

SYNERGY

USER'S GUIDE



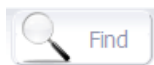
SYNERGY — *The combined action of two or more to achieve an effect greater than that of which each is individually capable.*



Synergy is programmed using FileMaker Pro. On the left side of most screens, the Navigation Panel will appear (picture to the left). This Navigation Panel allows a user to flip through various records within the system. The "flip-book" icon controls flipping through records.

To go to the previous record, click the left-pointing arrow of the "flip-book" icon. To go to the next record, click the right-pointing arrow of the "flip-book" icon. For Synergy, the other pieces to the Navigation Panel are not in use.

These buttons appear at the bottom-left of the screen. The first icon (100, in this case) shows the zoom size of the screen. The icon next to it, the "little mountains", allows the user to shrink the screen size. The third icon, the "big mountains", allows the user to increase the screen size. The fourth icon, "the box icon", allows the user to hide or unhide the Navigation Panel (picture to the left).



FileMaker offers powerful search options, available to Synergy users through the "Find" buttons on the various screens. Once the "Find" button has been clicked, the user will enter "Find Mode" which allows them to type in the criteria they are searching for. When the criteria has been entered, the search can be initiated by hitting the "Enter" key on the keyboard. In addition to searching for specific values, FileMaker also allows the user to search for a range of values within a field. For instance, in a date field, a user may enter their search criteria as "02/14/2007", which would search for all records having a date of 02/14/2007 in that particular field. However, a user may also enter a search criteria such as "02/14/2007..08/01/2007" (the ".." means "range" in FileMaker) which would search for any records having a date between 02/14/2007 and 08/01/2007 in that particular field. There is also a "Patient Searches" drop down menu at the top of the screen that contains the following thirteen "instant searches":

Altered Mental Status – finds patients with altered mental statuses

Altered Mental Status, Fall Risk, Restraints, and Sitter – finds patients with altered mental statuses, patients identified as fall risks, patients in restraints, or patients with a sitter

Core Measures – finds patients with Core Measures

Fall Risk – finds patients identified as fall risks

High Alert Medications – finds patients on High Alert Medications

Infectious Disease – finds patients identified with having infectious diseases

Restraints – finds patients currently in restraints

Sitter – finds patients currently with sitters

Skin Breakdown Risk – finds patients identified as being at risk for skin breakdown

Today's Discharges – finds patients identified with a discharge date matching today's date

Without Attestations – finds patients whose information has not been verified by an RN

Without Medicare Letters – finds patients scheduled for discharge without Medicare letters

Without RN Assignments – finds all patients that do not currently have an RN assignment

Launching Synergy

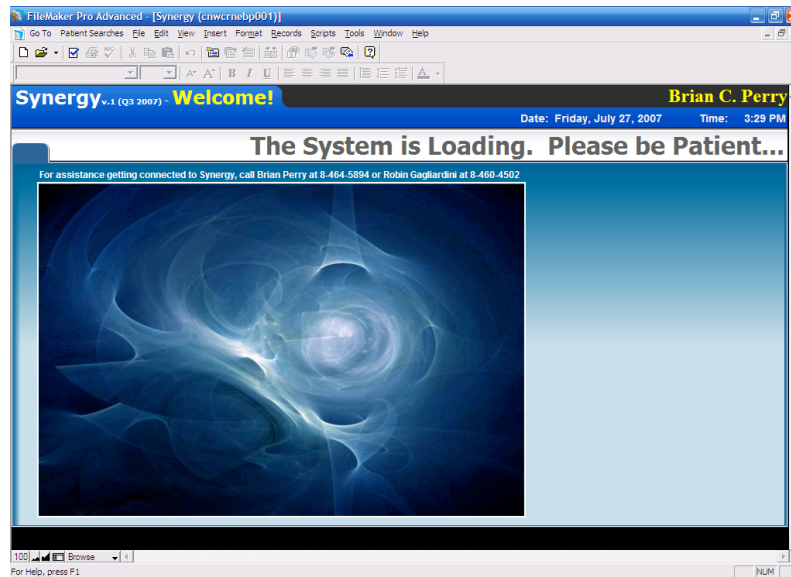
The icon below will appear on the "Start" desktops of the selected computers in the department. Double-clicking the icon will launch Synergy.



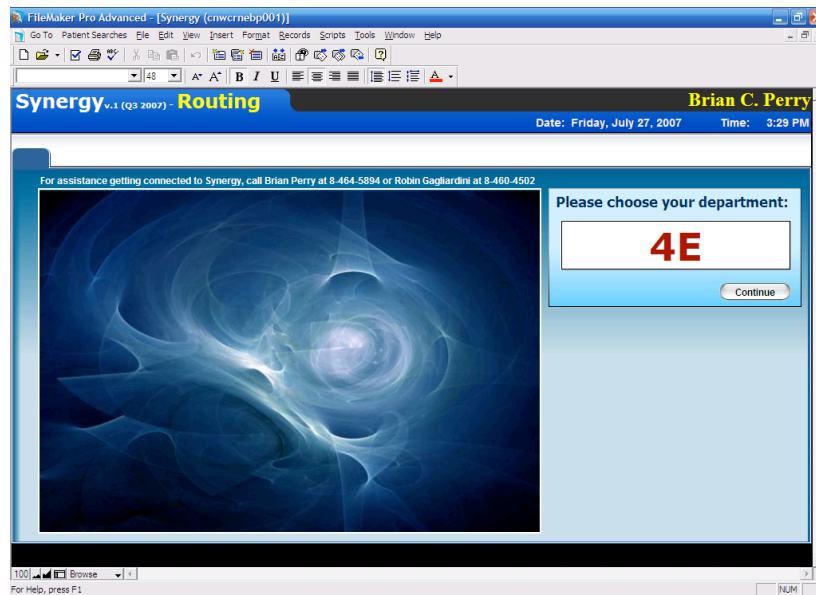
A pop-up box will request the Account Name and Password.

The Account Name that automatically populates will need to be replaced with the user's NUID.

The first-time log-in Password is "kaiser123". The user will then be directed to change the password. The password selected will need to be greater than 6 characters and will need to include numbers AND letters. Passwords **ARE** case-sensitive. The passwords will not require changing, however, one may change the password at any time by clicking the "Change Password" button on the Synergy Menu.



Access to the system is determined by role. The user will choose the department in which they are working or desire to view from the following screen:

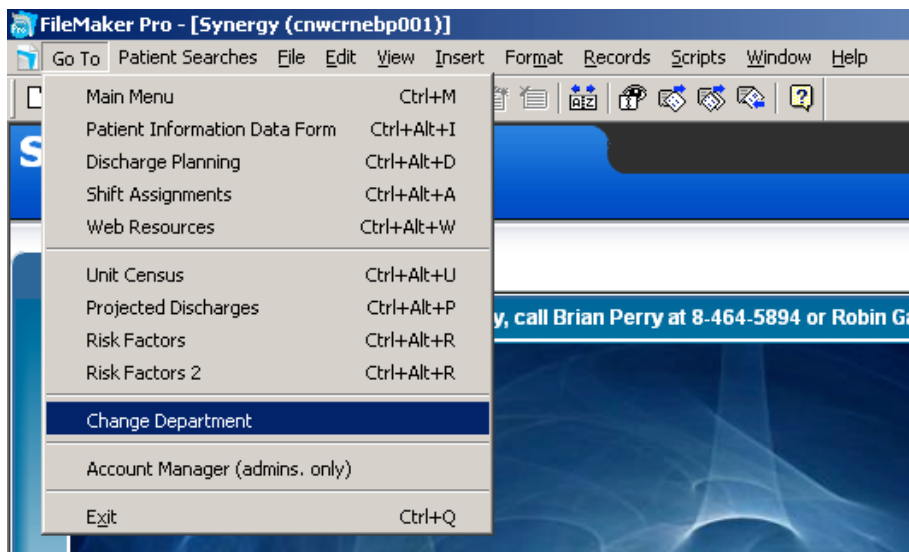


A drop-down list will show all departments to which the current user has access. Some users will also have an option to select "ALL". "ALL" will show information for ALL departments in the system at once.

If the desired department is not listed, it must be added to a user's account by an administrator. For non-administrator users, only one department may be logged into at one time.

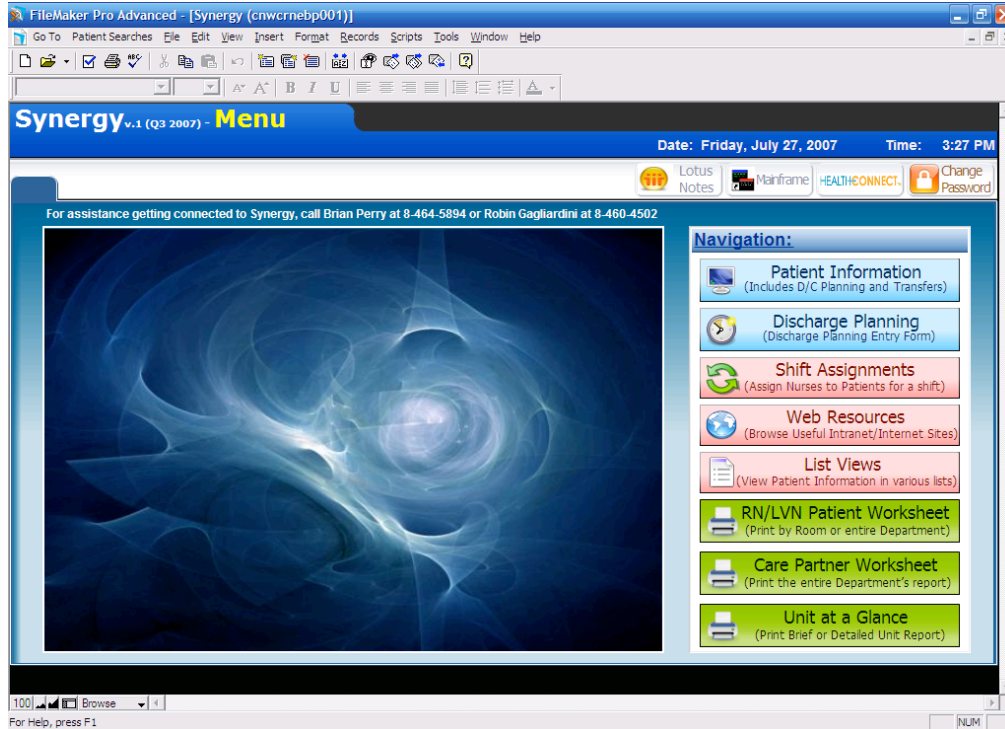
TO CHANGE DEPARTMENTS

Use the "Go To" button on the tool bar and select "Change Department". This will return the user to the "Choose Department" screen (above).

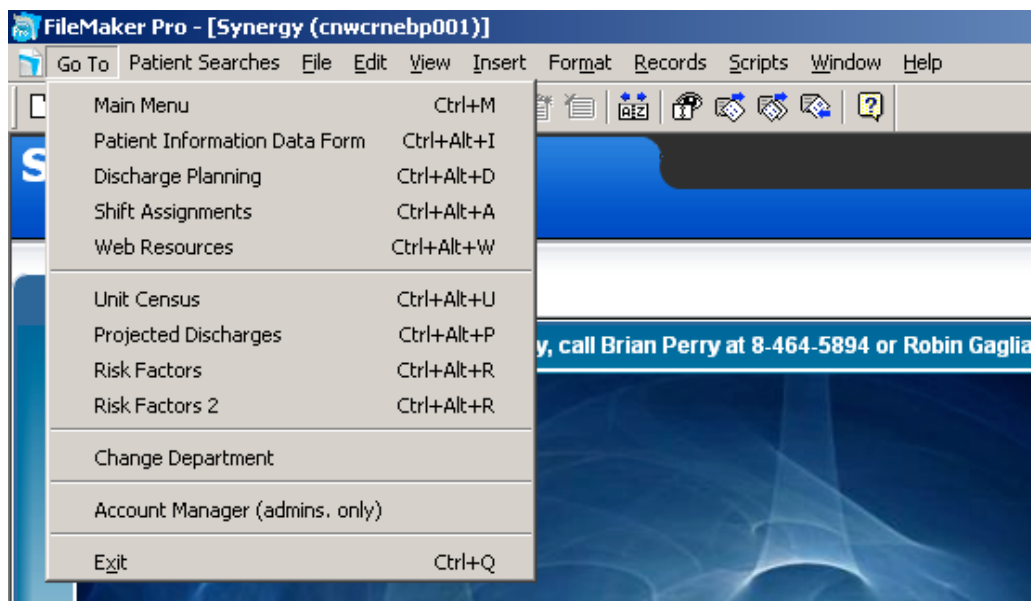


MAIN MENU PAGE

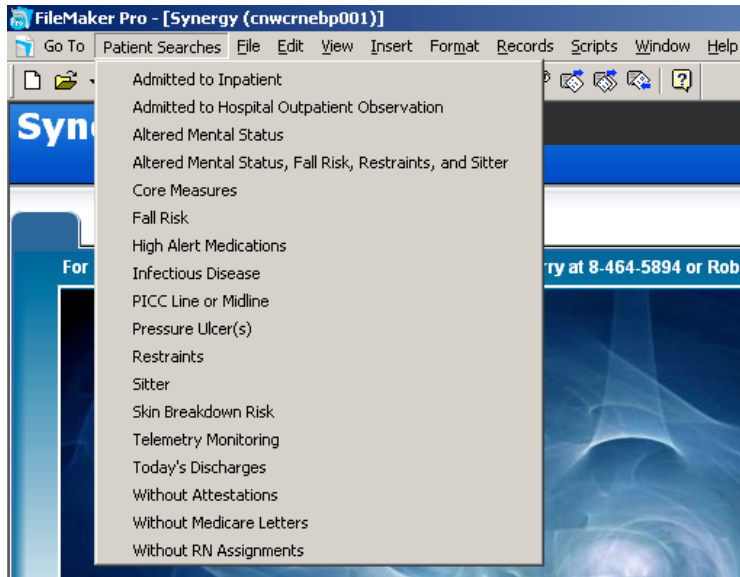
The Main Menu page provides links to various sections of Synergy and resources external to Synergy.



The "Go To" menu drop-down on the tool bar is set up the same as the "Navigation" buttons on the Main Menu. NOTE: The "Account Manager" is accessible for those with "Administrator" accounts in Synergy for managing user access.



The **"Patient Searches"** menu drop-down on the tool bar provides specialized searches of patient data that will search for and list patients with the criteria selected.



PATIENT INFORMATION FORM



The **Patient Information Form** is the main screen for data entry. It is where admits, discharges, or transfers of patients are entered. NOTE: Data is stored as soon as the field ("box") is left. Saving data is automatic and requires no user action.

The image is a screenshot of the 'Synergy - Patient Information Form (Med/Surg - 4 East)' in FileMaker Pro Advanced. The form is divided into several sections for data entry:

- Demographic Data:** Includes fields for Room (402), Admit Date (1/27/2007), RN (Need RN assignment), Code Status (DNR with Exceptions), MD (MICHAEL CLARK), MRN (02154987), Last Name (BRADEN), First Name (HELGA), Age (86), Height, Current Weight (148lb), Gender (Female), and Language (English).
- Neurological/Safety:** Includes Mental Status (Confused and Combative), Sitter (1:2), Sensorimotor (Bilateral Weakness), Neuro Checks, Fall Risk (History of Falls), Restraints (4 Rails and Soft Limb), Safety Concerns, High Alert Meds (checked), Seizure Precautions, and CIWA Protocol Started.
- Medical/Surgical Data:** Includes Diagnosis (CHF r/o MI, R FLEURAL EFFUSION w/CHEST TUBE etc...), History (L mastectomy, Afib), Core Measures (checked for CHF, Acute MI, Pneumonia), Surgery Date (7/18/2007), and Post-Op Day# (2).
- Cardiac:** Includes Telemetry Monitoring (radio buttons for Yes/No), Tele Rhythm, Ectopy, and Hemodynamic Monitoring.
- Respiratory:** Includes O₂ via, Art Line Inserted, ET Size, Intubation Date, Vent Date, Vent Days, Trach Type/Size, Trach Insert Date, Trach Days, Vent Mode (Pressure Support), FIO₂, PEEP, Pressure Support, and IS/CDB.

ATTESTATION OF INFORMATION

All patient information must be verified and "attested to" by an RN. This is accomplished by "clicking" in the box located on the lower right-hand column of the Patient Information Form. The user's name will automatically be populated when this field is selected. NOTE: Manual entry is not permitted in this field.

Attestation of Information must occur:

- **Every shift**
- **Prior to transferring a patient (either to another unit or another department – CT, Radiology)**

Attestation:

I have reviewed ALL data on this Patient Data Entry screen and have confirmed its accuracy:

ADMISSIONS



Select the "Admit" button to begin admitting a patient to the department. The system will locate available rooms and allow the user to select the room to which the patient will be admitted.

DISCHARGES



To Discharge a patient, select the "Discharge" button. To lessen the risk of accidental deletion of patient data, the system will prompt the user to type the last name of the patient whose data is to be deleted. If the name typed does not match the name on the form, deletion will not continue.

Synergy - Patient Information Form
(Med/Surg - 4 East)

Room: 402 Admit Date: 1/27/2007 RN Need RN assignment
Code Status: DNR with Exceptions MD: MICHAEL CLARK

MRN: 02154987 Last Name: BRADEN Height: Current Weight: 148lb Gender: Female

Warning!
You are about to clear the contents of this room. All of this patient's data will be lost. Please confirm that you wish to do this by typing the patient's last name into the box below.

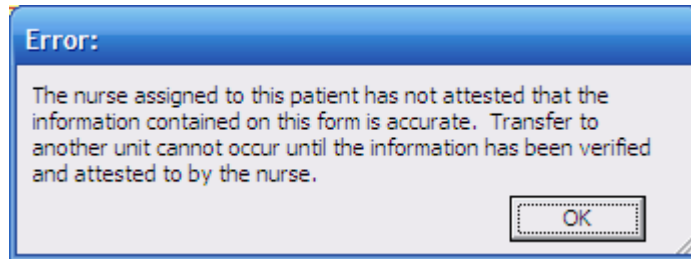
Braden

Cancel OK

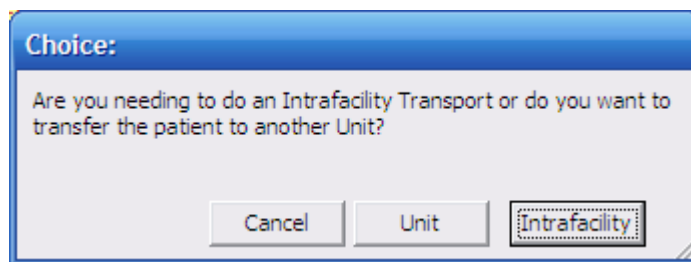
PATIENT TRANSFER



Once **"Transfer"** is clicked, the system will determine if the patient information has been verified and attested to by the nurse. If not, transfer cannot continue and the following message will appear:



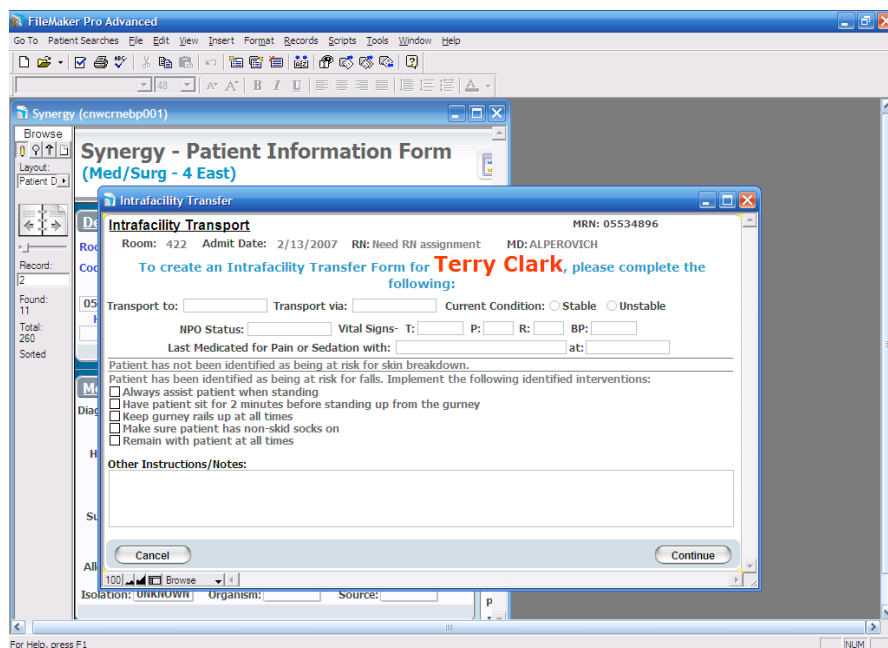
Once the information has been attested to, a transfer can be completed. The system will prompt the user to select the type of transfer:



INTRAFACILITY TRANSFER

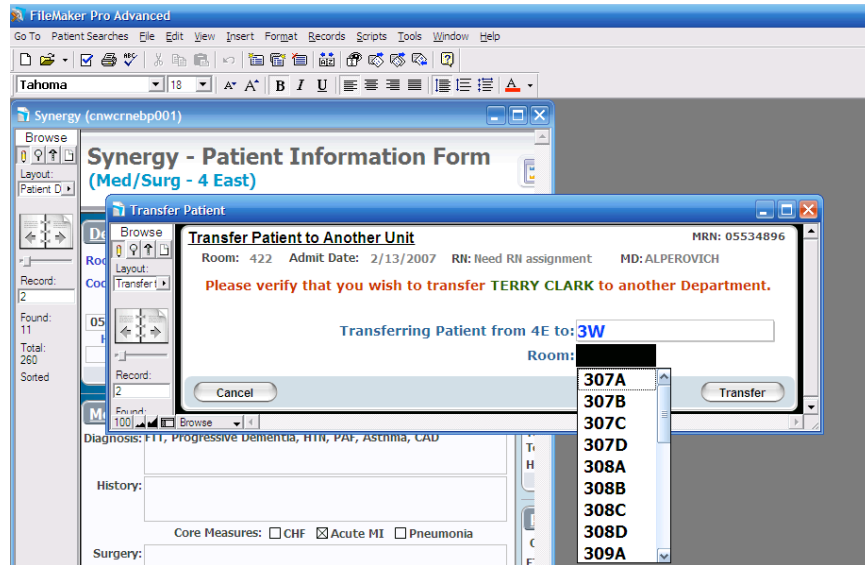
A pop-up window will allow the RN to complete information that is required for an intrafacility transfer. If the RN is unable to complete the information at that time, the "Continue" button may be clicked to "Print" the form so that it may be completed by hand.

The RN will provide instructions to address risk issues (e.g., falls, skin breakdown).

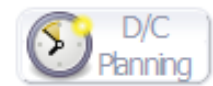


TRANSFER TO ANOTHER UNIT

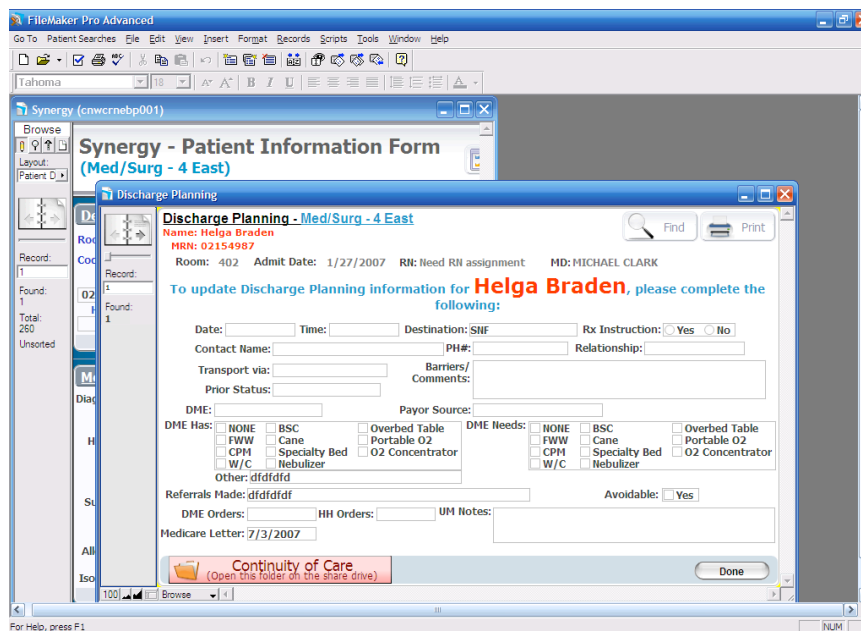
A pop-up window will appear to determine to which department and room a patient is being transferred. NOTE: Once the "Transfer" button on the pop-up window is pressed, the data is moved to the other department and WILL NO LONGER BE ACCESSIBLE BY THE FORMER UNIT. It is recommended to transfer the data when the patient is being transported to the next department.



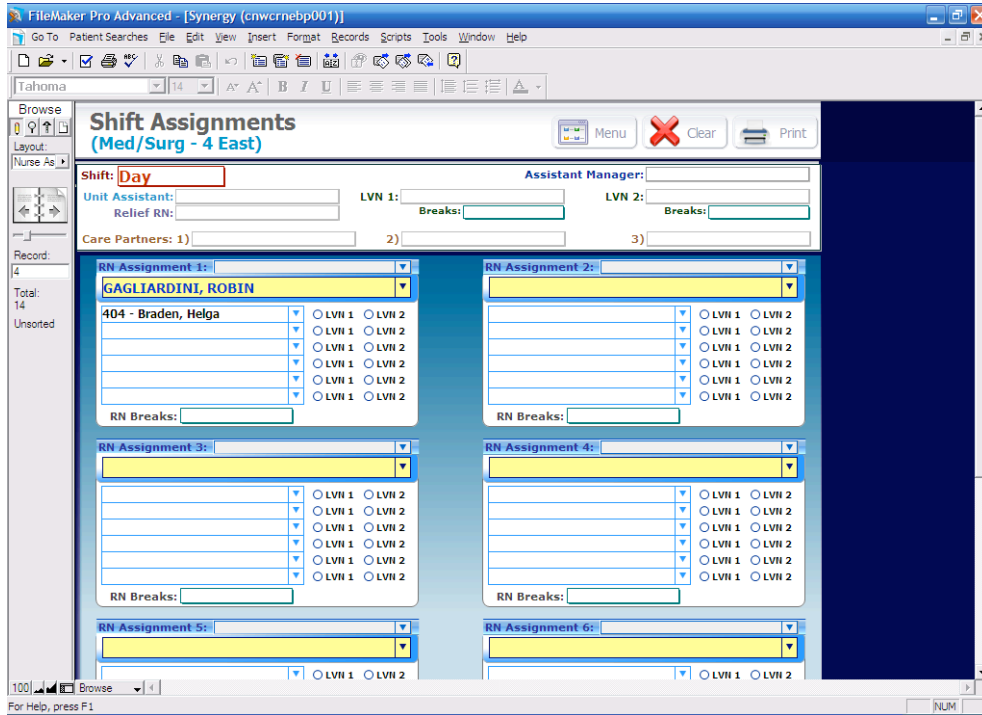
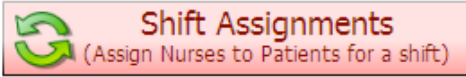
DISCHARGE PLANNING



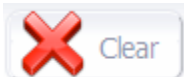
Discharge Planning can be selected on the Main Menu or on the Patient Information Form. The Discharge Planning form is a pop-up window that overlays the Patient Information Form. Click on the Patient Information Form window to view detailed information.



SHIFT ASSIGNMENTS



1. To begin making shift assignments, the current information must be cleared from the document:



2. The Shift is then selected. The shift determines the break times that will populate.
3. All additional information is completed based on the staffing model of that department (i.e., all boxes will not necessarily be used).

Staff names will populate based on the user list (very long). To speed up this process, click in the box and begin typing the name. The list will narrow the choices down to those that begin with letters typed.



Assignments include any tasks that an RN is responsible for completing during the shift.

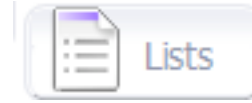
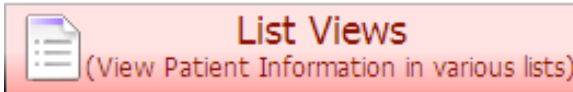
The screenshot shows a software interface for 'RN Assignment 1'. At the top, there is a dropdown menu for the RN, currently set to 'GAGLIARDINI, ROBIN'. Below this is a list of patients with dropdown arrows next to their names: '404 - Braden, Helga', '402 - BRADEN, hELGA', and '422 - CLARK, TERRY'. To the right of each patient name are two radio button options: 'LVN 1' and 'LVN 2'. At the bottom of the window, there is a text input field labeled 'RN Breaks:'.

Patient names will populate based on occupied rooms in the department.

This screenshot is similar to the previous one, but with a dropdown menu open for the 'RN Breaks:' field. The menu lists several time ranges: '0845/1100/1315', '0900/1100/1330', '0915/1130/1345', '0930/1200/1400', '0945/1230/1415', and '1000/1300/1430'. The first option, '0845/1100/1315', is highlighted. The rest of the interface, including the RN name and patient list, remains the same.

Break times are to be assigned.

PATIENT LIST VIEWS



Patient Lists can be selected on the Main Menu or on the Patient Information Form. Lists that are available are noted on the tabs at the top of the form.

UNIT CENSUS:

FileMaker Pro Advanced - [Synergy (cnwcrneb001)]

Go To Patient Searches File Edit View Insert Format Records Scripts Tools Window Help

Tahoma 18 A⁺ B I U

List: Unit Census Projected D/Cs Risk Factors

Synergy - Unit Census Today is: 07-27-2007 Time 15:39 Brian C. Perry is logged in

Menu Find E-mail/PDF Print

Sort - The list can be sorted by clicking on the Column Headers in blue

Record:	Room	Admit Date	Name	Diagnosis	RN/LVN
1	402	1/27/2007	Braden, Helga MRN: 02154987 Age: 86	CHF r/o MI, R FLEURAL EFFUSION w/CHEST TUBE etc...	Need Rn Assignment
Found: 11	422	2/13/2007	Clark, Terry MRN: 05534896 Age: 87	FTT, Progressive Dementia, HTN, PAF, Asthma, CAD	Need Rn Assignment
Total: 260	532	2/7/2007	Mama, Joseph MRN: 02558466 Age: 64	CVA / LSW	Gagliardini/ Perry
Sorted	11A	2/13/2007	Graham, Bob MRN: 15648943 Age: 37	POST TONSILLECTOMY BLEED	Gagliardini/ Acosta
	12B	2/5/2007	Jones, Joyce MRN: 15641361 Age: 68	PNEUMONIA	Bauer, Joseph
	13A	1/18/2007	Infinite, Allen MRN: 21365456 Age: 52	pneumonia,tb,sepsis	Bansale/ Alvarez
	14B	2/7/2007	Joyce, Shirley MRN: 12365498 Age: 81	Loss of consciousness	Need Rn Assignment
	18B	2/11/2007	Webb, Charlotte MRN: 05469845 Age: 57	COPD Exac/RLL PNA (Gram + cocci)	Bansale/ Acosta
	6	2/3/2007	Banana, Chita Ann MRN: 12548861 Age: 54	Diastolic CHF, Fail to thrive, COPD	Need Rn Assignment
	7A	2/12/2007	Columbus, Christopher MRN: 12335463 Age: 30	SEVERE PANCREATITIS/ necrotising pancreatitis	Gagliardini, Robin
	640	2/8/2007	Moore, Dudley E		

100 Browse For Help, press F1

PROJECTED DISCHARGES:

FileMaker Pro Advanced - [Synergy (cnwcrneb001)]

Go To Patient Searches File Edit View Insert Format Records Scripts Tools Window Help

Tahoma 18 A⁺ B I U

List: Unit Census Projected D/Cs Risk Factors

Synergy - Projected Discharges Today is: 07-27-2007 Time 15:40 Brian C. Perry is logged in

Menu Find E-mail/PDF Print

Sort - The list can be sorted by clicking on the Column Headers in blue

Record:	D/C Date & Destination	Room	Name, MRN, & Number of Days Post-Op.	Diagnosis	Provider	Rx, D/C Time, & Letter	Barriers/Comments
1	1/14/2007 Home	18B	Webb, Charlotte MRN: 05469845 POD #: 1	COPD Exac/RLL PNA (Gram + cocci)	GERACI		
Found: 3	12/29/2007 Board And Care	11A	Graham, Bob MRN: 15648943 POD #: 1	POST TONSILLECTOMY BLEED	DR. KIM	Yes 8:00pm 12/27/2007	
Total: 260	7/19/2007 Other Acute Facility	7A	Columbus, Christopher MRN: 12335463 POD #: 0	SEVERE PANCREATITIS/ necrotising pancreatitis	jhuuti	Yes 10:00am	Needs To Tolerate Oral Analgesics.
Sorted							

RISK FACTORS:

FileMaker Pro Advanced - [Synergy (cnwcrneb001)]

Go To Patient Searches File Edit View Insert Format Records Scripts Tools Window Help

Tahoma 18 A^T A^S B I U

Browse List: Unit Census Projected D/Cs Risk Factors

Synergy - Risk Factors Brian C. Perry is logged in

Layout: Today is: 07-27-2007 Time 15:40

Risk Fact

Menu Find E-mail/PDF Print

Sort - The list can be sorted by clicking on the Column Headers in blue

	Room	Name	Mental Status	Fall Risk	Restraints & Sitter	Braden < 18	Isolation	Source & Organism	Core Measures	HAMP
1	640	Moore, Dudley E		History of Falls	NONE	No	None		Pneumonia	
Found: 9	TCW	MRN: 05354863 Age: 22								
Total: 260	532	Mama, Joseph	Confused	Yes		No	None		CHF	
Sorted	5W	MRN: 02558466 Age: 64								
	422	Clark, Terry		Yes		No	UNKNOWN		Acute MI	
	4E	MRN: 05534896 Age: 67								
	402	Braden, Helga	Confused and Combative	History of Falls	4 Rails and Soft Limb 1:2	Yes	None		CHF	Yes
	4E	MRN: 02154987 Age: 86								
	18B	Webb, Charlotte		Yes	All	No	None			
	ICU-E	MRN: 05469845 Age: 57								
	14B	Joyce, Shirley		History of Falls	NONE	No	None			
	ICU-E	MRN: 12365498 Age: 81								
	13A	Infinite, Allen	Combative	Yes	NONE	No	Airborne			
	ICU-E	MRN: 21365456 Age: 52								
	7A	Columbus, Christopher	Confused and Combative	History of Falls	4 Rails and Mitts	Yes	Protective	Sputum VRE	Acute MI Pneumonia CHF	
	ICU-W	MRN: 12335463 Age: 30								
	6	Banana, Chita Ann		Yes	NONE	No	None			
	ICU-W	MRN: 12548861 Age: 54								

100% Browse

For Help, press F1



The **"Go"** button links directly to the Patient Information Form of the selected patient.



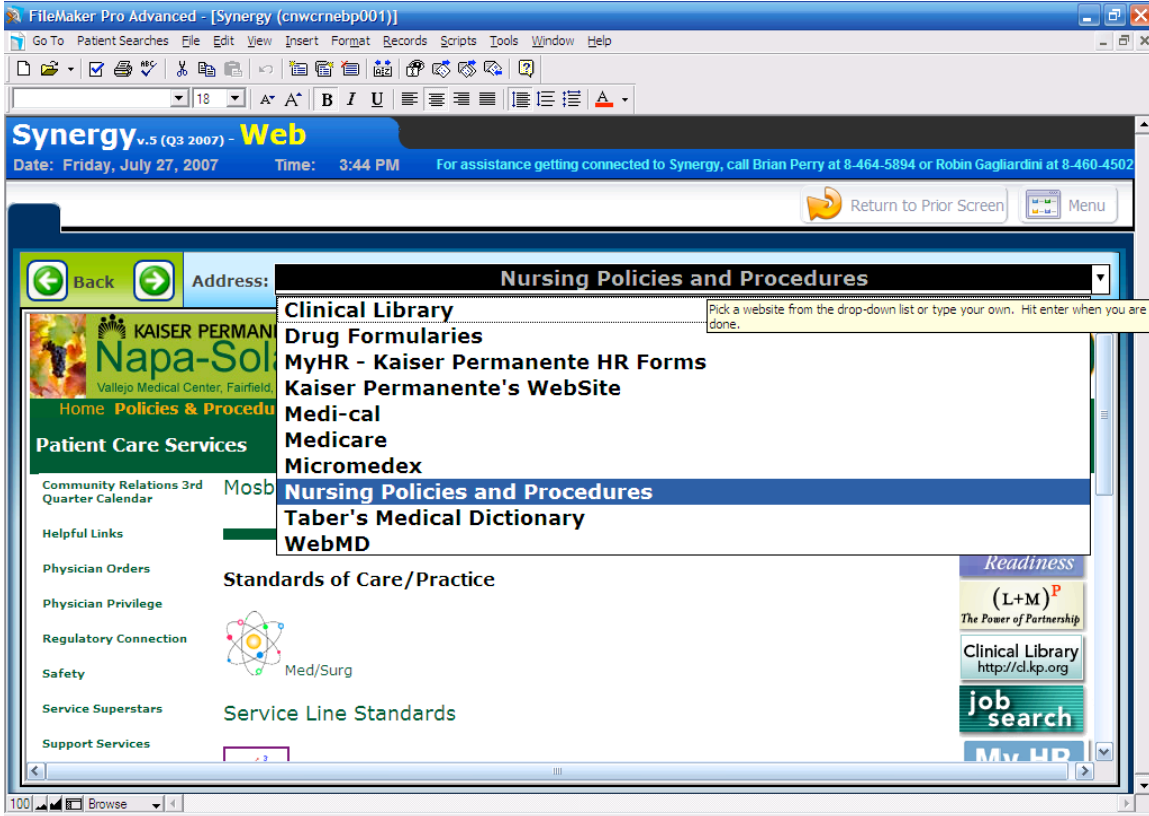
The **"E-mail/PDF"** button allows for the viewed list to be sent directly in Lotus Notes as an attachment or to be saved as a PDF. NOTE: Lotus Notes must be open to send the document.

NOTE: There are currently 4 lists and multiple searches available in Synergy. To request additional lists or searches, please contact Robin Gagliardini, Nursing Project Manager at ext. 4502.

WEB RESOURCES



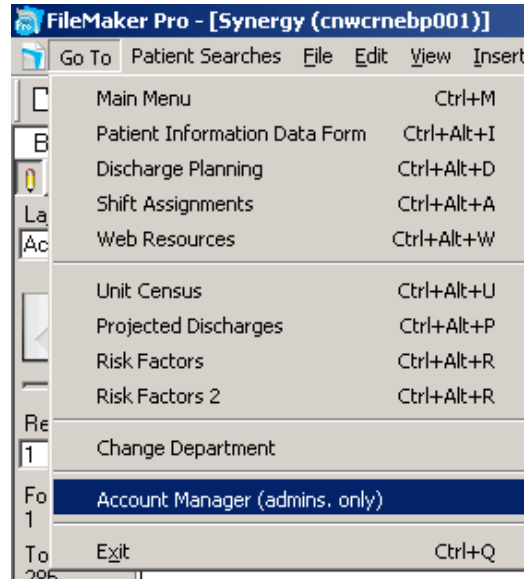
Web Resources may be selected on the Main Menu or on the Patient Information Form. This will display the Nursing Section of the Napa/Solano website. The Address Bar lists resource sites commonly used.



ACCOUNT MANAGER

The Account Manager is accessible to those with Administrator rights only. This is the area that is used to add users to the system.

Select the "Account Manager (admins. only)" on the "Go To" button.



TO ADD AN ACCOUNT:

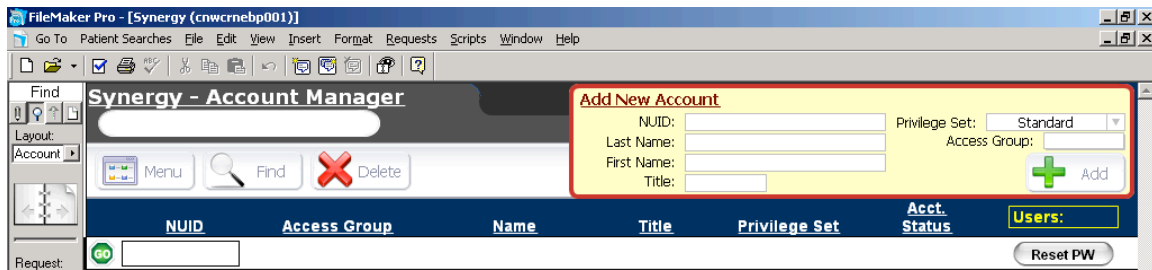
Enter the information requested in the "Add New Account" area.

"Privilege Set" is "Standard" for basic users. The "Access Group" determines the departments to which a user has access. "All" is selected for UAs and those who frequently float to various departments.

When all fields have been completed, push the "Add" button. NOTE: Once the "Add" button is pushed, the user will have access and a first-time password of "kaiser123" will be assigned.

TO RESET A PASSWORD:

To locate an employee's account, push the "Find" button and search by NUID or Name by clicking in the area below the header. When the employee's account is found, push the "Reset PW" button at the end of the row. This will automatically reset the employee's password to "kaiser123".



HELPFUL REMINDERS

1. First-time log-in password for ALL is "kaiser123".
2. The Account Name will need to be replaced with the user's NUID.
3. The password that is determined by the user follows that user throughout Synergy, regardless of department.
4. If a user forgets their password, an Administrator is able to reset it to "kaiser123".
5. **Patient Information MUST be "attested to" by an RN prior to transfer of care:**
 - **Intrafacility**
 - **Interunit**
 - **Between shifts**
6. All patients must be assigned to a nurse upon arrival to the department.
7. Any assignment changes MUST be changed in Synergy.
8. Any changes, suggestions, or issues related to Synergy are to be directed to Robin Gagliardini, Nursing Project Manager at ext. 4502.