

ED-PACT Tool



RN Care Manager User Guide

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INTRODUCTION

Welcome to using the ED-PACT Tool. We hope that you will find it easy to use and incorporate into your practice. It will benefit your patients by ensuring that your patients get the care they need following an ED visit. It will benefit you and your PACT team by helping you proactively manage your workflow.

Examples of the types of ED follow-up care needs that the tool is commonly used for are:

- Sign and symptom recheck
- Blood pressure recheck
- Laboratory re-check/follow-up
- Wound Check or suture removal
- Radiology re-imaging/follow-up
- Care coordination for specialty follow-up
- Expedited outpatient evaluation

This booklet provides instructions on how to use this tool. If you have any problems, questions or concerns that are not addressed in this booklet, please contact VHAWLAEDPACT@va.gov.

Thank you!

The ED-PACT Tool Team

USING THE ED-PACT TOOL

There are eight steps for the RN Care Manager to follow when using the ED-PACT tool:

STEP 1: Receive alert

STEP 2: Click on the alert to view order

STEP 3: Click on order

STEP 4: If needed, read ED note for details

STEP 5: Contact patient; work with team to initiate addressing need

STEP 6: Write focused note documenting action/plans

STEP 7: Change status of order to complete

STEP 8: Remove alert

Step 1: Click on Alert

When the ED provider uses the ED-PACT Tool for one of your patients, and directs the order to your team, you will receive an alert in the notification section of your “Select Patient” CPRS screen. The Alert shows the name of the patient (ZZtest in the example below) as well as the last 4 digits of the patient’s social security number. Look in the message to see if it is your team (All RNs in a clinic (e.g., Green, Red) will get all alerts for that clinic.)

The screenshot shows a software window titled "Patient Selection". It has a left sidebar with a tree view containing "Default: GMED Cordasco", "Providers", "Team/Personal", "Specialties", "Clinics", "Wards", and "All". The main area is titled "Patients (GMED Cordasco)" and contains a list of patient names. "Zztest A Patient" is selected and highlighted in blue. To the right of the list, details for "Zztest A Patient" are shown: SSN: "SENSITIVE", DOB: "SENSITIVE", Female, and Veteran. At the bottom right of this section is a "Save Patient List Settings" button. Below the patient list is a "Notifications" section with a table. The table has columns: Info, Patient, Location, Urgency, Alert Date/Time, Message, and Forwarded By/When. One notification is listed with the patient name "ZzTest, A Patient" (underlined), Location "ER", Urgency "HIGH", Alert Date/Time "12/14/2015@04:52", and Message "Order placed: ED-PACT TOOL SILVER312/14 04:52". Two large red arrows point to the patient name and the message in the notification row. At the bottom of the window are buttons for "Process Info", "Process All", "Process", "Forward", "Show Comments", and "Remove".

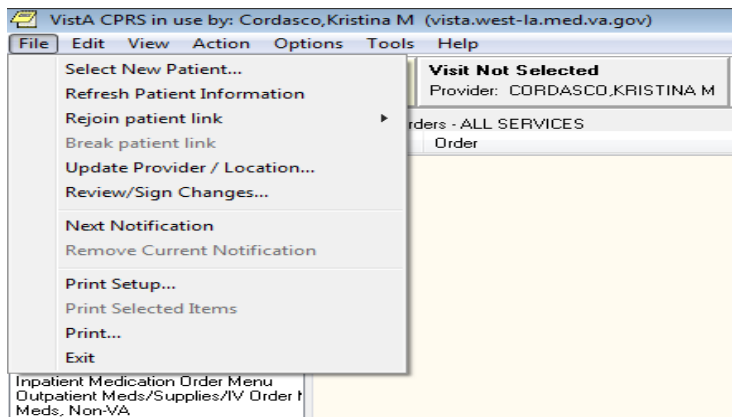
Info	Patient	Location	Urgency	Alert Date/Time	Message	Forwarded By/When
	<u>ZzTest, A Patient</u>	ER	HIGH	12/14/2015@04:52	Order placed: ED-PACT TOOL SILVER312/14 04:52	

STEP 2: Refresh Patient Information to View Active Orders

When you click on the alert, it will take you to the patient's UNSIGNED ORDERS – this will likely be a blank page with no orders.



Go to File and Select “Refresh Patient Information”




(Alternatively, instead of clicking on order, you can manually enter patients last initial/last 4, select patients, and manually navigate order screen)

STEP 3: Find ED-PACT Tool Order

Under the “service” of care coordination, find the order that starts with “ED-PACT Tool”

Vista CPRS in use by: Cordasco,Kristina M (vista.west-la.med.va.gov)

File Edit View Action Options Tools Help

	ZZTEST, A PATIENT EDDIE (OUTPATIENT) 000-00-9983 Aug 08,1935 (81)	TRAIN Jul 10,17 08:00 Provider: CORDASCO,KRISTINA M	No PACT assigned at any VA location /	
---	---	---	---------------------------------------	--

View Orders	Active Orders (includes Pending & Recent Activity) - ALL SERVICES				
Active Orders (includes Pending & Recent Activity)	Service	Order	Start / Stop	Provider	Nurse
Write Delayed Orders	Care Coordin	>> ED-PACT TOOL WLA GOLD TEAM 4 ***** PATIENT PHONE NUMBER: Phone: (310) 777-7777 Work: NONE GIVEN Cell: ***** Is the patient phone number in CPRS correct: Yes Contact phone number if different than CPRS/instructions given if patient has no phone number: RN Care Manager - Please work with your team to initiate communicating and/or coordinating the following post-ED care needs/recommendations. REASON FOR REQUEST: Sumptom/Sym, recheck	Start: NOW Stop: T+14	Cordasco,Kristina M	
Write Orders	Out. Meds	*FUROSEMIDE TAB 20MG TAKE ONE TABLET BY MOUTH EVERY DAY WATER PILL Quantity: 14 Refills: 3	Start: 06/07/17 Stop: 06/06/18	Jennings,Eric C	
Allergies		*NIGONIN TAB 0.125MG	Start: 06/07/17	Jennings,Eric C	
Consults/Procedures Order Menu					
Lab Test Quick Orders Menu					
Blood Bank Orders					
Inpatient Medication Order Menu					
Outpatient Meds/Supplies/IV Order Menu					
Meds, Non-VA					
Radiology/NucMed Order Menu					
*** INPATIENT UNITS ***					
INPATIENT WARDS Order Menu					
WLA CLC Order Menu					
SEP CLC Order Menu					

STEP 4: Click on order to display it

Click on the Order to open and display it. At the top (Arrow #1) you will see the patient's phone numbers, as listed in CPRS. Next (Arrow #2), you will see the ED provider's response to the question "Is the patient phone number in CPRS Correct?" If the answer is "no", the correct phone number should be listed. Finally (Arrow #3) shows the reason(s) for the follow-up request.

Order Details - 82197229;1

>>
ED-PACT TOOL WLA BRONZE TEAM 1

PATIENT PHONE NUMBER:
Phone: (213)815-2359
Work: NONE
Cell: 3104783711

Is the patient phone number in CPRS correct: Yes
Contact phone number if different than CPRS/instructions given if patient
has no phone number:

RN Care Manager - Please work with your team to initiate communicating
and/or coordinating the following post-ED care needs/recommendations.

REASON FOR REQUEST:
Symptom/Sign recheck , Blood pressure recheck
(EXPLAIN IN DETAIL BELOW)
BP 178/101, started amlodipine. also with mild abd pain, now improved,
labs nl, please f/u if continues to improve ED-PACT TOOL WLA BRONZE1_

STEP 5: If needed, read ED note for details

You may find it helpful to read the Emergency Department Note to learn more details about the patient's ED Visit. Look at the top of the note to see the details of why the patient came to the ED, and the bottom of the note to see what the provider's assessment was, the ED course, and the plan at disposition from the ED. If the patient was seen by a resident provider, there may also be an addendum from the attending provider, or a separate "Attending Note," which will provide a concise summary of the ED visit and decision making.

The screenshot displays the Vista CPRS (Computerized Patient Record System) interface. The top bar indicates the user is Cordasco, Kristina M. (vista.west-la.med.va.gov). The patient is ZZTEST, A PATIENT CHARLES (OUTPATIENT), ER May 23, 2016 17:09. The note is titled "EMERGENCY DEPT NOTE (SIGNED PATIENT DOCUMENTS)".

LOCAL TITLE: EMERGENCY DEPT NOTE (SIGNED PATIENT DOCUMENTS)
STANDARD TITLE: EMERGENCY DEPT NOTE
DATE OF NOTE: MAY 23, 2016@17:21 **ENTRY DATE:** MAY 23, 2016@17:21:49
AUTHOR: CORDASCO, KRISTINA M **EXP COSIGNER:**
URGENCY: **STATUS:** COMPLETED

CHIEF COMPLAINT:
Abdominal pain

HISTORY OF PRESENT ILLNESS (Include 4 modifiers if possible):
53 yo male presents with diffuse abdominal pain, periumbilical, sharp, colicky. No back pain/chest pain. Started approx 30 min after eat meal including yogurt that he said tasted "funny". + mild nausea, no vomiting. No diarrhea. No fevers, chills, urinary symptoms. Felt well before this. No history of bowel/liver problems. Not h/o of abd surgeries. Reports took BP med today

PAST MEDICAL HISTORY:
hypertension.

ROS (Include atleast 10 different systems if possible, look at shared templates):
No fevers/chills, weight gain/loss, cough, runny nose, chest pain, SOB urinary symptoms, rashes, bruises, swelling in legs/arms, joint pain, rashes, bruises, weakness/numbness, falls/balance problems

MEDICATION LIST:
HCTZ

ADDITIONAL NON-VA MEDS:
none

OVER THE COUNTER MEDS:
none

NUTRITIONAL OR OTHER SUPPLEMENTS:
none

MEDICATION RECONCILIATION:
I have reviewed the patient's outpatient medication with the patient/caregiver and the list above accurately reflects the medications that the patient is currently taking including any that may be provided from non-VA sources, over the counter medications, nutritional or other supplements

ALLERGIES:
PENICILLIN, LISINAPRIL, FLUOROURACIL, ACETAMINOPHEN/COCAINE, SULFA DRUGS, MORPHINE, SIMVASTATIN, EGG PRODUCTS

FAMILY HISTORY:
NC

SOCIAL HISTORY:
no tob, ETOR, IVDU

Vitals: T:98.2 F (36.8 C) (01/04/2016 09:03)
P:80 (01/04/2016 09:03)

The interface includes a left sidebar with a list of notes and a bottom navigation bar with tabs for Cover Sheet, Problems, Meds, Orders, Notes, Consults, Surgery, D/C Summ, Labs, and Reports.

STEP 5: Contact patient and work with team to initiate addressing need

Within 1-3 days after the patient's ED visit, contact the patient and initiate addressing the patient's care need. Some of the patient's needs, such as symptom re-check, will be able to be addressed with a simple phone call. Others will need a nurse or primary care provider visit. Some will need coordination with other services, such as lab, radiology, and specialty care. If it is not clear to you what this patient needs, contact your team's primary care provider (PCP) to seek assistance. And, keep your team PCP "in the loop" with what actions are being taken. Use whatever communication mechanism are currently in place for your team (e.g., in-person or virtual huddles).



STEP 6: Write focused note documenting action/plans

Write a brief, focused note documenting that you initiated follow-up on the patient's recent ED visit and the outcome and/or plans. The Note Template "Primary Care Post-ED Follow Up Care Nurse Note" is available.

Reminder Dialog Template: PRIMARY CARE POST-ED FOLLOW UP CARE NURSING NOTE

Able to reach patient/patient's family member?

☐ Yes. This encounter was with:

☐ No. Attempts made. Action taken:

☒ No. Patient's contact information not correct. Action taken: *

Reason(s) for Post-ED telephone call: (Select from appropriate boxes) *

☐ Symptom/Sign recheck

☐ Blood pressure recheck

☐ Wound care/suture removal

☐ Laboratory recheck

☐ Radiology follow-up/reimaging

☐ Coordination of follow-up care with consultants/specialized testing

☐ Medication adjustment

☐ Other (EXPLAIN IN DETAIL BELOW) *

Plan/Intervention:

Comment:

☒ Clinic Follow-Up:

Patient informed of any follow-up appointments. Future appointments are as follows:

No Scheduled Appointments at this time.

☒ Patient Access:

☒ - Patient given teamlet phone number and asked to call during clinic hours with any questions or concerns.

☐ - Patient given 1-877-252-4866 24-hour nurse advice line number if PACT teamlet unavailable.

☐ - Call Center number 1-877-251-7295.

☐ - Medication Refill phone number 1-800-952-4852.

You may use a workload encounter if you speak to the patient (use your location)

- 1) Select PACT phone visit location for encounter (this will give workload credit)

Location for Current Activities

Select the appointment or visit that should be associated with the note or orders .

OK

Cancel

Encounter Location

WLA-PACT PHONE BRONZE Mar 09,16 10:20

Clinic Appointments | Hospital Admissions | New Visit

Visit Location

WLA-PACT PHONE BRONZE

WLA-PACT PHONE BRONZE 1A

WLA-PACT PHONE BRONZE 1B

WLA-PACT PHONE BRONZE 1C

WLA-PACT PHONE BRONZE 2A

WLA-PACT PHONE BRONZE 2B

WLA-PACT PHONE BRONZE 2C

Date/Time of Visit

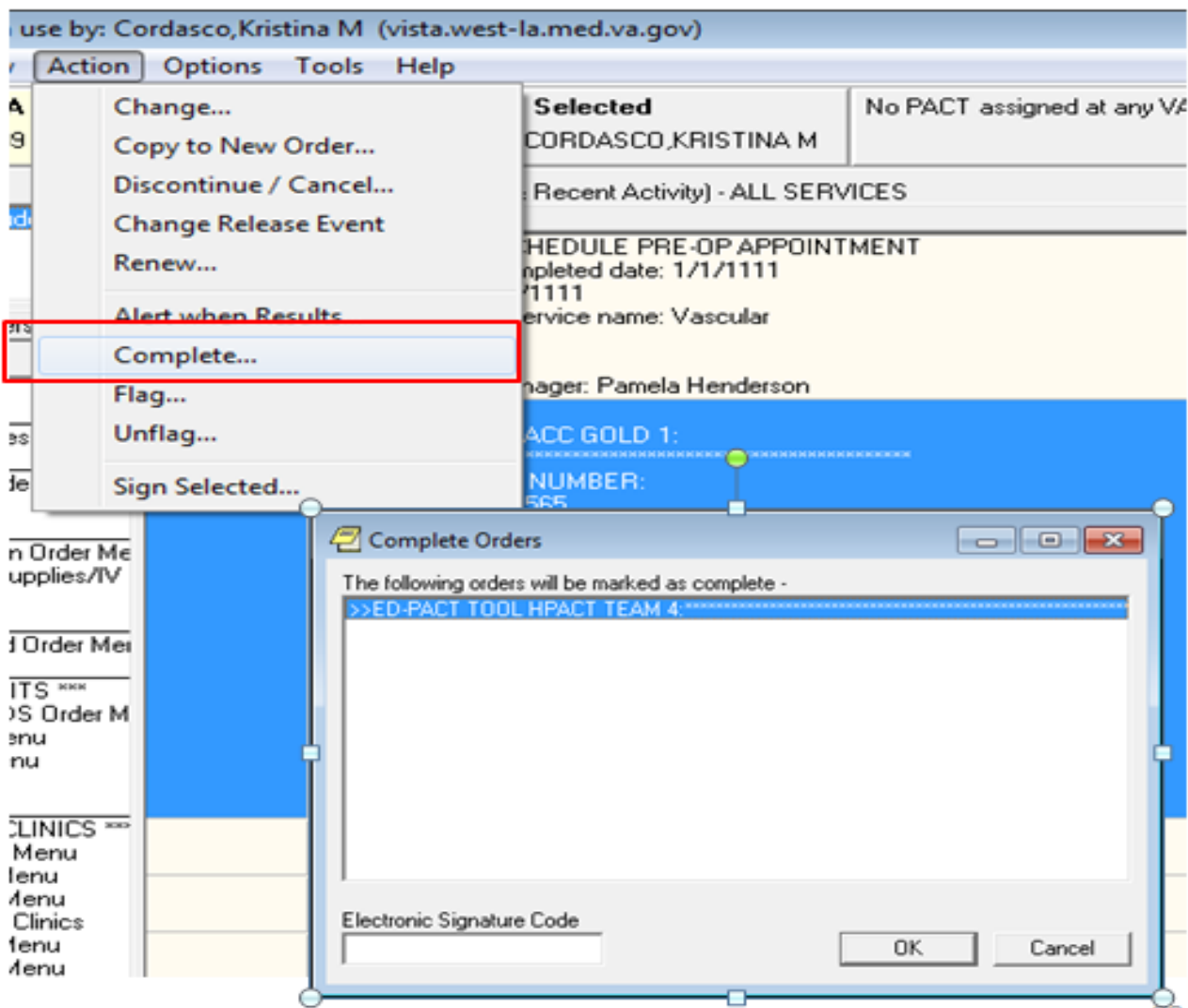
NOW

☐ Historical Visit: a visit that occurred at some time in the past or at some other location (possibly non-VA) but is not used for workload credit.

STEP 7: Change status of order to complete

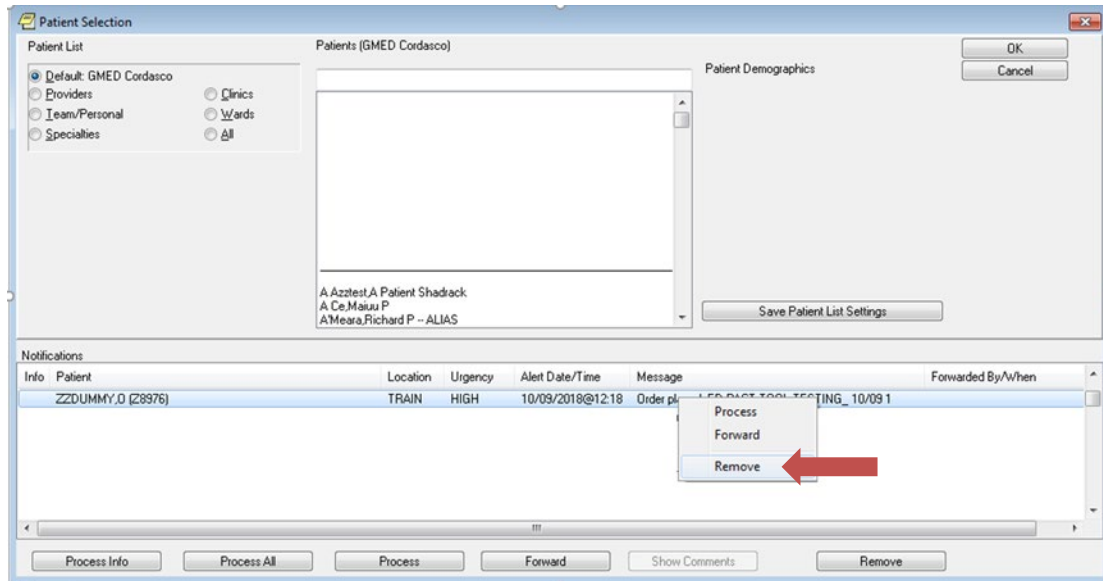
Once you have initiated follow-up on the patient's recent ED visit and written your initial note, change the status of the order from 'active' to 'complete'. To do this, hi-light the order, go to the Action tab, then select Complete. You will then be asked to enter your signature code.

This is a signal that the transfer of care from the ED to the PACT team has been completed, not necessarily that the care is complete (as this may involve a series of steps, or may take time). Be sure to do this within 3 days of the patient's emergency department visit.



STEP 8: Remove alert

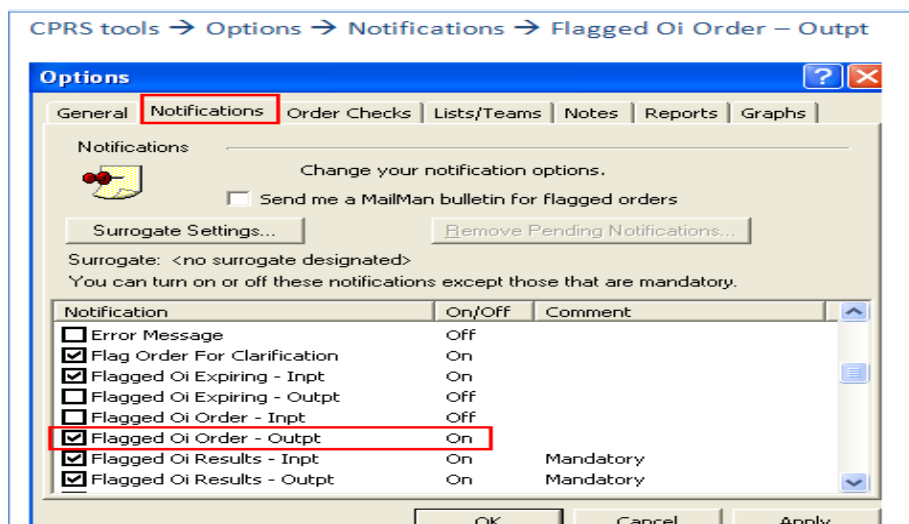
Clear alert from your notifications by right click on the alert and selecting “remove”



SETTING UP YOUR ACCOUNT TO RECEIVE NOTIFICATIONS

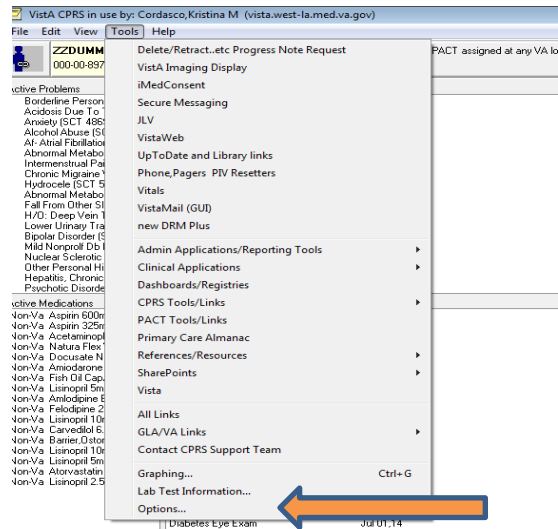
STEP 1 Initial Configuration: To begin receiving ED-PACT Tool notifications, make sure your CPRS notifications are set up correctly. (This only needs to be done once – if you have previously received ED-PACT Tool notifications you can skip this step.)

- 1) Go to CPRS Tools
- 2) Select “Options”
- 3) Select “Notifications”
- 4) Scroll down and check “Flagged Oi Order”

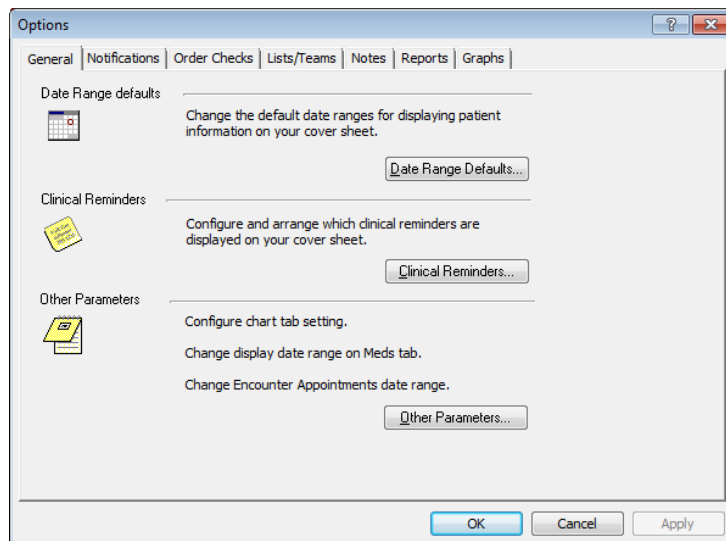


Step 2: Assign yourself to receive alerts for your team(s).

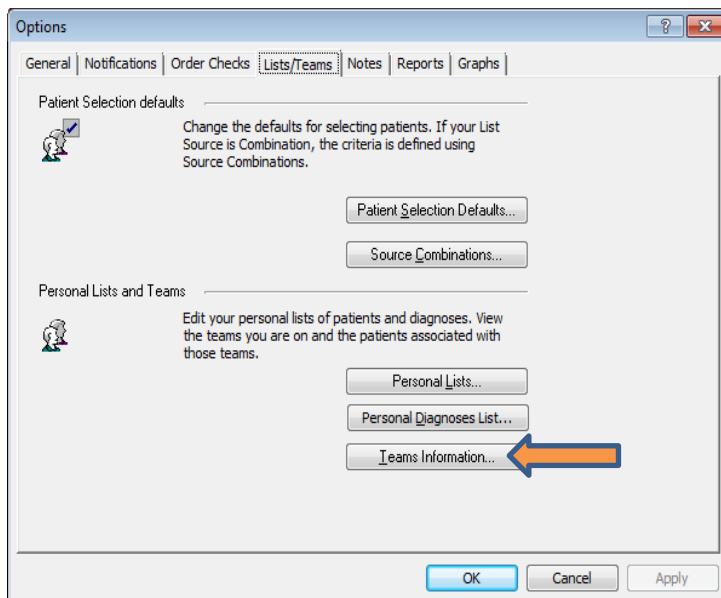
2a) With the record open for any patient, go to “Tools” and select “Options”



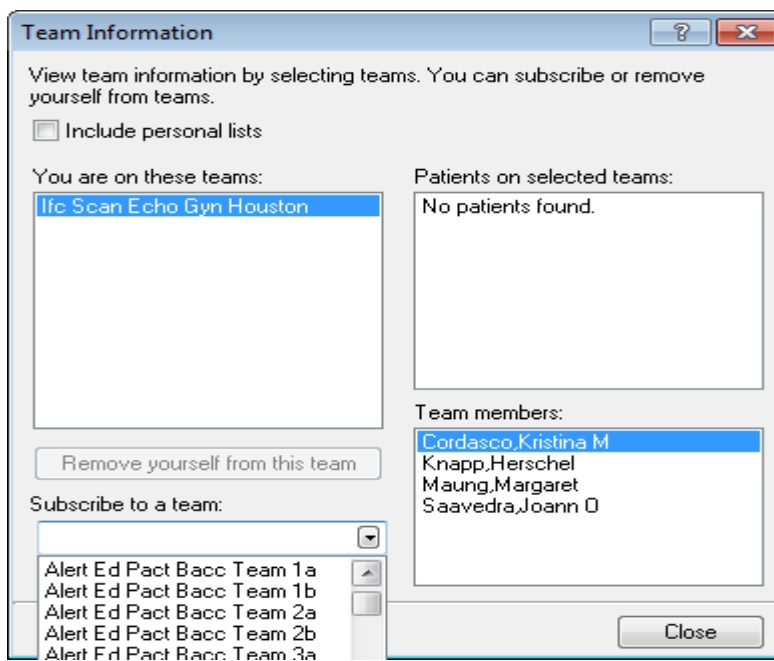
2b) From the Options menu, select the Lists/Teams tab



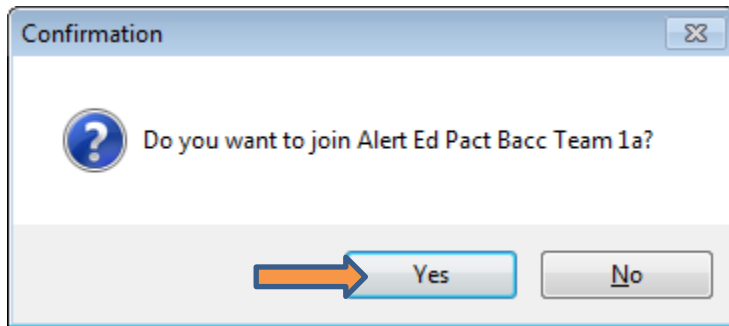
2c) Select “Teams Information”



2d) Next to “Subscribe to a team” click the down arrow, and then select the team for which you would like to start receiving alerts.

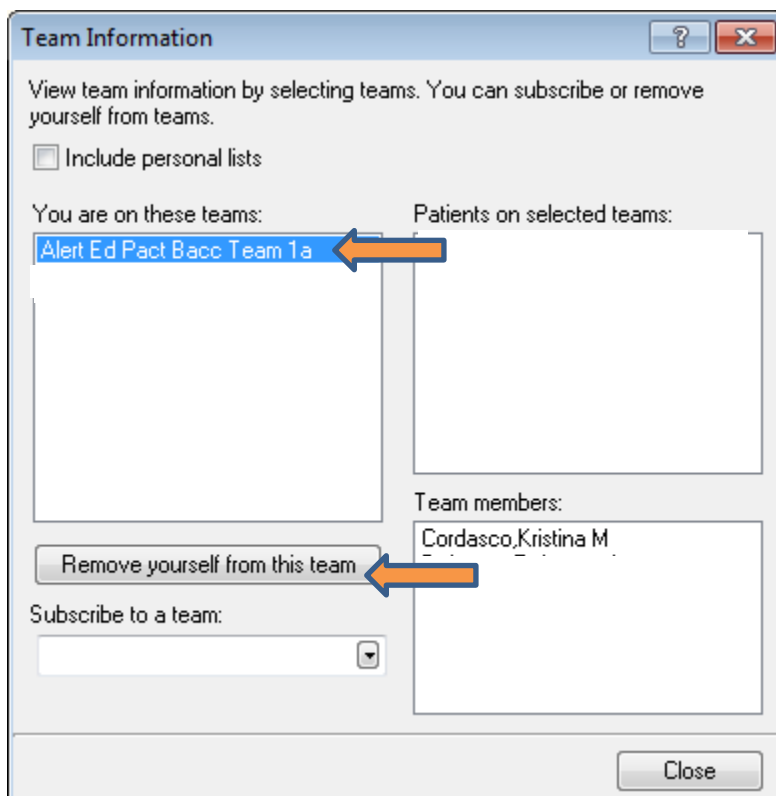


2e) Select Yes to the confirmation pop-up



To un-assign yourself from receiving alerts for a team

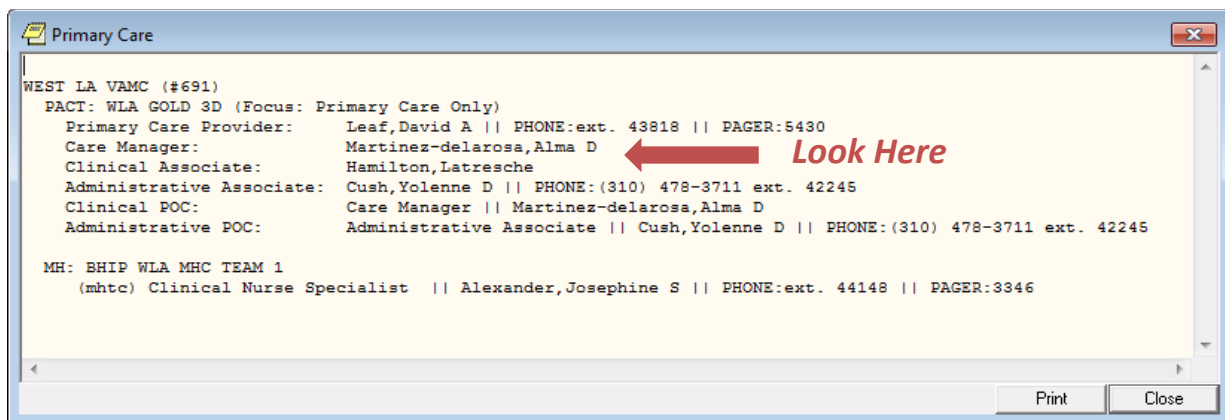
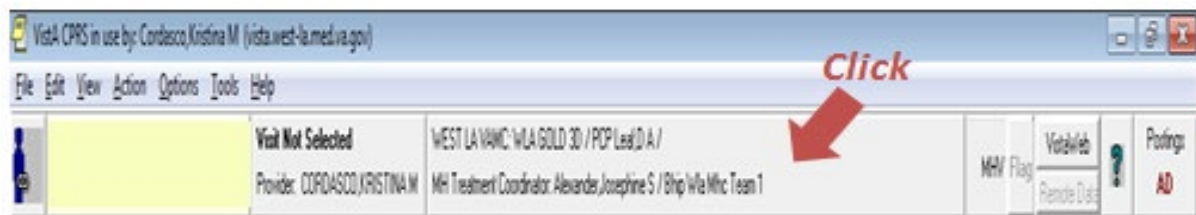
Follow steps 2a-2c above, then select the team you want to remove yourself from, and click "remove yourself from this team"



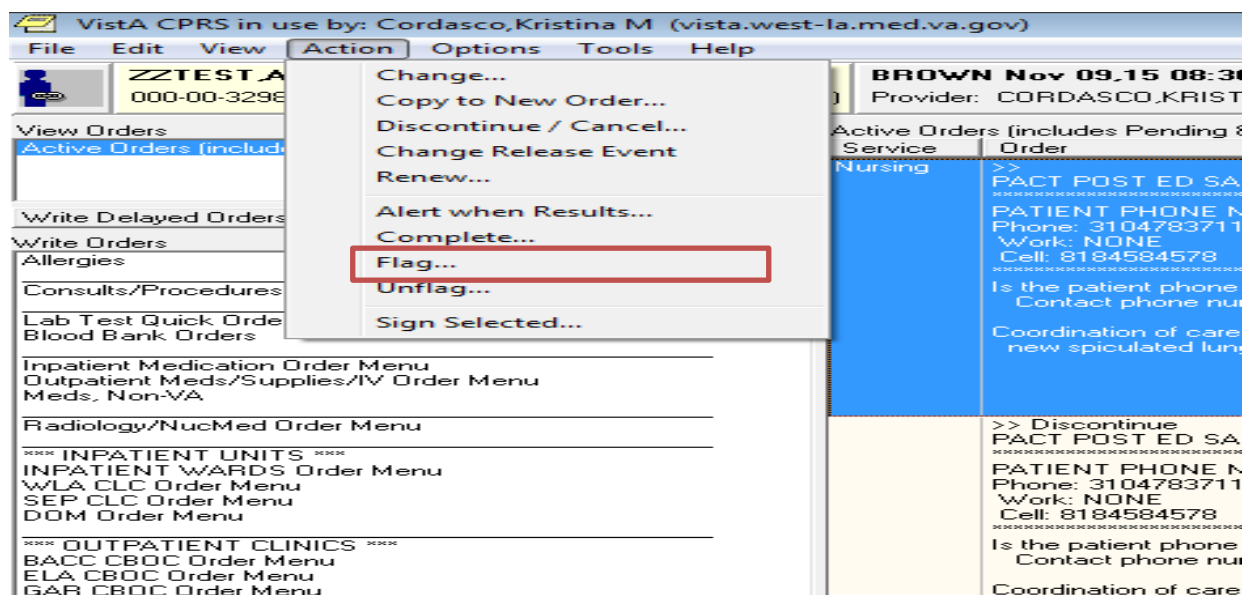
Forwarding Alerts to Other People

The ED-PACT tool is dependent on the ED provider directing the message to the correct team. Therefore, unfortunately, errors may happen and you may get an alert for a patient assigned to a different PACT team, or one who is unassigned. If the patient is assigned to a different GLA team, please alert the appropriate RN Care Manager. You can do this informally through calling them or sending them a Skype message, or through flagging it for them, which will send an alert to their CPRS notifications.

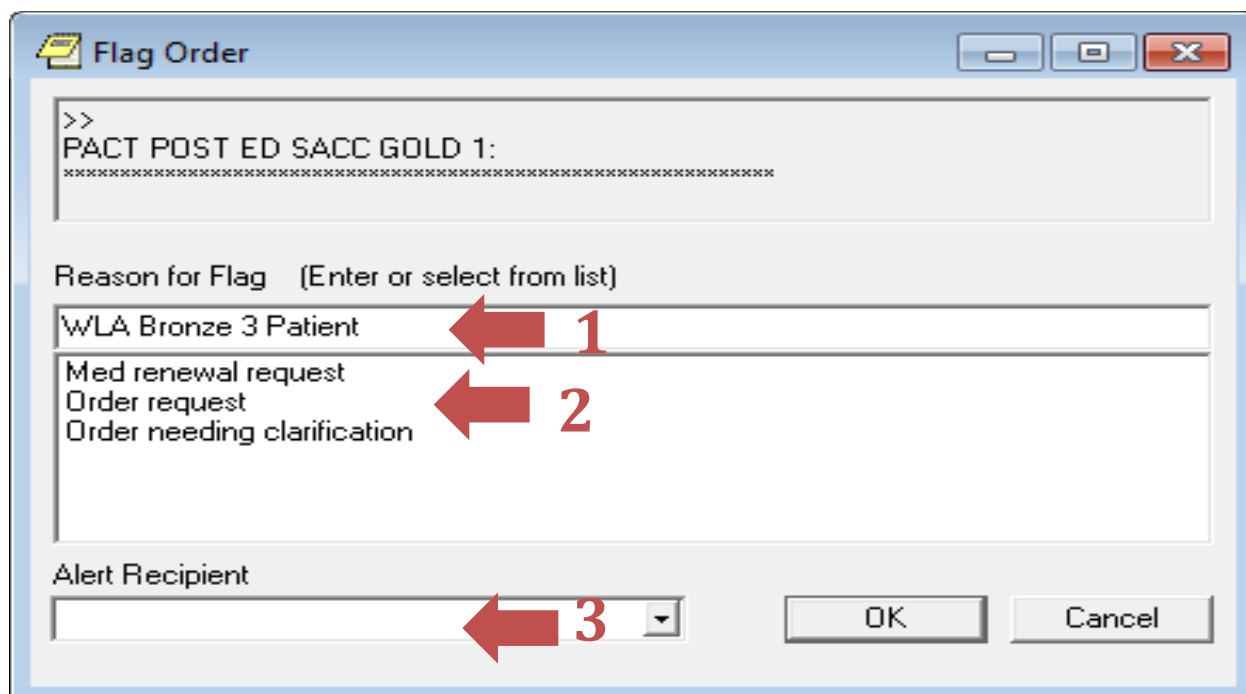
To identify the correct RN Care Manager for a patient, click on the Primary Care Team box in the top banner. The appropriate Care Manager's name will be listed next to Clinical POC.



To flag an order to another person (essentially forwarding the alert), hi-light the order and then go to Action, and select Flag



Then, in the pop-up box, write in the reason for flag (Arrow #1), select Order request (Arrow #2), and select the appropriate Alert Recipient (Arrow #3)



The flagged order will show a red highlighted bar in the service section of the order-

Vista CPRS in use by: Cordasco,Kristina M (vista.west-la.med.va.gov)

File Edit View Action Options Tools Help

ZZTEST A PATIENT (OUTPATIENT) 000-00-8999 Mar 10,1926 (90) ZKRASNO Aug 08,16 10:00 Provider: CORDASCO,KRISTINA M No PACT assigned at any VA location /

Flag VistaWeb Remote Data Postings WAD

View Orders

Active Orders (includes Pending & Recent Activity) - ALL SERVICES

Service	Order	Start / Stop	Provider	Nurse	Clerk	Chart	Status	Location
Cardio	ED-PACT TOOL "TESTING": PATIENT PHONE NUMBER: Phone: 000-000-0000 Work: 424 666-6666 Cell: 310-555-5555 Is the patient phone number in CPRS correct: Yes Contact phone number if different than CPRS/instructions given if patient has no phone number: test REASON FOR REQUEST: Symptom/Sign recheck (EXPLAIN IN DETAIL BELOW) test "Flagged"	Start: 08/17/16 13:49 Stop: 08/31/16	Cordasco,Kristina M				active	Leo-Mhc K
Cardio	ED-PACT TOOL "TESTING": PATIENT PHONE NUMBER: Phone: 000-000-0000 Work: 424 666-6666 Cell: 310-555-5555 Is the patient phone number in CPRS correct: Yes Contact phone number if different than CPRS/instructions given if patient has no phone number: test REASON FOR REQUEST: Symptom/Sign recheck (EXPLAIN IN DETAIL BELOW) test "Flagged"	Start: 08/08/16 13:03 Stop: 08/22/16	Song,Hyun-Sung				active	1no Workk
Nursing	>> Please do: 12 lead EKG Now "UNSIGNED"	Start: NOW Stop: t+180	Rabbath,Peter R				unreleased	Sam-Telere
Nursing	>> Please do: 12 lead EKG Now "UNSIGNED"	Start: NOW Stop: t+180	Rabbath,Peter R				unreleased	Sam-Telere
	>> IV: Saline Lock NOW	Start: 12/07/15 12:14	Yim,Natalya	ADO			active	Wla-Nurse
	>> Supplemental O2 as needed	Start: 12/07/15 12:14	Yim,Natalya	ADO			active	Wla-Nurse
	>> Please give patient: Tetanus Vaccine	Start: 10/22/15 14:48	Rokhsar,Soleyman				active	Wla-Trainir
	>> Please give patient: INFLUENZA VACCINE	Start: 04/13/15 10:58	Urbina,Rene M				active	Wla-Trainir
	>> IV: Saline Lock Jan 05, 2015@20:04	Start: 01/05/15 20:04	Carag,Christian Paulo M				active	Wla-Nurse
	>> IV: Saline Lock NOW	Start: 01/05/15 20:01	Kim,Emily J				active	Wla-Nurse
	>> Supplemental O2 as needed	Start: 01/05/15 20:01	Kim,Emily J				active	Wla-Nurse
	>> Supplemental O2 as needed	Start: 07/30/14 11:04	Kim,Emily J				active	Wla-Nurse
	>> IV: Saline Lock w/ 2nd large bore catheter NOW	Start: 07/30/14 11:04	Kim,Emily J				active	Wla-Nurse
	>> DUMMY NUR ORDER	Start: 07/22/14 16:44	Rokhsar,Soleyman				active	Wla-Pact F
	>> Encourage food intake	Start: 07/21/14 18:15	Chang,Donald S				active	Wla-Denta

Cover Sheet | Problems | Meds | Orders | Notes | Consults | Surgery | D/C Summ | Labs | Reports

Using the ED-PACT Dashboard

What is the ED-PACT Tool Dashboard?

- An EXCEL® table that shows all ED-PACT Tool orders that have been placed
- Updated with new ED-PACT Tool orders every morning

When would you use the ED-PACT Tool Dashboard?

- 1) To look up active orders for your teamlet or the teamlet you're covering
- 2) To look up patients for whom ED-PACT Tool orders have been completed

How do you use the ED-PACT Tool Dashboard??

First, go to the ED-PACT Tool Dashboard website:*

[ED-PACT OrderStatus.xlsx](#)

(save this link in your favorites)**

- To look up any active orders for your teamlet or the teamlet you're covering

1. Make sure 'Active' is selected for 'Order Status' (cell B3)

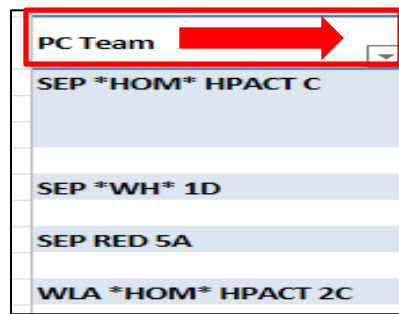
The screenshot shows a web browser window with the address bar displaying the URL: https://vaww.dev.r01.cdw.va.gov/sites/V22/Special_Projects/GLA_KM/_layouts/15/xlvview. The browser tab title is 'VDW_ED-PACT_OrderStatus.xlsx'. The browser interface includes a search bar, a 'DATA' dropdown menu, and a 'FIND' button. The spreadsheet content is displayed in a table format with columns A, B, and C. The title 'ED-PACT Patient List Since 1/1/2015' is centered across the top. The first row of data has the following values: 'Order Status' in column A, 'ACTIVE' in column B, and '(All)' in column C. The second row has the following values: 'Ordering Provider' in column A, '(All)' in column B, and '(All)' in column C. The third row has the following values: 'InactivatedDateTime' in column A, '(All)' in column B, and '(All)' in column C. A red rectangle highlights the cell containing 'ACTIVE' in the first row, column B.

ED-PACT Patient List Since 1/1/2015		
Order Status	ACTIVE	
Ordering Provider	(All)	
InactivatedDateTime	(All)	

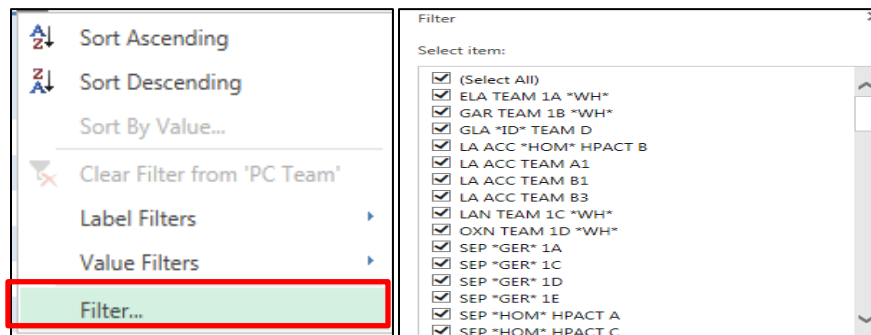
*The first time you click on this link, you will be prompted to answer why you need access to this website. Write 'PACT RN' in response box and click send. You will receive access to this website within 1-2 days.

****Once you've accessed the ED-PACT Tool Dashboard website, navigate to the top, right-hand corner of the browser window and click the star icon (your favorites menu). Click 'Add to favorites,' name this link, and click 'add'. You will now be able to access this link from your favorites menu.**

- Click on arrow in cell A7, labeled 'PC Team'



- From dropdown menu, select 'Filter' and select the name of your PACT teamlet (or the one you are covering)



- All active orders for the teamlet you selected will be listed in the table
- To see patients for ED-PACT Tool orders that have been completed
 - Select 'Complete' for 'Order Status' (cell B3)
 - Follow steps 2 and 3 above

FREQUENTLY ASKED QUESTIONS

- ***What if I can't reach the patient?***

Leave a discreet message, with your call-back number. The number of attempts you make should be appropriate to the severity/urgency of the follow-up care need (determined in consultation with your team PCP). Consider sending a letter to the patient, if warranted. Once you document your attempt(s) and actions, change the order status to "Completed."

- ***What if the message from the ED is unclear or vague?***

If the message from the ED is unclear or vague, look at the ED note to try to clarify and gather the needed information. If there is still ambiguity, consult with the PCP to clarify and get additional instructions.

- ***What if the patient is not assigned to any GLA PACT?***

If the patient is not yet assigned to a PACT Team at GLA, send an encrypted email to Leon.Lee@va.gov letting us know, so that we may take care of making sure it is acted on.

- ***What if the patient returns to ED before I contact him/her?***

If the patient returns to the ED before you contact him/her, and is discharged home again, read ED note and see if patient need is still applicable. If the issue is still applicable, proceed with order. If the issue is not applicable, write a brief note why the order is not applicable and complete the order. If the patient returns to the ED before you contact him/her, and is admitted to the hospital, write a brief note saying that the order is no longer applicable and that you will follow-up on needs post hospitalization and complete the order.