuses
  - Inpatient
  - Ready to go home
  - Discharged
## Electronic Whiteboard Implementation

### Set up—Step 2: EWB Settings—Areas and Ward/Loc

<table>
<thead>
<tr>
<th>Areas (assigned per EWB order)</th>
<th>Ward/Loc (assigned per patient)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Setup Suggestions</strong></td>
<td><strong>Setup Suggestions</strong></td>
</tr>
<tr>
<td>Location in hospital</td>
<td>Location in hospital</td>
</tr>
<tr>
<td>Boarding, ICU, Treatment</td>
<td>Sx, Tx, Iso, ICU</td>
</tr>
<tr>
<td>Task List</td>
<td>Department</td>
</tr>
<tr>
<td>Labwork, Radiology, Exam</td>
<td>Boarding, hospital, grooming</td>
</tr>
<tr>
<td>Staff to complete</td>
<td>Reason for Visit</td>
</tr>
<tr>
<td>Tech, Doctor, Assistant</td>
<td>Board, surgery, drop off</td>
</tr>
<tr>
<td><strong>Use Options</strong></td>
<td><strong>Use Options</strong></td>
</tr>
<tr>
<td>filter EWB main view and EWB reports</td>
<td>filter EWB main view and EWB reports</td>
</tr>
<tr>
<td>Assign to each Patient Order</td>
<td>Enter/modify from Check-In and Patient Orders</td>
</tr>
<tr>
<td></td>
<td>Readedly visible from EWB, Census List, Clipboard</td>
</tr>
</tbody>
</table>
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Areas

Assign per patient order

Create under Lists > Electronic Whiteboard > Areas

Main view filter
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Ward/Loc

Assign/Update at Check In or Patient Orders

Create under Lists > Ward/Loc

Main view filter
Set up—Step 3: Nonbillable & Dispensing Items

For nonbilled patient care:

- Draw blood
- Remove catheter
- Check bandage
- Take radiographs
- Administer meds
- Check incision

Dispensing Items:

Used in lieu of dispensing ‘fee’ for items administered to patients directly from pharmacy to reduce inventory and bill patient accordingly
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Prepare for staff training

... by training the EWB first!
Did you know the EWB "memorizes" Patient Orders???

- Use a ‘test’ patient
- Add all nonbillable items
- Set billing, category, frequency, medical note requirement and area for each
- Click **OK** to Save
- Reopen orders and discontinue all items
- Repeat steps for common groups and hospitalized patient invoice items
- The EWB ‘memorizes’ the order after first entry and uses same settings on subsequent patient orders
- Staff only adjust frequency and start times/durations
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The Basics

1. Check in as ‘inpatient’
2. Enter orders
3. Complete treatments
4. Update status and/or remove from EWB
5. Invoice
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The Basics: Check In

Check In as ‘inpatient’
- Check-in window or
- Update to ‘inpatient’ from Census List or
- Orders for new patient on EWB
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The Basics: Patient Orders

Add Patient Orders:
- ‘Unperformed’ PVL items*
- Travel Sheet
- Smart Groups*
- Individual invoice items

* group pricing, estimate markups, and manually changed prices require special handling to retain pricing structure
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The Basics: Patient Orders

- Review frequency, start date/time/duration
  - Set billing, category, frequency, medical note requirement and area for each item first time used
- Write special orders on blue line
  - Fluid type/drip rate
  - Dose and administration route
  - Medication and dosage for ‘administer medications’
  - Orders ‘reviewed by’
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## The Basics: Patient Orders

### Patient Information
- ID: 273
- Case: Casey
- Age: 10 Yrs. 4 Mos. 10.3 pounds
- Breed: Domestic Mediumhair, Spayed Female
- Admit: 10/02/2011 08:15 AM
- Discharge: 10/04/2011

### Patient Orders

<table>
<thead>
<tr>
<th>Item ID</th>
<th>Item Description</th>
<th>Quantity</th>
<th>Billing</th>
<th>Category</th>
<th>Frequency</th>
<th>Note</th>
<th>PRN</th>
<th>Dose</th>
<th>Start</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>2350</td>
<td>Examination Presurg</td>
<td>1.00</td>
<td>1 line</td>
<td>Diagnostics</td>
<td>One time</td>
<td>Req when com</td>
<td></td>
<td></td>
<td>10/02/2011 08 AM</td>
<td>0</td>
</tr>
<tr>
<td>2402</td>
<td>IV Set/Catheter &amp; Fluid</td>
<td>1.00</td>
<td>1 line</td>
<td>Procedures</td>
<td>One time</td>
<td>Req when com</td>
<td></td>
<td></td>
<td>10/02/2011 10 AM</td>
<td>0</td>
</tr>
<tr>
<td>LRS 20 ml/hr</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 DG2F</td>
<td>Dental Grade 2 Feline</td>
<td>1.00</td>
<td>1 line</td>
<td>Procedures</td>
<td>Until complete</td>
<td>Not required</td>
<td></td>
<td></td>
<td>10/02/2011 10 AM</td>
<td>0</td>
</tr>
<tr>
<td>7535</td>
<td>Fluoride Treatment</td>
<td>1.00</td>
<td>1 line</td>
<td>Procedures</td>
<td>Until complete</td>
<td>Not required</td>
<td></td>
<td></td>
<td>10/02/2011 10 AM</td>
<td>0</td>
</tr>
<tr>
<td>5 MFLUID</td>
<td>Monitor Fluid/Check Catheter</td>
<td>1.00</td>
<td>1 line</td>
<td>Patient Care</td>
<td>BID 7a, 5p</td>
<td>Req when com</td>
<td></td>
<td></td>
<td>10/02/2011 10 AM</td>
<td>0</td>
</tr>
<tr>
<td>LRS 15 ml/hr post op</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 RC</td>
<td>Remove Catheter (Whitebo)</td>
<td>1.00</td>
<td>1 line</td>
<td>Patient Care</td>
<td>One time</td>
<td>Req when com</td>
<td></td>
<td></td>
<td>10/03/2011 09 AM</td>
<td>0</td>
</tr>
</tbody>
</table>
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The Basics: Patient Orders

- Update as needed:
  - Current care doctor
  - Discharge date
  - Ward/Location
  - Cage field (free type)
  - Status
The Basics: Patient Treatments

- Complete single treatments
- Complete multiple treatments
- Process special actions
  - Laboratory request
  - Vital signs
  - Vaccine tag
- Mark ‘did not perform’
- Completed items billed to PVL
- Treatment times/dates stamped to patient record
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The Basics: Update Status/Remove

- **Update status (remains on EWB until invoiced)**
  - Patient Orders window- change status to ‘RTG’

- **Remove from EWB (incurred charges remain on PVL)**
  - Right click on patient from EWB main view
  - Remove from EWB
  - Change status to ‘RTG’
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The Basics: Invoice

- Start invoice and transfer PVL or
- Open PVL and invoice
- Based on default settings:
  - Stop/Warning if patient treatments are not completed
  - Stop/Warning if patient is not at Ready to Go Home status
- Once invoice posted, patient removed from EWB and ‘checked out’ from Census List
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See it all in action....

- Invoice and discharge
- Place patient on EWB
- Review charges & Update Status
- Enter Patient Orders
- Complete Treatments
- View all patients on EWB
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What’s coming in Cornerstone® version 8.2!

- Additional sort and display options, including alerts
- Invoice item defaults to speed up order entry
- Expanded treatment frequency options
  - Every X minutes
  - Every X days
- Improved EWB display, with detailed treatment blocks
- Expanded hours display to include previous and next day
- Icons to denote critical patients and nonbillable items
### 8.2 Electronic Whiteboard

#### Whiteboard - Tuesday, June 28, 2011

<table>
<thead>
<tr>
<th>11 am</th>
<th>Noon</th>
<th>1 pm</th>
<th>2 pm</th>
<th>3 pm</th>
<th>4 pm</th>
<th>5 pm</th>
<th>6 pm</th>
<th>Alerts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Patients (12) | | | | | | | |
|---------------|---|---|---|---|---|---|---|---|
| Barksalot     | Possible Bladder S |       |       |       |       |       |       |        |
| Adarone       | Incision          |       |       |       |       |       |       |        |
| Daisey        | PLI/PDI workup    |       |       |       |       |       |       |        |
| LOPEZ(1468)   | Incision          |       |       |       |       |       |       |        |
| Bean          | Neurology         |       |       |       |       |       |       |        |
| Andreas(8973) | Incision          |       |       |       |       |       |       |        |
| Hagar         | Cardiology        |       |       |       |       |       |       |        |
| Harry         | Ultrasound Consult |       |       |       |       |       |       |        |
| Morgan        | Cleaning          |       |       |       |       |       |       |        |
| Nacho Dog     | Retinal Emergenci |       |       |       |       |       |       |        |
| Radar         | Cardiology        |       |       |       |       |       |       |        |

- V. Catheter Placement
- IV Set/Cath & Fluids
- IV Pump per day

**Notes:**
- Barksalot: Possible Bladder S
- Daisey: PLI/PDI workup
- Bean: Neurology
- Morgan: Cleaning
- Nacho Dog: Retinal Emergenci
- Radar: Cardiology

**Other Information:**
- Cal Dr if RBN < 100
- 30 Ultrasound abdomen
- 30 Laser injection
- 30 Euphenin 10 mg
- 30 Ultrasound abdomen
- Dental - Caine
- Oral tablets B69 mg

**Alerts:**
- COVID-19/COVID-19
- Immune Suppressed
## Electronic Whiteboard Implementation

### Planning Worksheet

- **Use to plan and document setup**

<table>
<thead>
<tr>
<th>Step</th>
<th>Who</th>
<th>Notes</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security</td>
<td>Dr Owner/Manager</td>
<td>Set up general user log in; copy to all staff. Remove and Undo restricted to: _______</td>
<td>☐</td>
</tr>
<tr>
<td>Defaults</td>
<td>Practice Manager</td>
<td>Doctor to use on invoice? Time to keep discharged patients on Whiteboard? Time to check for uncompleted treatments?</td>
<td>✅</td>
</tr>
<tr>
<td>Categories</td>
<td>Dr Owner and Tech Manager</td>
<td>Review default categories Match categories to current treatment sheet Unused categories can be deleted. Once used, can only modify.</td>
<td>☐</td>
</tr>
<tr>
<td>Areas</td>
<td>Dr Owner and Tech Manager</td>
<td>Use by task, department or staff?</td>
<td>☐</td>
</tr>
</tbody>
</table>
Questions?

- Thank you!
- Please fill out the survey and turn it in
- Break

Next sessions

- Optimizing Medical Note Templates
- Key Performance Indicators: The Vital Signs of Your Practice
Thank you for attending . . . .

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Realize Your Vision

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