

# Lesson 7: Understanding Additional Sunrise Features

This lesson introduces additional Sunrise features and functions that may be used to support the day-to-day Emergency Care patient care tasks and workflows.

## Learning Objectives

After completing this lesson, you should be able to:

- Understand use of the Workflow Management Tool in the ED workflow.
- Use Signature Manager to sign orders and documents entered on one's behalf

## Using the Workflow Management Tool

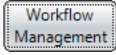

The **Workflow Management** tool provides the ability to:

- Assign a workflow to clinicians for the patient.
- View the status of each activity in the workflow.
- Complete the activities in the workflow.

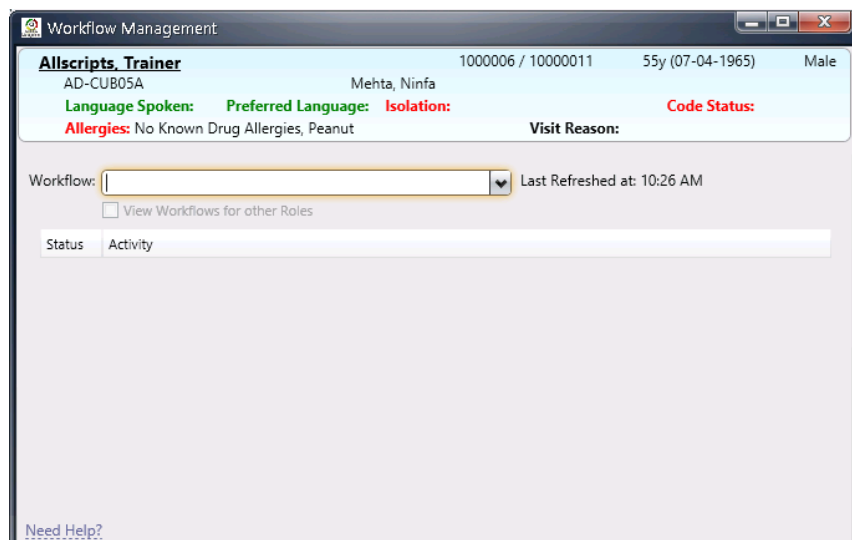
The **Workflow Management** tool can be used to assist providers and clinicians in guiding the respective patient care workflow tasks across the continuum of care (admission / discharge).

### Accessing the Workflow Management Tool

#### TO ACCESS THE WORKFLOW MANAGEMENT TOOL:

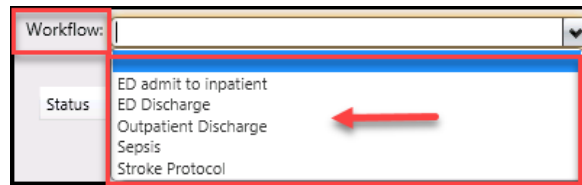
- ▶ With a patient in context, do one of the following:
  - From the **Status Board** (bottom of board), click the **Workflow Management**  button.
  - From the Sunrise toolbar, click the **Workflow Management**  toolbar button.
  - From the menu bar, select **GoTo > Enter/View > Workflow Management**.

⇒ *The Workflow Management window appears.*



In the **Workflow Management** window, you can do any of the following:

- Click the **Workflow** drop-down to select a workflow to assign.



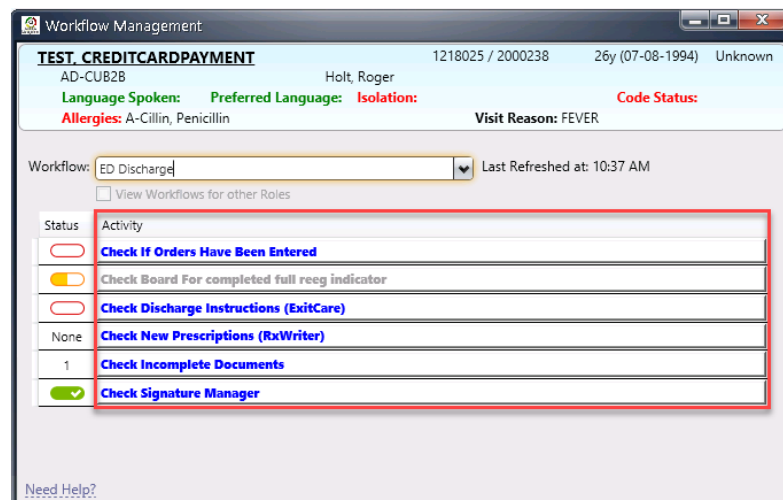
⇒ The activities for the selected workflow are displayed below the drop-down list.



- If you have the appropriate security rights, you can select the **View Workflows for Other Roles** checkbox to display the workflows assigned to other roles in the **Workflow** drop-down list so you can view the status of activities for those workflows.




## Completing Workflow Activities

Click on a task in the **Activity** list to open the respective function associated with the task (for example, documentation).



**Note:** You must have the security rights to complete the activity. You can view the activity, but you cannot complete any activities for that workflow. Activities can be completed in any order.

The status of each activity is indicated in the **Status** column with a status bar:


Status Indicator	Description
	Indicates the activity has not been started.
	Indicates the activity was started but is not complete.
	Indicates the activity is complete.
None	Indicates no items for that task have been initiated (for example, <b>New Prescriptions</b> ).
A number	Indicates the number of items that are active on the chart for that task (for example, <b>Incomplete Documents</b> ).

## Using Signature Manager

The **Signature Manager** function is used to complete signature requirements for orders placed on one's behalf or documentation co-signature protocols.

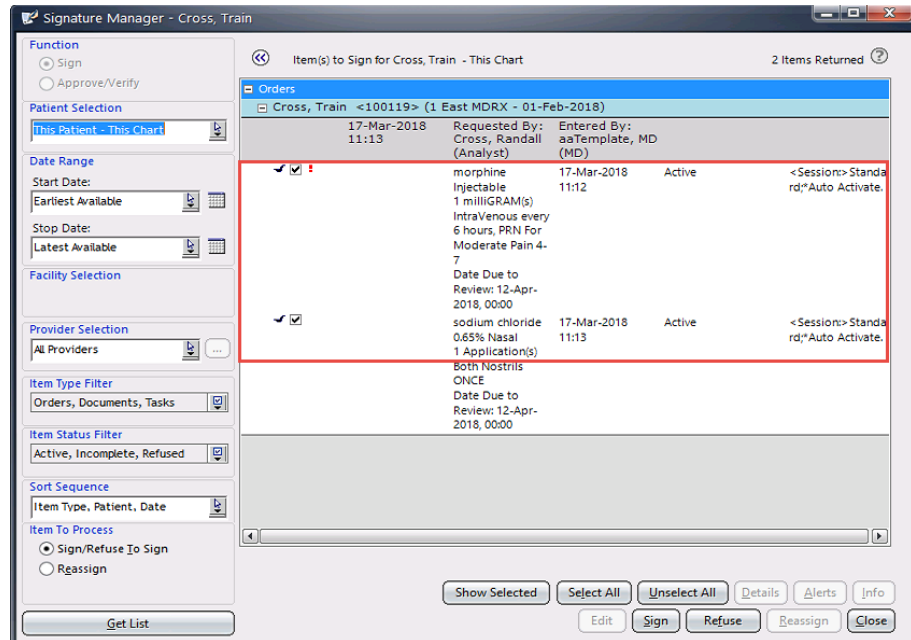
### Signing Order and Document Tasks

#### TO SIGN ORDER AND DOCUMENT TASKS:

- To access **Signature Manager**, click the **Signature Manager**  toolbar button.

⇒ *The **Signature Manager** window appears.*

The following screenshot depicts Signature Manager in **Sign** mode.



2. Optionally, change any **Filter** options (left panel), as needed.

**Note:** When you change a filter option, you must click the **Get List** button to update the changes.

The following table provides a description of the **Filter Panel** options (left panel).

Filter Option	Description
<b>Function</b>	The appropriate selection will default based on the signature rule of the respective item to sign: <b>Sign</b> or <b>Approve/Verify</b> .
<b>Patient Selection</b>	Select one of the following options: <ul style="list-style-type: none"> <li><b>This Patient – This Chart:</b> Displays items requiring signature for the currently selected patient and the currently selected chart.</li> <li><b>This Patient – All Charts:</b> Displays all items requiring signatures for the currently selected patient, regardless of the chart they belong to.</li> <li><b>This List – This Chart:</b> Displays items requiring signatures for the patient visits on the current Patient List.</li> <li><b>This List – All Charts:</b> Displays items requiring signatures for patients on the current Patient List, no matter which chart contains the items.</li> </ul> <b>All Patients:</b> Displays items requiring a signature for any patient, based on your assigned rights.
<b>Date Range</b>	Allows you to filter items to sign by <b>Start / Stop Date</b> . The start date represents when the items were entered.

Filter Option	Description
Facility Selection	For multi-facility hospitals, allows you to filter items to sign by facility.
Provider Selection	Select one of the following options: <ul style="list-style-type: none"> <li>• <b>My Signatures:</b> Displays only items assigned to you.</li> <li>• <b>My Group Signatures:</b> Displays items in the My Signature group (items that belong to others on whose behalf you can sign). If you have no signature groups, only items assigned to you are displayed.</li> </ul> <p><b>Selected Providers:</b> Click the (...) button to open the <b>Provider Selection</b> window, in which you can select specific providers.</p>
Date Range	Allows you to filter items to sign by <b>Start / Stop Date</b> . The start date represents when the items were entered.
Facility Selection	For multi-facility hospitals, allows you to filter items to sign by facility.
Provider Selection	Select one of the following options: <ul style="list-style-type: none"> <li>• <b>My Signatures:</b> Displays only items assigned to you.</li> <li>• <b>My Group Signatures:</b> Displays items in the My Signature group (items that belong to others on whose behalf you can sign). If you have no signature groups, only items assigned to you are displayed.</li> </ul> <p><b>Selected Providers:</b> Click the (...) button to open the <b>Provider Selection</b> window, in which you can select specific providers.</p>
Item Type Filter	Select the types of items to include: <b>Orders, Documents, Tasks, All</b>
Item Status Filter	Select the status of items to include: <b>Active, Refused, Incomplete</b>
Sort Sequence	Allows you to define the sort sequence display of items to sign.
Item to Process	Select the appropriate signature processing method: <b>Sign, Refuse to Sign, Reassign</b> . <p><b>Note:</b> The <b>Reassign</b> option is available only if you have the rights to reassign signatures. This is usually assigned to and managed by someone in Medical Records.</p>

3. Ensure the items to sign are checked (or uncheck items you do not want to sign).

**Note:** Items requiring your signature will be checked by default.

4. Click **Sign**.

⇒ A red checkmark appears next to each signed item.

30-Aug-2018 07:56	Requested By: Ames, Joan (MD)	Entered By: 2Ames, Joan (MD)	
<input checked="" type="checkbox"/>	morphine Injectable 1 milliGRAM(s) IntraVenous ONCE	30-Aug-2018 07:56	Active

- Click **Close** to close the **Signature Manager** window.

## Refusing to Sign Orders, Documents or Tasks

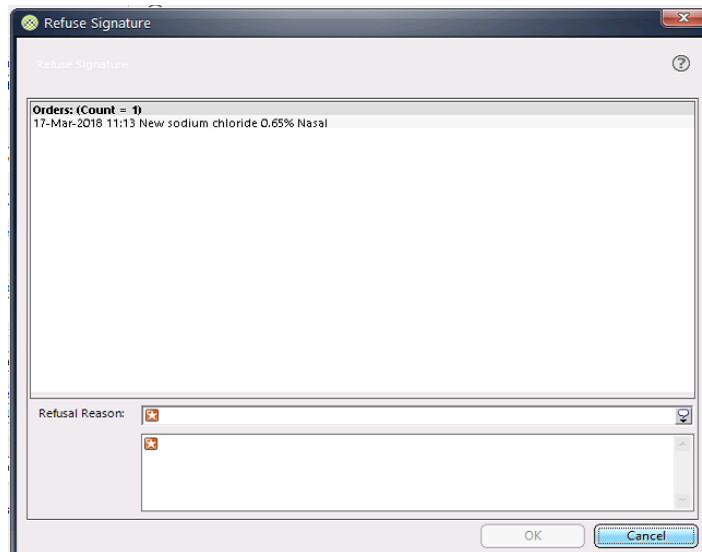
If an item has been misattributed to you for signing, you can refuse to sign the item. When items are marked as refused to sign, the item must be manually **Reassigned** to the correct user.

**Note:** The **Reassign** function is only available to users who have the rights to reassign signatures. This security is normally assigned to an appropriate Medical Records staff level.

### TO REFUSE TO SIGN AN ORDER, DOCUMENT OR TASK:

- On the **Signature Manager** window, ensure the item to refuse signature is checked.
- Click the **Refuse** button.

⇒ The **Refuse Signature** window appears with the list of items selected as refuse to sign.



Refuse Signature

Orders: (Count = 1)  
17-Mar-2018 11:13 New sodium chloride 0.65% Nasal

Refusal Reason:

OK Cancel

- In the **Refusal Reason** field, select or type a reason for not signing the item.
- Click **OK**.

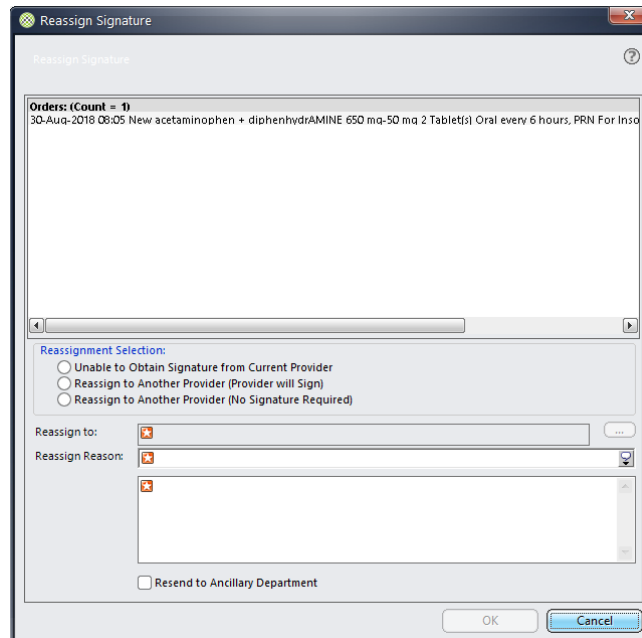
## Reassigning Orders, Documents or Tasks

Depending on your security rights, you can reassign an item that was assigned to the wrong provider or assigned to a provider who is no longer available to sign. Your enterprise decides whether to allow only Medical Records personnel to reassign items or allow providers to reassign items as well.

### TO REASSIGN AN ORDER, DOCUMENT OR TASK:

1. On the **Signature Manager** window, select **Reassign** in the **Item to Process** section.
2. Select the items to reassign and click **Reassign**.

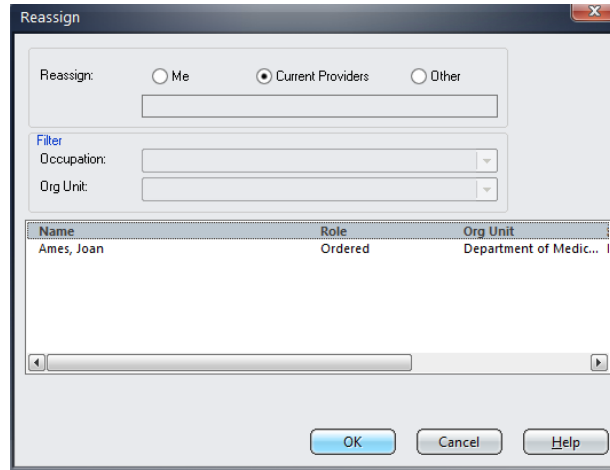
⇒ *The Reassign Signature window appears.*



3. In the **Reassignment Selection** section, select the appropriate reassignment option:
  - **Unable to Obtain Signature from Current Provider:** Select this option if the item is correct, but a signature cannot be obtained (for example, the provider is no longer associated with the facility).
  - **Reassign to Another Provider (Provider will Sign):** Select this option if an error occurred when the item was entered.
  - **Reassign to Another Provider (No Signature Required):** Select this option if the assigned user does not have to sign the item.
4. If you selected one of the **Reassign to Another Provider** options, click the (...) button to select a provider in the **Reassign** field.



⇒ The Reassign window appears.



Reassign

Reassign:  Me  Current Providers  Other

Filter

Occupation:

Org Unit:

Name	Role	Org Unit
Ames, Joan	Ordered	Department of Medic...

OK Cancel Help

5. Do one of the following:
  - Select **Current Providers** to select one of the patient's assigned providers.
  - Select **Other** to search for a provider who is not a current provider for the patient.
6. In the **Reassign Reason** field, select or type the reason for reassigning the item.
7. Click **OK**.

## Lesson Review

Having completed this lesson, you should be able to:

- Understand use of the Workflow Management Tool in the ED workflow.
- Use Signature Manager to sign orders and documents entered on one's behalf