CONSOLO IDG SNAPSHOT WIZARD

This guide will explain basic Consolo IDG Snapshot functionality. Additional important information can be found in other user guides in Training Tools / Reference Documents.

Additionally, basic functionality may be enhanced by periodic updates to Consolo’s software. While we endeavor to keep these manuals up to date, you should always review the Release Notes, and attend pre-release training, whenever a new version of Consolo is released.

GENERAL INFORMATION

There are a variety of ways to utilize the new IDG Snapshot but the recommended process for the Interdisciplinary Group Meeting is to:

- Display Consolo on a Screen
- Run the IDG Report to display patients to discuss
- Utilize the Wizard to open the IDG Snapshot Document and View the Patient/Family Data
- Complete the Editable Areas
- E-Sign the IDG Snapshot once the discussion has been completed
- Repeat with subsequent patients.

IDG Snapshots may be produced for multiple patients (e.g. for an entire Office or Team), using the “IDG & Hospice Assignments” Clinical Report, or they may be produced for individual patients via a link on each patient’s homepage.

Whichever method is used, IDG Snapshots are stored in each patient’s Medical Record, and may be accessed via the “IDG Snapshots” link on the patient’s homepage.

IDG Snapshots also fulfill two other purposes:

- Ongoing Comprehensive Assessment – an IDG Snapshot is considered the updated Comprehensive Assessment
- Offline Charting – download as a patient summary for offline use. Downloading the most recent IDG Snapshot when offline charting allows the user to have a convenient summary of recent patient assessments, notes, care plans, and medications.
IDG Snapshot / Electronic Wizard Process

This is the preferred method for generating IDG Snapshots. Snapshots produced using the Wizard:

- Are automatically stored in patient’s Consolo Chart
- May be individually or bulk e-signed
- May be e-faxed from within Consolo

Go to Admin / Reports / IDG & Hospice Assignments Summary

The report defaults to include patients who were Admitted, Active, or Discharged in the past 14 days. Select a different date range by using the Filter Options. Or, use the Filter Options to select a specific Office, Area, Region, or Corporation, or a specific Team. When ready, click “Generate Report”:
Acknowledge the following message. Consolo will generate your IDG Report “behind the scenes”. You may close the Reports tab in your web browser, or do other work in Consolo.

When the IDG Report has finished generating, you’ll receive a Notification in the lower right corner of Consolo. If configured in your User profile, you may also get an email or text notification:

Click on “Notifications” and then click on the Notification message to open the IDG Report:
The Filter Options selected for the IDG Report will display at the top of the screen. Beneath that, your patients are divided into three sections:

- Patient’s admitted in last 14 days
- Active patients
- Patient’s discharged in last 14 days

Use the screen shown above to facilitate your IDG meeting. The screen contains a variety of summary information about each patient. Click on the column headings to re-sort the patient list. For example, if you want to discuss patients in order of admission date, click the “Admission Date” column header to re-sort the patient list accordingly.

When ready to create an IDG Snapshot for the first patient, click the “Wizard” button next to their name:

The IDG Snapshot for this patient will open in a new browser Tab. The IDG Report summary screen shown above will remain open in the current Tab:

The IDG Report is open in the left Tab; this patient’s IDG Snapshot is open in the right Tab.
The IDG Snapshot screen will show Steps to Follow:

- Review the clinical documents and summaries that may have changed since your last IDG meeting.
- Add notes related to your clinical findings.
- Save and sign your new document.
- Create the static PDF (snapshot). It is not even necessary to print, but you may if desired.

Current IDG Charts for Real C.

The IDG Snapshot screen will show a series of “accordion” sections. Each section contains relevant clinical charting. Each section will include either:

- The most recent information charted in the past 14 days (or the Date Range from Filter Options)
- If no charting in past 14 days, the most recent charting

Note: Different patients may show different sections. Only sections that have clinical charting completed will display. Any differences are due to the presence or absence of certain types of charting in one patient’s record vis-à-vis the other patient’s record.

Note: Patient Demographics, Plan of Care, Certification, Medication, Comprehensive Assessment, Clinical Indicator & Diagnosis, Care Level Change, Visit Note, and Hospice Assignment information is always included.
WARNING: If the User generating the IDG Snapshot does NOT have Role Permissions to view a clinical chart that is included in the Snapshot, that section WILL NOT display or print as part of the PDF.

In order to include ALL clinical charting, the user generating the Snapshot must have Role Permissions to View ALL clinical charting.

Once your IDG Team has reviewed this information, complete the “IDG Snapshot Details” at the bottom:

Note: Effective Date of the IDG Snapshot CAN be a future date. This allows you to create an IDG Snapshot <today> for an IDG Meeting that happens <in the future>. Effective Date always defaults to today’s date, as the intention is for the IDG Snapshot to be created in real time at IDG meeting. Use the future-dating option at your own discretion.
Complete these fields at your discretion, summarizing the patient's care, progress towards goals, changes to Plan of Care, etc. Complete only those fields that are relevant. When finished, click “Create”.

A summary of the content you added to the IDG Snapshot will display:

Use the Related Links Menu to take further action:

At this point, you have created an IDG Snapshot for this patient. You have the following options:

- Close this Tab and return to the IDG Report Tab. The completed, unsigned, EDITABLE, IDG Snapshot will be stored in the patient’s homepage / IDG Snapshots link. It can later be e-faxed, printed, edited, destroyed, or e-Signed by individual users.
• Add your Signature. The completed, signed IDG Snapshot will be stored in the patient’s homepage / IDG Snapshots link. It can later be e-faxed, printed, or e-Signed by other individual users. It CANNOT be edited or destroyed.

• Add Physician or MD Signature. This is typically not done at this point. This allows you to certify that the Attending Physician has signed the IDG Snapshot. Typically this step is done later, after the IDG Snapshot has been faxed to the Attending Physician or MD, signed, and returned.

• Create PDF Snapshot. This allows immediate generation of a PDF of the IDG Snapshot. The completed, unsigned IDG Snapshot will be stored in the patient’s homepage / IDG Snapshots link. It can later be e-faxed, printed, edited, destroyed, or e-Signed by individual users.

• Edit this IDG Snapshot. The “IDG Snapshot Details” content you’ve added to the IDG Snapshot can be edited, as long as the Snapshot is NOT e-signed. Once e-signed, either by an individual user or batch of users, the Snapshot is locked and CANNOT be edited or destroyed.

• Add Signatures. This is the recommended next step.

Note: IDG Snapshots CAN be edited IF they are NOT e-Signed or converted to a PDF. Once e-Signed or converted to a PDF, IDG Snapshots CANNOT be edited or destroyed.

ADDING BATCH SIGNATURES TO IDG SNAPSHOTS

Clicking the “Add Signatures” Related Link will allow you to e-Sign the IDG Snapshot on behalf of all Assigned Users who participated in the IDG meeting for this patient:

Check the box next to the name of each person who was present at this patient’s IDG review. Then click “Create Signatures”. The e-Signature for each selected user will be attached to the IDG Snapshot:
Note: Only Users who are specified as Assignees in the patient’s Hospice Assignments can be selected as e-Signatories.

Note: IDG Snapshots CAN be edited IF they are NOT e-Signed. Once e-Signed, IDG Snapshots CANNOT be edited or destroyed.

Select another Related Link option, or Close this Tab, return to the IDG Report, and select the next patient to review. Continue creating the rest of the needed IDG Snapshots.

IDG SNAPSHOTS – PATIENT HOMEPAGE

You may create IDG Snapshots for individual patients by clicking the “+” symbol next to “IDG Snapshots” link on the patient’s homepage:
Once created, you’ll be able to:

- Add your Signature
- Add Physician or Medical Director Signature
- Add batch Signatures for any/all Assigned Users
- Create another new IDG Snapshot
- Edit this IDG Snapshot

**Note:** IDG Snapshots **CAN be edited IF they are NOT e-Signed or converted to a PDF. Once e-Signed or converted to a PDF, IDG Snapshots CANNOT be edited or destroyed.**

**PRINTING IDG SNAPSHOTS**

The “IDG Snapshots” link on the patient’s homepage will include a summary list of all completed IDG Snapshots for that patient:

Clicking the Printer Icon will allow you to print just the Summary (“IDG Snapshot Details”) portion of the IDG Snapshot. Printing this Summary, which includes only the check and text boxes you created, produces a document suitable for users, attending physicians, or others, who just need this brief detail.

Click the Printer Icon to print the Summary. Select options to include in the PDF:
Clicking the “Create PDF” link will allow you to create a full-length IDG Snapshot that includes:

- General patient details
- Hospice Assignments
- Indicators
- Care Level Change Summary
- Current Visit Notes
- Current Volunteer Information - Most Recent Volunteer Care Plan, Request Notes, Care Notes
- Current Hospice Aide Assignment
- Recent Vitals
- Recently updated Medications
- Non-Recently Updated Medications
- DME Order
- Physician Orders
- Current Certification
- Nursing, Social, Spiritual, Volunteer, Physician & Administrative Notes
- Current Plan of Care

For each item above, the IDG Snapshot will include: Items completed in the past 14 days, OR the most recently-completed item

Click the “Create PDF” link, and then select optional items to include in the IDG Snapshot:
FAXING IDG SNAPSHOTS

Completed IDG Snapshots may be e-faxed. Click the “Fax Documents” link on the patient’s homepage:

On the following screen, select a Fax Recipient, and complete Additional Instructions:

Next, select optional items to include in the fax:
Now, check items you want to fax, from the list of available “Attachments:

Click “Fax” button, and your item(s) will be sent:

PRINTING MULTIPLE ELECTRONIC IDG SNAPSHOTs

Previously completed electronic Snapshots can be printed, en masse, from Patients / IDG Snapshots:

Check the box at the far right of each Snapshot you wish to print. Then, from Related Links, select the Print Option:
IDG Snapshot / Batch Paper - Print Process

It is also possible to generate IDG Snapshots for multiple patients at the same time. These Snapshots will be printed in one batch. They differ from Snapshots created using the “Wizard” process described above:

Batch printed IDG Snapshots:
- Cannot be electronically signed
- Cannot be electronically edited
- Cannot be e-faxed
- Are not automatically stored in patient’s Consolo chart
- Require users to hand write information in the “Snapshot Details” section of each patient’s Snapshot
- Require users to hand sign each Snapshot
- Require users to manually fax Snapshots
- Require users to manually upload Snapshots to patient’s Consolo chart, or maintain in a separate hard chart

To create Batch IDG Snapshots:

Go to Admin / Reports / IDG & Hospice Assignments Summary

The report defaults to include patients who were Admitted, Active, or Discharged in the past 14 days. Select a different date range by using the Filter Options. Or, use the Filter Options to select a specific Office, Area, Region, or Corporation, or a specific Team. When ready, click “Generate Report”:
Acknowledge the following message. Consolo will generate your IDG Report “behind the scenes”. You may close the Reports tab in your web browser, do other work in Consolo.

When the IDG Report has finished generating, you’ll receive a Notification in the lower right corner of Consolo. If configured in your User profile, you may also get an email or text notification:

Click on “Notifications” and then click on the Notification message to open the IDG Report:
The Filter Options selected for the IDG Report will display at the top of the screen. Beneath that, your patients are divided into three sections:

- Patient’s admitted in last 14 days
- Active patients
- Patient’s discharged in last 14 days

In the “Blank” column, check each patient for whom you wish to print a paper IDG Snapshot:

NOTE: At the bottom of the Report, a “Select All” button may be used to check ALL patients.
After all necessary patients are selected, click the “Create PDF” button at the bottom of the Report:

The following “PDF Options” dialog box appears. Check the items you’d like to INCLUDE on the printed Snapshot for each patient. When ready to print Snapshots for the selected patients, click “Yes”: 
Acknowledge the following message. Consolo will generate your printable Snapshots “behind the scenes”. You may close the Reports tab in your web browser, do other work in Consolo:

When the Snapshots have finished generating, you’ll receive a Notification in the lower right corner of Consolo. If configured in your User profile, you may also get an email or text notification:

Click on “Notifications” and then click on the Notification message to open the IDG Report:
Consolo will now open a single PDF document that includes the complete Snapshots for each patient you selected:

Consolo IDG Snapshot 09/07/2012 for Oceane A. at Office Watsica and Sons

**Patient Details for Abshire, Oceane Malinda**

<table>
<thead>
<tr>
<th>Date Of Birth</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/13/1923</td>
<td>Active</td>
</tr>
</tbody>
</table>

**General Patient Details**

- Admission Date: 12/21/2011
- Discharge Date: (NA)
- Medical Record Number: (NA)
- Level Of Care: Routines
- Code Status: (NA)
- Imminence of Death: No
- Length of Service: 262
- Benefit Period: 1
- Recertification Date: 03/20/2012

**Allergies**
- Not Assessed

**IDG Assignments**

Seven patients selected; PDF totals 41 pages.

Print the PDF, and separate the Snapshots by patient.

*Note: Select small batches of patients. If you attempt to generate Snapshots for a large number of patients, the resulting PDF could be hundreds of pages long. It may be so large that your printer will be unable to manage the job. We recommend batches of 10-20 patients at a time.*

The printed Snapshots may be brought to your IDG meeting, where individual staff members may hand-write comments and signatures as necessary on the snapshots.

You will then need to gather all the printed Snapshots, ensure the pages remain properly collated, and either Upload them individually to each patient’s Consolo chart, or manually file them to a separate hard chart for each patient.

If desired, you may manually fax printed Snapshots, using your own fax machine.