Anesthesia Touch Client Functions

Charting Functions

This document outlines the functions and features of the Anesthesia Touch client. This document does not describe a specific configuration of Anesthesia Touch, such as the language or content of charting entries and medical documents. Functions are grouped by user interface component.

Patient List

After login, Anesthesia Touch presents the Patient List, which can be used to find an encounter and start or open any document for that encounter.

List Functions

- Filter Cases: Use the Patient List's filter dropdown menu to show only those appointments or ongoing cases that match specific criteria, e.g., only appointments in specific rooms or with specific providers.
- Text Search: Use the Patient List's search field to search records by account number, medical record number, or patient name.
- Date Range Filter: By default, the Patient List shows the current day, but the date range filter can be changed to show the past or future for 1 or more days.
- Sort Patient List: Select the sort button to switch between sorting the Patient List by name or by appointment time.

Appointment Row Functions

- Case Information: Select the information icon (blue "i") to view case information. This includes updating the procedure and diagnosis. (And, optionally, the anesthesia team scheduled for an upcoming case.)
- Start/Open Documents: Select the document status checkboxes to open the documents associated with the case or to start a new document. Some documents allow multiple instances.

Patient List Toolbar Functions

- Logout: Select to log out the current user.
- Documents: Select an appointment and select the "Docs" icon in the toolbar to see a list of current documents and documents that can be started.
- IntraOp: Select an appointment and then select the IntraOp icon in the toolbar to quickly start or open the IntraOp Summary for the selected appointment.
- Others: The Toolbar's Others menu holds additional functions.
    - Sign IntraOp: To check or complete signatures for an appointment, select the appointment and then "Sign IntraOp" to open attestation dialog for an in-progress Anesthesia Record.
    - Change Password: Open a dialog to update the current user's password by selecting "Change Password."
    - Make Cases available offline: As on the login screen, select the offline option to put Anesthesia Touch into "offline mode." When offline mode is activated, necessary appointment data will be downloaded. This is *only* necessary if the user intends to be without network access for an extended period (hours or days). Anesthesia Touch automatically manages brief periods of network unavailability and users don't need to take any action.
    - Remote Vitals: To see the latest vitals data from all transmitters, select "Remote Vitals." (This requires transmitters be installed and configured.)
    - Concurrency: See a chart of concurrency data (case overlap) for all users for the day by selecting "Concurrency."
    - About: Open the "About" dialog to check the version of the client by selecting "About." (The software version is also visible on the login screen)
- Active User Pane: Select the active user's name to open a dialog to quickly login as another user (logging out the current user).

Document Functions

Documents (e.g., Nerve Blocks, Transfer Checklists, Post Anesthesia Evaluations) have a consistent patient header (including the "Sign" function) and toolbar showing document functions.

Document Header Functions

Document headers show the patient identifiers (name, age, account number, medical record number, and date of birth). Next to the patient identifiers, the signing status (unsigned or signed with the signing user's name) appears in the upper right along with the name of the document.

- Sign: When a document is completed, appropriate users can select the "sign" button to digitally sign the current document. (If configured, Anesthesia Touch may prompt for a PIN or show an alert for required information.)

Document Toolbar Functions

Document toolbars contain controls to manage the document.

- Save: Select "Save" to save and close the current document.
- Preview: To preview the document as it will print, select "Preview" for a paginated view, including configured headers and pagination. From the preview, select "Print" to print the document as seen.
- Revisions (when document supports): Documents that support revision control can show past signed version of the document by selecting "Revisions" from the toolbar.
- Cancel (when document supports): When possible, the current session can be cancelled, discarding charted entries, by selecting "Cancel." This does not get rid of previously saved entries.
- Active User Pane: Select the active user's name to open a dialog to quickly login as another user (logging out the current user).

Image Capture Document

The Image Capture Document contains the following special functions, not related to the common header and toolbar functions found in Documents (see *Document Functions*).

- Capture (Circular Button): Still photographs can be captured on iOS and added to the document.
- View Thumbnails (Thumbnail Icon): All images added to the Image Capture document can be previewed by selecting the thumbnail of the most recent image; swipe left and right to select images and delete any that are unwanted.
- Return: To close the Image Capture interface and document, select the "Return" button to return to the prior screen in the application.

PreOp Documentation Functions

The PreOp Document has unique charting controls tailored to the needs of the PreOp workflow. In addition to standard document header and toolbar controls, additional controls are outlined below.

PreOp Document Toolbar

The PreOp Document contains the same patient header and signature pane as other documents (see *Document Functions*). The PreOp Toolbar has additional functions specific to PreOp:

- Import: Opens a list of available pre-op information to import, including prior visits and any preop information (e.g., CCDs) available from external interfaces.
- Images (Image Capture): Image Capture in PreOp can be used to capture photos to the record, such as dentition or lines placed.
- Others
    - Family Hx (History): To view controls to document family history, select "Family Hx."
    - Labs: To view the Labs interface, including a summary of imported labs and controls to import additional labs, select "Labs."
        - Import: In the labs screen, select the import function to import available lab data for the patient.
    - Immunization: Select "Immunization" to documentation immunization status and information.
    - Visit Summary: To provide a summary for a visit, select "Visit Summary."
    - Note: Select "Note" to open controls for adding a note to the record.
    - Procedure/Diagnosis: To update or document the procedure and diagnosis information for the case, select "Procedure/Diagnosis."
- Active User Pane: To quickly login as another user within the PreOp document, logging out the current user, select the user pane for a login prompt.

PreOp Charting Functions

- Palettes: The document has palettes (floating dialogs) showing a summary of documented information. Selecting a palette opens controls to chart the corresponding content, e.g., selecting "Allergies" opens a searchable database of allergies.
    - "Next" Button: Some palettes, such as for problems (the review of systems), can be completed sequentially. Selecting the "Next" button at the bottom of the palette opens the next area in the series (e.g., moving through a review of systems by problem area).
- Favorites (Star): To speed PreOp charting, "Favorites" are available by selecting the star icon. For example, for Meds, the Favorites function presents a list of common medications to select rather than the searchable medication documentation palette.
- WNL/Normal Function: For the Problems list and Physical Exam, select the checkbox for "Normal" or "WNL" (Within Normal Limits) to quickly mark the section as normal in order to "chart by exception" and only note items in needed areas.
- Lab Results: Select the lab "fishbones" of lab results to open the labs interface, where labs can be reviewed in detail and new labs can be imported.

IntraOp Documentation Functions

The IntraOp Summary shows the information charted to create the anesthesia record. IntraOp focuses on documentation of medications and the patient's vital signs. "Macros" are configured to contain specific documentation needed as the case progresses, and macros are typically arranged chronologically (top to bottom, first to last event). Because IntraOp is the focus of Anesthesia Touch, additional document functions are also available.

IntraOp Document Header Functions

The document header displays the patient's information, a "Staff button," and information cards that add additional context to IntraOp.

- Patient Information: The patient's name, age, account number, medical record number, and date of birth appear here. Select to open the Edit Patient info dialog.
- Staff Button: The anesthesia record often requires multiple attestations and strict control of signing-in and out of the case (e.g., for concurrency). The document "Sign" button is replaced with a "Staff" button that can be selected to access all attestations and sign-in functions for the case.
  - User Signatures: In the staff dialog, users may select each attestation to sign it for the record. To change times for sign-in, select the Started and Ended times. By default, "Anes Start" and "Anes End" will automatically be used.
  - Removing a Signature: If a signature was added incorrectly, select the Staff Button, then select the incorrect signature. At the bottom of the staff dialog, select "Unsign" to remove the signature. Select "Save" to continue.
- Procedures Card: Select the Procedure card to open corresponding macro where procedure information is charted.
- Surgeons Card: Select the Surgeon's card to open controls to add surgeons to a case, e.g., if not included in the schedule or changed.
- ASA Card: To update the charted ASA, select the ASA card to open the corresponding macro where ASA is charted.
- Allergies Card: To update allergy information, select the Allergies card to open a searchable list of patient allergies to chart.

Grid Functions

Display controls for the medication grid (top) and the physiologic grid (bottom) are shared, since the time period and interval are in sync between the grids.

- Interval: Select the interval dropdown for the columns in the medications and physiologic grid. For longer cases, Anesthesia Touch will automatically increase the interval, but it can always be manually set to zoom in or out of the case timeline.
- AutoScroll: Select the toggle to enable or disable auto-scroll. When enabled, the grid view will automatically advance to always show the current time (scroll left to view the past).
- Mark and Event Comments: Beneath the medications grid are controls to quickly mark a time.
  - Events: Select "Events" to open a list of comments for marked events. Comments can be added and marks removed from this list.
  - Event Row: Select a point in time in the event row to mark that time.
  - Mark: Select "Mark" to create a mark for the current time. The marked times are available for comment in the "Events" list.
- Divider: The proportion of the screen used for medications and physiologic data can be changed by selecting and dragging the gray oval divider between the grids.

Medication Grid Functions

- Medication Row: Rows in the medication grid can be selected to open a dialog to document administration of the drug at the selected time.
  - Named (Reserved) Row: Rows assigned a medication for the template can be selected to document an administration.
  - Blank Row: Blank rows can be tapped to bring up the complete list of medications to document administration at a given time.

    - Administrations: Administrations, whether a bolus or an infusion, can be tapped to reveal details and either remove or change the administration.
- Smart Meds: Optionally, groups of related medications (e.g., induction medications) can be created.
- Smart Buttons: Optionally, buttons below the physiologic grid can be configured for a common dose of a common medication. Selecting a button documents the medication at the current time.

Physiologic Grid

- Display Mode: The physiologic grid can display a graph of common vital signs, a grid of all physiologic rows, or split the space between the two. Select "Graph," "Grid," or "Spit" (the default).
- Quick Charting Cluster: Select these controls to mark blood pressure and heart rate in the graph. Select "Erase" to remove an item.
- Grid Zoom Controls: Select the "+" and "-" icons to zoom in and out on the grid.
- Physiologic Row: Select a physiologic row (e.g., EKG) to open controls to chart the value for the selected time.
- Transmitter Status (and Switch): The cases' current vitals transmitter's name will appear. Select the transmitter to switch to another transmitter if needed. (Requires that transmitters be installed and configured.)
- Physiologic Buttons: If vitals are being transcribed by transmitter, these buttons will show the last values recorded (always use patient monitors to see the current patient condition). If vitals are not being automatically recorded, tap the Physiologic buttons (e.g., HR) and use the on-screen controls to chart. Enter all necessary vitals and select "Save" to write the charted vitals to the record.

Macro Functions

- Change Template: Select the current template (purple button) to switch to another template. A template is a group of macros whose documentation and defaults are geared to the case type.
- Macros: Selecting a macro brings up a dialog with controls to document time, check lists, or enter text to complete the anesthesia record.
    - Tab Controls, Select (and Remove): In Macros with multiple possibilities (such as multiple types of lines), entries may be grouped into tabs. Use "Select" to pick one, and Anesthesia Touch will open the selected tab of entries within the macro. Use "Remove" to clear a tab.
- Procedure and Diagnosis Search: Procedure and Diagnosis present searchable databases of anesthesia related CPT codes, indicated by a magnifying glass search icon. Favorite codes may be configured in the "Lightbulb" icon next to search. Select either icon to chart procedure or diagnosis.
- Image Capture: Image Capture in IntraOp can be used to capture photos to the record, such as block or patient position. Select the "Image Capture" macro to open the interface for managing images in IntraOp. Image Capture in IntraOp allows users to record file names and add annotations to images (e.g., circle areas of interest in photos).
- QI Search: Anesthesia Touch contains a database of Quality Indicators. Select the "QI" Macro to open a searchable, hierarchical list of indicators to add to the record. Select an added QI indicator to add a comment to it.

Case Times

Case Times appear above the medication grid in the IntraOp view.

- Open Case Times: Select from a list of common case times to see a string of time milestones. Select any milestone to mark the time for that item.

- Case Times Quick Viewer: The case viewer shows time milestones in the case. Select a time to mark it. For example, marking Anesthesia Start will set that time to the current time.

IntraOp Toolbar Functions

The IntraOp Document contains the same toolbar found in other documents as well as several additional functions specific to IntraOp. The order and presence of toolbar buttons is configurable.

- Validations: Any hard or soft alerts for a case are listed here. Hard alerts prevent ending a case. The Validation indicator will turn green when no alerts remain. Selecting the Validations button opens a list of alerts.
    - Validations with Borders: In the Validations dialog, alerts marked with a border can be selected to open their corresponding macro.
- Patients: Select to return to the Patients List.
- Preview: Select “Preview” to view a print preview of the document. From the preview, you can print the current version of the document.
- Documents: Use Documents to quickly view or start another document in the record for the current patient. Anesthesia Touch returns to the IntraOp Summary when the other document is closed.
- Medications: Select “Medications” to initiate documentation for a medication. The time, drug, dose, and infusion or bolus will need to be entered from the medications dialog.
- Fluids: Select “Fluids” to initiate documentation for a fluid. The time, fluid, dose, and infusion information will need to be entered from the fluids dialog.
- End Case, Sign & Send, Print/End: When charting is complete, select the toolbar button to end the case. This will check for any hard stops and–if the case is complete–physically print the case or send to an EHR as configured.
- Others
    - Logout: Select “Logout” to logout the current user and close the record.
    - Discharge: e.g., Finish & Send, Sign & Send, Print/End. Selecting the configured workflow for finishing a record initiates a validation check and the configured interface and printing actions when finishing a record.
    - Labs: Select “Labs” to open the IntraOp Labs interface, used for labs run during IntraOp and sent via interface (e.g., bloodwork during a procedure).
    - Edit Patient Info: To edit patient information, such as identifiers and demographics, select “Edit Patient Info.” (Editing patient information may be disabled to prevent information conflicts with the hospital or facility EMR.)
    - Migrate Patient: Select “Migrate Patient” to migrate the charted entries on the record to another patient. This function is used when the incorrect case has been charted on.
    - Cancel Case: Select “Cancel Case: to open a dialog to document a case cancellation.
    - Delete Case: To delete the charted entries for the case while retaining the scheduled appointment, select “Delete Case.” Deleting a case is typically only done when testing.
    - Import Physiologics: To capture physiologic data from another transmitter to the current record, select “Import Physiologics.” This is used when the incorrect transmitter or no transmitter was selected when starting the IntraOp record.
    - Remote Vitals: To view a dialog showing the latest vitals data from all transmitters, select “Remote Vitals.”

    - Concurrency: To view a chart showing the concurrency data (case overlap) for all users for the day, select “Concurrency.”
    - Physiologic: Select “Physiologic” to open a dialog to add additional rows for physiologic data to the grid.
    - Signature: Selecting “Signature” signs-in the currently active user and opens the Staff dialog to set times and add attestations.
    - Refresh Record: To manually initiate a refresh of the current record from the server, select “Refresh Record.”
    - About: Select “About” to open a dialog to check the version of the client (also visible on the login screen).
- Active User: Select the active user’s name to open a dialog to quickly login as another user (logging out the current user).