

UW Medicine

Viewing the Yellow Packet Application



**Pocket Guide
February 2011**

**IT Services Help Desk:
206-543-7012**

Table of Contents

Section 1: Getting Assistance.....	4
Troubleshooting	4
Section 2: Locating and Opening Yellow Packets	5
From the Patient Chart.....	5
Section 3: Viewing Header Information.....	6
Introduction	6
Viewing Procedure Information.....	7
Viewing Service Information	8
Viewing Contact Information.....	9
Viewing Day of Surgery Information	10
Section 4: Viewing Band Information.....	11
Band Content Indicators	11
Band Icons	12
Viewing Bypass Sections	13
Viewing Bypass Request	13
Viewing Bypass Documents	14
Viewing Consent/Advanced Directives	15
Viewing Orders	16
Viewing Assessments.....	17

Viewing Consults and Diagnosis 18

Viewing Recent Results 19

Viewing Appointments 20

Viewing Med Reconciliation 21

Viewing Referrals..... 22

Section 5: Finding Information in the Patient Chart 23

Reviewing Allergies and Alerts 23

 Reviewing Allergies..... 23

 Reviewing Alerts 23

Look Up Patient Demographics 24

Run the OR PreOp Information Report..... 25

Look Up Results 26

Navigate Using Tabs in the Main Window .. 27

Section 6: Navigate Using Tabs and a Link Within the Yellow Packet..... 28

Section 1: Getting Assistance Troubleshooting

For ORCA problems try one of the following:

1. Click the **Refresh** icon
2. Close and reopen the chart
3. Logout then log back in
4. Look for information in the Pocket Guide
5. Ask a Shift Expert
6. Ask a Unit Expert
7. Call the Help Desk at 543-7012
8. Email the Help Desk at mcsos@uw.edu

Section 2: Locating and Opening Yellow Packets From the Organizer and the Patient Chart

From the Patient Chart

To view a patient's Yellow Packets:

1. Open the patient's chart.
2. Select **Chart Summary** from the **Menu**
3. Click **More** link and select **Yellow Packet** (default view from now on unless you change it)
4. Choose from **Upcoming**, **Past** and **Archived** procedures.
 - **Upcoming (future) Procedures:** Lists any future procedures for that patient and includes the link to **+ Add New Yellow Packet**
 - **Past Procedures:** Lists all past, not archived, procedures for that patient.
 - **Archived/Deleted:** Lists all archived Yellow Packets for that patient.
5. Click on the link in the **YP Status** column for the appropriate Yellow Packet.

Section 3: Viewing Header Information

Introduction

The main Yellow Packet page consists of four headers and several bands. The headers are:

- Procedure Information
 - Service Information
 - Contact Information
 - Day of Surgery Information
- ① *Some of the contact information may be completed at the same time as day of surgery information.*

Viewing Procedure Information

The **Procedure Information** section contains basic patient procedure information.

- **Patient name**
- **MRN**
- **Procedure Date**
- **PAC Visit Date**
- **Diagnoses:** For each diagnosis, view a:
 1. **Description:** The ellipses (...) indicates additional information.
 - ① 1. Click the blue **Description** link to view the complete text.
 - 2. Click **Close** when done.
 2. **ICD-9 code**
- **Procedures:** For each procedure, view a:
 1. **Description:**
 - ① *The ellipses may appear in the Procedures section and works similarly.*
 2. **CPT-4** code for each procedure
- **Lat:** Right, Left, Bilateral, or N/A

Viewing Service Information

The **Service Information** section of the Yellow Packet provides location, encounter, and provider information.

Details include:

- **Location:** UWMC-Main, Roosevelt, UWMC-Pavilion or Offsite.
- **Visit Type:** Inpatient-AM, Inpatient, Outpatient-bedded (unlimited stay), and Outpatient.
- **Surgery Clinic:** Clinic where the surgery is occurring.

For each provider assigned to the procedure view:

- **Role** of the provider
- **Provider** name
- **Contact** information
- **YP Work Finished column:** If checked, the provider information is complete.

Viewing Contact Information

The **Contact Information** section of the Yellow Packet provides patient contact information. Details include:

- **Called:** If checked, the patient was called.
- **DOS Arrival Time:** The patient's required arrival time on the day of surgery.
- **Patient Phone #:**
- **Mobile Phone#:**
- **Alternate #:**
- **Day Before #:** The number where the patient can be reached the day before surgery.
- **Leave Msg With:** The person designated by the patient to take messages.
- **Travel Time:** Time expected for the patient to travel to the surgery location.

Viewing Day of Surgery Information

The **Day of Surgery Information** section provides the following patient contact information:

DOS Procedure: Procedure date and time.

Interpreter:

- **Interpreter Required:** If checked, the patient will require language interpretation services.
- **Language:** The patient's language that requires interpreting.
- **Pre-op @:** The time and duration interpretation services are needed for pre-op.
- **Post-op @:** The time and duration interpretation services are needed for post-op.

Special Care Notes: Patient conditions that may require special handling during the procedure.

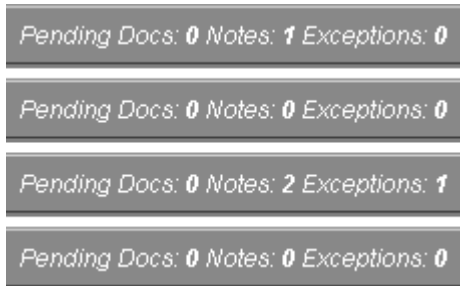
Anes. Assessment Alert: Alert regarding anesthesia as well as any additional alerts affecting the procedure.

Section 4: Viewing Band Information

Band Content Indicators







On the right side of some of the bands are Band Content Indicators. These indicators allow you to quickly see document status (Consent/Advance Directives, Orders, Assessments, and Consults and Diagnostics).

- **Pending Docs:** Indicates number of pending documents on that band.
- **Notes:** Indicates number of Notes entered on that band.
- **Exceptions:** Indicates number of Exceptions entered on that band



Band Icons

On the left side of each band there is an icon that indicates the status of that band. These are the status icons:

- **Grey NR in Circle (Not Required) Icon:** This band is not required or is read only. 
- **Green Check (Complete) Icon:** This section is complete. The appropriate document (s) have been added where appropriate, all outstanding tasks are completed, and there are no pending documents. 
- **White Stop Sign (Stop) Icon:** This section is incomplete and it is less than 2 days after the creation of the yellow packet and more than 3 days before the scheduled surgery. 
- **Yellow Stop Sign (Incomplete) Icon:** This section is incomplete and it is between 2 days after the creation of the Yellow Packet and more than 3 days before the scheduled surgery. 
- **Red Stop Sign (Stop) Icon:** Same as Yellow Stop Sign Incomplete, except it is now within 3 days of the scheduled surgery. 
- **Yellow Check (Exception) Icon:** This section contains an exception. An exception indicates that the Yellow Packet is incomplete, but will be completed on the specified date. Beginning 3 days before surgery, the status will change to red icon when Yellow Packet is still incomplete. 

Viewing Bypass Sections

Viewing Bypass Request

Click the **Bypass Request** band to view requests to exempt the patient from specific documents or assessments. Details include:

Request Status:

- No Request
- Request is not submitted (request may be saved)

Bypass Type:

- **Healthy Patient** – if checked, the patient is healthy and does not require a particular document or assessment.
- **Recent Surgery** – If checked, the patient has recent documents or assessments that can apply to the upcoming surgery.
- **Answered By:** Person responding to the request.
- **Answered On:** Date on which the request was answered.
- **Response Details:** Reason or other additional information about the request response.
- **Requested By:** Person requesting the bypass.
- **Requested On:** Date on which the bypass was requested.

Bypass Requests, continued.

- **Required documents:** Documents with a checkbox outlined in yellow cannot be bypassed. Other documents specific to the upcoming surgery may also be required and not eligible for bypass.
- **Supplementary Info:** Information further explaining the request for bypass.

Viewing Bypass Documents

Documents supporting a Bypass Request should be added here if they are indicated in the Bypass Request band.

ORCA documents can be viewed by clicking on the **Document Type** link.

Viewing Consent/Advanced Directives

All documents documented in this band will be found in the paper Yellow Packet. Viewing the **Consent/Advance Directives** band will provide information about the status of these documents. Details include:

- **Document Type:** Consent or Advanced Directive.
- **Document Service Date:** The date the document was completed.
- **Document Author:** The person who completed the document.
- **Document Status:** The location of the document; printed documents will be in the paper Yellow Packet.
- **Added On:** The date the document was added to the Yellow Packet.
- **Has the patient signed a blood transfusion refusal form?** Options are Yes, No (needs to sign), or N/A (patient has not refused blood transfusions).
- **Complete the advanced directive flowsheet.** If completed appears checked, the date and time of completion and the person who added the form to the paper Yellow Packet will display.

Viewing Orders

All documents documented in this band will be found in the paper Yellow Packet. Viewing the **Orders** band will provide information about the status of these documents. The types of orders recorded are:

- Surgeon Orders
- Anesthesia Orders
- Blood Products

For each order type you can also view:

- **Required:** If checked, this order must be signed and in the paper Yellow Packet.
- **Order is signed and in the paper Yellow Packet:** If checked, the order is signed and in the paper Yellow Packet. You can view who has verified this information and the date on which it was verified.

Viewing Assessments

Click the **Assessments** band to view all assessments associated with the patient's procedure. Required documents are:

- History & Physical Assessment
- Patient Questionnaire
- Anesthesia Assessment

① *Optional documents may be included.*

Details include:

- **Document Type:** If the document title contains an ORCA icon, click to view online. Otherwise, the document is in the paper Yellow Packet.
- **Document Service Date:** Date the document was completed.
- **Document Author:** Person who completed the document.
- **Document Status:** Status of the document, for example, Authenticated in ORCA, Pending Transcription, or In Paper YP.
- **Added On:** The date in which the document was made available in the Yellow Packet, either online or in print.
- **Actions:** Do not use if only viewing data.

Viewing Consults and Diagnostics

Click the **Consults and Diagnostics** band to view consultations and diagnostic information relevant to the surgery.

① *Documents needed in this band only if it is required for this particular surgery.*

- **Document Type:** If the document title contains an ORCA icon, click to view the document online. Otherwise, the document is located in the printed Yellow Packet, Epic, or the Paper Chart.

① *ECG results may appear here or in Recent Results > Other Diagnostics.*

- **Document Service Date:** Date the document was completed.
- **Document Author:** person who completed the document.
- **Document Status:** Status of the document, for example, Authenticated in ORCA or Pending Transcription.
- **Added On:** Date the document was made available, either online or in print, in the Yellow Packet.

Viewing Recent Results

Click the **Recent Results** band to view diagnostic information from the last 30 days, including:

- Laboratory
- Pathology
- Radiology
- Other Diagnostics: ECG, Echo, Cath, others
- Vital Signs

Within each of the results, you can view:

- **Last Date:** Most recent results dates.
- **Last Value:** Most recent value or the location and status of the most recent result value(s). For example, if the status Authenticated or Transcribed displays, click the link to view the most recent document. Click **Cancel** when done viewing.
- **Range (Min – Max):** Normal range for these results.
- **Prior:** Prior results for this patient.
- **(#) More:** Additional results. Click to view. Click **Close** when done.
- **Show Full Flowsheet:** Click to view. Click **Close** when done.

Viewing Appointments

Click the **Appointments** band to view scheduled and completed appointments relevant to the patient's surgery. Appointment information includes:

- **Timeframe:** Appointments view may be selected for 30, 60, 180, or 365 days.
- **Date/Time:** Date and time of the appointment.
- **Location:** Clinic where the appointment is taking place.
- **Type:** The type of appointment, such as Follow-up or Post-op.
- **Reason:** Reason for scheduling the appointment.
- **Duration:** Length of the appointment .
- **Status:** Status of the appointments, such as Arrived or Scheduled.

Viewing Medications Reconciliation

Click the **Med Reconciliation** band to verify Medication Reconciliation has occurred. Details include:

- **Clinic:** Clinic where Med Reconciliation occurred.
- **Date:** Date when Med Reconciliation marked done in the Yellow Packet.
- **Provider:** Provider performing the Med Reconciliation.
- **Reviewed w/Pt & Reconciled:** If Yes, the patient has reviewed and reconciled all medications.
- **Form Sent to RX:** Med Reconciliation form sent to Pharmacy due to discovered and reconciled discrepancies.
- **Rec. Added By:** Person who added the information to the Yellow Packet.

The actual Medication List is found in the source application. Click one of the following **Quick Links** based on the origin of the patient's medication list.

- **View ORCA Med Profile:**
- **View Epic Med Profile:**
- **View Mindscape MDS Report:**

When done viewing, click the **Surgery Schedule** tab to return to the **Med Reconciliation** band.

Viewing Referrals

Click the **Referrals** band to view contact information for primary and referring providers, including:

- **Name:** Name of the person who referred the patient.
- **Role:** Role of the person who referred the patient.
- **Phone:** Optional; may not be present.
- **Address(es):** Optional, may not be present.
- **Actions:** Do not use if only viewing data.

Section 5: Finding Information in the Patient Chart

Reviewing Allergies and Alerts

Reviewing Allergies

1. From the patient chart, go to the Demographic Banner (colored bar above the patient chart).
2. View **Allergies**: just left of center on bottom row.
3. If an ellipsis (...) displays at the end of the allergy list, hover over the list to view all allergies.

Reviewing Alerts

1. From the patient chart, select **Alerts/Adv Dir/ Code** from the **Menu**
2. The follow may be available from here:
 - Advanced Directives (if scanned into ORCA)
 - Alert Care Plans
 - MRSA screening
 - Inpatient Precautions
 - Inpatient Advanced Directives Screening and the date screening was done

Look Up Patient Demographics

To look up demographic information for Implant Record Tracking and other purposes:

1. From the patient chart, go to the Demographic Banner (colored bar above the patient chart)
2. Click on the patient name to review the following:
 - Full address
 - Date of Birth
 - Last 4 digits of Social Security Number
 - Phone number
 - Marital status

Run the OR PreOp Information Report

The OR PreOp Information Report is designed to provide the information required for a procedure. It pulls information from various places in the patient chart into one report.

1. From the patient chart, select **Status/Plan Summary** from the **Menu**.
2. Select **Status Summary**.
3. In the **Reports** section, click the green **More...** button.
4. Click the **OR Pre-Op Information** link.
5. Review and/or print the report (click the **Print** icon).

Look Up Results

To look up patient results, such as labs, especially when a patient does not have a Yellow Packet (most recent 30 days results display in the Yellow Packet):

1. From the patient chart, select **Results Review** from the **Menu**.
2. Select **Last 72 hrs (All)**.
3. Review results.

Navigating Using Tabs and a Link Within the Yellow Packet

There are four tabs and one link within the Yellow Packet:

- **Go Back:** Returns the view back to the Surgery Schedule.
- **Archive YP:** Places open Yellow Packet in Archive status.
- **Restore YP:** Restores open Yellow Packet from Archive status to normal status.
- **Recent YP:** Displays list of recently viewed Yellow Packet links. Clicking a link will open that patient's yellow packet.
- **Print YP:** Prints the open Yellow Packet.

Section 6: Navigating Using Additional Tabs and Links

Navigating Using Tabs in the Main Window

There are 7 tabs in the Yellow Packet to assist the user in finding the correct yellow packet.

- **My Yellow Packets:** Displays a list of packets started by the logged in user.
- **Clinic Yellow Packet:** Default view when opening Yellow Packet from Surgery Schedule.
- **Clinic Bypass Requests:** All Bypass Requests based on the search criteria, such as date range and clinic.
- **PAC Appointments:** PAC (Pre-Anesthesia Clinic) patients for the date selected.
- **PAC Upcoming Surgeries:** All Yellow Packets for PAC in the selected date range.
- **PAC Bypass Pending:** All Bypass Requests that are pending in the selected date range.
- **Back to Surgery Schedule:** Returns the view back to the Surgery Schedule.
- **Set Tab as Default:** Sets open tab to the default open tab.