



Admit checklist [Coram]:

- Create patient profile in Advanced MD, Patient Management (PM) side
 - Complete name, address, phone number and birthday per Coram Prescriber Order
 - In the "Additional MRN:" box, enter the Coram Pt ID#, beginning with 2000xxxxxx
 - Under financial class, enter "H" in the search box. Click search and select "HOME HEALTH"
 - Under Provider Profile, enter "G" in the search box. Click search and select "GUZMAN, MARIVIC"
 - Click "OK" to save
- Upload Order to EHR
 - Save the document(s) to your computer
 - Files must be saved as a **PDF**
 - May use Adobe Acrobat Scan Feature to upload files as PDF
 - Open AMD and log into the EHR side
 - Enter <https://login.advancedmd.com/> in Chrome browser
 - Click on "EHR" check box at login
 - In patient search box located in the top left corner of window, identified by a magnifier glass icon, type in patient last name
 - Select the correct patient to open the patient's chart
 - Locate the "Documents" card in the patient's file
 - Click on the "+" icon in the top right corner
 - Select "Upload Document" from the pop-up window
 - In the "Folder" field, click on the blue drop down arrow to the right and select "Orders"
 - In the "Name" field located below the "Date" field, enter "LASTNAME ORDER YEARMODAY" (ie "MOUSE ORDER 20201122" for patient Mickey Mouse seen on November 22, 2020)
 - In the "Description" field, enter ordering entity/name (ie "Coram Order" for Coram)
 - In the "Document to Upload" field, click on the "Choose File" button
 - Select the previously saved **PDF file** containing the order
 - Click on "Upload to Chart" at the top left of the "New Upload" tab
 - The newly uploaded file should populate in the "Documents" card
 - Open the file to review for correct patient name
 - Click on "Review" from the top menu bar
- Upload H&P to EHR
 - Save the H&P to your computer
 - Files must be saved as a **PDF**



PRECISION VASCULAR ACCESS

San Diego's Mobile PICC Nurse

VISIT CHECKLIST

- May use Adobe Acrobat Scan Feature to upload files as PDF
- Open AMD and log into the EHR side
 - Enter <https://login.advancedmd.com/> in Chrome browser
 - Click on “EHR” check box at login
- In patient search box located in the top left corner of window, identified by a magnifier glass icon, type in patient last name
 - Select the correct patient to open the patient’s chart
- Locate the “Documents” card in the patient’s file
 - Click on the “+” icon in the top right corner
 - Select “Upload Document” from the pop-up window
- In the “Folder” field, click on the blue drop down arrow to the right and select “Docs”
- In the “Name” field located below the “Date” field, enter “LASTNAME HP YEARMODAY” (ie “MOUSE HP 20201122” for patient Mickey Mouse seen on November 22, 2020)
- In the “Description” field, enter “H&P”
- In the “Document to Upload” field, click on the “Choose File” button
 - Select the previously saved **PDF file** containing the H&P
- Click on “Upload to Chart” at the top left of the “New Upload” tab
- The newly uploaded file should populate in the “Documents” card
 - Open the file to review for correct patient name
 - Click on “Review” from the top menu bar
- Complete visit
 - Document “**Visit Time Start**” and “**Visit Time End**”
 - List **Drug Therapy** Type
 - List **Diagnosis Code** and description
 - Sign bottom left of first page, and list Agency name as “Precision Vascular Access” or “PVA”
 - Label top of second page with “Patient Last Name, First Name”, Coram Pt ID# and date of visit
 - List “**Next MD Visit**”
 - **Obtain patient signature**
 - Sign bottom left of second page, and list Agency name as “Precision Vascular Access” or “PVA”
- Upload ID card, front & back if applicable to PM
 - Crop the edges of the ID card image to show only the card
 - Save the image to your computer
 - Select “Chart Files” at the bottom of the patient chart in PM side
 - Select “Import” and select the appropriate file



PRECISION VASCULAR ACCESS

San Diego's Mobile PICC Nurse

VISIT CHECKLIST

- In the new window, in the "File Name" box, enter "PT IDENTIFICATION"
 - In the "File Description" box, enter the form of identification, such as "CA DRIVERS LICENSE"
 - In the "File Type" box, ensure "MISCELLANEOUS" is selected
 - In the box below on the left, select "OTHER ID"
 - Click on the right arrow between the boxes to move "OTHER ID" to the box on the right
 - Click "OK" to save
- Upload insurance card, front & back to PM
 - Crop the edges of the insurance card image to show only the card
 - Save the image to your computer
 - Select "Chart Files" at the bottom of the patient chart in PM side
 - Click "Import" and select the appropriate file
 - In the new window, in the "File Name" box, enter "INSURANCE CARD"
 - In the "File Description" box, enter "INSURANCE FRONT" for the image of the FRONT of the insurance card
 - In the "File Type" box, click on the down arrow and select "BILLING"
 - In the box below on the left, select "INSURANCE CARDS"
 - Click on the right arrow between the boxes to move "INSURANCE CARDS" to the box on the right
 - Click "OK" to save
 - Repeat the same process for the BACK of the card
 - In the "File Description" box, enter "INSURANCE BACK" for the image of the BACK of the insurance card
- Check out Admit Visit in Scheduler
 - Click on the Calendar Icon at the top
 - In EHR, click on "Home" from top menu bar and select "Scheduler"
 - Locate the patient's name and hover until a pop-up window appears
 - In the column on the left, select the icon with a check mark within a circle, or left-click and select "Check Out"
- Create follow up visit appointments in scheduler
 - Determine which day of the week the patient will be seen based on their weekly lab draw order per the Coram Prescriber Order (ie Labs to be drawn every Monday)
 - Open the Scheduler by clicking on the Calendar Icon
 - Select the day of the week the patient is to be seen for the following week (ie *next* Monday)
 - Click on an open time slot during normal business hours



PRECISION VASCULAR ACCESS

San Diego's Mobile PICC Nurse

VISIT CHECKLIST

- Select “New Appt” from the pop-up window
- Enter patient’s last name in the search box. Select the correct patient chart.
- In the “Provider” box, select “(GUZMA) GUZMAN, MARIVIC”
- In the “Appointment Type” box below on the left, highlight the “HOME VISIT” option
 - Click on the right arrow in between the boxes to move “HOME VISIT” to the box on the right
- Click on the “Instructions” box to the right of the “Appointment Type” box to reveal options
 - Select the appropriate instructions for the patient’s weekly visit by checking the box (ie “Change PICC/ML dsq and assess site” and “Draw labs and drop off to nearest location”)
- In the “Comments” box below the “Instructions” box, enter the Therapy start date and Therapy end date according to the Coram Prescriber Order (ie 12/11/2020 – 1/11/2021)
 - If the patient has a trough level, make a note of when the dose is scheduled for (ie **Vanco trough to be drawn before 1230 dose)
- Click on the Calendar icon in the bottom left of the pop-up window. “Recurrence (Alt + U) should appear when you hover over the icon.
 - In the new pop-up window under the highlighted section labeled “Start/End Dates”, click on the radio button labeled “End By”. Click on the tiny calendar icon to the right. Select the appropriate end therapy date according to the Coram Prescriber Order. (ie 1/11/2021)
- Click “Ok” to exit the Recurrence window.
- Click “Save”
- Upload Admit Nurse Note (NN) into EHR
 - Save the document to your computer
 - Files must be saved as a **pdf**
 - May use Adobe Acrobat Scan Feature to upload files as pdf
 - Open AMD and log into the EHR side
 - Enter <https://login.advancedmd.com/> in Chrome browser
 - Click on “EHR” check box at login
 - In patient search box located in the top left corner of window, identified by a magnifier glass icon, type in patient last name
 - Select the correct patient to open the patient’s chart
 - Locate the “Documents” card in the patient’s file
 - Click on the “+” icon in the top right corner
 - Select “Upload Document” from the pop-up window
 - In the “Folder” field, click on the blue drop down arrow to the right and select “Notes”



PRECISION VASCULAR ACCESS

San Diego's Mobile PICC Nurse

VISIT CHECKLIST

- In the "Name" field located below the "Date" field, enter "LASTNAME ADMIT NN YEARMODAY" (ie "MOUSE ADMIT NN 20201122" for patient Mickey Mouse seen on November 22, 2020)
- In the "Description" field, enter "For submission"
- In the "Document to Upload" field, click on the "Choose File" button
 - Select the previously saved **PDF file** containing the **patient signature**
- Click on "Upload to Chart" at the top left of the "New Upload" tab
- The newly uploaded file should populate in the "Documents" card
 - Open the file to review for correct patient name and patient signature
 - Click on "Review" from the top menu bar
- Email Admit NN to Nurse Supervisor from AMD
 - Submit original paperwork OR pdf via email within **48 hours** to avoid late penalty fee
 - If documents are emailed, may return original documents to office via mail or drop off in person
- Log visit in PVA log book
 - Access SharePoint Nurses
 - In the "Documents" section, click on "PVA HH Work Log"
 - Enter Visit information, mileage and your name
- Erase any patient info from your personal cell phone memory when complete



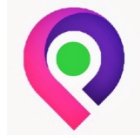
PRECISION VASCULAR ACCESS

San Diego's Mobile PICC Nurse

VISIT CHECKLIST

Follow up visit checklist:

- Complete visit
 - Document **“Visit Time Start”** and **“Visit Time End”**
 - List **Drug Therapy** Type
 - List **Diagnosis Code** and description
 - Sign bottom left of first page, and list Agency name as **“Precision Vascular Access”** or **“PVA”**
 - Label top of second page with **“Patient Last Name, First Name”**, Coram Pt ID# and date of visit
 - List **“Next MD Visit”**
 - **Obtain patient signature**
 - Sign bottom left of second page, and list Agency name as **“Precision Vascular Access”** or **“PVA”**
- Drop off labs after each visit
 - Scripps patient labs must be dropped off at a Scripps Clinic Lab location
 - VA patient labs must be dropped off at a VA Clinic location
 - All other patient labs are dropped off at a LabCorp location (ie Sharp, UCSD)
- Check out visit in scheduler
 - Click on the Calendar Icon at the top
 - Locate the patient's name and hover until a pop-up window appears
 - In the column on the left, select the icon with a check mark within a circle, or left-click and select **“Check Out”**
- Upload NN into EHR
 - Save the document to your computer
 - Files must be saved as a **pdf**
 - May use Adobe Acrobat Scan Feature to upload files as pdf
 - Open AMD and log into the EHR side
 - Enter <https://login.advancedmd.com/> in Chrome browser
 - Click on **“EHR”** check box at login
 - In patient search box located in the top left corner of window, identified by a magnifier glass icon, type in patient last name
 - Select the correct patient to open the patient's chart
 - Locate the **“Documents”** card in the patient's file
 - Click on the **“+”** icon in the top right corner
 - Select **“Upload Document”** from the pop-up window
 - In the **“Folder”** field, click on the blue drop down arrow to the right and select **“Notes”**



PRECISION VASCULAR ACCESS

San Diego's Mobile PICC Nurse

VISIT CHECKLIST

- In the "Name" field located below the "Date" field, enter "LASTNAME NN YEARMODAY" (ie "MOUSE NN 20201122" for patient Mickey Mouse seen on November 22, 2020)
- In the "Description" field, enter "For submission"
- In the "Document to Upload" field, click on the "Choose File" button
 - Select the previously saved **PDF file** containing the **patient signature**
- Click on "Upload to Chart" at the top left of the "New Upload" tab
- The newly uploaded file should populate in the "Documents" card
 - Open the file to review for correct patient name and patient signature
 - Click on "Review" from the top menu bar
- Email NN to Nurse Supervisor from AMD
 - Submit original paperwork OR pdf via email within **48 hours** to avoid late penalty fee
 - If documents are emailed, may return original documents to office via mail or drop off in person
- Log visit in PVA log book
 - Access SharePoint Nurses
 - In the "Documents" section, click on "PVA HH Work Log"
 - Enter Visit information, mileage and your name
- Erase any patient info from your personal cell phone memory when complete