


## ORCA Rounding (CORES)

### Accessing ORCA Rounding (CORES)

ORCA Rounding (CORES) is located in ORCA to the right of the Surgery Schedule tab in the organizer. The tab is called Rounding (CORES).

If this selection is not visible, click the arrow  to reveal the full list of organizer options.

### Setting your Facility and Rounding Service, Team and Sub-Team

First select the facility, then service, team and sub-team. This filters the patient lists and printed reports. The next time you log into Rounding (CORES), the system will retain your selections.

- A Rounding Team selection is NOT required, if you wish to view the complete service list.
- Not all teams have sub-teams in ORCA Rounding (CORES), so selection of a sub team is not required.

### Setting your Preferences (Manage Preferences)

- Click on Manage Preferences
- Preferences can be set for Service/Team, Patient List Sort and Filters, Printing
- Once Preferences are set they will be the Default until changed.

### Rounding (CORES) Navigation:

Navigate in ORCA Rounding (CORES) using the left hand column (i.e., navigation bar). Actions will be selected here.

### Home/Main (is the Default Page):

- Navigate: Navigate to the Patient List, Management Contacts page, Locate Patient (all inpts) screen, Manage Preferences and Help.
- Quick Web Links: UWResidents.com, Amion and Excel Census.
  - The Excel Census can be used to copy and paste a list into an Excel Spreadsheet.
- Contact: Use to provide email feedback to the ORCA-CORES team.

**Patient List (click Patient List in Navigate section):**

## Patient List Actions:

- Add a Patient From: Inpatient Census, ED Census, Pre-Admit Census, Search, Family Medicine-Pre-Admits.
- Print a Report: Reports and Worksheets. Click more to see the full list of options. Simple Census is the most compressed printout.

**Patient List**

The Patient List screen is used to manage the Rounding (CORES) patient lists at a team or sub-team level. This gives the option to:

- Add and Remove Patients.
- Update patient list data such as Attending, Status, Consult, etc.
  - To update any information, click on the underlined MRN hyperlink.
  - A pop-up will open giving you the option to update the information.

**Adding a Patient**

There are several ways to add a patient to the patient list.

- Inpatient Census: This will load the census list of all active inpatients.
  - Check the box in front of the patient name to add one or more patients to the list.
  - Click the Add button to add the patient to the current list.
- Emerg. Dept. Census: This will load a list of patients admitted to the Emergency Department within the last 24 hours.
  - Check the box in front of the patient name to add one or more patients to the list.
  - Click the Add button to add the patient(s) to the current list.
- Pre-Admit Census: This will load a list of patients with a pre-admit encounter.
  - Check the box in front of the patient name to add one or more patients to the list.
  - Click the Add button to add the patient to the current list.

- Search: This opens a patient search window.
  - Look up the patient by MRN or name.
  - Select the correct encounter.
  - Click on the Add Patient button.

### Update Attending

You can update the Attending for a patient in ORCA Rounding (Cores) and it applies only to your own team. Updating the information in Rounding (CORES) does not automatically update the information in Reg/ADT.

- To do this, click on the team Attending's name.
- The pop-up box lets you search by name: last, first.
- Changes only apply to your team's list.
- You can Batch update the Attending to update more than one patient at a time. Uncheck any patient names that you do not want to update.



### Update Status

- Click on the status. Choose ICU or Floor.

### Update Consult

- Click on the consult checkbox to indicate that your team is consulting on this patient.

### Update Sub-Team

To change the sub-team assigned:

- Click on the sub-team value and select from the defined list. Not all Rounding (CORES) teams have defined sub-teams.

### Filtering and Sorting Data

The team list provides the ability to sort patients, and to filter out patients.

- To sort, click on the column head name.
- To filter, use the drop down arrow to access the filter list.
- You can filter sub-sets of patients to view only ICU patients, Consult patients, etc.
- Be sure to click on Apply Filter or Remove Filter to activate the Filter

## Removing a Patient from a List

Click the Remove button and confirm that you want to remove the patient from the list. This affects everyone that uses this team list.

## Updating Patient Data

To update patient ORCA Rounding (CORES) information, go to the patient list and click on the patient MRN hyperlink or the icon in front of the MRN.

- The data update screen will open.

The CORES update screen is color-coded to identify who will see the updates you are making:

- Green: Patient level data: everyone who adds this patient to their list will see this information.
- Blue: All teams on the same service will see this information and your changes. For example, Internal Medicine A will see data changed by Internal Medicine B, but General Surgery will not see these changes.
- Pink: Team-specific data is not shared with any other team. For example. Internal Medicine A will NOT see data changed by Internal Medicine B.

## Updating Data

In most fields you can type in the information, or select them from a drop down list. Always SAVE the information by clicking on the Save button before exiting or the updates will be lost.

## Updating Medications

Medications are automatically imported from the pharmacy into ORCA Rounding (CORES). This gives the option to:

- Filter which medication or sections should not print for that patient.
- Add a note to a medication.
- Mark a medication as an antibiotic and select its start date.

## Filtering Medications

To stop a medication or a group of medications (Med, PRN, Infusion) from printing on the rounding report:

- Un-select the checkbox to the left of the medication.

- The medication will show as grey when it is unchecked and will not show on the printed report.

### **Antibiotics**

If a medication is checked as an antibiotic in the Abx field, it will:

- Provide a calendar to select the medication start date.
- The date will display in the Notes Field.
- Display that drug in the Abx section of the rounding report.

### **Lists (Tubes/Lines/Drains and Procedures)**

- To add an item on a list, enter the value (free-text or calendar) and select Add.
- To Delete and items, click delete.
- To modify an item, update the information and remember to save.
- Date default is today's date. Other dates can be selected.

### **Saving Data**

To save the any changes or updates, click the Save or Save and Exit buttons before closing the window. If there are changes pending, the words Save or Save and Exit will be bright red as a reminder.



## **Other Updates and Options**

### **Setting the Primary Service/Team**

To update the primary service/team:

- Click the Make Primary link. This is the same process as in the old CORES.

### **Opening the Patient Chart in ORCA**

Click on the PowerChart icon and the patient chart will open.

- Always check the colored demographic banner to confirm that the chart has opened to the correct encounter before writing a note.

## Printing a Report

When viewing the patient list, there are three additional options in the navigation menu:

Print Report: This will print a Rounding Report for all of the patients currently on the list. To print a report:

1. Go to the Patient List page.
2. Use the filters to select the patient list for printing.
  - a. Filters include status, sub-team, team, service, consult, attending, etc.
3. Select the desired report. Filter window appears:
  - Radio button selection will sort the order of the patients on the report
  - Contacts will appear on the report unless the contacts box is unchecked
4. Click Run
5. Wait for the report to generate.
  - a. The report will be generated for the patients shown on the list.
  - b. After the report is finished, a new box will appear with printing options: if there isn't a printer identified, find a different computer so that you can print.
  - c. Call the HelpDesk to report that the first computer needs to have a printer assigned to it.


## Updating Contacts

To update the team contacts, click on the Manage Contacts button and update the contact information. Remember to click the Save button. Contacts will print on the rounding reports, if selected.

## Locate Patient

The Locate Patient option shows all inpatients currently tracked in ORCA. It also shows all teams and services that are tracking any given patient. The primary team/service is displayed. Click on a team to view its rounding information in ORCA Rounding (CORES) (read-only). A patient can also be added to a team from this page.

## The Alert Triangle

The Alert Triangle  appears if an encounter is:

- ED
- Pre-Admit
- Outpatient
- Discharged

The Encounter will update automatically every few minutes except for Outpatient Encounters.

Outpatient Encounters will never update.

## Contact and Help

- Help: Click on Help to get a copy of instructions on how to use ORCA Rounding (CORES).
- Click on the "question mark within a circle" icon next to a particular function, to find quick information about that function in ORCA Rounding (CORES).
- Call the HelpDesk with concerns or questions about ORCA Rounding (CORES) 206-543-7012.
- Click on the feedback contact buttons to send an email about a problem, suggestion or request to the ORCA-CORES team.