The Sydney children's Hospitals Network
care, advocacy, research, education

QUICKSTART

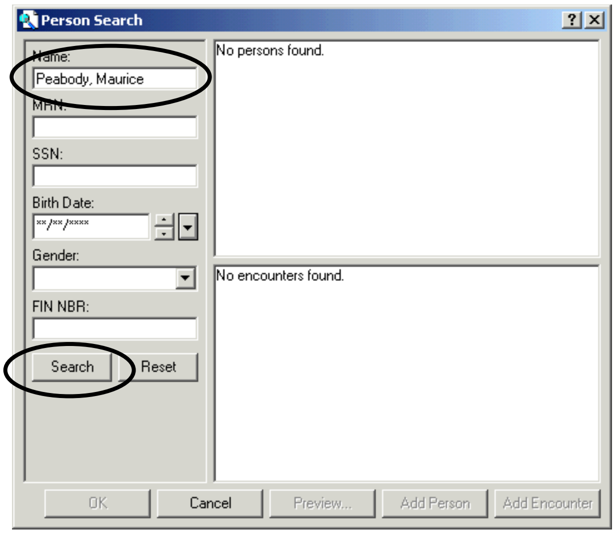
A series of helpful guides provided by the Information Technology Department

1. Register patients and modify their details

Register Patients

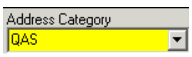
1. Within PowerChart, click on the drop-down arrow next to the **PM Conversation** button and select **Add Person**.

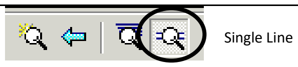
2. Within the **Person Search** window, enter the patient name: enter surname, a comma, a space and a first name and click the **Search** button



3. Ensuring that the patient does not already exist in the system, click the **Add Person** button.
4. The Add New Person 'conversation' window opens. Ensure all mandatory fields are completed. *(Note to highlight mandatory fields, right-click on a blank grey area of the window and **select Highlight required fields**).*

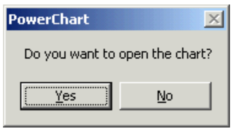
Add New Person fields:

MRN Allocation Source		Select **Trapeze**
Medicare Flag		Select either **Eligible-Aust. Resident** OR **Ineligible** (do not select other options) If you sited the patient's Medicare Card, select **Eligible-Aust. Resident**, then enter the 11-digit number in the Medicare Number field. If there is no card or number, select **Ineligible**.
Address Category		Select **QAS** – this allows you to proceed to click the Address Help button and search for an Australian address.
Address Help		Launches the QAS application (Quick Address Search). Ensure that the Single Line search option is selected

	 Click in the Enter search field and type the address, separate the suburb with a comma, for example: 2/25 Elm St, Chatswood Search for the address and click Select, then click Accept. Select Yes, if you wish to copy the residential address to the mailing address.
Contact numbers	Enter Home, Mobile, Business phone numbers, Fax number and Email address.
Demographic Tab	Complete the fields Date of Birth, Sex, Marital Status, Country of Birth, Aboriginality, and Preferred Language.
Next of Kin / Next of Kin 2	Next of kin is the primary contact who is legally responsible for the patient. 1. Select NOK Relationship to person, eg Mother. 2. Click on the Search for Next of Kin button. 3. Within the **Person Search** window, enter the NOK name: enter surname, a comma, a space and a first name and click the **Search** button 4. If the person is not found in the search results click Add Person If the person is found, select their name and click OK. 5. Enter Address and contact numbers
Carer Information	Foster parent (authorised foster carer, relative carer or kinship carer) details can be recorded here.

5. Once all fields are complete, click **OK**. A message will appear confirming the MRN of the newly added patient.
   Click **OK**.

6. Click **Yes** if you wish to open the new patient's chart.



Modify Patient Details

1. Within PowerChart, click on the drop-down arrow next to the **PM Conversation** button and select **Modify Person Details**.

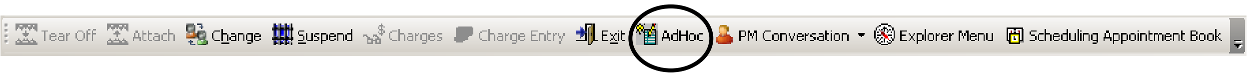
2. Within the **Person Search** window, enter the patient MRN, or enter the name (surname, a comma, a space and a first name)
3. Click the **Search** button.
   The Modify Person Details conversation window opens.
4. Update any fields as necessary.
   Click OK.

2. Using Trapeze Ad Hoc Forms in PowerChart

All Trapeze forms are available via the AdHoc button in PowerChart. This includes the Trapeze Referral form. After this form is saved, the patient is added to the Trapeze Pending Referrals task list.

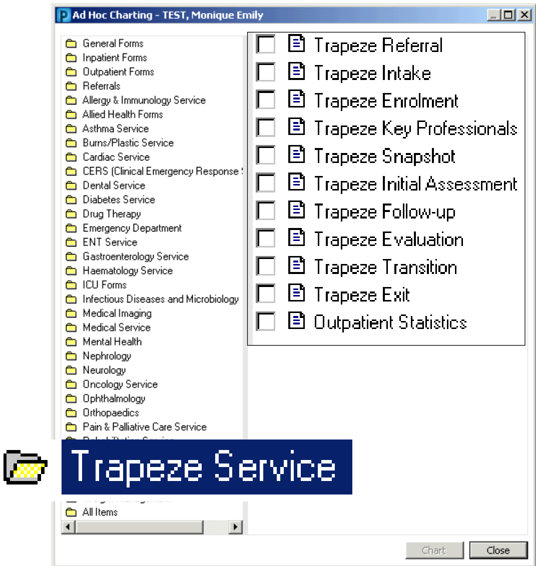
Locating and opening a Trapeze form (Ad Hoc charting)

1. In PowerChart, find the patient using MRN or name in the Patient Search window, or open the patient chart from a ward or patient list.
2. Click on the **Ad Hoc Charting icon** from the toolbar.



Tip:	If the Ad Hoc icon is not visible, the toolbar is not wide enough to display all icons. The toolbar needs to be moved downwards to appear on a row on its own. To do this, position your mouse at the beginning of the toolbar, and drag downwards.

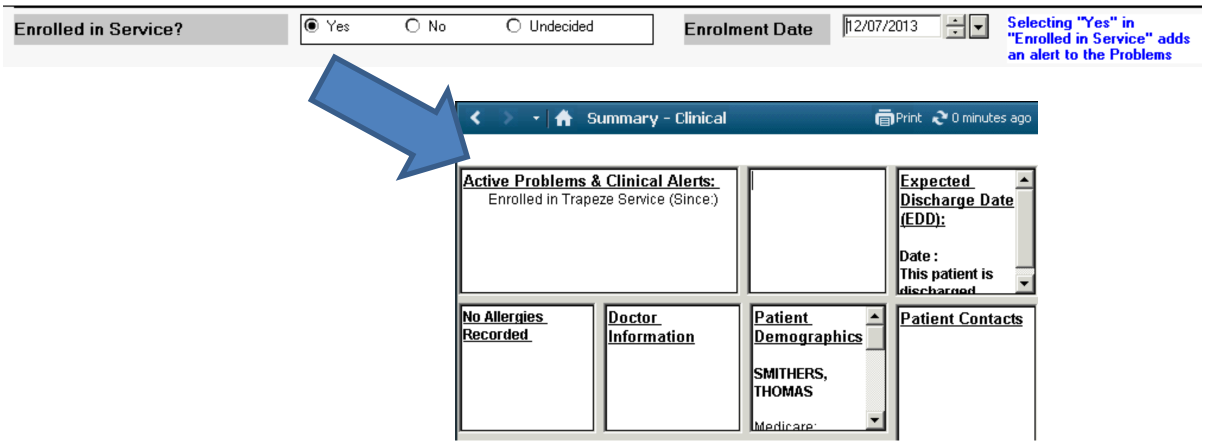
Beginning of toolbar



3. Select the **Trapeze Service** folder from the folder list on the left and then select the form/s you wish to use.
4. Click on the **Chart** button.

NOTE:

- When "Yes" is selected on the **Trapeze Enrolment** form, an alert is automatically added to the patient's problems and alerts window.



- When a **Trapeze Exit** form is completed, the alert is automatically removed from the patient's record.

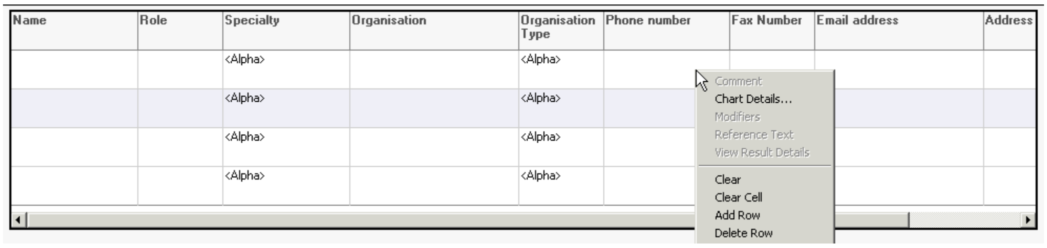
Completing a form

1. Enter the necessary details in the fields provided (see below for hints on working on a form)
2. After the form has been completed click on the **Sign Form** icon (green tick in the top left of the screen) and enter your password.

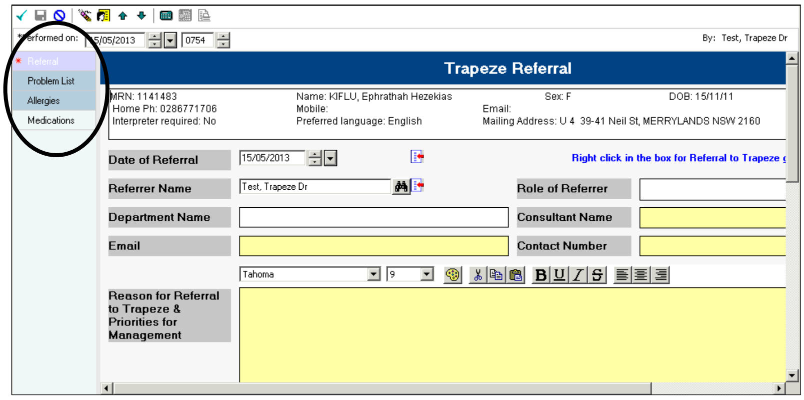
Hints to remember when working on an Ad Hoc form:

- Selecting options:
  - Circle ○ means only one option can be selected.
  - Square ☐ means more than one option can be selected.
- Yellow means this information is required or mandatory.
- Small plain white boxes allow for free text (limited to 255 characters).
- Larger boxes (with formatting icons) allow for unlimited text.
- Blue text: indicates important points to note.
- Access additional information and reference guidelines by right-clicking white box when indicated:

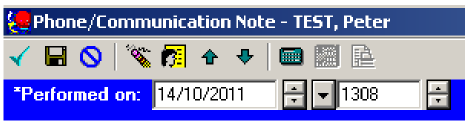
- Working with grids on forms:
  - Resize columns by positioning mouse between column headings and dragging.
  - Add a row by right-clicking on a cell and selecting **Add Row** (a new row is added beneath all existing rows in grid)
  - Delete a row by right-clicking on a cell IN THE ROW TO BE DELETED and selecting **Delete Row**.
  - Clear the contents of a cell by right-clicking in the cell and selecting **Clear Cell**.
  - Clear the ENTIRE contents of the grid by right-clicking in a cell and selecting **Clear**.



- Move between different pages in a form by selecting the page name from the list on the left.



- The date and time fields (in the top left of the form) default to the current date and time. These fields can be modified if required. To enter today's date in a date field, type't'. To enter the current time in a time field, type 'n'.



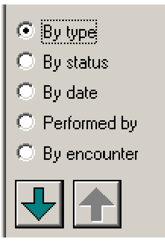
Hint:	If you change the resolution settings on your computer or make the font larger than normal you may not always see all the fields on the forms as they become distorted.

Viewing completed forms

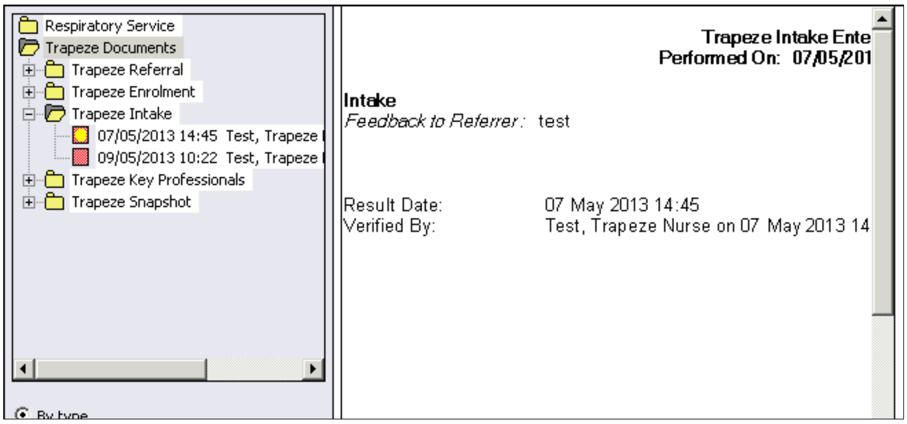
Completed forms can be viewed from either the **Clinical Notes** screen or the **Results** screen.

A. Viewing from Clinical Notes

1. Click on **Clinical Notes** from the menu on the patient's chart.
2. Click the **By type** option

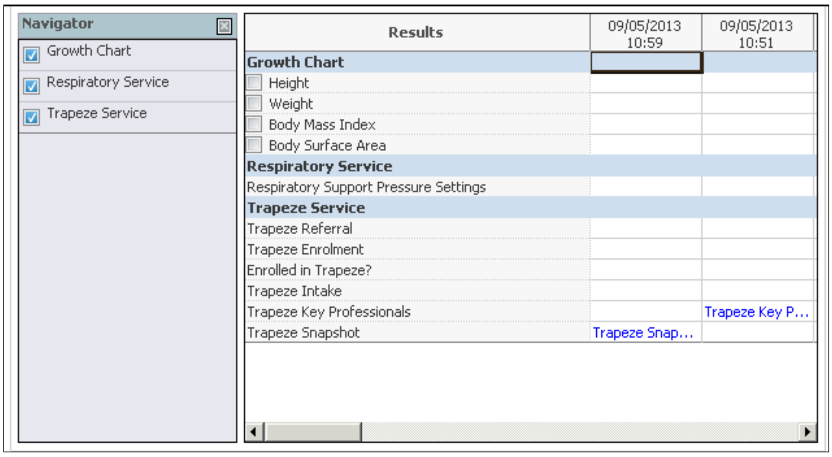


3. Double-click on the **Trapeze Documents** folder, then double-click the relative sub-folder.
4. Double-click on a form within the sub-folder to view.



B. Viewing from Results

1. Click on **Results** from the menu on the patient's chart.
2. Navigate to the Trapeze forms by selecting **Trapeze Service** from the Navigator.
3. Double-click on the form name within the cell on the results flowsheet.



Modify or Cancel Ad Hoc Forms

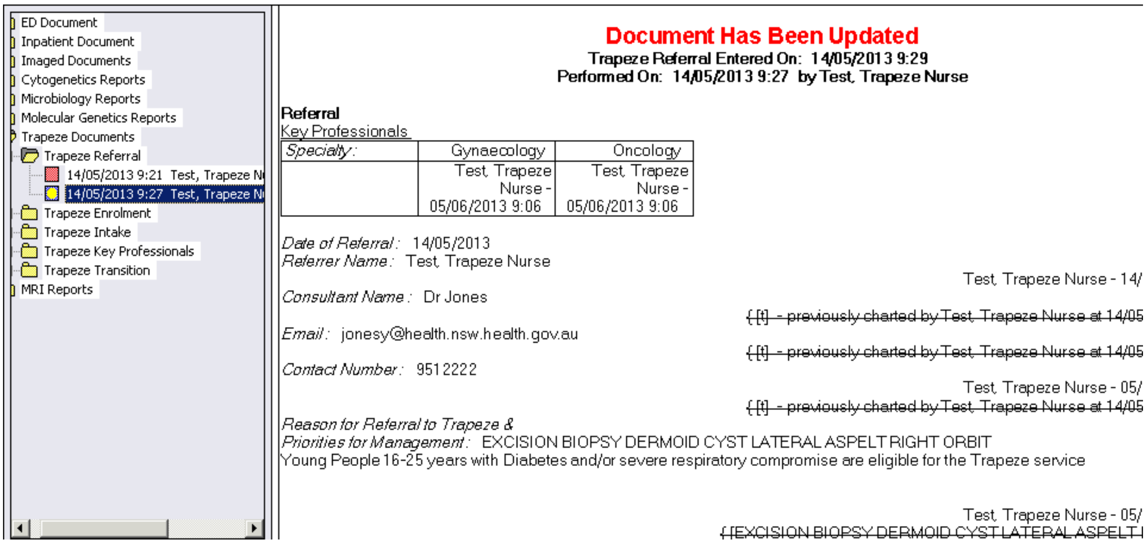
You are able to modify the details on a form or cancel a form that had been completed in error. Such actions are performed on the Form Browser screen.

1. Click on **Form Browser** from the menu on the patient's chart.
   In the **Sort by** field, select **Form** to sort all Trapeze documents separately from other forms.
2. Right-click on the form you wish to modify or cancel.

A. To Modify

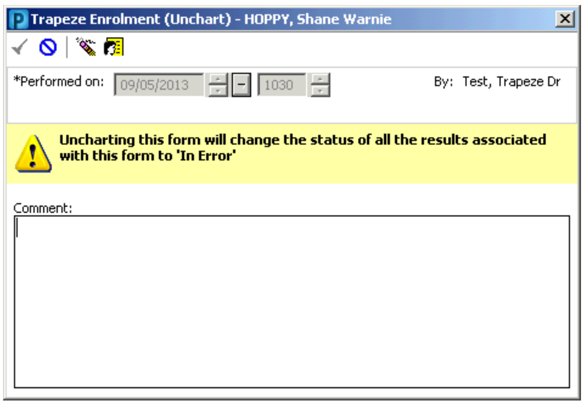
1. Select **Modify** from the drop-down list.
2. Complete modification and sign the form.

   Note: When a modified form is viewed from Clinical Notes or Results, any information entered prior to the modification will be formatted as strikethrough text, indicating that it is no longer valid but still readable.



B. To Cancel

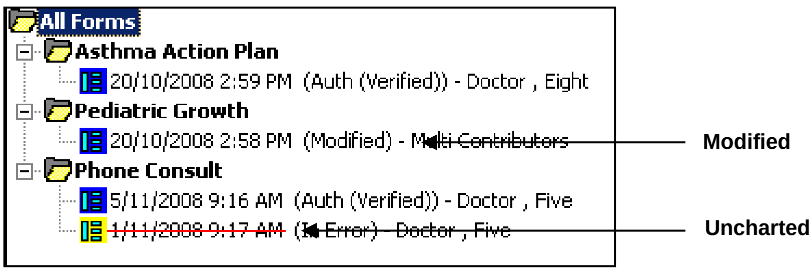
1. Select **Unchart** from the drop-down list. The following screen will display:



Sign Form

2. Enter a reason for cancelling the form, then click the **Sign Form** icon to complete.

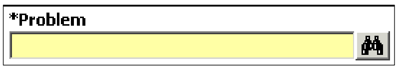
Note : The result will now display on the **Form Browser** menu with an updated status



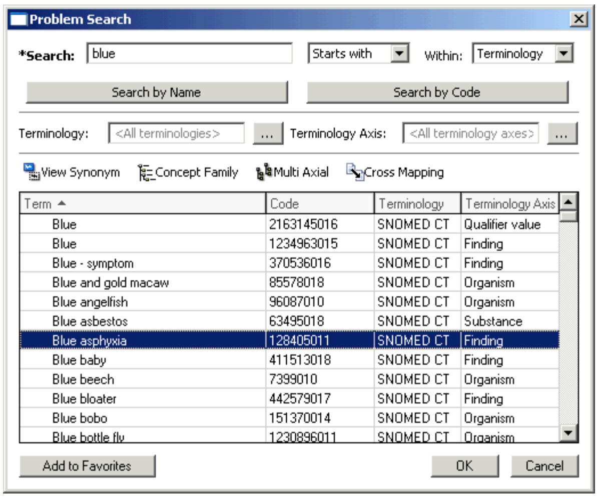
3. Add/Update problems and alerts in Trapeze forms

Add Problems in the Ad Hoc Trapeze form

1. Right-click anywhere in the white portion of the Problems List and select Add Problem…
2. Click on the binoculars button at the end of the ***Problem** field.



3. In the **Problem Search** window, click into the **Search** field and type in the name of the Problem.



4. Click on the **Search by name** button. 

5. Select the required problem/alert.

Add Problems directly in the patient chart

1. Click on **Problems/Alerts & Demographics** from the Menu on the patient chart.
2. Right-click anywhere in the white portion of the **Problems List** and select **Add New Problem…**
3. In the **Add New Problem** window, click on the ellipsis button at the end of the ***Problem** field.
4. In the Problem Search window, click in the Search field and type the name of the problem.
5. Click on the **Search by name** button and select the required problem/alert.

Update Problems

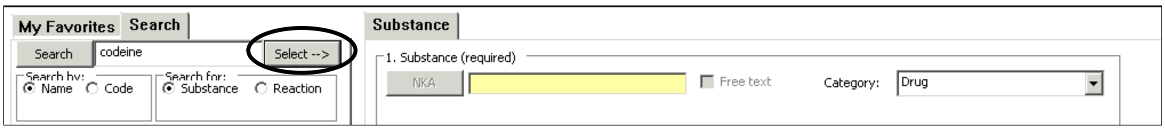
1. Right-click on the problem and select **Update Problem** or **Modify Problem**

NOTE: to cancel the problem, change the **Status** to **Canceled**.

4. Add/Update allergies in Trapeze forms

Add Allergies

1. Right-click anywhere in the white portion of the **Allergies** window and select **Add New**, then choose **Drug Allergy**, **Drug Side Effect** or **Other**.
2. Click in the **Search** field and type the allergy name, then click on the **Search** button.
3. Select the required allergy from the result list and click on the **Select** button to move the allergy to the **Substance** field.



4. If necessary, select the appropriate **Category** (Drug, Environment, Food, Other)
5. If required, click in the **Reaction symptoms** field and search for any reaction symptoms the same way you searched for the allergy.
6. Enter any other **Allergy details** and/or **Comments**, then click **OK**.

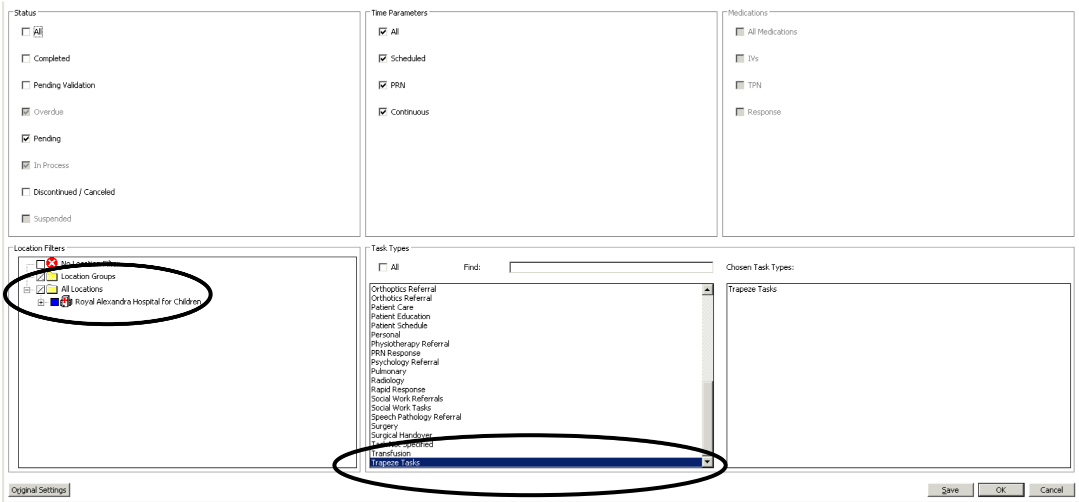
Update Allergies

1. Right-click on the allergy you wish to update and select **Modify *[name of allergy].***
2. Change any details as required, then click **OK**.

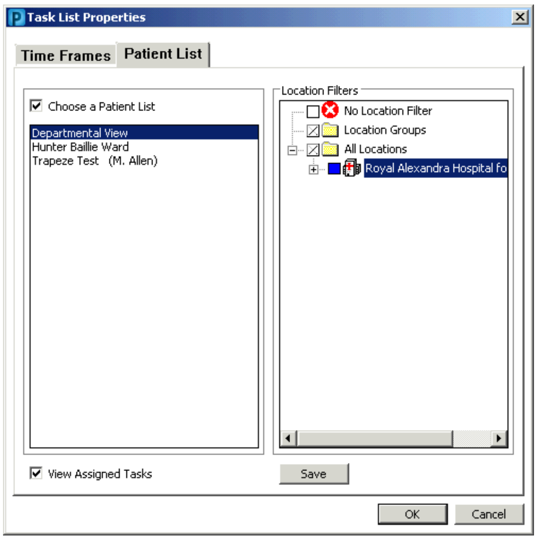
5. Setting up the Pending Referrals Task List to View Trapeze Referrals

To be able to view the list of patients who have been referred to the Trapeze service, the following settings must first be applied:

1. From the **Options** menu, select **Task Display**.
2. Under **Location Filters**: select **Royal Alexandra Hospital for Children** (ensure the square is blue, not white).
3. Under **Task Types**: select **Trapeze Tasks.**



4. Click **Save**, then **OK**.
5. From the **Options** menu, select **Task List Properties.**
6. Click on the **Patient List** tab**,** then tick the box next to **Choose a Patient List**.
7. Select **Departmental View.**
8. Under **Location Filters**: select **Royal Alexandra Hospital for Children** (ensure the square is blue, not white).
9. Tick the box next to **View Assigned Tasks.**



10. Click **Save**, then **OK**.

6. Working with Pending Referrals

When a Trapeze Referral form is completed for a patient, the patient will appear in the Trapeze Pending Referrals list.

- Patients listed on the Trapeze Pending Referrals list will have one of three statuses:

	In Process
	Pending
	Complete (these tasks disappear from the task list once the screen is refreshed)

		Location/Room/Bed	MRN	Name	Task Status	Task Descriptio
		Camperdown Ward / 07 / 10	9999998	TEST, Resident One	Complete	Trapeze Referr
		Clancy Ward	1141732	TEST, Tata	Pending	Trapeze Intake
		Clancy Ward / 02 / 02	1141609	HOPPY, Gavin Kevin	InProcess	Trapeze Enrolm

- Clicking once on a task will highlight it, clicking twice will open the task. You are able to highlight multiple tasks if you wish to open and work through tasks simultaneously. Note you will only be able to open multiple tasks if the status of the highlighted tasks are all the same.
- Clicking on a newly referred patient will open the **Trapeze Intake** form.
  Don't forget to refresh the screen if you can't see a patient you know has one completed
- When the **Trapeze Intake** form has been completed and signed the patient should disappear from the task list – there will be a green tick next to the patient's name
  Refresh the task list to clear the ticked patients

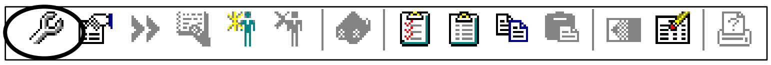
7. Patient Lists, create, maintain, share with others

View Patient Lists

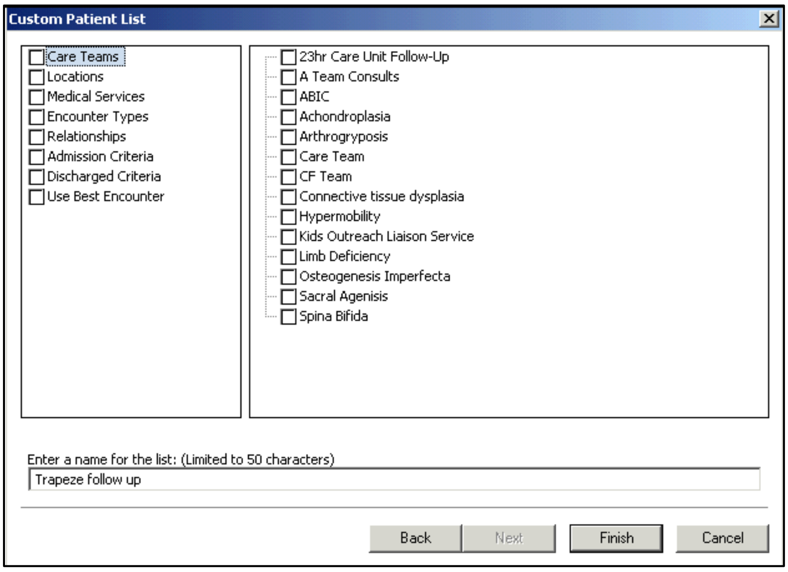
Move between displaying Patient List view and Pending Referrals view by using buttons on toolbar:

Create a Custom Patient List

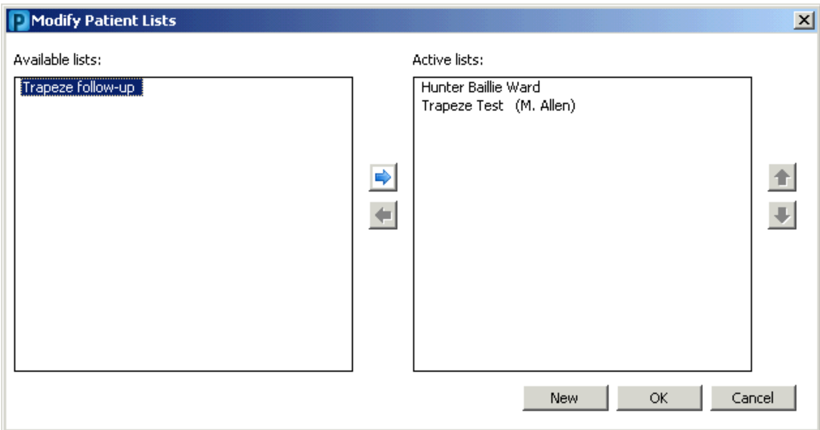
1. Click on the **List Maintenance** (wrench) icon on the Patient List toolbar



2. Press **New**
3. Select Custom, press **Next**
4. Enter a name for the list, then press **Finish**



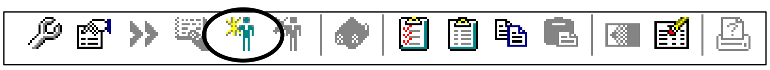
5. Select the list from the **Available lists** side and click on the blue arrow to move it to the **Active lists** side.



6. Click OK. The list will now be visible as a tab on the Patient List view.

Adding Patients to a Custom List

1. Click on the **Add Patient** icon on the Patient List toolbar



2. Search for the patient you wish to add to your custom list.

OR

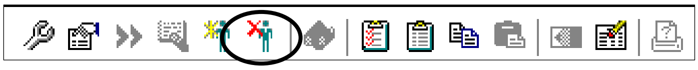
1. Right-click on the name of a patient from an existing patient list

2. Select Add to a Patient List, then select the name of your custom list. 

NOTE: if the patient does not appear on list after it has been added, simply refresh the screen.

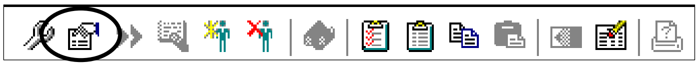
Removing Patients from a Custom List

1. Select the patient from your custom list
2. Click on the **Remove Patient** icon on the Patient List toolbar

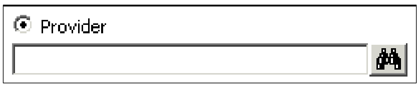


Sharing Your Custom List with Others

1. Click on the **Properties** icon on the Patient List toolbar



2. Select the **Proxy** tab
3. Press **New**
4. Select **Provider**, then click on the binoculars icon to search for the person you wish to share the list with.



5. In the **Access** field, select the access level of **Maintain**. Any person with **Maintain** access will be able to add and remove patients from the list (these changes are visible to all users sharing the list).

   Note that any person with **Full Access** can add and remove patients from the list, and can also remove the list completely (other users who have access to a deleted list will no longer see the list).

6. Press **Apply.**
7. Repeat steps 3 - 6 for any additional people you wish to share the list with.

Accessing a Custom List which has been shared with you

1. Click on the List Maintenance (wrench) icon on the Patient List toolbar.
2. Your newly assigned patient list will appear in the left frame of the Modify Patient Lists dialogue box (this list will also include the name of the list owner in brackets).
3. Select the list and click on the forward arrow to move it to the Active Lists side (right frame).
4. Click on OK.

8. Creating, opening and printing clinic letters from Clinical Notes

Create a Trapeze Summary Report

1. Click on **Clinical Notes** from the Menu on the patient chart.
2. Click on the Add button (located on the Clinical Notes toolbar)

3. In the **Add Document** window, click in the **Type** field and select **Trapeze Summary Report**.
4. The Trapeze Summary Report will be pre-populated with information from the Key Professionals and Snapshot forms
5. Review the information and amend as required
6. Click Sign.

Open a Trapeze Summary report

1. Click on **Clinical Notes** from the Menu on the patient chart.
2. Double-click the Trapeze Documents folder; the summary reports will be located in subfolders inside this folder.
3. Double-click on a summary reports within a folder to view it.

Print a Trapeze Clinic Letter

1. Open the Summary Report
2. Select “Draft Print without Headers and Footers”.
3. Click on the Print button (located on the Clinical Notes toolbar).