CNA for Nurse
User Guide
3Tier Version 2.0
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CNA for Nurses

This system is designed to document and schedule tasks completed by CNAs. ADL’s CNA modules allow real-time data capture at the point of care. As the CNA cares for each resident, a wireless touch-screen monitor carried to the resident’s room, or a hallway-mounted touch-screen captures data with the push of a button. Data entry is quick, easy, and accurate.

CNA for Nurse allows the nurse to determine care requirements for residents, and set current or future CNA Schedules. The CNA for Nurse module also allows nurses to correct any errors entered by CNAs in the CNA for CNA module.

Where to Start

CNA Touch screen modules offer an easy-to-use, convenient method to keep track of CNA work assignments and collected data, streamlining resident care.

Touch Screens

A Touch Screen is exactly the same as a click with a mouse on a conventional desktop or laptop computer with a monitor and mouse and keyboard. You can enter text with your keyboard anywhere there is a keypad to touch. When using a Touch Screen, touch anything you want to enter; buttons and links are activated by a touch.

Buttons

CNA Buttons toggle on and off, like a retractable ball-point pen: you push the button once and the pen is ‘on’ and ready to use. Push it again and the button pops back out as the pen tip retracts. The pen is ‘off’ and not ready to write. Touch a CNA Button once and it displays as pushed in and the function is on. Touch it again and the function is off.

This is an example of a button that is pushed in:

![Button Pushed In](image)

This is an example of a button that is not pushed in:

![Button Not Pushed In](image)

Drag and Drop Items

Touch an item to drag something and pull your finger across the screen as if you are dragging a piece of paper. Release it when you have reached the place you would like to drop the item.

Select an Item

Touch an item to select it.
Log into the System

1. Log in to **CNA for Nurse**:

2. Select the **Facility** and the **Nursing Unit**.

3. Select the **Nurse’s Name**.

   **Note:** Check the **User** and **Security Settings** if the **Nurse’s Name** is not available.
4. Enter the **Password** and touch or click the **Logon** button to display the **adl Nurse Touch Screen** main menu (as illustrated on the next page.)

**Note:** You can try as many times as you like to get your logon right. If you’re sure that your name and password are correct, and you can’t log into the system, see your administrator for help.
Home Window

The Home Window displays after you successfully log into the CNA system:

Note: You can navigate to the Home Window from anywhere in the system by touching or clicking the Home button.

The Home window is the main menu for the CNA system. Buttons in this window allow you to navigate to screens that let you:

- Edit Resident Profiles
- Correct Actions Entered by CNAs
- Record Resident Actions
- Record Resident’s Vital Signs
- Schedule Current or Future CNA Schedules
- Generate Reports

You can exit the system by touching or clicking the Exit button.
Edit Profile

A resident’s Profile defines what has to be done, and how often, for each resident in each shift. The Edit Profile function allows nurses to enter, change and delete resident profiles. You can work with a profile for an individual resident, or you can work with the shift default profile for needs that your residents may have in common. (See the Default Profile section on page 10 for additional details.)

1. Touch or click in the Home window to display:

2. Select any resident from the list by touching his or her name.

   Note: Click or touch the button to search the list of residents. Press the button once to display a pop-up touch screen keyboard. The program scrolls to the nearest match for any selection you key in. Click or touch the button a second time to hide the pop-up touch screen.

3. Touch or click the button at the bottom of the screen to display general information about the selected resident. Click or touch the tabs to view Basic, MDS, and/or DX Codes information.
4. The **Unit** and **Shift** display at the top of the window. The **Unit** is **1SE** and the **Shift** is **EVE** in the example on the previous page. These values can be changed. Touch the drop down arrow and select a different value from the list.

   **Note:** Changing the **Unit** changes the list of residents that display. This allows you to edit profiles of residents in other **Units**. Changing the **Shift** changes the **Profile** you are editing for the selected resident. There is a different resident profile for each shift which allows setting meals, baths, etc. to be specific to the shift being worked.

5. Immediately below the **Unit** and **Shift** is a **Status Bar**. The **Status Bar** automatically displays the number of residents in a unit and the number of residents assigned to either a **Default** or an **Individual Profile**:

   ![Status Bar Example]

   **Note:** The **Profile Status** column in the **Resident List** displays which specific residents are on either an **Individual** or a **Default Profile** for the selected shift.

6. **Work with Profile** – Select which version of the profile you would like to work with: **Resident** or **Default**, and **Current** or **Future**.
   - Select **Resident Profile** for an individual resident, or **Default** for a shared profile (used by all residents not already on an Individual profile).
   - The **Current Profile** is the profile currently active. A **Future Profile** is a profile that is not in effect yet.

   **Note:** You must select a specific resident from the list before proceeding to **Step 5** if **Resident Profile** is selected. If **Default profile** is selected, you do not have to select a specific resident. The example in the following step displays editing the **Default Profile**. The procedure is the same when editing an **Individual Profile**.
5. Touch or click the **Enter** button (on the bottom right) to display:

![Screen Overview (Edit Profile)](image)

**Screen Overview (Edit Profile)**

Three types of Action items can be scheduled within any profile:

![Default Resident Profile](image)

Each type of item is edited in the profile using the same methods. ADL actions are used in the following example. The same steps are required when editing **Tasks** and **RSTV** (Restorative) actions.

![Default Resident Profile](image)

The Green lettering and green vertical bars that display on each of the ADL buttons displayed above indicate these buttons are scheduled and visible in the selected profile and will display as documentation action items for the **CNA** in their **Record Actions** Area.
Drag the desired button with your finger to the delete area and drop it there to remove an action item from the Profile.

Adding an item or editing an already scheduled item is described in the Default Profile section on page 10.

**Copy Profile**

You can copy an existing profile to create a new profile by touching the button. This displays an up-to-date list for the most recent profiles for an individual resident, or for the Default Profile.

**Note:** If an Individual Profile has changed and you need to ‘pull it back’ to it’s original definition, copy the Default Profile for the same shift and making changes to that. In other words, reset the Individual Profile using the Default Profile as the source.

**Note:** If you are creating a new profile and want to work from an earlier, existing Profile, touch or click the button.
1. Touch or click the button in the **Edit Current Resident Profile** window. The **Copy Profile Wizard** for the selected resident displays:

   ![Copy Profile Wizard](image)

   **Note:** The **Standard Profile** is created by ADL and cannot be changed.

2. Touch or click the specific profile and shift you wish to copy on the left. The button is activated. Click the button.
3. If a prior admission is on record for the selected resident, a Prior Stay category displays on the left. Touch the shift categories in the list (Day, Evening, Night) to see what profiles are listed for each shift.

4. The button displays on the Edit Future Resident Profile button when Future is selected in Work with Profile. This button can be used to define a specific start date for the new profile. The new profile must be defined before you can access this function. Once you have confirmed the new profile (by touching the button, touch or click the button to display:

![Profile Info]

Note: The future profile becomes activated on the date entered in this field, regardless of whether it is completed or not. It is recommended you set this date only after you have finished the profile to prevent its taking effect before you complete it.

5. All changes made to profiles are saved only after you click the Save button.

Default Profile

The Default Profile allows you to specify treatment common to all residents, and provides you with a convenient starting place for individual profiles for each shift. However, once Individual Profiles have been modified, changes made to the Default Profile are not reflected in the Individual Profiles.

Note: The Default Profile must be Set and Verified for each Shift. This sets the Default Profile across all residents admitted, until those residents are given an individual profile.

The Copy Profile function allows you to copy an existing profile to make a default profile. Refer to the Copy Profile section on page 8 for additional information.
1. Click the button to display the details of the current profile.

![Profile Details]

<table>
<thead>
<tr>
<th>Task</th>
<th>Start Date</th>
<th>Start Time</th>
<th>End Date</th>
<th>End Time</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diabetic Foot Care</td>
<td>07-25-08</td>
<td></td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>Turn / Reposition</td>
<td>07-25-08</td>
<td></td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>Ambulate</td>
<td>07-25-08</td>
<td></td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>Restraints</td>
<td>07-25-08</td>
<td></td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>Vital Signs</td>
<td>07-25-08</td>
<td></td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>Negative Behaviors</td>
<td>07-25-08</td>
<td></td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>ADL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bed Mobility</td>
<td>11-28-02</td>
<td>06:59 AM</td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>Transfer</td>
<td>11-28-02</td>
<td>06:59 AM</td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>Walk in Room</td>
<td>11-28-02</td>
<td>06:59 AM</td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>Walk in Corridor</td>
<td>11-28-02</td>
<td>06:59 AM</td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
<tr>
<td>Locomotion on Unit</td>
<td>11-28-02</td>
<td>06:59 AM</td>
<td></td>
<td></td>
<td>As Needed</td>
</tr>
</tbody>
</table>

2. Select an Action Item type:
   
   **Note:** ADL is used in this example.

3. Touch or click a specific ADL Button(s) to set default parameters:

   ![ADL Buttons]

   **Note:** Eating is not currently a scheduled ADL Action item and does not display on the Record Actions Screen for the resident with this profile. This is visually indicated because the lettering on the Eating button is black and no vertical green bars are seen. Eating can be added using the same steps shown below for editing.

4. For example, touch or click to display:

   ![Example Display]
5. Touch or click to display:

6. Enter the data and touch or click the Save button.

7. Blue lettering on a button indicates the settings have been completed.

8. Continue to set the default profile data for each button. This is generic data and is automatically applied to all residents not already on an individual profile. (Changes can be made to individual profiles using these same steps as necessary.)

Nursing Directives

Nursing Directives are applied to either individual resident profiles or Default profiles, and can be added to any ADL, Task, or RSTV item in the Profile. Adding directives to default profiles is only recommended to communicate or re-enforce facility standards that are to be followed for any and all residents.

Note: An Individual Profile is adjusted by selecting the Resident button on the Edit Profiles: Residents instead of the Default button.
1. Click or touch to display the **Edit Profile: Residents** window.

2. Click or touch the appropriate **Work with Profile** button. Refer to the **Edit Profile** section on page 5 for additional details.

3. Select the specific **ADL, Task, or RSTV** button and click or touch the button to display:

4. Enter the directive for the selected **ADL** or **Task** and touch or click the **Apply** button.  
   **Note: Directives** can be viewed by the **CNA** as they provide care for the resident.

5. Click **Save** to save the **Directive**.

6. Click **Save** to save the **Profile**.

7. The **Confirm Profile Changes** displays.

8. Review the data and click **Save** to confirm the changes and save them to the database.
Visibility

The **Visibility button** displays under each main **ADL** and **RSTV** button. It is used to disable (make invisible) or enable (make visible) any of the available buttons under the specified **ADL** or **RSTV** area.

![Visibility Options]

**Note:** This example is from **ADL**. A similar screen displays when you access the **Visibility Options** from **RSTV**.

The system defaults to select all options. These options can be changed. A checkmark displays when an option is selected. Click to select an enabled option to remove the checkmark.

If a check mark displays, the option in **Enabled** for the specific role. Touch or click to un-check the **Enabled** column. This makes the corresponding button invisible to all users. If you touch or click to select the **CNA** column, the corresponding button is made invisible to **CNA** users. Touch or click to select a button in the **Nurse** column to make the corresponding button invisible to **Nurse** users.

**Note:** **ADL** recommends un-checking the **Enabled** column for any **Ostomy** or **Catheter** buttons under **Bowel** and **Bladder** respectively within the shift default profiles for your facility. **Visibility** should only be set for these buttons in the individual resident profile for residents who have an **Ostomy** and/or a **Catheter**.
Example:

<table>
<thead>
<tr>
<th>Description</th>
<th>Enabled</th>
<th>CNA</th>
<th>Nurse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bowel Movement</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Character</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Continent</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Ostomy Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ileostomy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Colostomy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not Applicable</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ostomy Leaks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Correct Actions

The **Correct Actions** function allows you to make corrections to any action mistakenly or improperly recorded by your **CNAs**. You can only make corrections during the same shift as the mistake was made, unless you have special privileges to correct actions from earlier shifts and dates. If you have these privileges you can also record actions for earlier shifts in the event that they were not properly recorded at the time (either through error or due to extraordinary events, i.e., a power failure). The **CNA for CNAs** module does not allow actions to be recorded for any shift but the current shift to prevent error.

1. Select the **Unit**, **Date**, and **Shift** in the **Correct Actions** window:

![Correct Actions Window](image)

2. Highlight the resident whose data was improperly recorded.
3. Touch or click the button to display the Correct Actions Recorded window for the selected Resident/Date/Shift window:

![Correct Actions Recorded Window]

4. Touch or click a button to display the accompanying Self Performance and Support Provided buttons.

5. Touch or click the button you need to enter a correction for to display:
6. Touch or click the specific line you wish to correct. Or, touch or click the **Record another (unscheduled) action** if you wish to add an action for the selected resident.

7. The appropriate buttons display and you can record the corrected actions.

   **Note:** Only the buttons for the specific action you initiated display. In other words, if you selected **Self Performance**, only the **Self Performance** buttons display. If you need to correct **Support Provided** for the same action, you must select **Support Provided** and then select the appropriate line to enter corrections for that side of the action.

9. Make the necessary adjustments within the **ADL** and **Tasks** screens.

10. Touch or click the **Save** button when you have completed the corrections.

11. Click the **Close** or the **Residents** button to exit this screen.
Record Actions

1. Touch or click from the Nurse Touch screen to display the Residents screen:

   ![Residents Screen]

   **Note:** Highlight the name of a resident and touch or click the button to review the resident’s information. You can view Basic or MDS info, along with the Diagnosis Codes for the selected resident. This screen displays a list of residents based on the selected CNA. In the example above, Show All is selected in CNA, therefore, all residents in the Unit from your login display. You can change the display of residents by selecting a different value in CNA.

2. Touch or click the name of the resident for which to record actions.
3. Touch or click if the specific resident is not listed to display:

4. Select a name from the list and touch or click the **OK** button. The newly added resident displays at the top of the list:
5. Touch or click the name of a specific resident and then touch or click the 
button to display:

![Record Actions Screen]

**Note:** This is the exact Record Actions Screen that CNA’s have available for 
documenting action items.


**Record Actions Buttons**

1. ![Residents Button](image) - displays your **Residents List**.

2. ![Prior and Next Buttons](image) - enable you to scroll through list of residents in this screen.

3. ![ADL Button](image) - allows documentation of ADL data.

4. ![RSTV Button](image) - allows documentation of **RSTV** data. This button only displays if restorative tasks have been assigned to the resident.

5. ![Vital Signs Button](image) - allows entry of Vital Signs data for residents.

6. ![HIPAA Button](image) - hides all resident data from the screen until you touch or click the screen again.

7. ![Help Button](image) - launches online help.

8. ![Close Button](image) - closes the **Record Actions** screen and displays your **Residents List**.
9. Displays any ADL specific directives set up by the Nurse for the selected resident.

10. - displays the current Care Plan approaches for the selected resident. This button flashes red until acknowledged.

11. and - displays information about the specific resident’s current profile.

12. - displays the key to explaining the colors of the ADL and Tasks buttons:
13. displays the daily history of the selected **ADL** and/or **Task** button:

14. is for future development.

15. enables short video in-services to be linked to specific buttons on the screen. A video launches when a button with a video linked to it is dragged to the **Show Me** area.

16. and are only active when data has been entered on the screen. The **Cancel** button undoes any changes entered. The **Save** button saves changes to the resident’s record.
ADL

ADL stands for Activities of Daily Living. These are the activities which you must ensure that all the residents under your care do every day.

This program has a maximum of 15 ADL specified activities that you must keep track of. You might have to scroll the screen to view all the ADL buttons. Use the left and right arrow buttons on the right to scroll through the list of ADLs.

Note: There is a feature available to the nurse in charge to specify a subset of the available ADL buttons as required in a Profile. The Profile is defined by the nurse in charge and contains all the activities that must be defined for a specific resident. Therefore you may see less than the maximum 15 buttons. If you have any questions about the number of buttons that are available when you access this screen, see the nurse in charge.

Note: If an active arrow button displays to the right of the ADL buttons, additional ADL buttons are available on the next screen. Click or touch the arrow button to display the remaining ADL buttons.

Touch or click a specific ADL Button for the behavior to be documented, (i.e., Bed Mobility, Transfer, Walking, etc.)

Both Self Performance and Support Provided must be recorded (at a minimum) for each ADL recorded. The ADL cannot be saved until both ‘halves’ are charted. Some ADL’s (i.e., Eating) require additional data in addition to Self Performance and Support Provided.

Self Performance records how much help the resident needs from you to perform the specific task. There are seven choices available for Self Performance:

- Independent – If a resident performs the task without any help or oversight.
- Supervision – If a resident needed you to provide oversight, encouragement or cueing.
**Limited Assistance** – If the resident needed help that required touching the resident but not lifting any of the resident’s weight. Guided maneuvering of the limbs for example.

**Extensive Assistance** – If the resident required weight-bearing assistance.

**Total Dependence** – If the resident couldn’t do anything and needed you to do everything; full staff performance.

**Did Not Occur** – If the activity did not happen for any reason

**N/A** – If this activity does not apply to this resident

**Note:** You must select a value from the **Self Performance** list for every activity whether the activity is done or not before your shift is over.

**Support Provided** records how much help you needed to perform the specific activity. There are six choices available for **Support Provided**:

- **No Support or Help** – no set up or physical support from staff
- **Setup Help Only** – resident only needed help to set up items required to perform the activity
- **One Person Assist** – resident needed one person to help with the activity
- **Two Persons Assist** – resident needed two or more people to help with the activity
- **Did Not Occur** – If the activity was not completed
- **N/A** – If this activity is not something the resident needs

**Note:** Just as with **Self Performance**, you must select something from the **Support Provided** list for each activity whether the activity is done or not before your shift is over.

When an **ADL** is selected, i.e., **Bed Mobility**, the next level of buttons displays:
Another level of buttons display when **Self Performance** is selected:

ADL-specific directives also display if they are present:

When data is entered button labels display in blue. **Both** the **Self Performance** and **Support Provided** buttons must be **blue** before saving the data.

**Support Provided** answers only allow choices that are consistent with the **Self Performance** answer previously entered. In other words, if **Independent** was selected for **Self Performance**, the only available buttons for **Support Provided** is **No Support or Help** and **Setup help only**.
In the example above, **Limited Assistance** was selected for **Self Performance**. The only two buttons that are available in **Support Provided** are **One Person Assist** and **Two Persons Assist**.

Once the **Support Provided** parameter is selected, you can **Save** your work. The system displays a confirmation screen:

Double check your work and touch or click the **Save** button in the lower right corner. If something isn’t correct, click the **Cancel** button and go back and fix it. Touch the **Save** button again to review it. When you are happy with the recorded results, click the **Save** button again to confirm and save the data.

**Note:** You can always correct data, even after you have saved it.
The button displays in green when a scheduled ADL is completed:

**Tasks**

The **button displays next to the button on the ** Residents screen. **Tasks** are specialized care, outside of **ADL** that must be done for residents with specific conditions.

Touch the specific **Task** button (i.e., **Diabetic Foot Care**) and two buttons display: **Done** or **Not Done**. Touch the correct button and move to the next task.

When you have entered the data for all the tasks, save your changes by pressing or clicking the **Save** button.

**Note:** The **Vital Signs Task** button is only used to indicate if you have taken the resident’s **Vital Signs**. Refer to the **Vital Signs** section on page 30 for details on how to enter the specific **Vital Signs** data.
RSTV

The button displays next to the and buttons on the Residents screen. Restorative tasks are specialized tasks defined to help a patient with rehab goals.

1. Click or touch the button on the Record Actions screen to display:

2. Click or touch any RSTV button to display the next level:
3. Click or touch the specific **RSTV** task button to display:

![Diagram of RSTV task buttons]

4. There may be additional buttons when you select the third level:

![Diagram of additional buttons]

**Note:** A keypad displays if you touch or click **Minutes** in the example above. The displayed window allows you to enter the amount of minutes the resident engaged in the **RSTV** task.

5. Just as with both the **ADL** and the **Tasks** activities, the caption of an **RSTV** button displays in red if it has not been documented. If it has been documented, the caption displays in blue.
6. Click the **Save** button when you have entered all the **RSTV** documentation to display the **Confirm Recorded Actions** screen:

![Confirm Recorded Actions Screen](image)

7. Review the information and click **Save** if it is correct or **Cancel** if you need to make corrections.
Vital Signs

The Vital Signs screen allows a nurse to record a resident’s Vital Signs. There are two modes of entry, sliders and keypad. If you prefer to type in the numbers using a keypad on the touch screen, touch the Use Keypad button on the Vital Signs screen and a keypad displays. If you prefer to use the sliders, touch the Use Sliders button in the Vital Signs screen and the display toggles back to the sliders.

1. Click or touch the button to open the Record Vital Signs: Residents screen:
7. Select the **Resident** and touch or click the **Enter** button to display

There are two modes of entry: sliders and keypad.
Keypad

If you prefer to type in the numbers, use the keypad on the touch screen.

1. Touch the button in the Vital Signs window to display:

   ![Keypad Image]

   2. Touch the button of the vital sign you wish to record (i.e., Temperature). The New Value is activated (and displays as white).

   3. Type the new value for the Vital Sign which overwrites the old one.

      Note: If you make a mistake, use the Backspace key to erase.

   4. When you have entered the correct value, touch the button for the next Vital Sign to be entered and the value of the first Vital Sign updates in a second or so.

Sliders

1. Touch the bar above the slider to move it up. It jumps up one tick.

2. Touch the bar below the slider to move it down and it jumps down one tick.

3. An alternative method is to touch the slider itself and drag it to the desired position, releasing it by lifting your finger from the screen when the slider is in the correct position.

Record Vital Signs

1. Set the time when the vital signs are taken. If you took them earlier and are only recording them now, set the time to when they were actually taken.
2. Use the sliders of the keypad to set the value for each vital sign so that the number displayed in blue at the top of the panel is correct. The number displayed in green is the last value entered for the resident.

   **Note:** If the number you record is the same as the last number entered for that resident, be sure you adjust the slider or keypad so the new number display in blue as well, or the sign won’t be recorded as having been taken again.

3. For several of the signs, the method you used to obtain the number is important, so you must use the drop-down menu to specify it. For instance, Weight can be taken using a scale, a chair scale, a bath, or several other methods. You must specify the route you used to obtain your result.

4. Press Save to enter Save Mode when the numbers you want display in blue at the top of the screen. Each Vital Sign that was entered displays as a button with the value over it.

**Save Mode**

As each Vital Sign is recorded and saved, the new value displays as a button with the value over it:

![Temp 98.2](image)

If the number is correct, touch the button. This saves the number permanently and it becomes part of the resident’s legal record.

**Do Not** press the button unless you are positive that the value is correct. If one or more of the buttons have an error and are not correct, exit the Save Mode by pressing the button and readjust the incorrect values. Any buttons that you have already touched will have been saved by the system and do not need to be adjusted or saved again.

When all the buttons display the correct values, press the button to save all the values at once.
Sched CNA

**Note:** This function provides access to the Schedule if security settings are appropriately set.

### About Schedules

There are two types of schedules, and four states in which they can be.

The two types are **Permanent** and **Temporary**. A **Permanent** schedule has no ending date until it is replaced. A **Temporary** schedule is scheduled to be replaced at a certain time.

**Note:** ADL recommends using a single, **Permanent Active** schedule and scheduling all available **CNA's** to be available every day, every shift on their usual home unit.

**Schedules** can be **Draft**, **Planned**, **Active**, or **Archive**. A **Draft** is a schedule that’s being worked on. A **Planned** schedule is completed but will not begin until its scheduled start date, when it will replace another schedule that has an end date. An **Active** schedule is currently in use. And an **Archive** schedule is a schedule whose end date has passed, but is retained for use in planning new schedules.

**Note:** **CNAs** are added in **Optimum Security**. Refer to the **Optimum Security Clinical User & System Setup** manual for details.
New Schedules

1. Touch or click the button to display:

![Schedule CNA]

2. Touch or click the button to display:

![Create New Schedule]
Note: ADL recommends inserting only a single permanent schedule. **Be sure to set the “start on” date to be current day.**

3. Select **Permanent** or **Temporary**.

4. If you select **Permanent**, you can select a **Source Schedule** from the drop down list.
   
   **Note:** You do not have to select a **Source Schedule**. Selecting a **Source Schedule** allows you to build on something in creating a **Permanent Schedule**. **Source is not** used in ADL’s recommended approach.

5. If you select **Temporary**, you can pick a **Parent Schedule** to temporarily deviate from.
   
   **Note:** You do not have to select a **Parent Schedule**. Selecting a **Parent Schedule** allows you to build on something in creating a **Temporary Schedule**. **Parent is not** used in ADL’s recommended approach.

6. Pick a **Start Date**. The system assumes the next calendar date but this value can be changed. ADL recommends you change this to the current date.

7. Select an **End Date** if you are creating a **Temporary Schedule**.

8. Click **OK** to display the **Schedules** window with the new entry:
Modify a Schedule

Select a schedule from the list on in the Schedules window and touch or click the Enter button:

This screen operates using the drag and drop method. Drag a CNA’s Name to the Shift to assign them to that shift. Touch the + sign next to the CNAs name to see all their assignments. To get rid of one of the assignments, drag the assignment to the Delete Area.

ADL recommends dragging the CNA’s name to all three shifts on the right for the CNA’s typical home unit, for the current day. Once all CNA’s are scheduled this way to their typical home unit for the current day, the schedule can then be copied to six subsequent days of week. This way every CNA is “scheduled” every day, every shift and available to be assigned using CNA assignment screens. The CNA schedule then repeats itself every seven days. It only needs to be updated when new CNA staff is added or CNA’s leave.
Double-click any cell to display a separate window to see the details of a shift assignment:

You can drag **CNAs** to this window from the list on the main window to assign them, and you can drag them to the **Delete Area** to un-assign them. Deleted assignments display in red until the next **Save**.

Select a date from the bar at the top of the right window to assign a **CNA** for a different day. Select a **Unit** from the tab above the right window to assign a **CNA** to a different **Unit**.
Put in Plan

Security is required to **Put in Plan** which makes a schedule **ACTIVE**. The button is only active if you have the appropriate security.

1. Select the **Schedule** from the list in the **Schedules** window:
2. Touch or click the **button. The selected schedule is made **Permanent Planned:**

![Scheduled Tasks](image)

**Note:** The **button is no longer active.
Delete a Schedule

1. Select the Schedule from the list in the Schedules window:

2. Touch or click the Delete button. A confirmation message displays. Click or touch Yes to confirm the deletion or No to cancel the deletion.
Assign Residents to CNA

Refer to the 3Tier CNA Guide, Version 2 for details on how to assign a CNA to a Resident.
Reports

This function enables nurses to keep track of any problems that may arise in a resident’s health or behavior, such as a reduction in the amount a resident eats, negative behaviors, or missed treatments for any reason. These issues are mentioned in a resident’s profile, but the Reports function provides a convenient summary of all problems that can be quickly and easily checked.

Note: Refer to the CNA Touch Reports manual for a detailed discussion on these reports.

Reports can be accessed from a number of places within CNA For Nurse. A button is located on the Main Menu after login, in the Edit Profile window, and in the Correct Actions window. Touch or click this button to display the Reports window:

Select the Report you wish to view from the list and click OK to see the results in the grid in the lower part of the window and adjust them according to your preference. You can sort the report by any column or change the order of columns by dragging the column header to your desired location to make it easier to display the trend in which you’re interested.
For example, in the following example, the **Name** column precedes the **ID** column:

![Intake & Output View](image)

However, in this example, the columns have been switched simply by dragging and dropping them:

![Intake & Output View](image)

Touch or click the **Print** button for a printout of the view you have selected when you are happy with the layout of the **Report**.
ADL Data

ADL Data specifies how the data entered into the system can be viewed on the report. This report is no longer available in the CNA for Nurse Touch module. This report is now run from the Optimum Clinicals CNA function. Please refer to the 3Tier_Clinical_CNA_Version3 manual for details.
**Missing Treatments/Activities**

This report lists any **ADL** or **Task** item not addressed and may be listed either in a *detail* or *summary* format. This report at a **Nurse’s** level displays all residents for a specific unit.

![Image](image.png)

The report defaults to **Details** which lists every item for every resident that has not been addressed and recorded by the **CNA**.

The report details each day by **Shift** and **CNA**. Additional details include the number of missing items.
If you view the report as a **Summary:**

![Report screenshot](image)

The report displays the number of missing **ADLs**, **Tasks**, and in the final column, the number of missing **Care Plan Confirmations**. (This last column refers to the **confirmation** of the **Care Plan** information available to the **CNA** through the **CP Confirm** button.)
Tracing Values

This report displays results entered for a few areas, including % Eating, Output, Intake, Bathing, Behaviors, General Condition, and Bowel Movements:

% Eating is the first option in the drop down menu at the top of the window. Select the parameter value for the report. In this example, any entries of 50% or less are included in the report.
Select the **Date**, **Unit**, and **Shift**. Touch or click the button to see the results. Behaviors are second in the drop down menu. Select the parameter value for the report. In this example, any entry of one or more behavioral incidents is included in the report:

![Image of Tracing Values screen]

All reports are printed by touching or clicking the button. A printer must be installed and available from the **Touch** screen to print reports.
Tasks and ADLs List

This report lists all items and frequency of each item for which the CNA is responsible. The Nurse views all CNAs & all residents on their unit.

Select the Date and Shift. The CNA drop down menu displays all CNAs assigned to the Unit in which the Nurse is logged into. Selecting a CNA displays a list of their assigned Residents and all identified items for which the CNA is responsible. In the example above, ADL(s) only was selected.

This report is a reflection of the Profile set for each resident on the CNAs assignment. There is no indication in this report that the task has either been performed or documented. It simply details the items as defined in the Profile.
CNA to Resident Assignment

This report displays the Assignment created for the selected day and shift. The Unit is identified when the Nurse logs into the application:

This report can be printed if a printer is available to the Touch application.
Bowel Movement

View all entries for BMs for a specific resident and/or specific Unit during a specific time frame:

The drop down menu for Character lists all options visible to CNAs in their Touch screens:
Select any one description to display a report limited to entries that use the selected description. The resulting report for **Any** displays below:

![Bowel Movement Report](image)

This report lists results based on the selected parameters in the previous example. Results display for the selected resident, the selected **Shift**, the selected time frame, and the selected **Characters** (i.e., **Formed**, **Soft**, etc.).

This report may also be created for the **Unit**. Navigation arrows provide movement between resident pages.
Exception Comments

Select Exception Comments from the Select Report menu and touch or click OK to display:

The list of residents that match the selection criteria display in the bottom of the window. The system defaults to Confirmed with Exceptions. Select the date range, Shift, and Unit to display:
Click or touch the button to display the actual report:

In the following example, **Not Confirmed** was selected:
One specific resident could be selected from the list of residents that display, or, as in the following example, all residents could be selected to display the following report:

![Intake & Output](image)

**Intake & Output**

Select the **From** and **To Date**, **Unit**, and **Shift**.
Touch or click **Intake** and the button to see the results:

![Intake and Output Interface]

Touch or click **Output** and the button to see the results:

![Intake and Output Interface]
Touch or click **Intake vs. Output** and the button to see the results: