

## Excellian Documentation Guidelines for Clinical Students

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 student may not be on the clinical site until access is active, due to HIPAA and compliance requirements. If student needs to leave the clinical site, the faculty should notify academic coordinator or [AllinaAcademics@allina.com](mailto:AllinaAcademics@allina.com).

***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 AMT risk department.

### **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

#### **MAR (Medication Administration Record):**

- 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.

### **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:

- MAR – the instructor will double check the students' meds while the student is preparing/obtaining meds from the ADC. These meds will be documented in Excellian as double checked at the time of the administration of the medication by the student.
- Enter a simple nursing note (use a SmartPhrase) to concur with the student's documentation.

### **RN's Role for Documentation with a Patient and an Assigned Student**

- 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 an assessment on the patient.
- The RN assigned to the patient will document that they agree with the student's charting when observed or document their own additional assessment. Faculty will document that they agree with the student's charting when observed by using a SmartPhrase.

### **RN's Role for Documentation with a Precepted Student**

- 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 an assessment on the patient.
- The RN assigned to the patient will document that they agree with the student's charting when observed by using a SmartPhrase or document their own additional assessment.
- The RN will double check the students' meds while the student is preparing/obtaining meds from the ADC. These meds will be documented in Excellian as double checked at the time of the administration of the medication by the student. Click on the empty space in the cell in order to chart as double checked.

### **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 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.