

# Excellian Documentation Guidelines for Clinical Students/Faculty

Documentation in the medical record is critical to assure the patient's episode of care is appropriately recorded, to facilitate ongoing communication among the interdisciplinary team of healthcare providers, and to maintain a record of historical data for audit, future care reference, and research.

Allina Health strictly enforces that any clinical student performing cares for a patient must be able to document the care given in the Excellian record. This requires the student have their own secure Excellian access. In order to receive Excellian access, the student must successfully complete the appropriate Excellian course, either web-based or instructor-led depending on the clinical role.

**IT IS NOT PERMISSIBLE TO HAVE A PRECEPTOR OR OTHER STAFF MEMBER DOCUMENT ON BEHALF OF THE CLINICAL STUDENT. This is considered fraudulent charting. It exposes the student, preceptor, and clinical department to enormous risk.**

- If a student is expected to have Excellian access and does not, the faculty or student must contact the Allina Information Services HelpDesk at 612-262-1900. If the HelpDesk is unable to fix the access without a new Electronic Access Request (EAR), the student, faculty, or leader must contact [StudentOnboarding@allina.com](mailto:StudentOnboarding@allina.com) for EARS submission and [AllinaAcademics@allina.com](mailto:AllinaAcademics@allina.com) for additional follow up.
- The student may only observe, and not perform patient care until access is secured. The student may need to leave the clinical setting, after discussion with the Academics coordinator.

***Exception-Allina Medical Transportation:*** Paramedic/EMT students and others using Allina Medical Transportation services for clinical experiences will not be given access to EMMA – the electronic record for this dept. Preceptors will continue to document on behalf of these students as decided by the Allina Medical Transportation risk department.

## Smart Phrase Use for preceptors of all students:

The Preceptor assigned to the patient will document that they agree with the student's charting when observed by using the SmartPhrase ".student", or document their own additional assessment.

## When Students are Allina Health Employees:

In Excellian, student access is always primary. Documentation will always have a student role in the auto-signature which is not editable. In the **employee role**, start each shift with a progress note that states "I am documenting this shift in my employee role of XXX" by creating a SmartPhrase. This will mitigate the auto-signature of student and assure clear communication of employee role at the time of documentation.

## How to Create a SmartPhrase:

Access your Workbench to create a SmartPhrase

1. Click the Epic button, hover over Tools, hover over SmartTool Editors, and click My Smart Phrases.
2. Click New to create a new SmartPhrase or highlight an existing SmartPhrase “.student” and click Edit.
3. In the Name field, enter a name for a new SmartPhrase.
4. On the Content tab, type your SmartPhrase text.
5. When ready to insert a system, place your cursor in the Insert SmartList field and type the name or keyword.

## Nursing and Respiratory Therapy Students

### Student Documentation Guidelines

All nursing and respiratory therapy students will document in the:

- MAR (Medication Administration Record)
- Doc Flowsheet
- I & O
- Vital Signs Flowsheet
- Notes when applicable

### Prohibited Charting Activities

Because the patient record is a legal document, there are certain activities that require a professional license and cannot be performed by a clinical student. These include:

- **Students may not acknowledge orders or take verbal or telephone orders.**
- **Students may not advance the plan of care.**

### Clinical Instructor Documentation Guidelines

When clinical instructors are on site with students they will document the following as appropriate:

- Medication Administration Record (MAR) – the instructor will double check the students’ medications while the student is preparing/obtaining meds from the Automated Dispensing Cabinet (ADC). These medications will be documented in Excellian as double checked at the time of the administration by the student.
- Enter a simple nursing note (use the SmartPhrase “.student”) to concur with the student’s documentation.

### RN’s Role for Documentation

- The staff RN retains the assessment, supervision of care, and evaluation for each patient assigned to a student.
- The RN assigned to the patient will be responsible for documenting patient assessment.
- The RN assigned to the patient will document that they agree with the student’s charting when observed, or document their own additional assessment.
- **When faculty are onsite:** Faculty will document that they agree with the student’s charting when observed by using the Smart Phrase “.student”.

## **MAR (Medication Administration Record) – instructions for students, preceptors, and faculty**

- Narcotics/Controlled substances: Students and Faculty are not allowed to access or withdraw from automatic dispensing cabinet or administer any narcotic/controlled substances. This category of medication must be administered by an Allina Health staff caring for the patient.
- PLEASE USE PATIENT SUMMARY REPORT TO VIEW MEDS INSTEAD OF THE MAR. The MAR should only be used for documenting administration of meds. This is the same view as the MAR but allows other RNs to simultaneously chart on the patient's MAR if necessary
- Clinical Instructor/RN Preceptor must document nursing student medications as “double checked” in the Excellian MAR. Clinical Instructor/RN Preceptor will log into Excellian and document each medication as “double checked” as the nursing student prepares/obtains the medication from the Automated Dispensing Cabinet [ADC]. The nursing student will then enter the patients' room and log into the patient's Excellian MAR. The nursing student will document each administered medication when the patient takes the medication. Click on the empty space in the cell in order to chart as double checked when medication is administered.
- A licensed RN/RT must be present in the patient's room and supervise the administration of ALL medications by a student nurse/respiratory therapist student.

## **Patient Care Plan and Patient Education**

Student nurses can (and should) collaborate with professional staff and interdisciplinary team members to update and individualize the care plan to meet patient needs and expected outcomes. Students should not be “meeting goals” in the patient care plan. This function should be performed by a licensed nurse ONLY. Student nurses should work with their preceptor on patient education documentation.

<b>DATE CREATED or REVIEWED:</b> 1/21/2020	<b>AFFECTED USERS:</b> All Excellian Users
<b>TEAM CREATED BY:</b> Excellian Clinical Training	<b>UPGRADE RELATED:</b> NO

## Selecting a Job Role at Log In

### Quick Reference

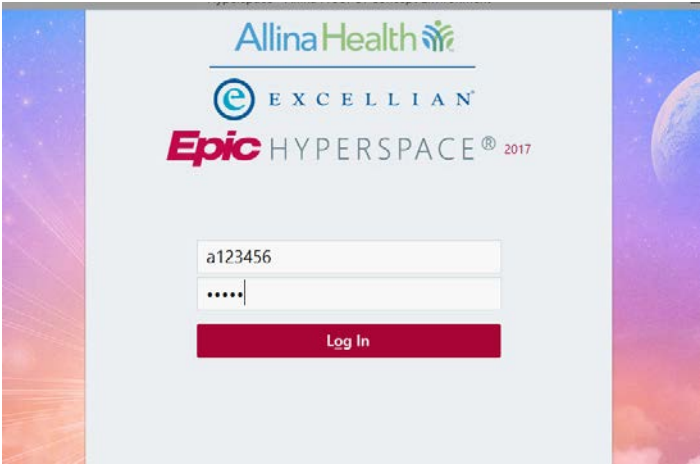
Users that have more than one job within Excellian need to select which role they are utilizing at login.

### Details

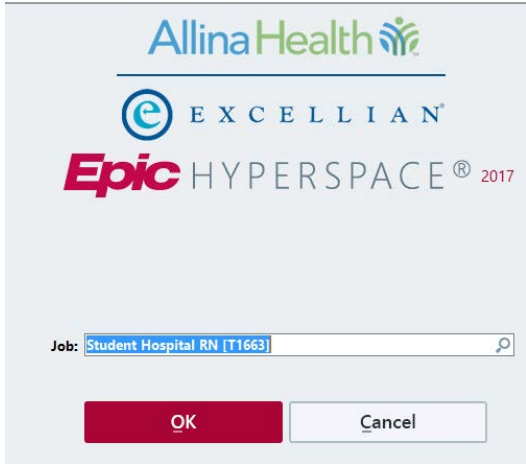
When a user has more than one job role security template built within Excellian (e.g. Clinic CMA and Student Nurse) they will need to select a job role before signing into Excellian.

### Logging In:

#### Step #1: Enter Login Credentials



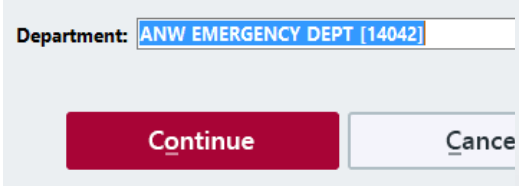
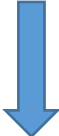
#### Step #2: Click the Magnify Glass



#### Step #3: Select Job Role for shift



**Step #4: Pick CORRECT DEPARTMENT.** Simply changing department alone will not give you the different Excellian tools. Example, if you switch to ED Job, you must also switch to ED department.



Item Select

Search:

ID	Name
T30341	Clinic LPN/CMA
T1663	Student Hospital RN

Highlight the Job Role you want to use. Here it shows the user will sign into Excellian as a LPN.

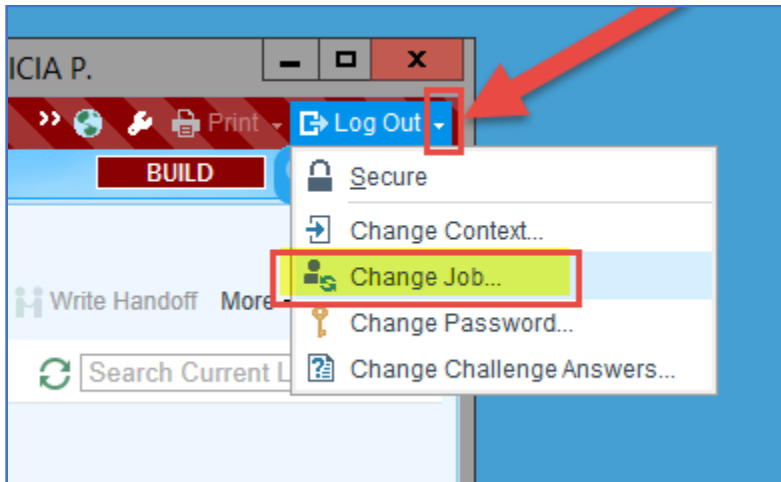
After you select the Job Role Click the Accept button to proceed.

2 items loaded.

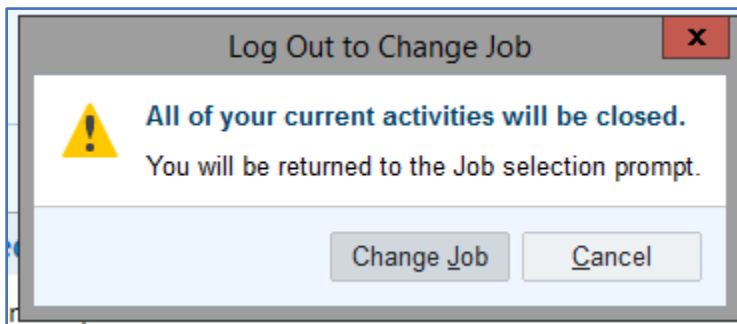
Accept
  Cancel

## Change job roles during shift:

**Step #1:** Click on the Drop Down Arrow on the right side of the Log Out Button (see red arrow). Then select Change Job...(see red box).



**Step #2:** Click on the Change Job button. Follow the process Step #2 above until logged in.



**Step #3:** Change your login Context if you are working somewhere else also.

