Observations Module

MediSked Connect Administrative Guide

Published: 3/23/2020

Version: 3.10.2020.0312

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1 Observations (Module)

The Observations module allows for the creation of and reporting on observations, also known as charts. Observations, such as bed checks or repositioning, are not logged here; instead observations or charts are logged within the Enter Notes screen.

- Observations can be given a service filter so they only appear when specific services are documented.
- An unlimited number of observations can be configured and each observation can contain up to 20 questions.
- An observations report is available that allows the user to select desired filters and export the report.

1.1 Observation Types

The Observation Types section allows the user to create and configure Observations.

There are three stages to successfully configure Observations:

1. Create the Observation Type, which is the name of the observation.
2. Add the Observation Details: the specific questions and the format for each answer to these questions.
3. Assign the Observation to an Individual with individualized directions and service filters.

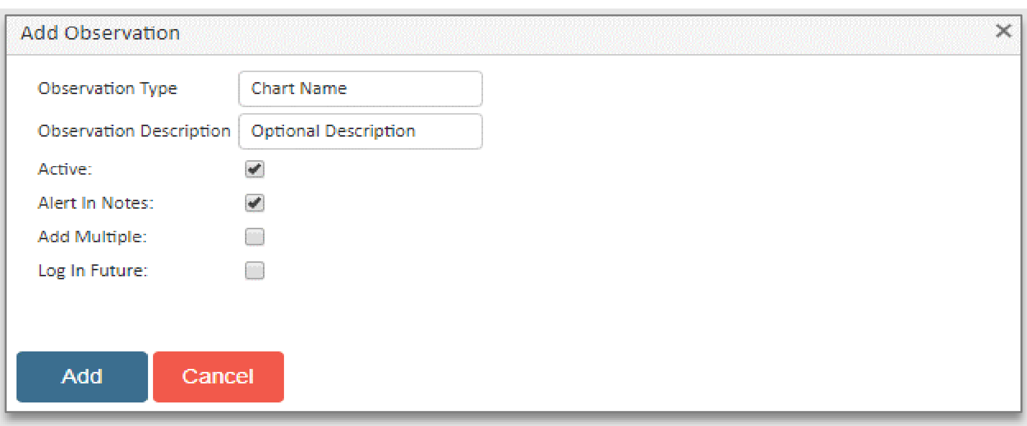
1.1.1 Configuring Observation Types

Configuring and creating an Observation involves setting the name of the Observation and other Observation features regarding alerts, allowing of multiple instances, and allowing future logging.

To add an Observation Type, follow these steps:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Medications/Observations tab.</td></tr>
<tr><td>2</td><td>Click Observation Types from the Observations Module.</td></tr>
<tr><td>3</td><td>Click the blue Add Observation button.</td></tr>
<tr><td>4</td><td>Enter the name of the Observation in the Observation Type field.

Note: Description is optional.</td></tr>
<tr><td>5</td><td>Configure additional Observation settings as needed:
<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Active</td><td>The Observation is available to link to Individuals.</td></tr>
<tr><td>Alert in Notes</td><td>Sets the Observation so users will receive a pop-up box alert within the Enter Notes experience reminding the user the individual has an Observation(s) to be documented.</td></tr>
<tr><td>Add Multiple</td><td>User should be able to complete multiple instances of this Observation at one time.</td></tr>
<tr><td>Log in Future</td><td>Allows user to complete an Observation at a time in the future.</td></tr>
</table>

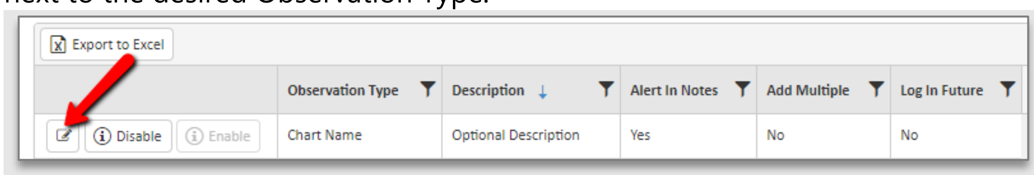
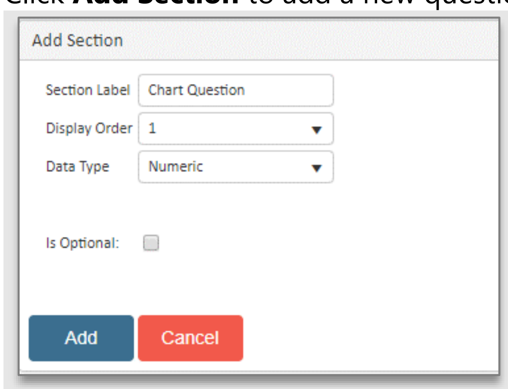


</td></tr>
<tr><td>6</td><td>Click Add to add the Observation type.</td></tr>
</table>

1.1.2 Adding Observation Details

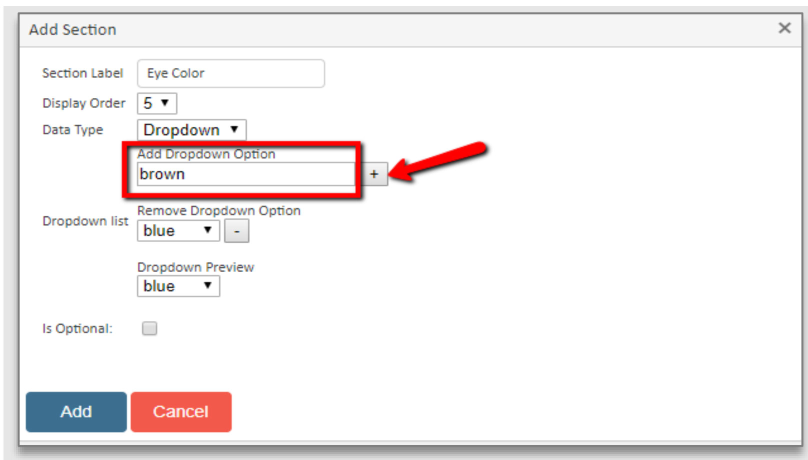
Once the Observation type has been added, the Observation details can be entered. These are the questions/comments users will be prompted to enter when completing an Observation. Up to 20 questions can be created.

To add Observation Details, follow these steps:

Step	Action
1	Click the **Medications/Observations** tab at the top of the screen.
2	Click **Observation Types** from the Observations Module.
3	All current Observation types will be listed on this screen. Click the **Pencil** icon next to the desired Observation Type. 
4	Click **Add Section** to add a new question to the Observation Type. 
5	Enter the question in the **Section Label** field.
6	Select the **Display Order** to indicate what order the questions are displayed within the Observation. ***Note:*** *1 is the first question and 20 is the last question.*

Step	Action
7	Select the **Data Type** from the drop down:

Data Type	Description
Numeric	Number field
Short Text	Up to 250 characters
Long Text	Text field which can hold paragraphs
Date Time	Date and time field
Dropdown	Enter each list item in **Add Dropdown Option** box, clicking the plus sign after each entry
Multiselect	Same as dropdown, but multiple options can be selected when completing Observations



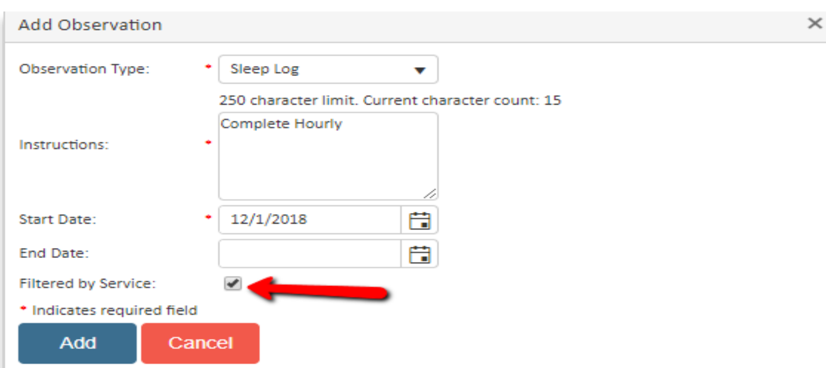
Step	Action
8	Check **Is Optional** if the question is not required to be answered by the user when completing the Observation.
9	Click **Add** to add the Observation detail.

1.1.3 Assigning Observations to Individuals

After the observation has been created it can be assigned to Individuals, including the additional details regarding instructions, start/end dates, and association with specific Services.

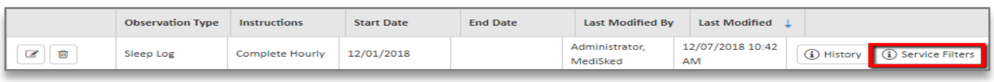
This is performed in the People & Services section of Connect:

Step	Action
1	Click the **People and Services** tab.

Step	Action
2	Click **Add/Change Individual** from the Entity Update Module.
3	Select the appropriate **Individual** from the Individual drop-down.
4	Click on the **magnifying glass icon** to access the Individual More Information Page**.**
5	Click **Observations** from the Descriptions Module.
6	Click the blue **Add Observation** button.
7	Select the **Observation Type** (observation name) from the drop-down.
8	Enter any **Instructions** to display for the user when completing the Observation.
9	Enter the **Start Date**. ***Note:*** *If this date is in the future, the observation will not appear in the daily notes for a user to complete until the start date occurs.*
10	Enter the **End Date** if applicable, which will set when the Observation is no longer applicable. ***Note:*** *Once the end date occurs, this observation will no longer show up in the daily notes for a user to complete.*
11	Check **Filtered by Service** if this Observation should only be completable when specific Services are performed. 
12	Click **Add** to finish assigning the observation to the individual.

1.1.4 Filtering Observations by Service

If an Observation should only be completable when specific Services are performed, the associations can be managed in the People & Services tab:

Step	Action
1	Click the **People and Services** tab.
2	Click **Add/Change Individual** from the <u>Entity Update Module</u>.
3	Select the appropriate **Individual** from the <u>Individual</u> drop-down.
4	Click on the **magnifying glass icon** to access the Individual More Information Page.
5	Click **Observations** from the Descriptions Module.
6	A list of currently assigned Observations will display. Click **Service Filters.** 
7	Check mark all applicable Services to affiliate with this Observation and click **Save.**

1.2 Observations Reporting

Observations can be reported on by one or more of the following:

- Date Range (Service Date or Logged Date based on the Filter Type selection)
- Individual
- Employee
- Service
- Location
- Observation Type(s)

To create an Observations Report, follow these steps:

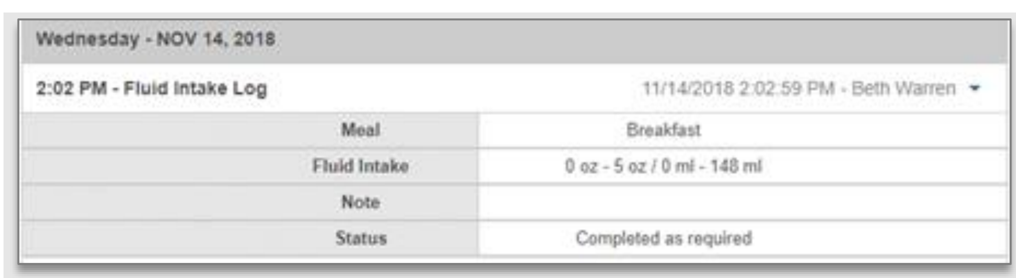
Step	Action
1	Click the **Medications/Observations** tab at the top of the screen.
2	Click **Observations Report** from the <u>Observations Module</u>.
3	Select the desired filters and click **Next >>** to display a list of all Individuals who meet the criteria. ***Note:*** *Select a "Filter Type" to choose if the date range selected refers to the Service Date or the Logged Date of the observations.* ***Note:*** *To select multiple Observation Types hold the "CTRL" key and click to select the desired Observation Types. To select all Observation Types hold the "CTRL" + "A" keys simultaneously.*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click EXPAND ALL to see all Individual’s details or click the right caret to see a specific individual’s details.


</td></tr>
<tr><td>5</td><td>Once expanded, a summary of the Observation Types completed will display. This includes the user who logged the Observation and the date and time the Observation was completed.

Click the right caret to see the Observation Details.

The details include all questions within the Observation Type and the responses entered by the user.


</td></tr>
<tr><td>6</td><td>To export the report to Excel, click the blue Export button at the top right of the screen.</td></tr>
</table>