Ambulatory Ancillary

Participant Guide

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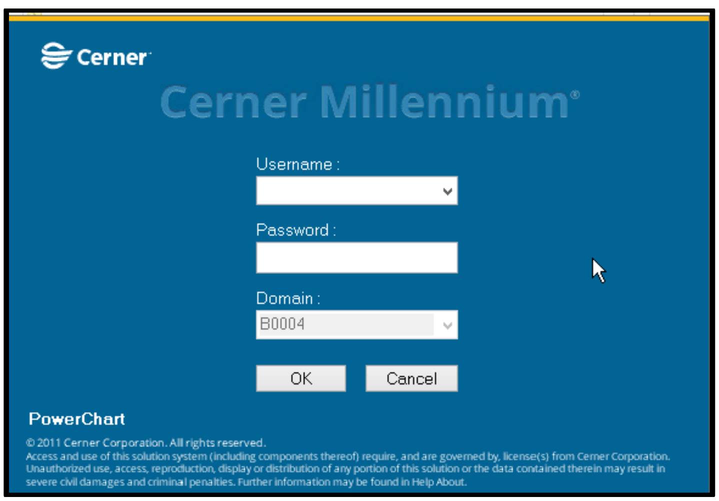
Introduction

Welcome to the Ambulatory Ancillary Cerner PowerChart training course. The purpose of this class is to provide a basic understanding of Cerner Ambulatory PowerChart functionality. This course is for Ambulatory Techs, Ambulatory Clinical Pharmacists, Outpatient PT, Outpatient OT, Outpatient ST, and any Ambulatory staff that needs PowerChart Navigation and Overview.

Overview

The course participant will be able to access, navigate and use PowerChart. The training course will cover several topics including, but not limited to logging into Cerner, a condensed PowerChart overview, Ambulatory Organizer, Message Center, Mpage overview, and navigation through Multi-Patient Task List.

Basic Functionalities of PowerChart

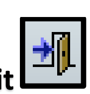


Logging In

Follow this procedure to log into the system.

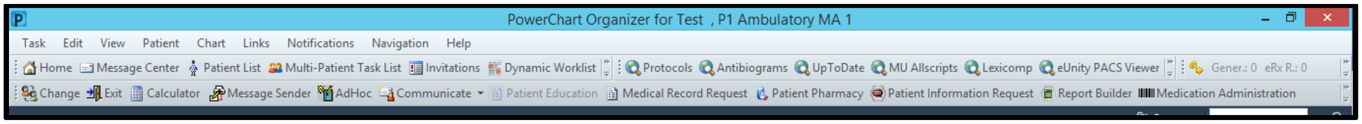
- At the Main Menu window, double-click on the Power Chart icon.
- At the Cerner log-in window, type your user name in the **User Name** field
- Press the Tab key to move to the next field and type your password into the **Password** field.
- Click on the **OK** button or press the **ENTER** key.

Logging Out

- When you have completed your activities, remember to log out of the application you are working on for security purposes.
- To log out of PowerChart, it is important to use the **Exit**  door button in the

menu bar at the top of the screen to log out.

PowerChart Layout and Toolbar



Overview of Toolbar

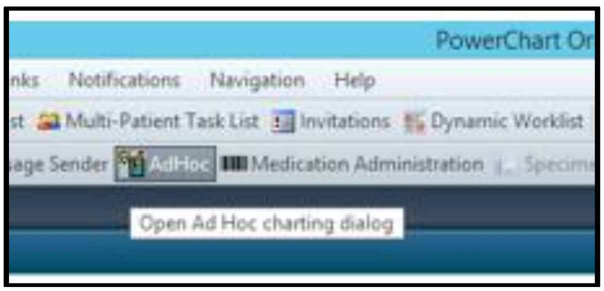
- **<u>Task</u>**
  - Change Password – Enables you to change your password. Do not change password here as it will only change the Password in PowerChart.
  - Change User – Opens the log in dialog box so a new user can log in to the system.
  - Reports – Opens the Reports dialog box where you can select one or more types of reports to be generated for the selected patient. When you designate a printer, the report is printed according to a predefined template and format.
  - Print – Medical Record Request – Prints the patient's entire chart. Print – Opens the Print dialog box to allow you the print the active screen or elements associated with the current screen. Print Screen – Prints the current window.
  - Refresh – Refreshes the screen.
  - Full Screen – Allows a full screen without the toolbar showing.
  - Exit – Closes the current application. If you have not saved your changes, you are prompted to do so.

- **<u>View</u>**
  - Home – Opens the Home view. By default, the Home view includes the Inbox Summary and Schedule, however, this view can be customized by your systems administrator to suit your facility needs.
  - Message Center – Opens Message Center. Message Center allows you to quickly view Results, Documents, and Messages. Through it, you can communicate with other clinicians.
  - Patient List – Opens the Patient List. This menu item is grayed out if patients have not been assigned, or a patient list has not been built
  - Multi-Patient Task List - Multi-Patient Task List allows you to view and manage tasks (patient orders) for multiple patients in a specified location.
  - Scheduling – Opens the Schedule workspace. The Schedule allows you to see your schedule and those of others, in daily, weekly, and monthly views.
  - Toolbar – The PowerChart toolbar is comprised of four individual toolbars. The buttons displayed on each toolbar can change depending on the active workspace.

- **Patient**
  - Search – Opens the Person Search dialog box, allowing you to search for a patient.
  - Recent – Displays a list of charts that you have recently viewed.
  - New – Allows you to Search for a patient and add a new Orders, add a new Clinical Notes, or add a new Allergy.
  - Patient Management Conversations – Displays a list of recent Patient Management conversations.

Hover Capability

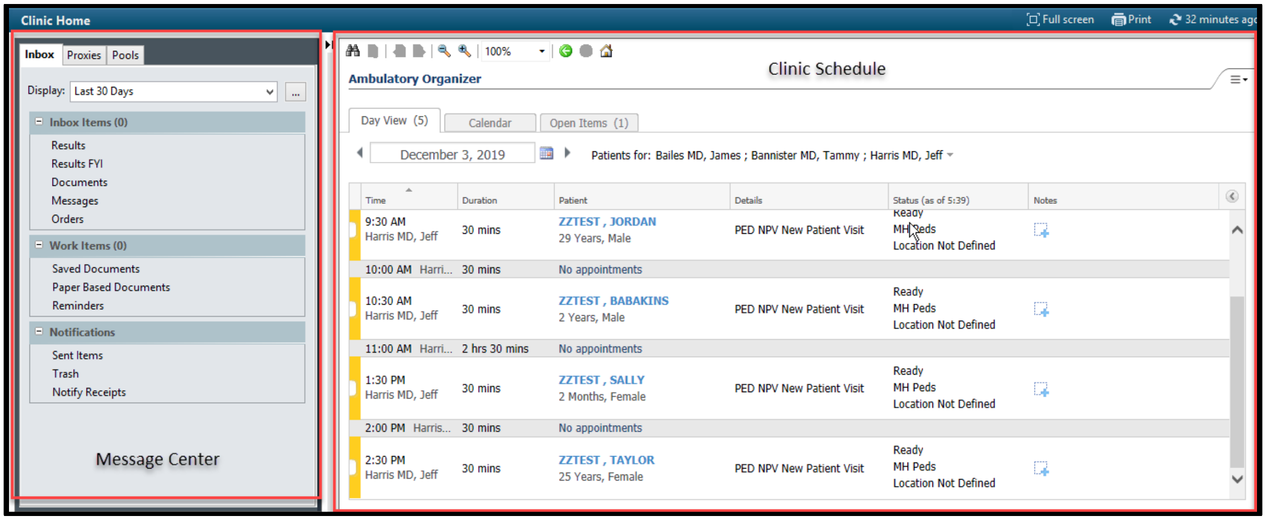
- **Hover to Discover:** When you hover over an item or icon, it will display more information and details.



Refresh Icon

Ambulatory Organizer

The **Ambulatory Organizer** provides a simple and comprehensive view of the Clinic's schedule. It provides a snapshot of the current day's appointments which includes appointment times, patient information, appointment details, and patient status.
The left column of the **Ambulatory Organizer** main window contains functionality for the **PowerChart® Message Center**.



Select Providers to Display

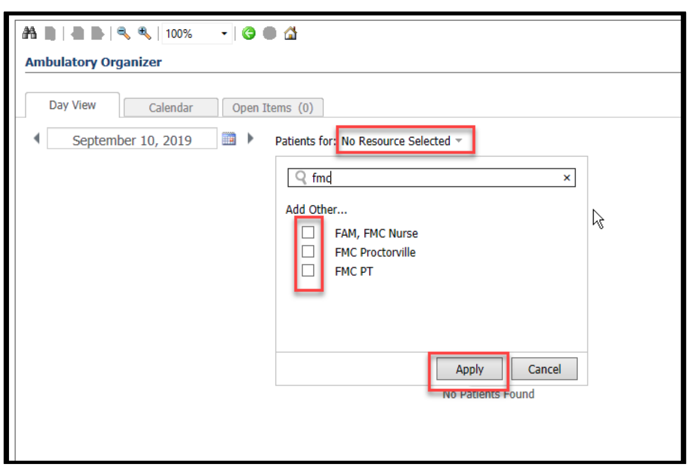
Complete the following steps to select the providers you want displayed:

Step 1 Add a New Resource

- Click on the **No Resources Selected** option in the **Patients For** menu
- Type in the Name of the Resource or the Clinic, Click **Enter**

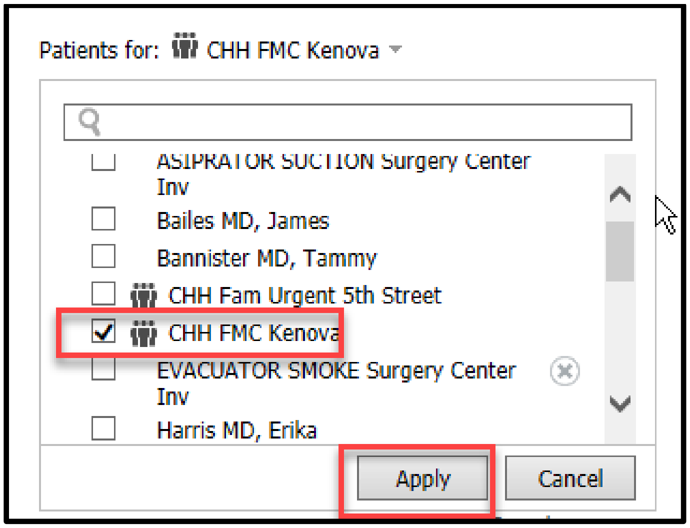
Step 2

- Select the check box to the left of the name
- Then click **Apply** to close this window and populate the selected resources data in the view.



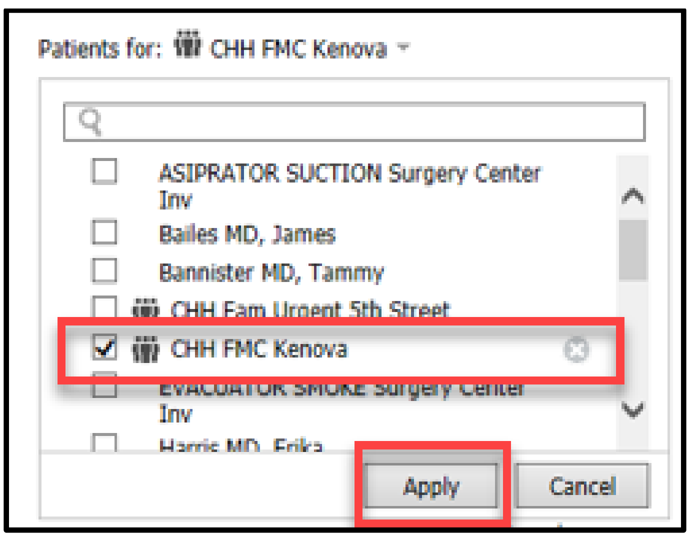
Step 1 Deselect a Resource

- To prevent a resource from being displayed, deselect the **check box** next to the name
- Click **Apply**.



Step 1 Delete a Resource

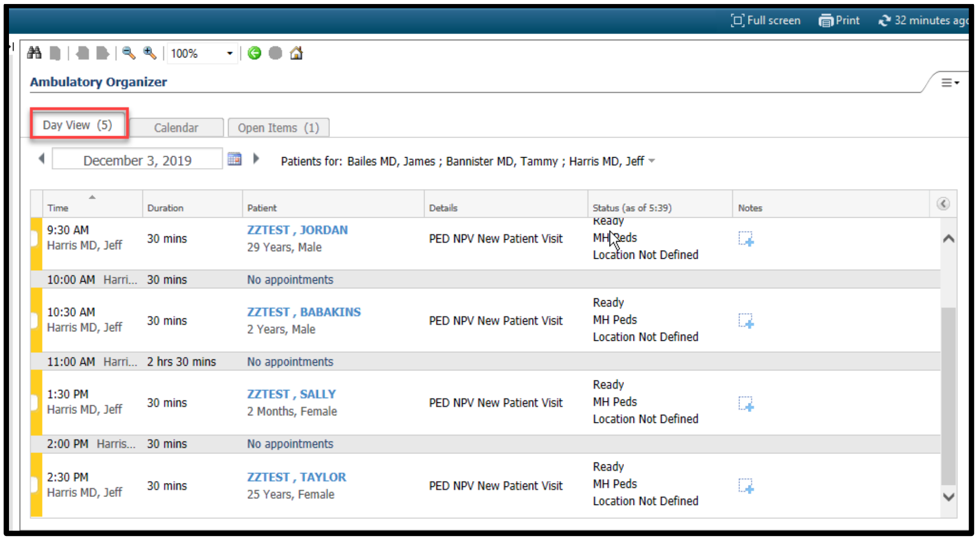
- To delete a resource from this menu, click the gray **X** to the far right
- Click **Apply** to display the change.



Overview of Day View

The **Day View** displays today's appointments for up to five providers. If only one provider is currently displayed on the **Day View**, then a timeline is available to the far-right side which mimics **Calendar** view behavior. The **Day View** displays the appointment details both face up and when the pointer is positioned over data.

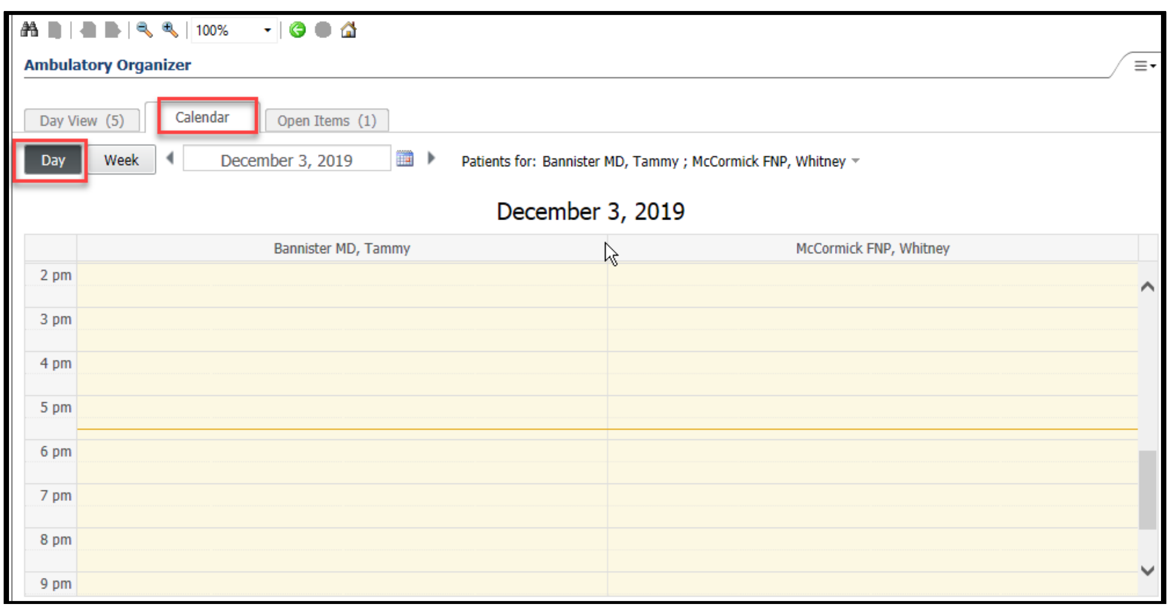
Day View Provides a snapshot of the current day's appointments, which includes ambulatory clinic appointment times, surgery appointments, patient information, appointment details, and patient status.



- By design, the following appointment types are not displayed in **Day View** appointments:
  - Rescheduled
  - Block
  - Pending

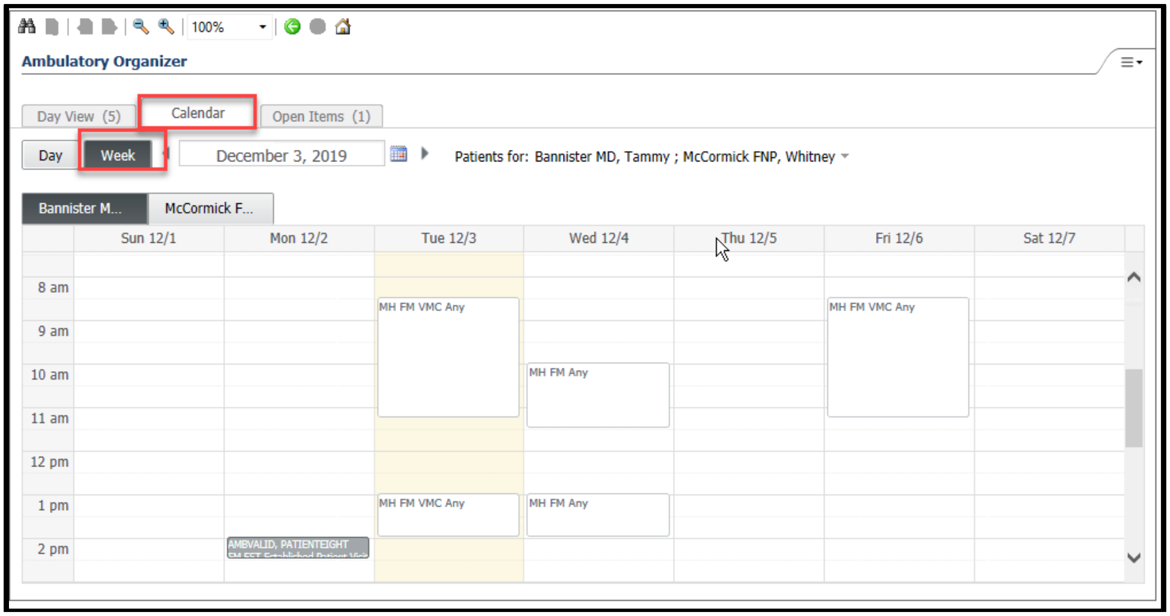
Calendar View

Calendar view provides the calender of appointments by daily or weekly intervals.



- Calendar View Details

- The **Calender** view displays a single providers schedule for a day or a week interval. The appointment details are displayed both face up and when the pointer is postion over data.

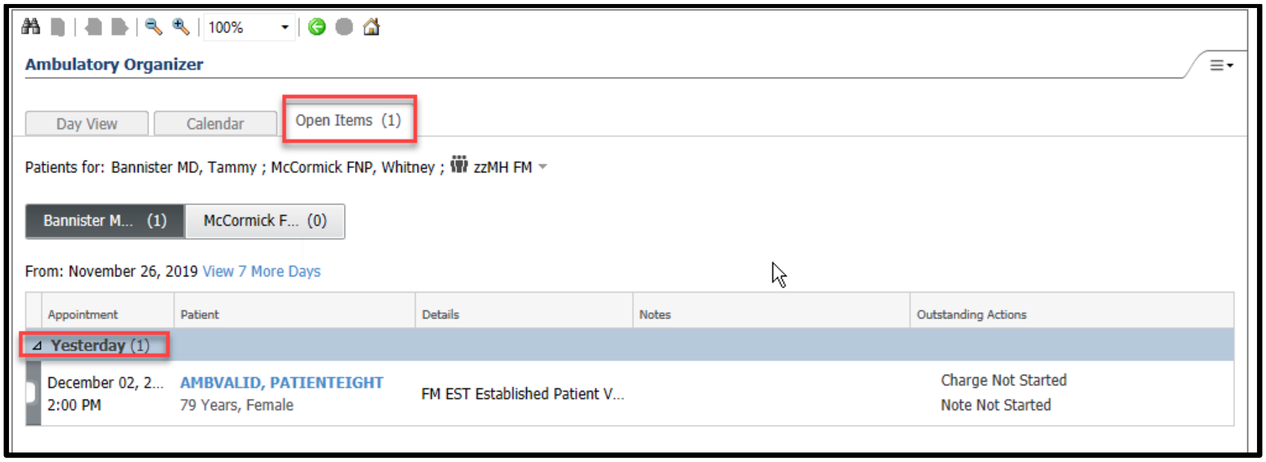


  - By design, the following appointment types are not displayed in the **Day View**: Timeline and Calendar view:
    - No Show
    - Hold
    - Reschedule

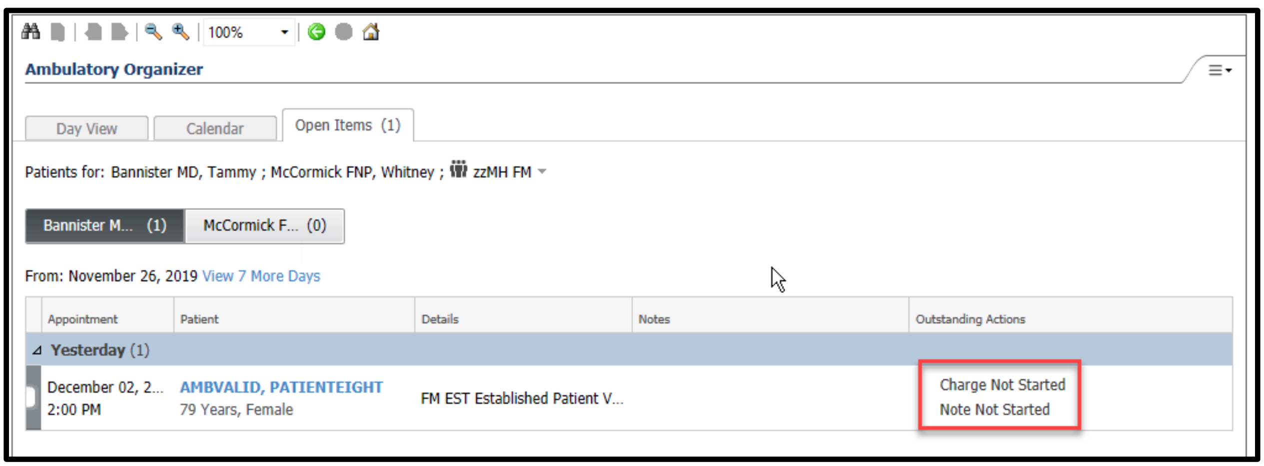
Open Items View Details

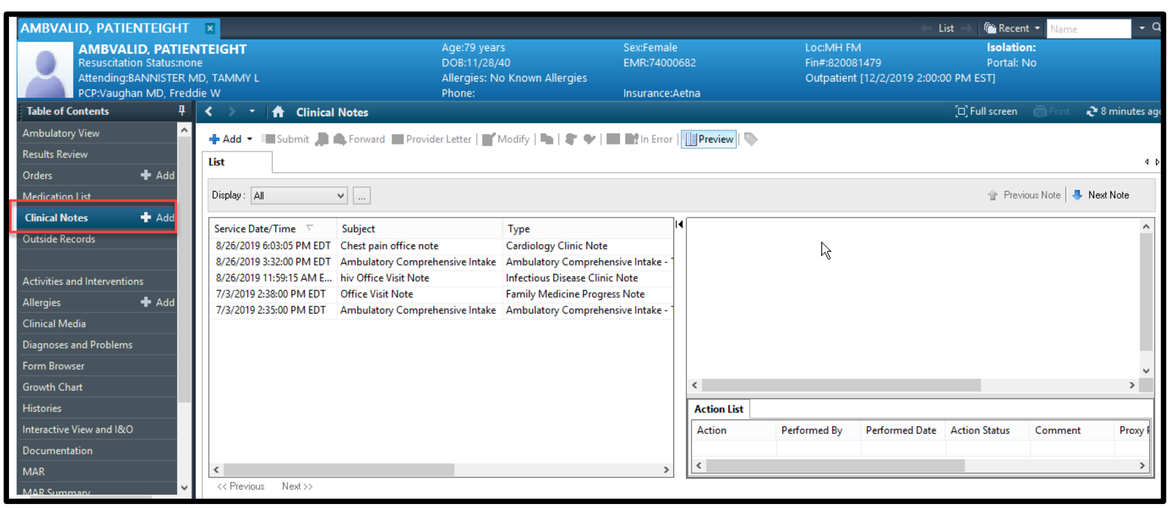
The **Open Items** view displays unfinished tasks for a single provider, from yesterday through the past seven days since the appointment. The **Open Items View** displays the appointment details both face up and when the pointer is positioned over data.

  - The appointments are divided into three sections: **Yesterday**, **2 days Ago**, and **More than 2 Days Ago**.



- Clicking the **Note Not Started**, **Note Saved**, or **Charge Not Started** text opens the charge entry or note entry section of the chart. The charge or note can be finished, and navigating back to **Ambulatory Organizer** now displays these items as complete.
- When you satisfy all reminder tasks for an appointment in *Open Items* view, the appointment is removed from the view.





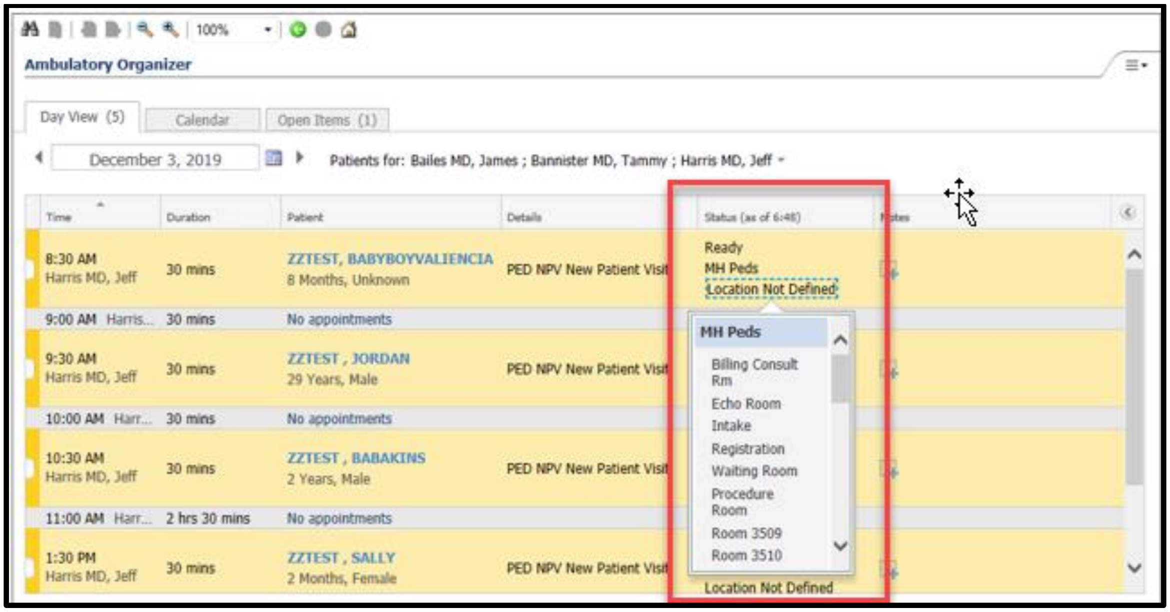
Un-Satisfy a Reminder Task

In the Open Items view, when an appointment is no longer displayed because the last reminder task was manually satisfied, you have the option to un-satisfy that task (if satisfied in error). Complete the following steps to un-satisfy a reminder task:

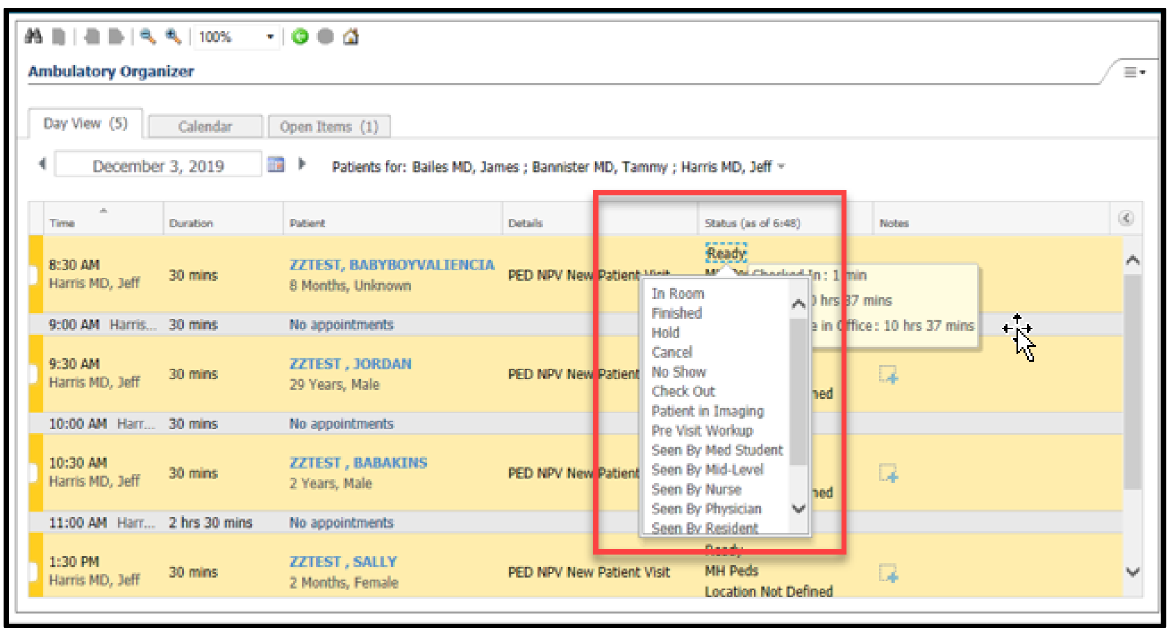
- Click **Undo Last Checked Task** in the user preference menu in the top right corner of the screen.
- This **must be done within 24-hours from the time the task was satisfied**, by the user who satisfied it, and only when the appointment is not older than the seven days.
- The undo option will not be available if it has been more than 24-hours since the manual satisfaction occurred. If you have not refreshed the Open Items or Upcoming views, however, it will appear to be available, but when selected the following message will be displayed:
    - **Undo Status**
    - **The undo function is not available. Your screen will be refreshed.**

Change Patient Location in the My Day View

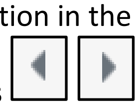
- In the **Day View**, the **Status** column displays both the **Status** of the appointment and



- the patient's **location**.



Date Control/Calendar

- The Date Control/Calendar option in the **Day View** allows you to select a specific date to view. Click the **arrows**  to move to yesterday's or tomorrow's schedule, or click the **Calendar** option to select the date there. The date selected is for both the **Day View** and **Timeline**.

Color Status Bar

The color of the **Color Status Bar** on the far left indicates the status of the appointment.

Color Status Bar Icons

Color Status	Definition
	Light blue indicates a confirmed appointment.
	Medium blue indicates a checked in appointment.
	Green indicates a Seen by nurse, medical student, or custom status has taken place.
	Orange indicates a Seen by physician, mid-level provider, resident, or custom status has taken place.
	Dark gray indicates the appointment has been checked out.
	White indicates a No Show, Hold, or Canceled appointment (these appointment types are displayed if the system administrator has configured them to display). When more than one provider schedule is in view, the provider will see their own appointments with the color bars in full, normal colors, while they will see other physicians' appointments displayed in a lighter version of those same colors.

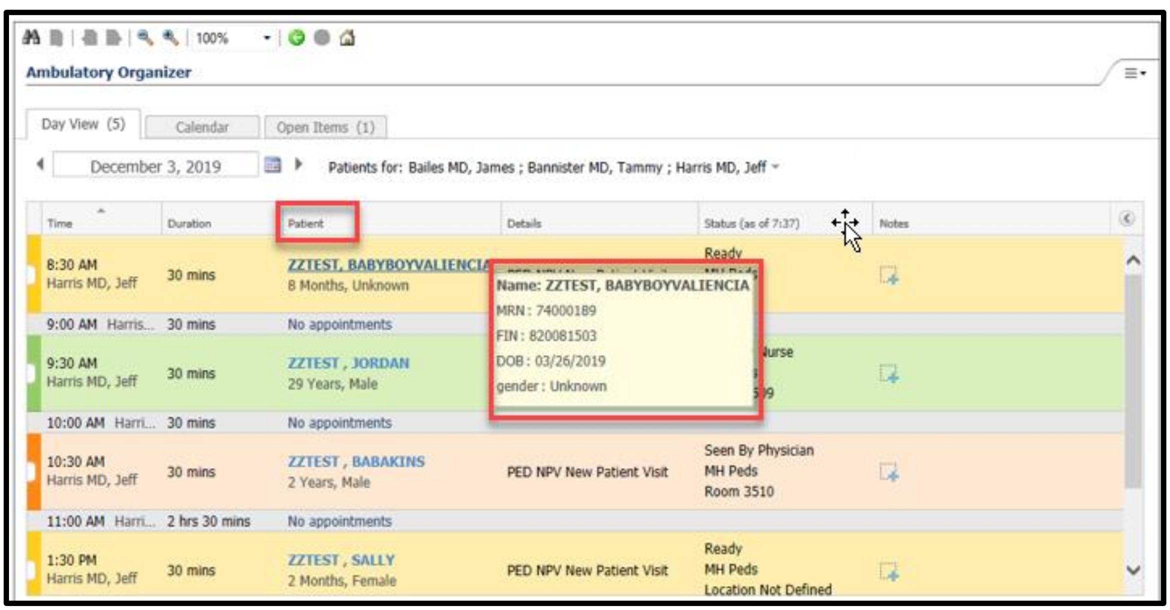
- The light indicator on the color status bar is displayed after the patient has been seen by a care provider, indicating there are tasks needing completion. When all reminder tasks have been satisfied, the light indicator is no longer displayed.
- Positioning the pointer over the color status bar after the appointment has been checked in displays the reminder tasks. The following can be displayed:
  - Charge Not Started, Charge Completed
  - Note Started, Note Saved, Note Completed
  - Task List Not Complete, Task List Complete
  - Visit Summary Not Started (with an option to Start Visit Summary or Decline Visit Summary), Visit Summary Complete, Visit Summary Declined
  - H and P Not Started, H and P Saved, H and P Complete
  - Consent Not Started, Consent Saved, Consent Complete

- Pre-Op Orders Not Started, Pre-Op Orders Complete

- Clicking the **Note Not Started**, **Note Saved**, or **Charge Not Started** text opens the charge entry or note entry section of the chart. The charge or note can be finished, and navigating back to **Ambulatory Organizer** now displays these items as complete.
- Clicking the **Visit Summary Not Started** text displays two options:
- Selecting **Start Visit Summary** opens a summary of today's visit. Completing this and navigating back to Ambulatory Organizer now displays this task as complete.
- Selecting **Decline Visit Summary** displays the appropriate *PowerForm*, allowing you to sign and close the document. Completing this and navigating back to Ambulatory Organizer now displays this task as complete.
- There is also an option to manually satisfy a reminder task. Positioning your pointer over the reminder task icon displays a check box. Selecting the **check box** completes the reminder task. Deselecting the **check box** un-satisfies the reminder task in case you accidentally selected the wrong one.

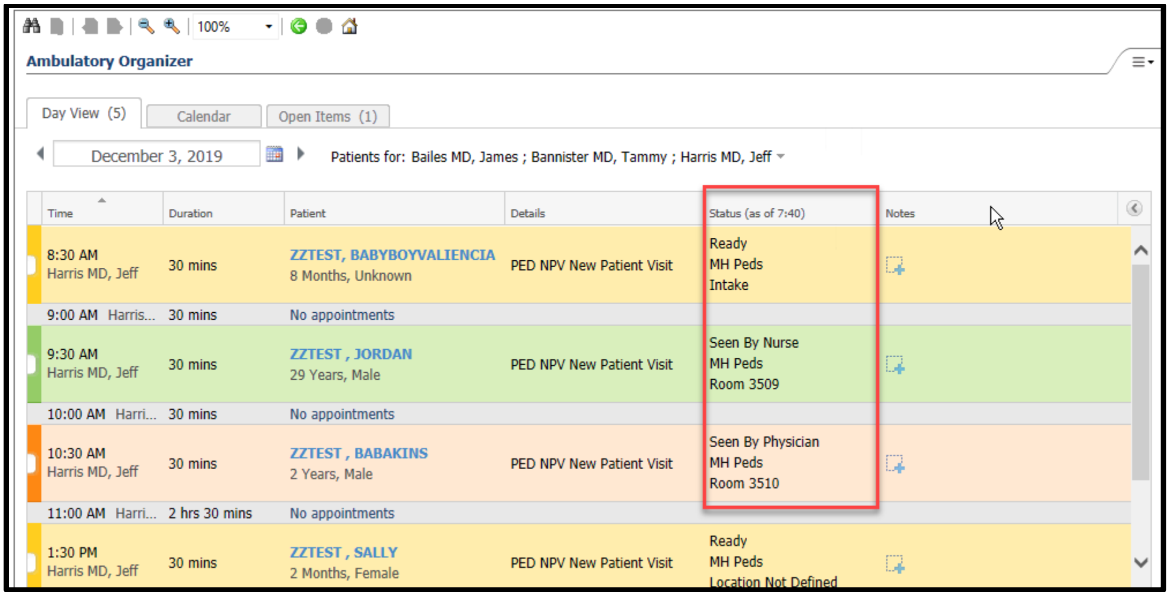
Patient Column

- The **Patient** column displays the patient name, age, and gender.
- Positioning your pointer on a patient name in the **Patient** column displays the patient name, MRN, FIN, DOB, and phone number. You can click the patient's name to open the patient's chart.



Status Column

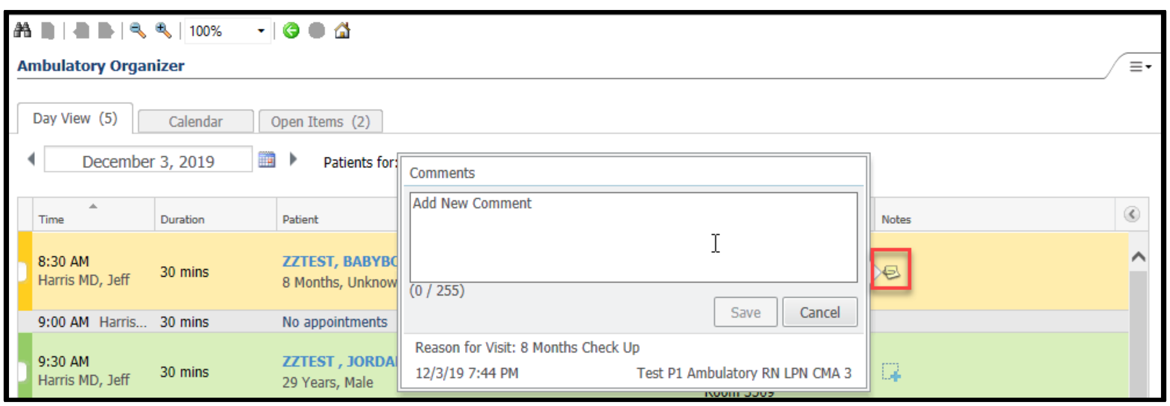
- Located in the **Status** column are both the status of the appointment (including how long since the appointment was placed in the status) and the patient's location.



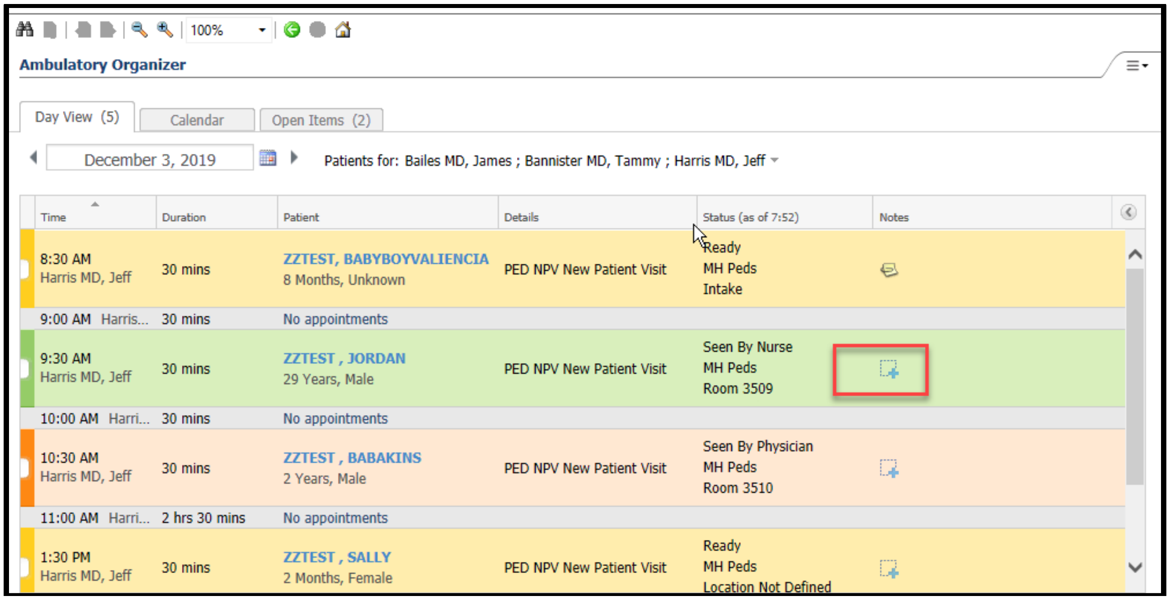
Add a Temporary Comment

Under the *Notes* column of the **Day View**, a **Note** button is displayed indicating whether temporary comments exist in **Ambulatory Organizer** for this appointment.

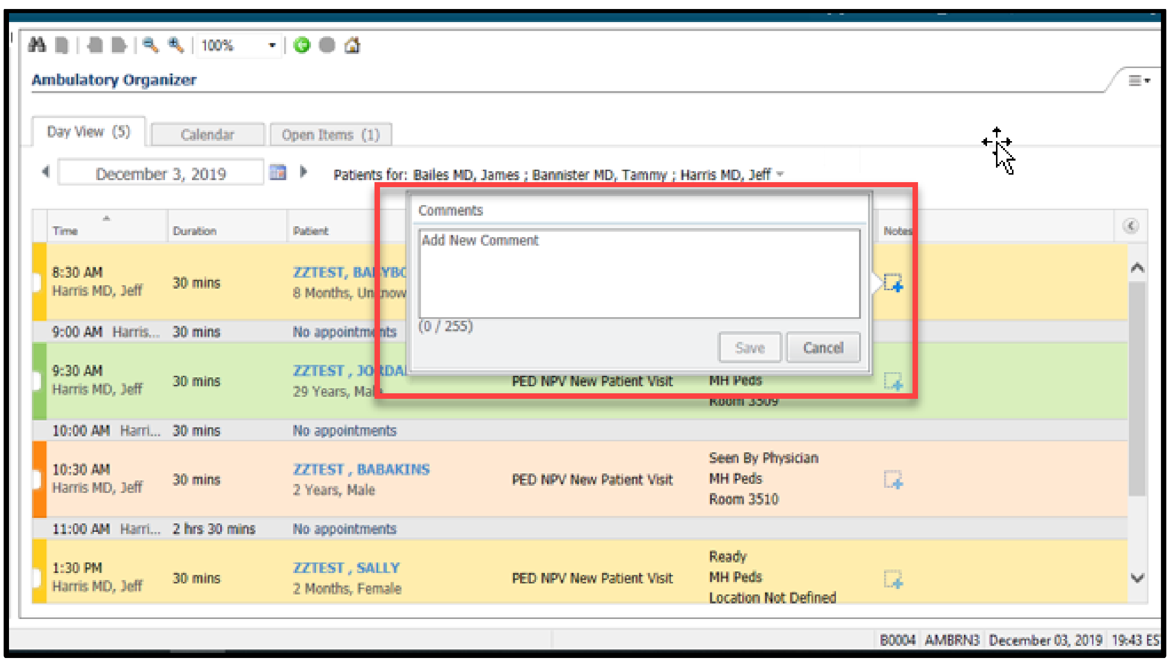
- When the button is active, this indicates the appointment contains a comment. This comment is not tied to any other part of **PowerChart®** and it is not part of the chart. This comment space is meant to provide staff the ability to enter information that aids in the care of a patient from one provider to another for this appointment. These comments are removed at the end of the day.



- When the button is unavailable, there are no comments stored in this temporary data area.

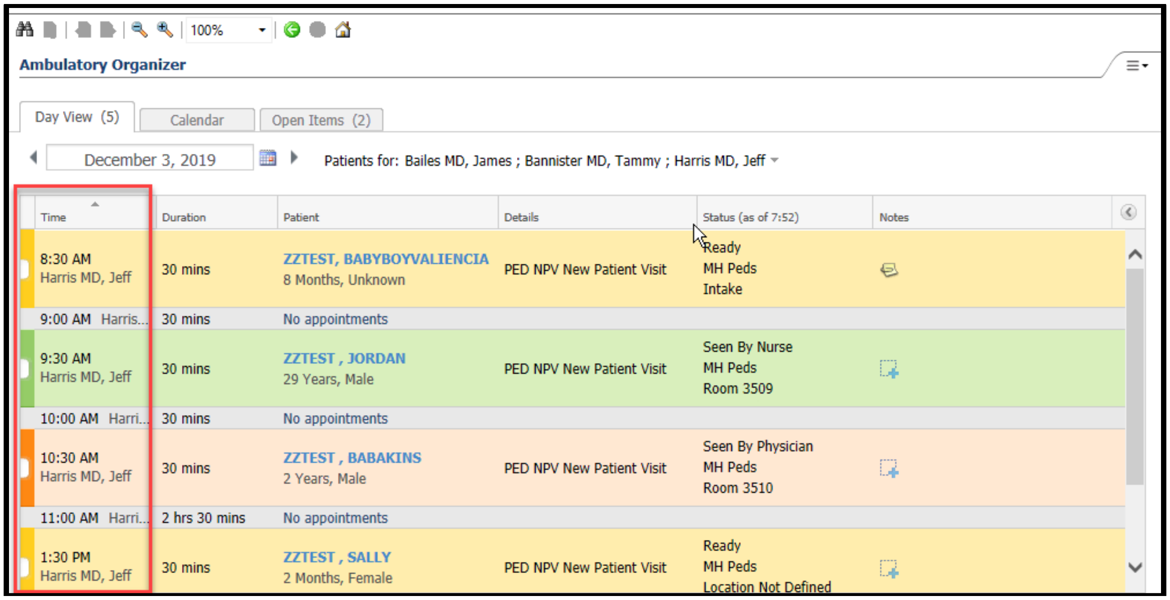


- Click on the **Blue +**
- Comments window opens
- Type in a Comment
- Click **Save**



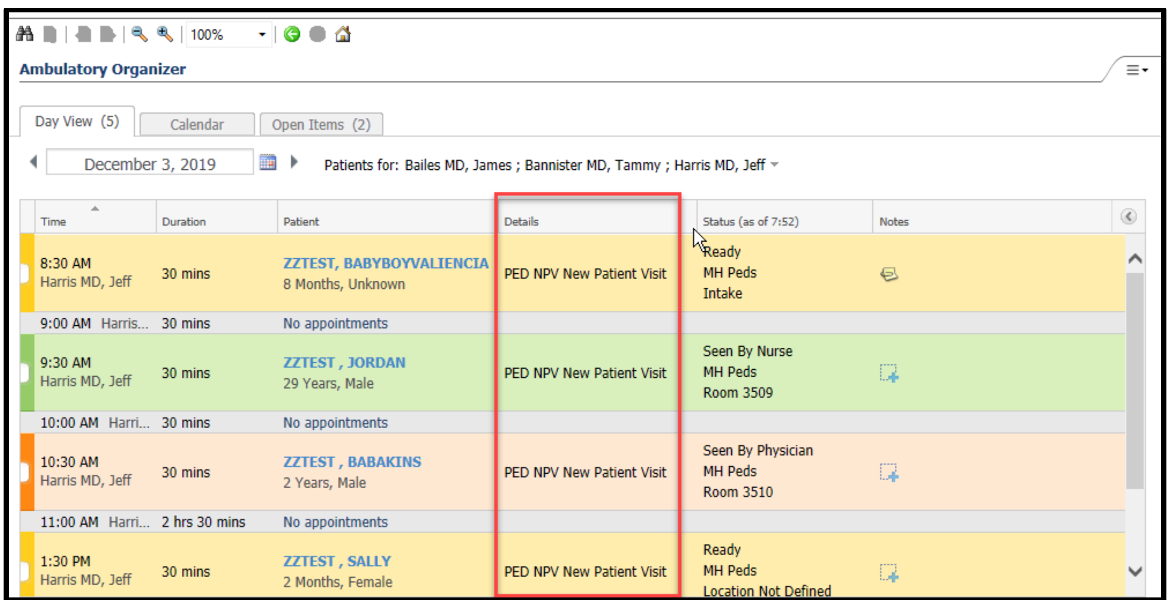
Appointment Time Column

If more than one provider’s schedule is displayed, appointment provider names are displayed under the appointment time.



Appointment Details Column

- In the **Appointment Details** column, the appointment type is displayed.

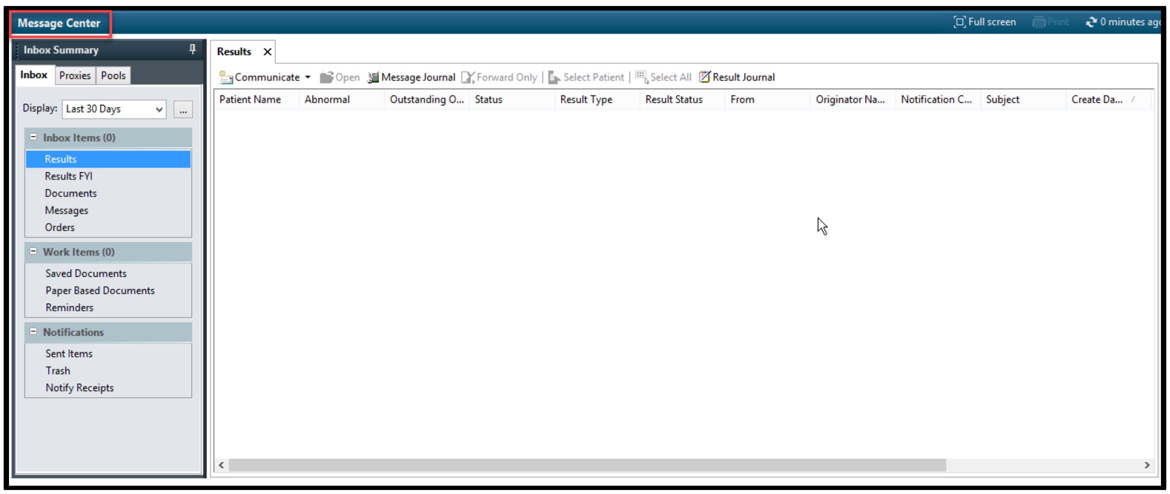


Message Center

The Message Center enables you to review or sign results, documents, and prescription requests, as well as work with phone and other messages. The Message Center offers the following benefits:

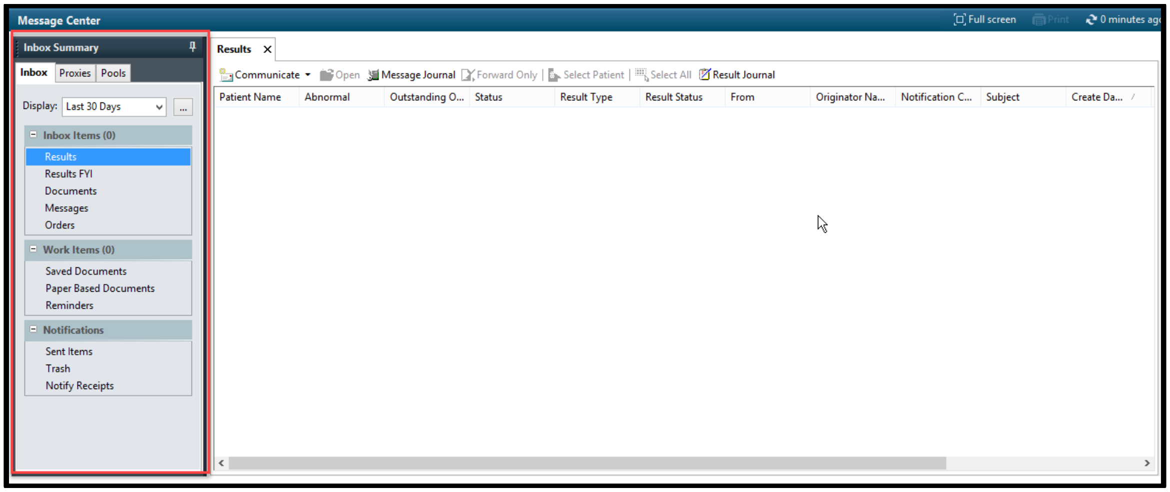
- All messages and notifications that require your attention, review, or signature are routed to your Inbox and are organized in folders.

- The operation of taking and distributing phone messages and saving that information to the patient's chart is completed electronically.
- Results can be reviewed, signed, or forwarded to other health care providers electronically.
- Your Inbox can be accessed from any computer on your network that has Cerner Millennium installed on it.
- You can customize the items you want displayed in the Message Center by filtering by dates, types of results, and so forth.

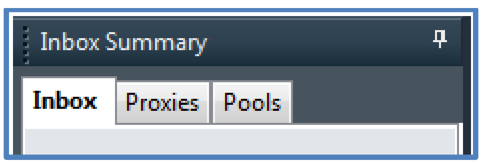


Inbox Summary

The **Inbox Summary** provides you with a quick view of all of the items in your inbox and allows you to access any message or result in the Message Center. Message Center notifications are divided into categories or folders; the number adjacent to the category name indicates the number of Inbox items in that category that are unread.

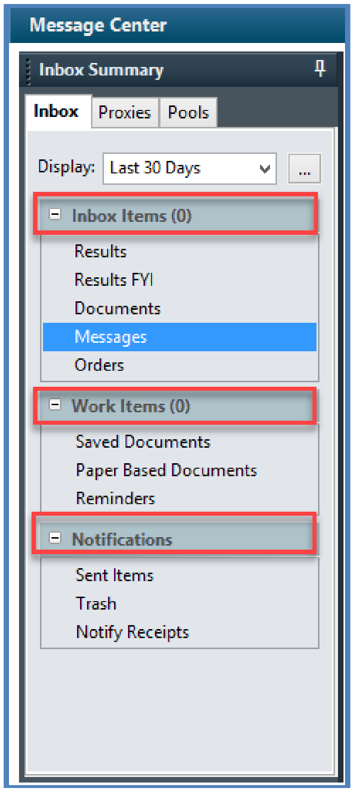


- Tabs at the top of the Summary pane allow you to select which Inbox you would like to work with, for example your own Inbox or a pool Inbox.
- View messages from the following sources by clicking the appropriate tab at the top of the **Inbox Summary**.



  - **Inbox:** Your own Inbox
  - **Proxies:** Inboxes for which you have proxy rights
  - **Pools:** Pool Inboxes
- Regardless of whether you are viewing your inbox, an inbox you are proxy to, or a pool inbox, the summary allows you to view all notifications from that category in four categories. Numbers next to each category or folder in the category indicate the number of unread and total notifications in that category or folder. If the folder is not shown, no notifications are present.

Inbox Tabs	**Description**
Inbox Items	Includes results, documents, messages, and orders
Work Items	Includes saved documents, paper-based documents, and reminders.
Notifications	Includes notification receipts for messaging, as well as, trash and sent items folders



How to Use the Inbox Summary

The **Inbox Summary** allows you to access any message or result in the inbox. Inbox notifications are divided into categories or folders; the number adjacent to the category name indicates the number of Inbox items in that category that are unread. Tabs at the top of the **Summary** pane allow you to select which inbox you would like to work with.

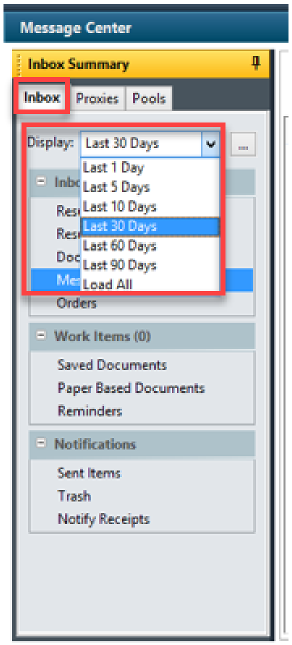
Complete the following steps to access messages and other notifications using the **Inbox Summary**:

Step 1

- Click the tab corresponding to the Inbox you would like to work with. For example, click the **Inbox** tab to view any Inbox that you have proxy rights to view.

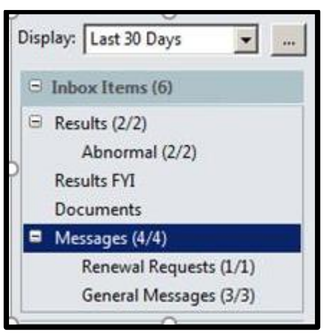
Step 2

- If necessary, select a specific date range.



Step 3

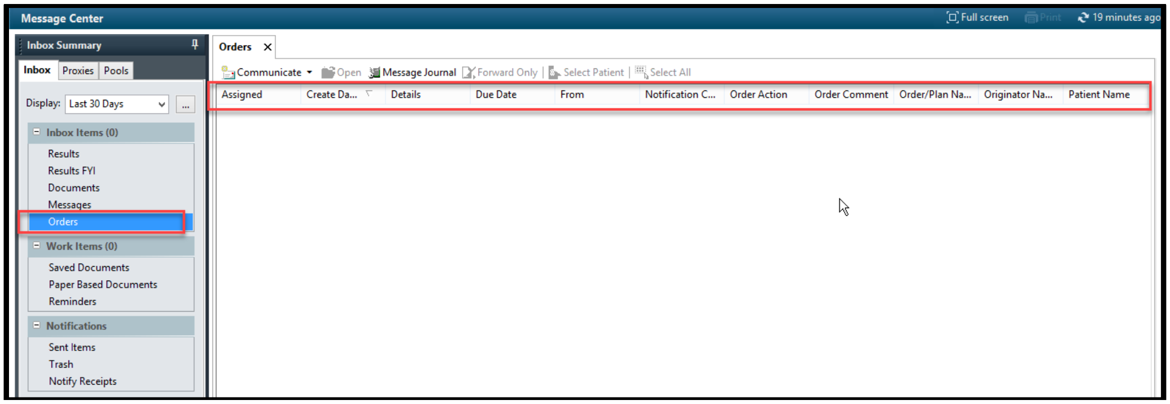
- Click the **plus sign** (**+**) next to the category to expand it; click the **minus sign** (**-**) next to the category to collapse it. Click a folder to display the items in that category.
- Double-click the item or select it and click Open to view the item. You can also preview an item by selecting Show Preview Pane from the Inbox Menu.



Summary Pane/Workspace

The summary pane lists the individual inbox items (messages, documents, etc.) contained in the folders in the Inbox Summary. Double-clicking an Inbox item in the summary pane opens the workspace for that item.

Message Center users can sort the view by each column. For example, if you select the Assigned column, the view is sorted by that column. This is applicable for all Message Center workspaces.

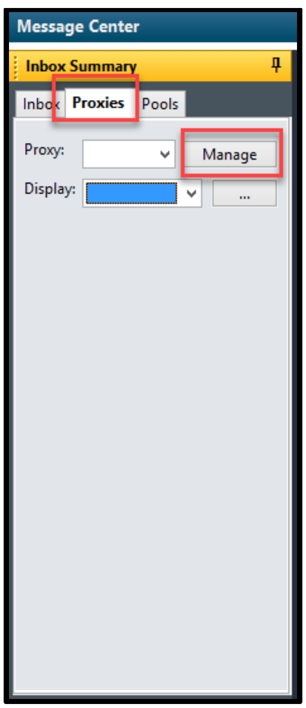


Proxy Capabilities

<u>Granting Proxy</u>: Complete the following steps to set up a Proxy:

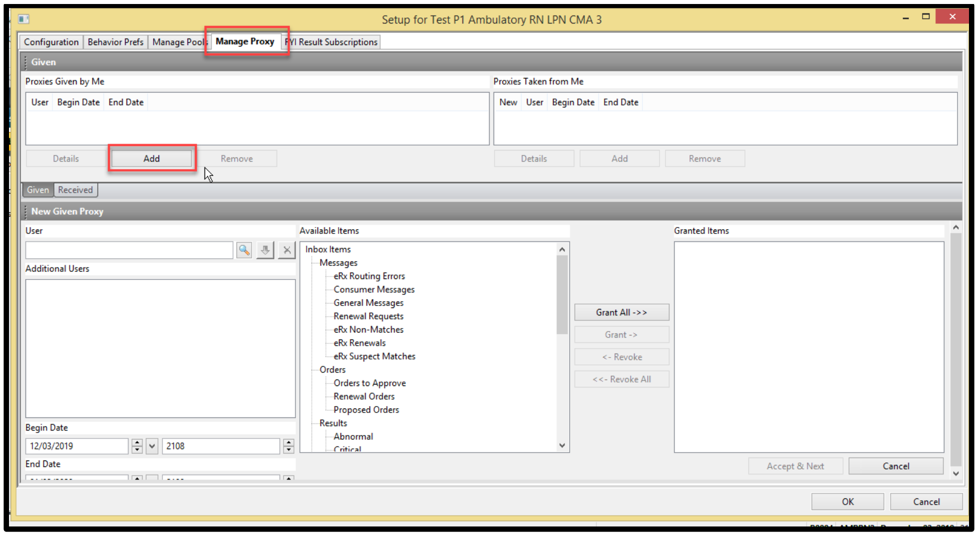
Step 1

- Click the **Proxies** tab in the Inbox Summary
- Click **Manage**



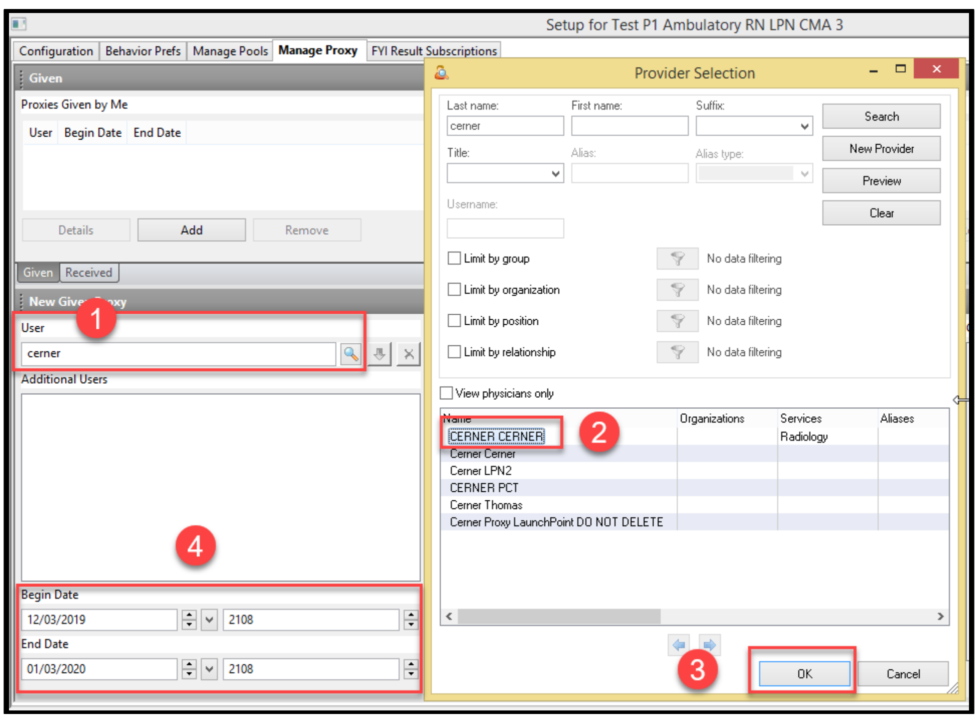
Step 2

- Setup window opens with **Manage Proxy** tab
- Click **Add**
- The Given/Received window opens at the bottom



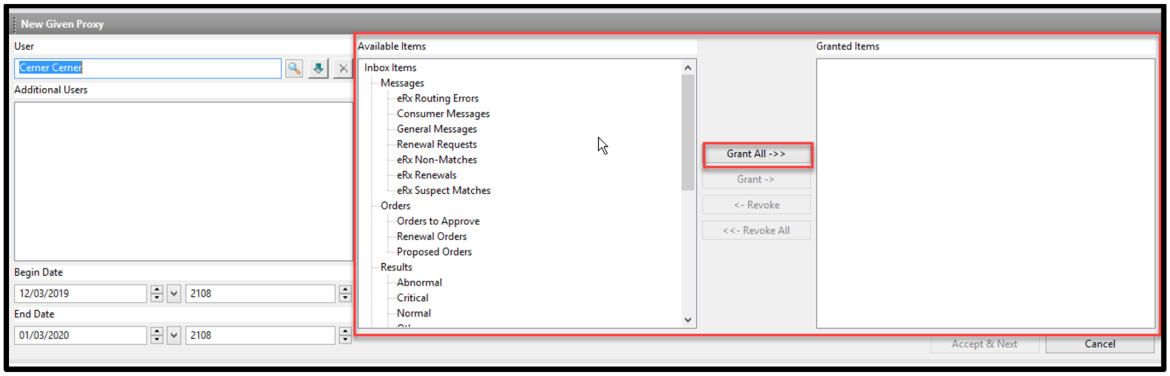
Step 3

- 1. Type in the **Name** of who will are granting **Proxy** to your mailbox
- 2. Provider Selection window opens, Select the **Person**
- 3. Click **OK**
- 4. Select **Begin Date and Time** and Select **End Date and Time**



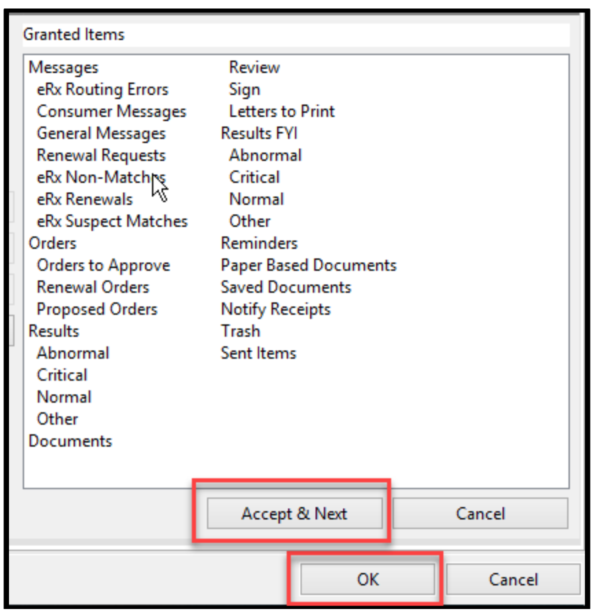
Step 4

- Select the Items under the **Available Items** that you are granting and Select **Grant OR**
- Click **Grant All** (to grant everything under the Available Items) or



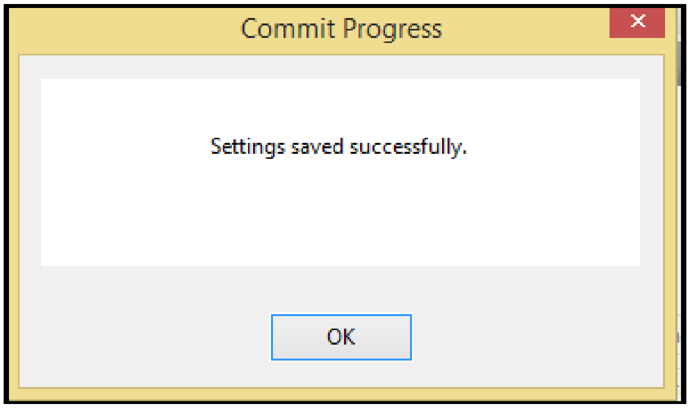
Step 5

- Items Granted are shown under the **Granted Items**
- Click **Accept & Next** (to Grant another person Proxy) **OR**
- Click **OK**



Step 6

- Commit Progress Window opens
- Click **OK**
- **Person** that you Proxied will receive a Message in the Message Center Inbox to accept the Proxy.



Viewing a Proxied Inbox

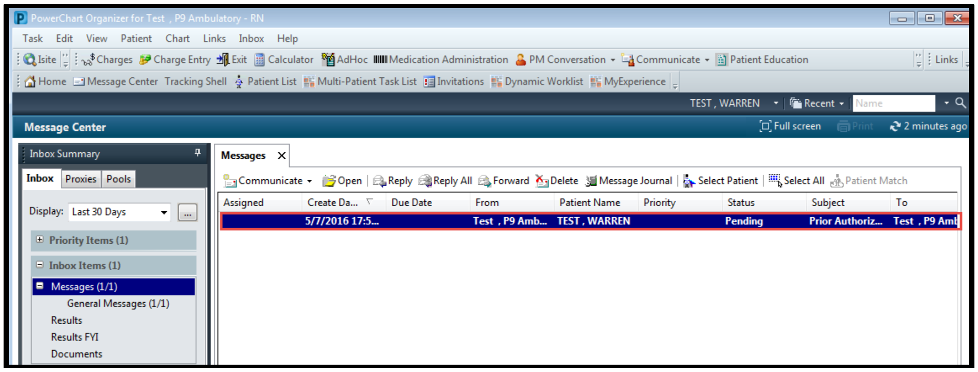
Complete the following steps to view another user's inbox:

Step 1

- Click the **Proxies** tab in the **Inbox Summary**.

- From the **Proxy** list, select the Inbox you would like to see.
- If necessary, specify a date range.
- The selected user's Inbox opens, allowing you to work in the proxy's Inbox as if it were your own.

Note: Tasks that you can perform can be limited by your Systems Administrator or by the user whose inbox you proxy. In order to view another user's inbox, you must have proxy rights to do so. You can either have the user grant you access to their inbox or you can make yourself a proxy.

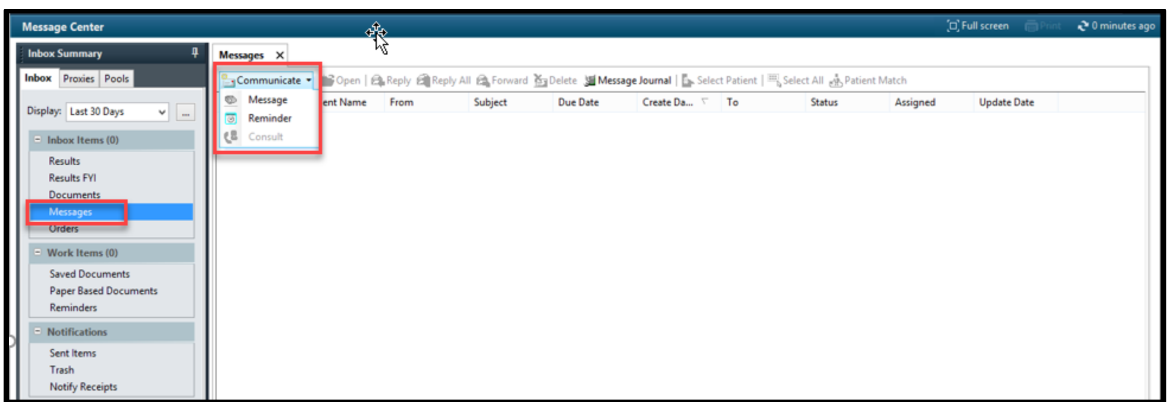


Working with Messages

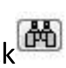
Create a new message (Ambulatory Only) to send a note or reminder to another provider's inbox or to a Patient.

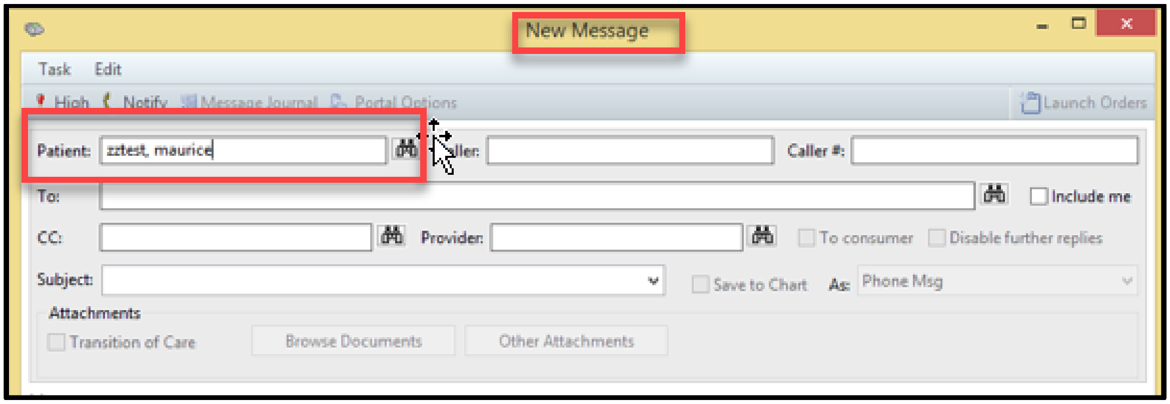
Step 1

- Click **Messages** under the Inbox Summary
- Message window opens
- Select **Communicate**
- Click **Message** to open a new message



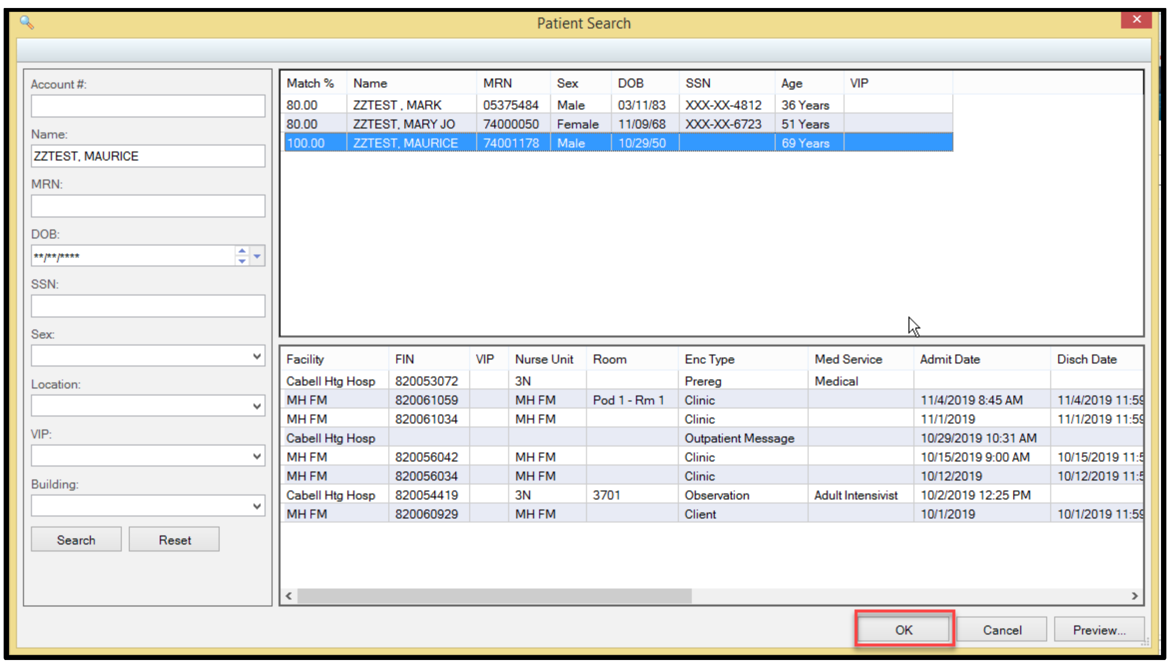
Step 2

- Enter the patient's **Last Name**, **First Name** in the **Patient box** and click  .
- The Patient Search window opens.



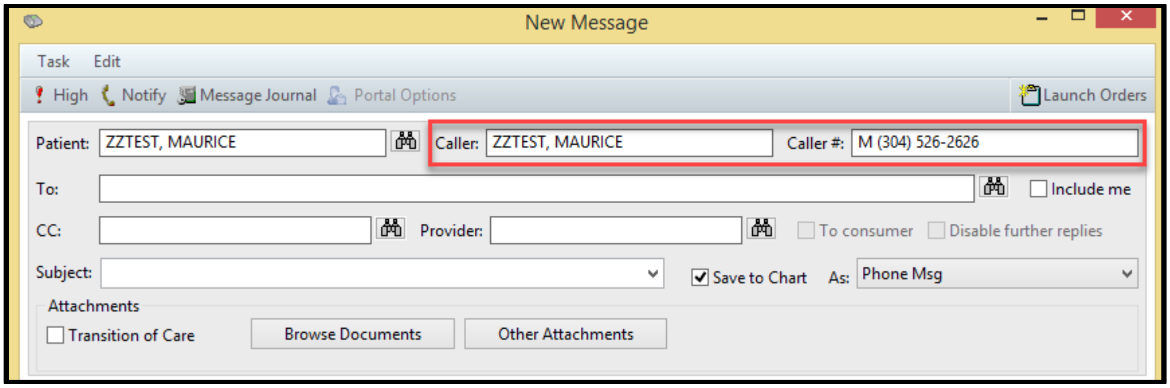
Step 3

- From the **Patient Search** window
- Select the correct **Patient**
- Click **OK**



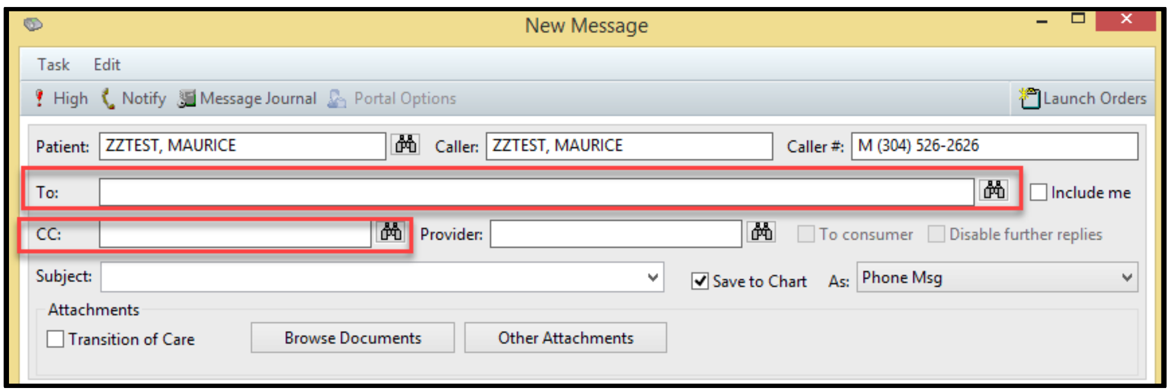
Step 4

- The Patient's Name is automatically entered in the **Caller** box.
- The Patient’s Phone Number is automatically entered in the **Caller#**
    - From the **Caller** box, review the caller. If the caller is not the patient, enter his or her name and phone number in the **Caller** and **Caller #** boxes.



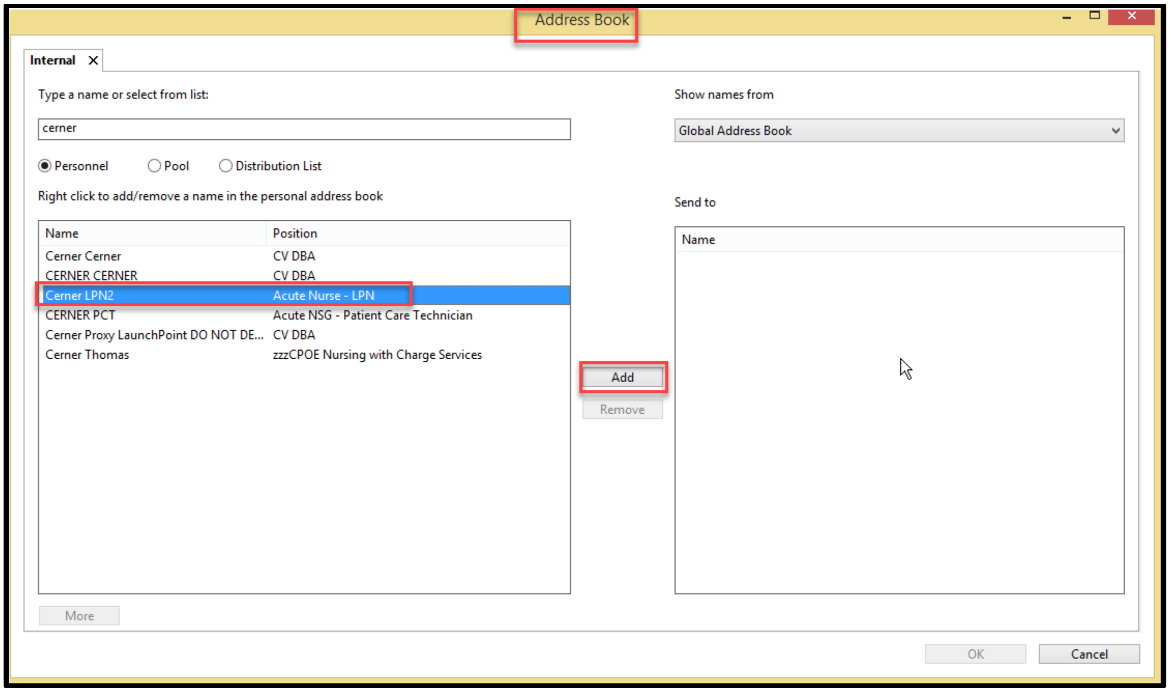
Step 5

- From the **To:** and **CC:** boxes, enter the first few letters of the recipient's **last name** and click or press ***ENTER***



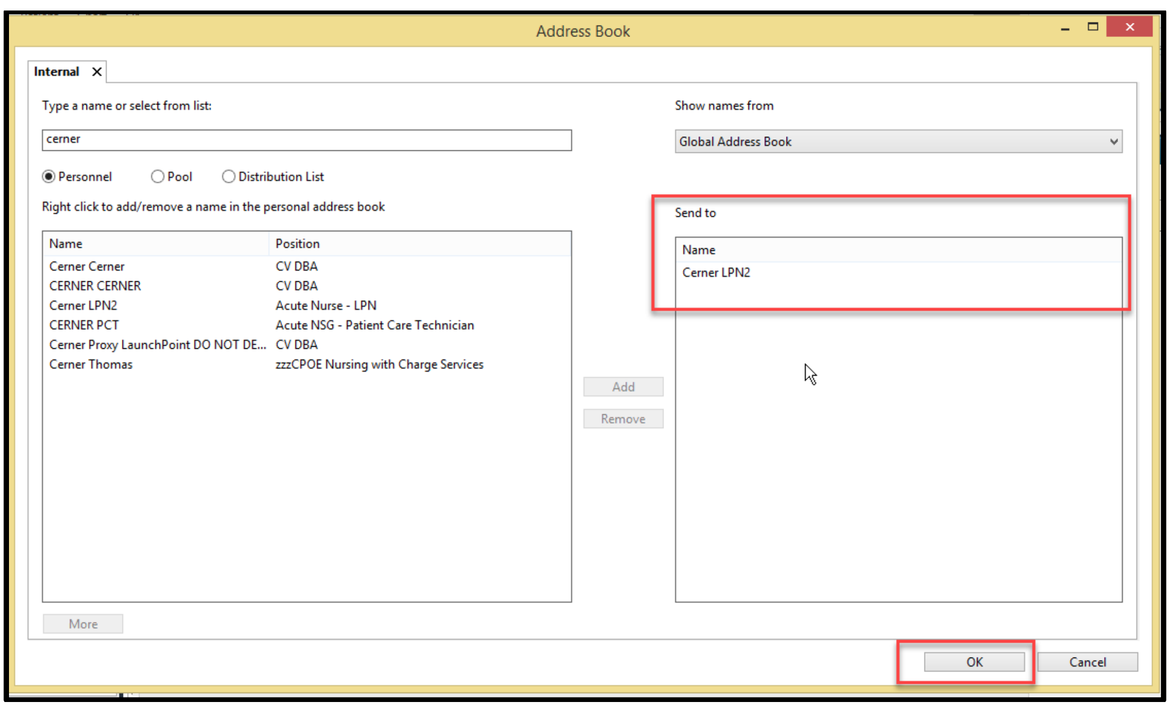
Step 6

- Address Book window opens with a list of everyone who has the Last Name that was entered in the **To:** box.
- Select the **Correct Person**
- Click **Add**
- Person is moved to the **Send to** box
  NOTE: If the Message is going to multiple recipients, go to the Type a name box, delete the current name, and type in the next last name. Continue the same above steps until all names have been added.



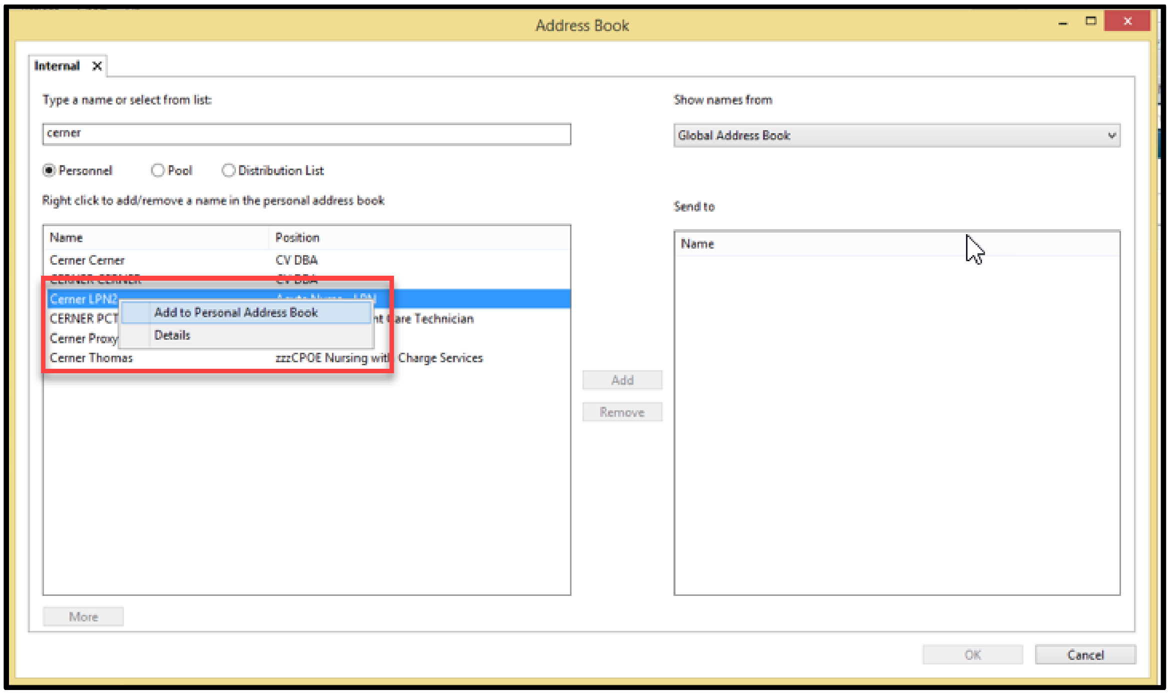
Step 7

- Recipients names are in the **Send to** box
- Click **OK**

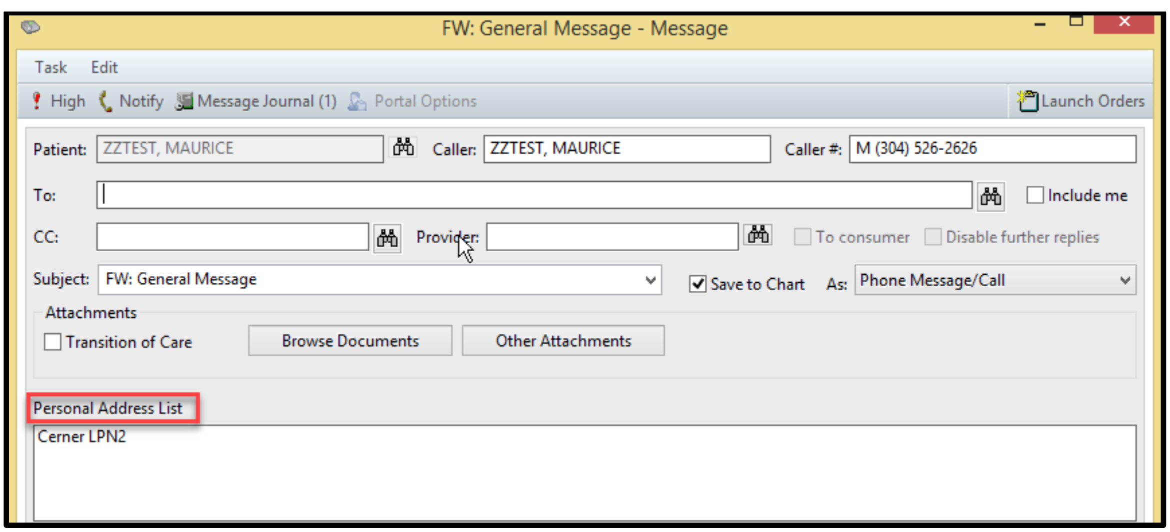


Step 8

- To Add the Recipient to your **Personal Address Book** (add recipients that you contact a lot, so that you can
- **Right Click** the recipient name
- Click **Add to Personal Address Book**

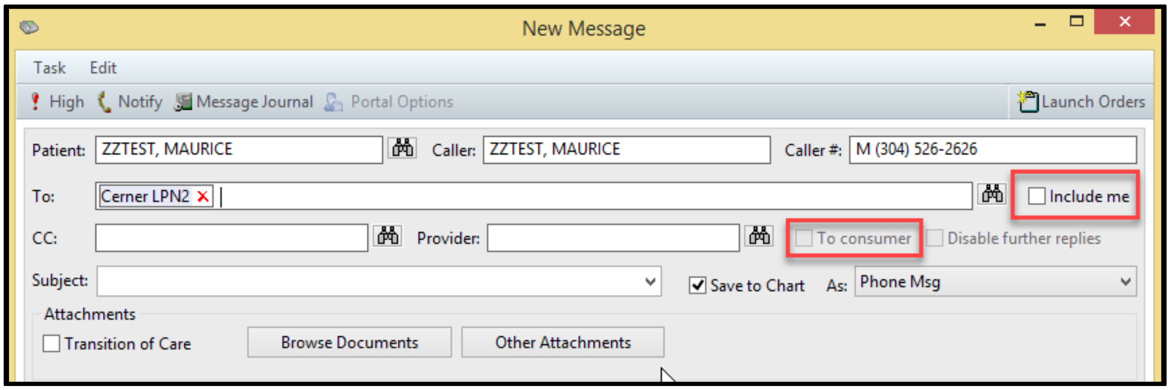


- Will show under the Personal Address List in the Message (when composing a Message, you can click on the recipient name to add to the **To:** or the **CC:**).



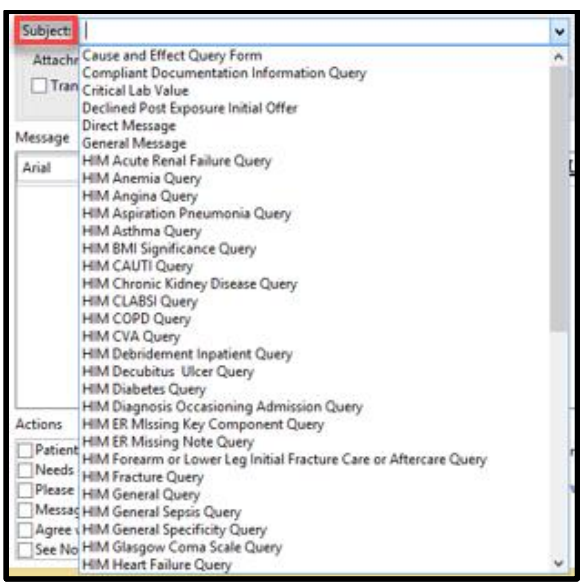
Step 9

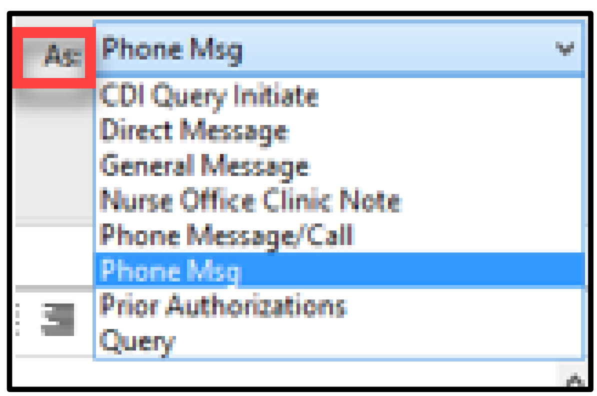
- Select **Include Me** to include yourself as a recipient of the message.
- If the patient has a Cerner Patient Portal account or a secure email, select **To Consumer** to include the patient as a message recipient (if the message is to be sent to the patient).



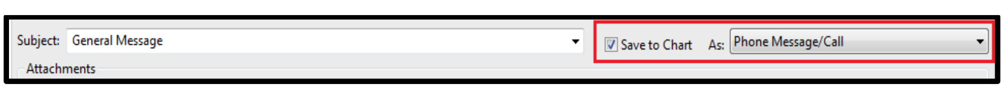
Step 10

- From the **Subject** list, enter or select a subject from the drop-down list.
- Select from the **As** box the document type.



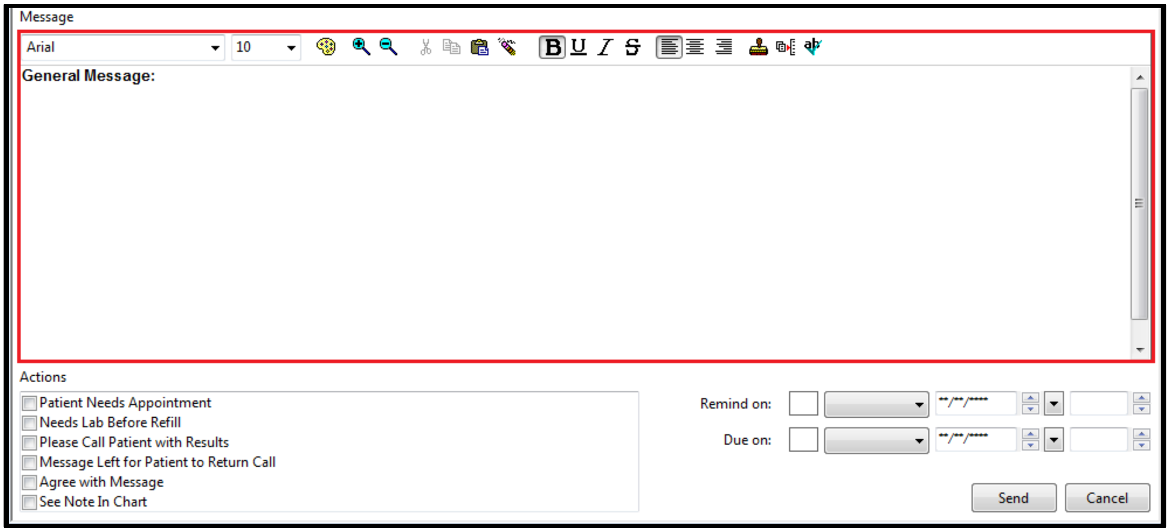


- If you are saving the message to the patient's chart, select **Save to Chart** (if not Saving to Patient's Chart, uncheck the box).



Step 11

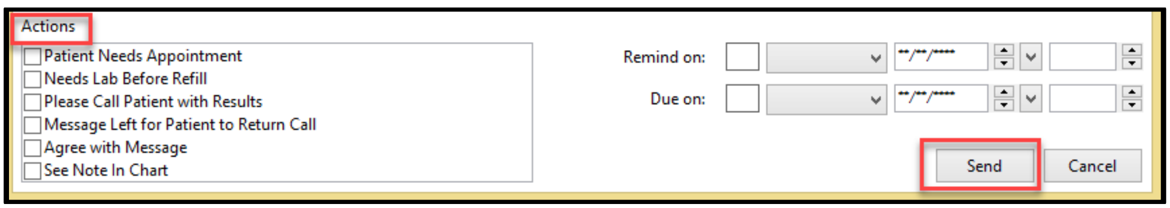
- From the **Message** box, compose the message.



Step 12

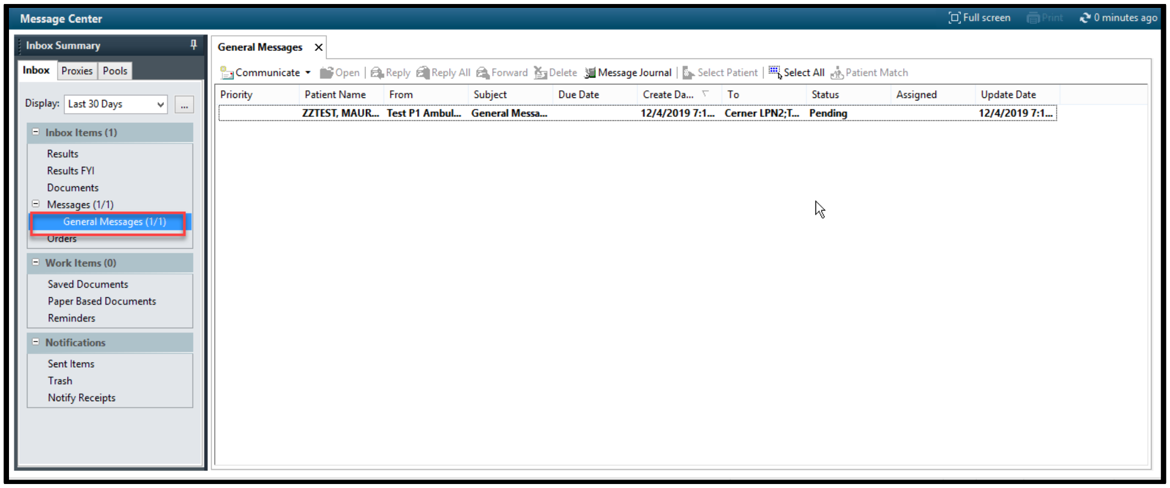
- If necessary, set a reminder or due date for the message.

- If necessary, select any action items options from the **Actions** box.
- When you have completed the message, click **Send**.



Step 13

- Message is viewable in Message Center

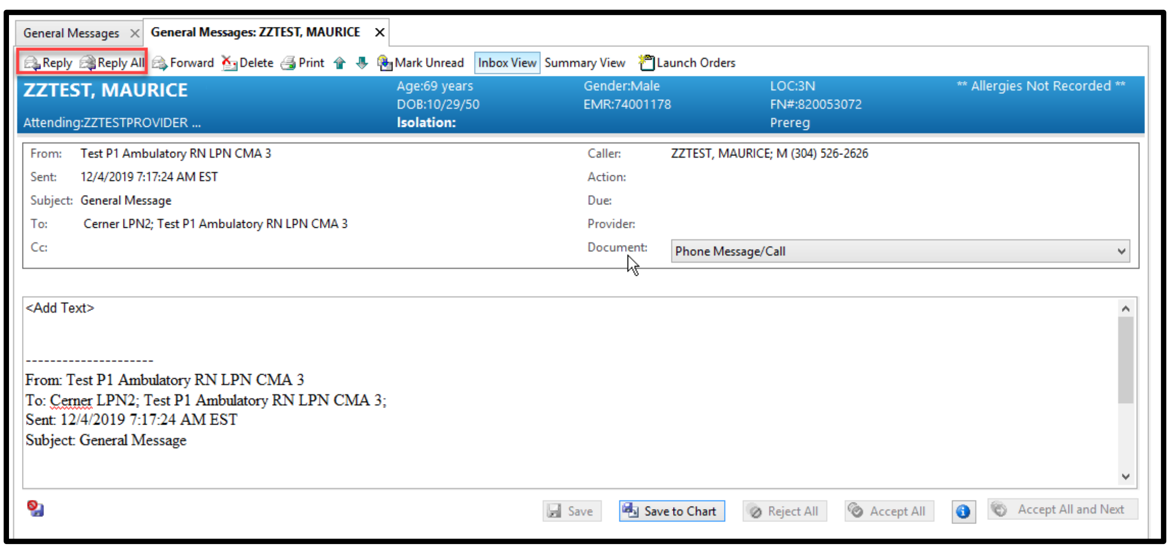


Reply to a Message

Complete the following steps to reply to a message:

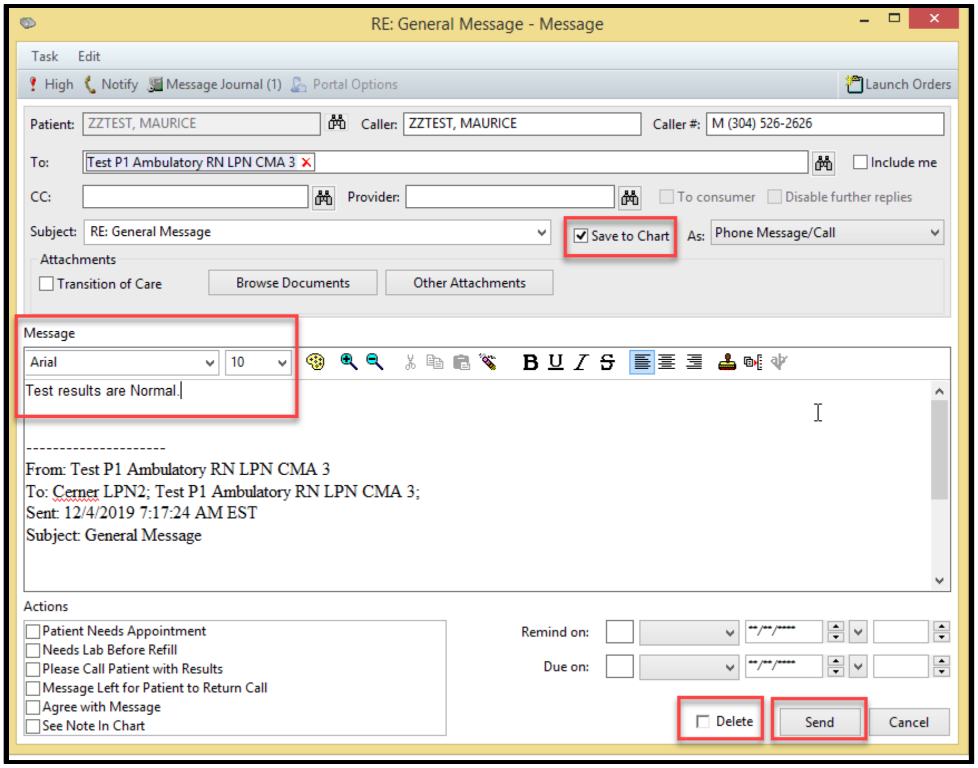
Step 1

- Open and read the message.
- Click **Reply** to reply to only the sender, or **Reply All** to reply to the sender and all recipients of the message.



Step 2

- Compose the message.
- Select any additional message options. If the existing message should be deleted once sent, select the **Delete** check box.
- Click **Send**.



Forward Messages

Complete the following steps to forward a message:

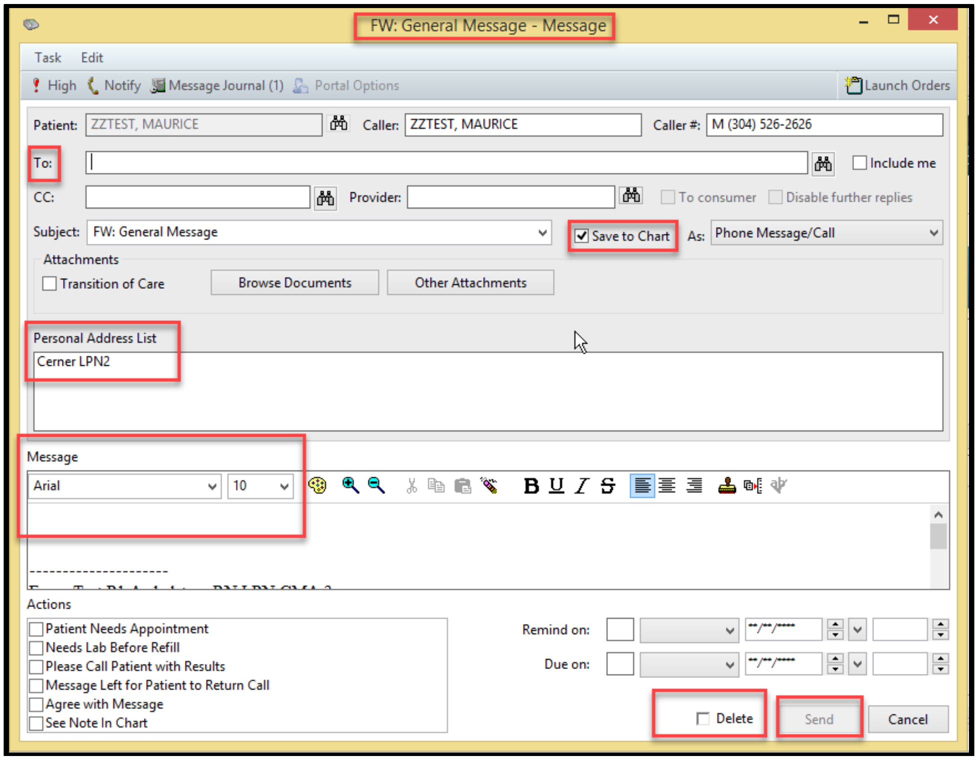
- With the message open, click **Forward**.

Click  button next to the **To** box, select a recipient, and click **OK**.

Note: Alternately, you can position your pointer in the **To** box and double-click, then select a recipient from your personal address book.

- Compose the message
- If you want to save a copy of the message to the patient's chart, click **Save to Chart** and select an option from the **As** list
- Select any additional message options. If the existing message should be deleted once sent, select the **Delete** check box
- Click **Send**

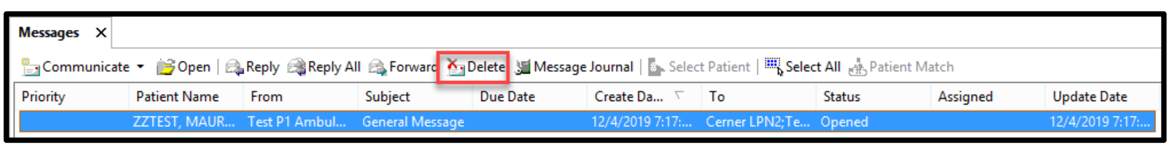
Note: You can also forward a message directly from the list of messages displayed in the Inbox workspace without opening it by selecting the message in the notification list and clicking Forward.



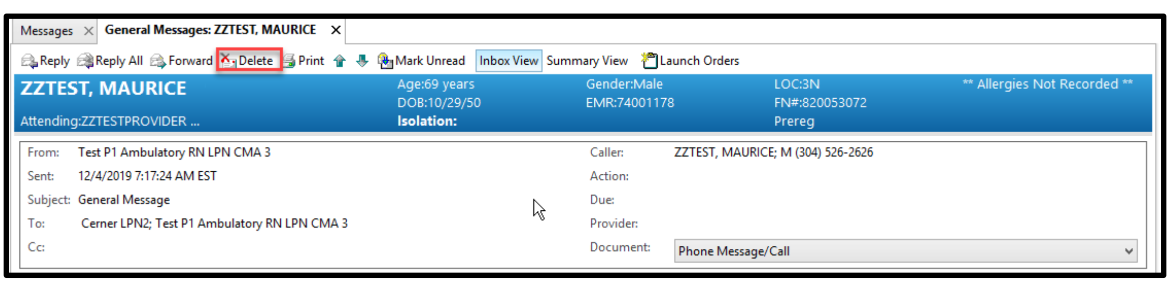
Delete Messages

Messages can be deleted in one of three ways:

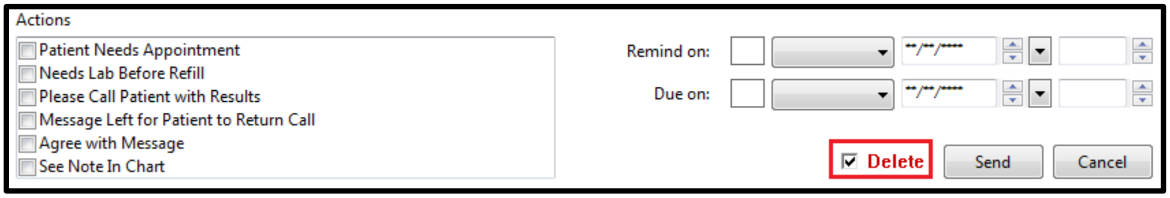
- 1. Select the message you want to delete from the message list in the **Message Center** workspace and click **Delete**.



- 2. With the message open, click **Delete**



- 3. In the **Reply** or **Forward** dialog box, select the **Delete** checkbox, and then click **Send** to send your message.

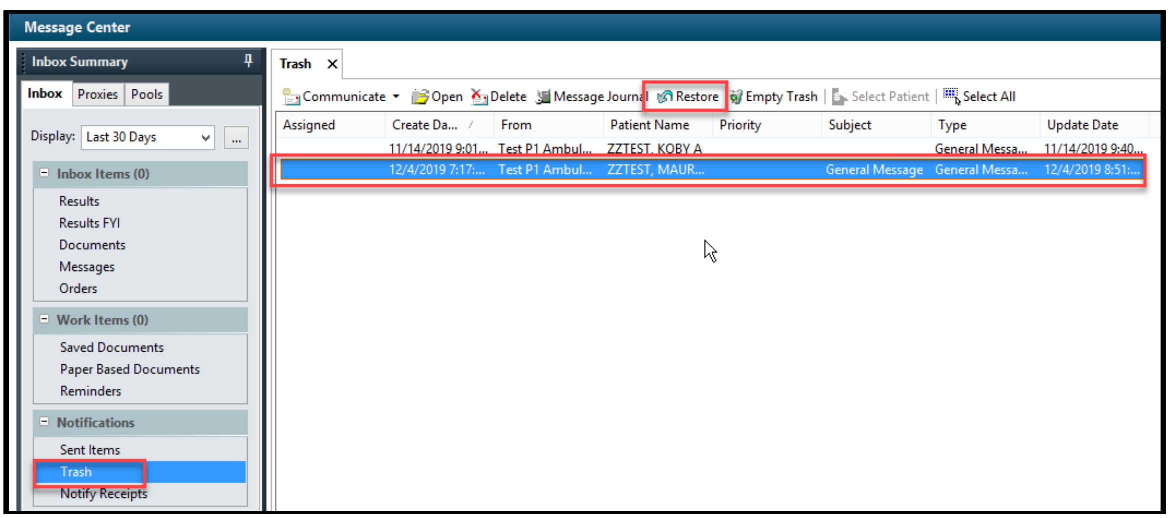


Note: Deleted messages are sent to the Messaging Trash folder and can be recovered until the Messaging Trash folder is emptied by the user or the system.

Restore Deleted Messages

Complete the following steps to restore deleted messages:

- Double-click the **Trash** folder in the *Inbox Summary*.
- Select the message or messages you want to restore.
- Click **Restore**. The message is moved from the *Messaging Trash* folder to its original folder.



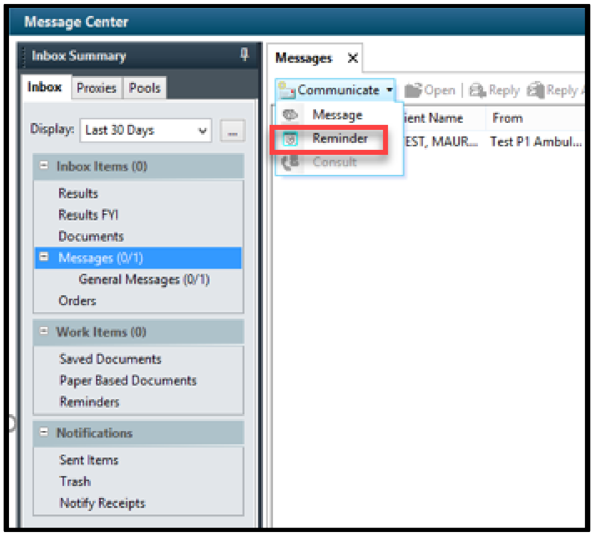
Create a New Reminder

Reminders help ensure that patient care activities for a specified patient are carried out at a later time.

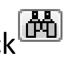
Complete the following steps to create a new reminder:

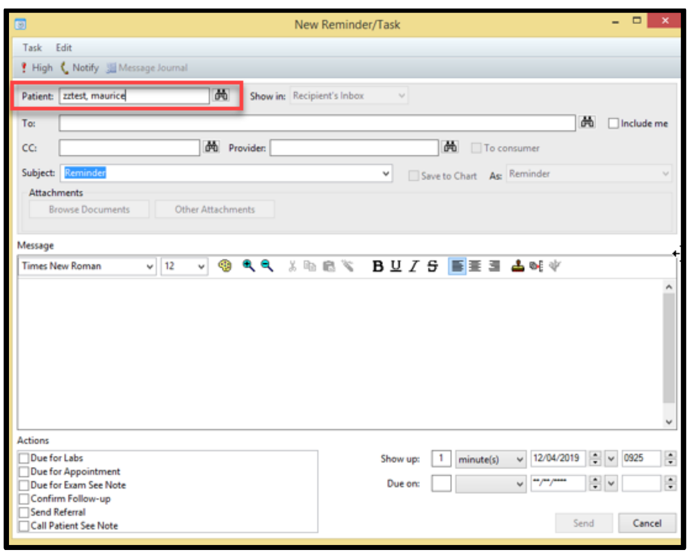
Step 1

- Click on Messages tab in the Inbox Summary
- Select **Communicate** ()
- Select **Reminder**



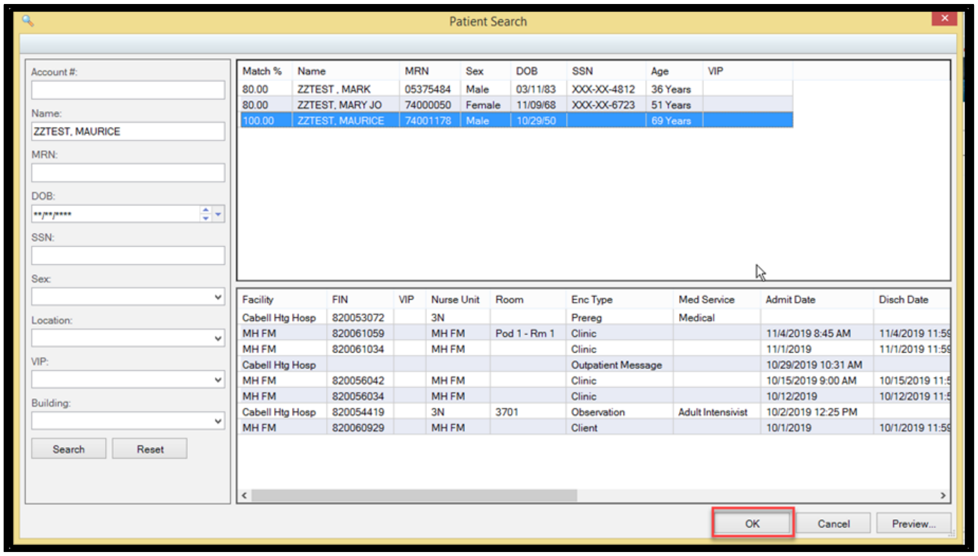
Step 2

- From the **Patient** box, enter the patient's name and click  .



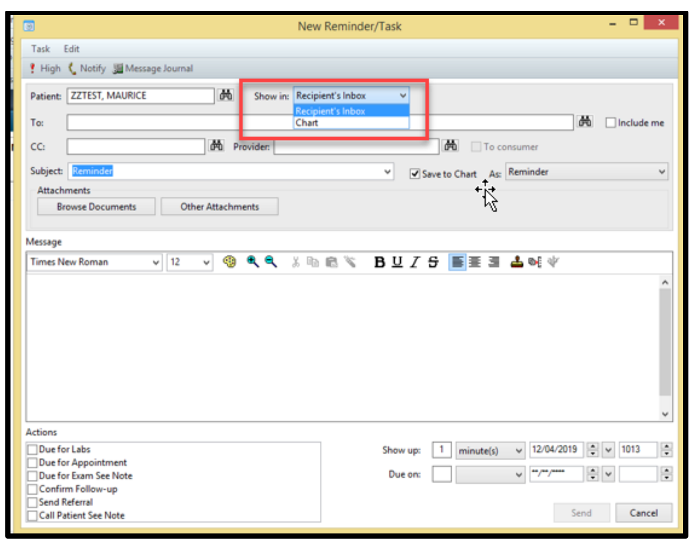
Step 3

- The **Person Search** window opens.
- From the **Patient Search** window, select the patient and click **OK**.



Step 4

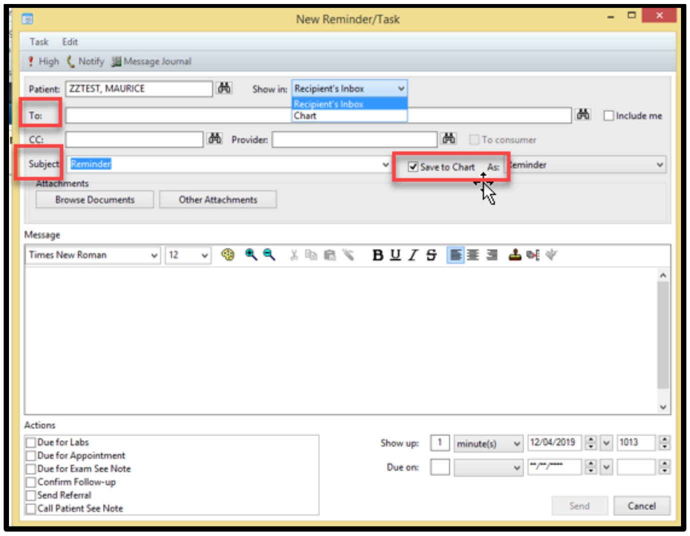
- ○ Select an option from the **Show In** list.
- ○ Select **Recipient's Inbox** to send the reminder to the recipients designated in the To: and CC boxes;
- ○ Select **Chart** to send the reminder to the selected patient's **Overview or Ambulatory Summary** *section* of the chart.



Step 5

- ○ If you are sending the reminder to another user, from the **To:** and CC boxes enter the first few letters of recipients last name and click  .
- ○ **Subject** list: **Reminder** is automatically populated.
- ○ If you are saving the message to the patient's chart, select **Save to Chart**

- The **As** list: **Reminder** is automatically populated.

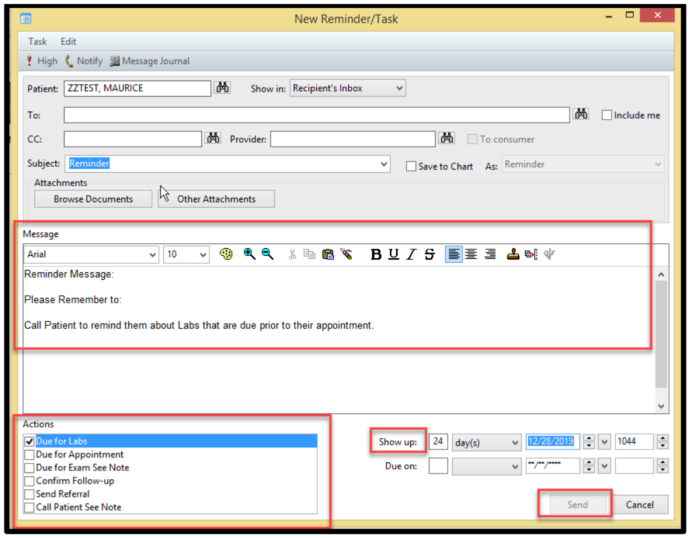


Step 6

- From the **Message** box, compose the message of the reminder.
- Enter the **Show Up** or **Due** on for the reminder. A reminder's **Show Up** on and **Due On** dates can be set in one of two ways:
  - **By number of days/months/of years:** Enter an interval. For example, **1 days**. The system calculates the **Show Up** or **Due On** date.
  - **By date:** Enter a **Show Up** or **Due On** date. The system calculates the interval.

Option	Action
Show Up	The Show Update sets the date when the reminder displays in the recipient's Inbox. The Show Up time defaults to one minute in the future. This option does not apply if the reminder is sent to the patient's chart.
Due On	The Due On date sets the due date for the reminder. Reminders that are overdue are indicated in red and displayed in the Priority folder.

- If necessary, select any action items options from the **Actions** box.
- Click **Send**.



Creating Letters

Creating Provider Letters

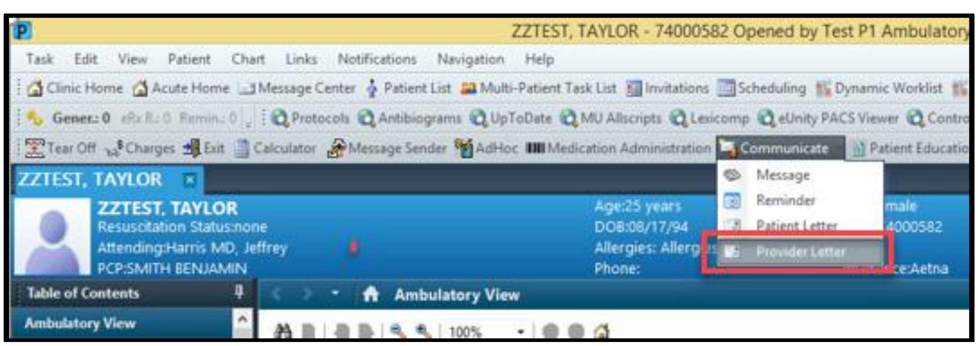
Provider Letters allows you to create a letter to another provider that can be mailed, faxed, or sent to their Message Center inbox. Patient Letters will be saved to the patient's chart in the Documentation in TOC.

Step 1

- Access PowerChart.
- Select a patient.
- Ensure you select the correct encounter.

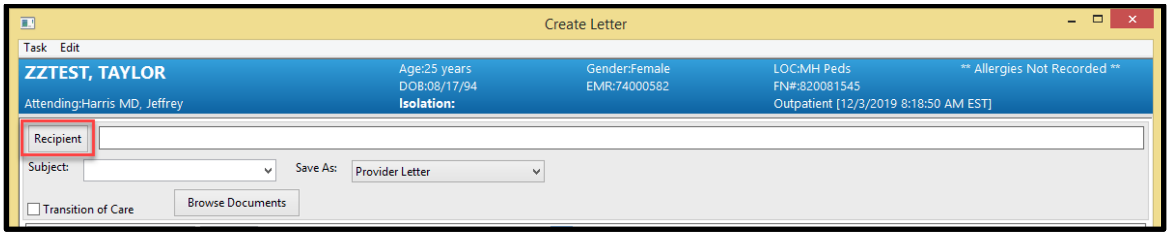
Step 2

- Select the Communicate menu on the PowerChart toolbar.
- Click the drop-down arrow on the Communicate menu.
- Select Provider Letter.

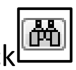


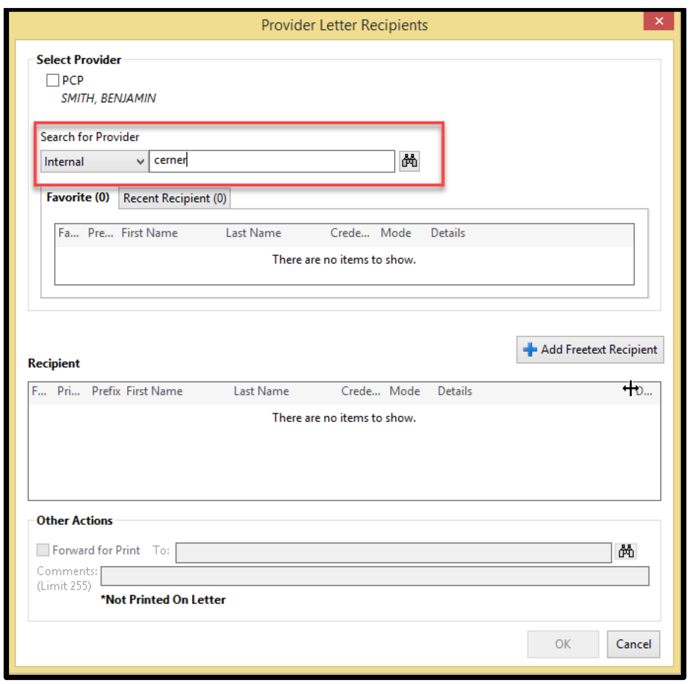
Step 3

- The Create Letter dialog box
- Click the **Recipient** button



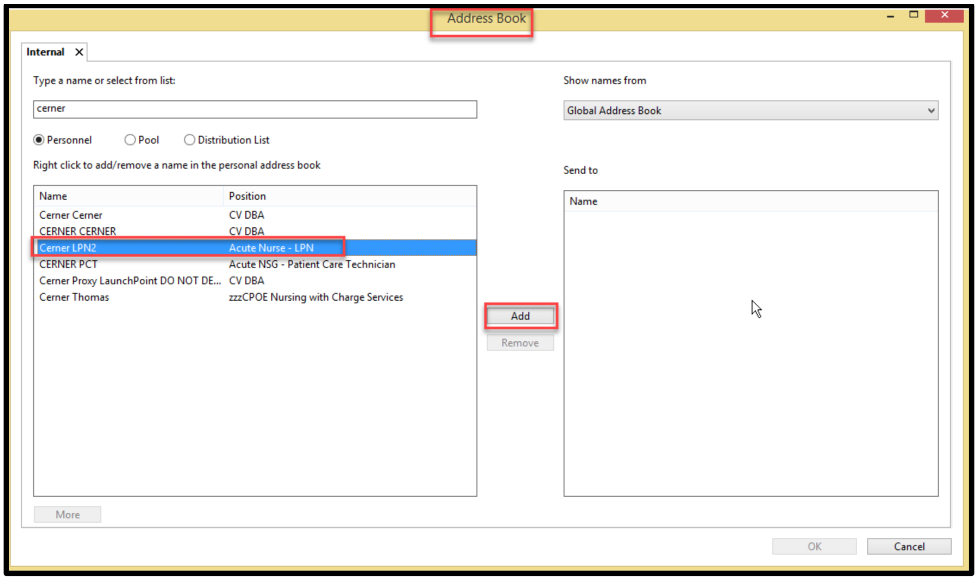
Step 4

- Provider Letter Recipients window opens.
- In the Search for Provider box, enter the first few letters of recipients last name and click. Or Select a provider from the **Favorite** or **Recent Recipient** tab. If letter is going to the patient's **PCP** and the PCP is showing, click the box next to the word **PCP**.



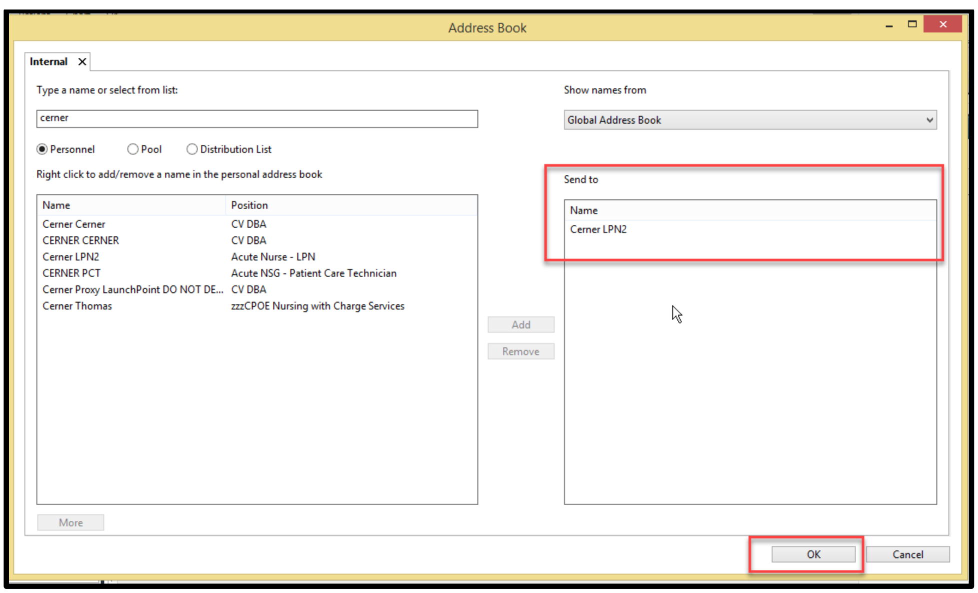
- Address Book window opens with a list of everyone who has the Last Name that was entered in the **To:** box.
- Select the **Correct Person**
- Click **Add**
- Person is moved to the **Send to** box

NOTE: If the Message is going to multiple recipients, go to the Type a name box, delete the current name, and type in the next last name. Continue the same above steps until all names have been added.



Step 5

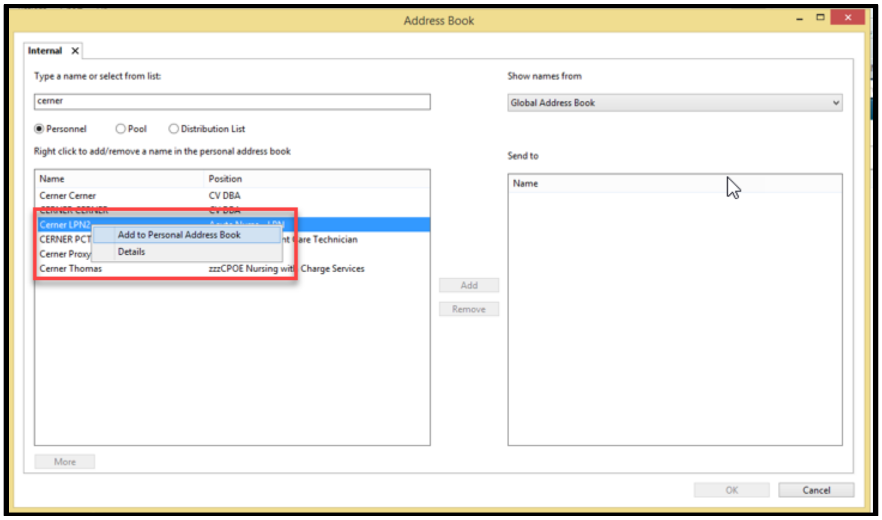
- Recipients names are in the **Send to** box
- Click **OK**



Step 6

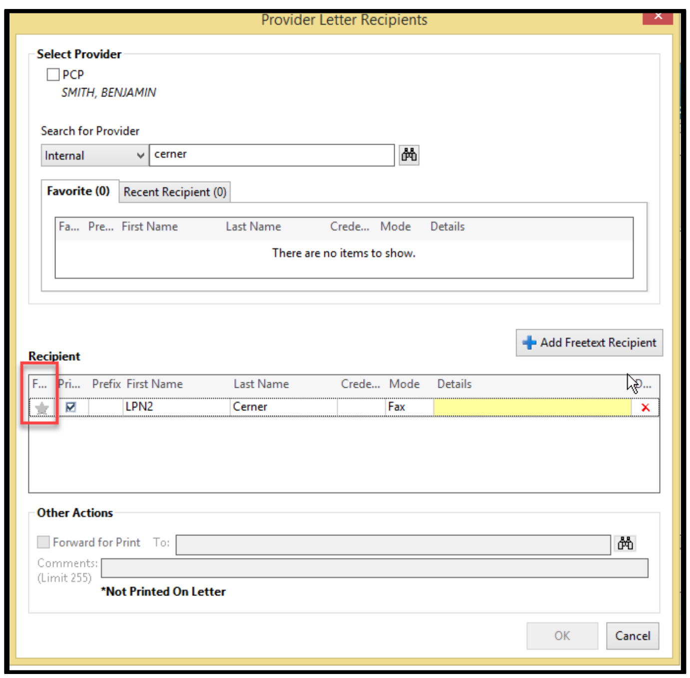
- To Add the Recipient to your **Personal Address Book** (add recipients that you contact a lot, so that you can
- **Right Click** the recipient name

- Click **Add to Personal Address Book**



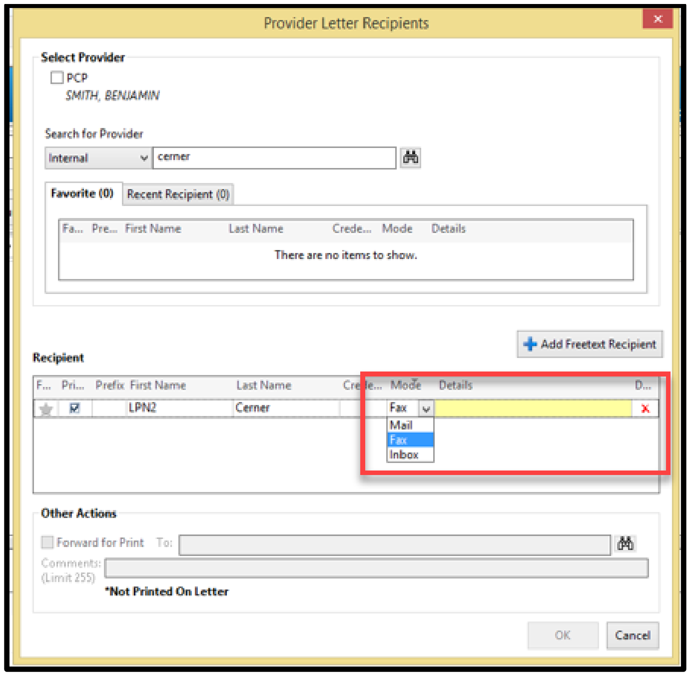
Step 7

- Provider Letter Recipients window opens with the Recipient Selected.
- If you wish to keep the Recipient as a favorite just simply select the star to the left.

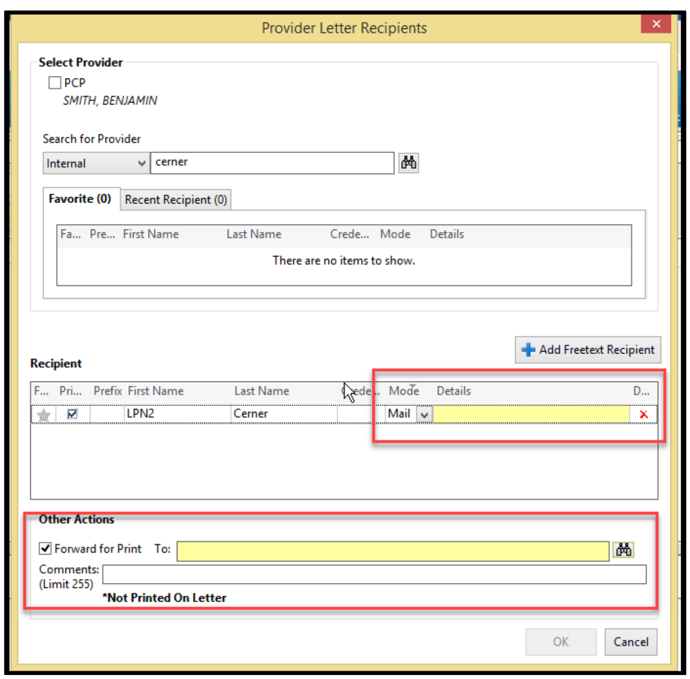


Step 8

- Update the mode by clicking **Mode**, Choose **Mail, Fax, or Inbox**.
  - Click **Fax:** When entering the fax number only include the number. **NO DASHES**
  - Click **OK**

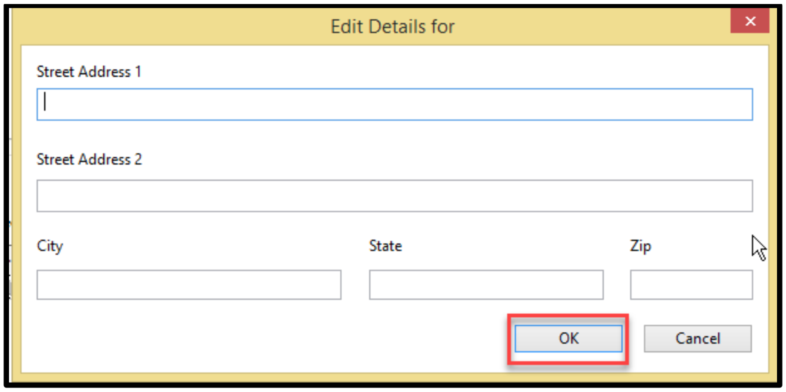


- Click **Mail:** Click in the yellow Details box
- **Other Actions**: Uncheck the Forward for Print box (message will no longer be forward). To forward to another Recipient, type the last name and click the Binoculars.

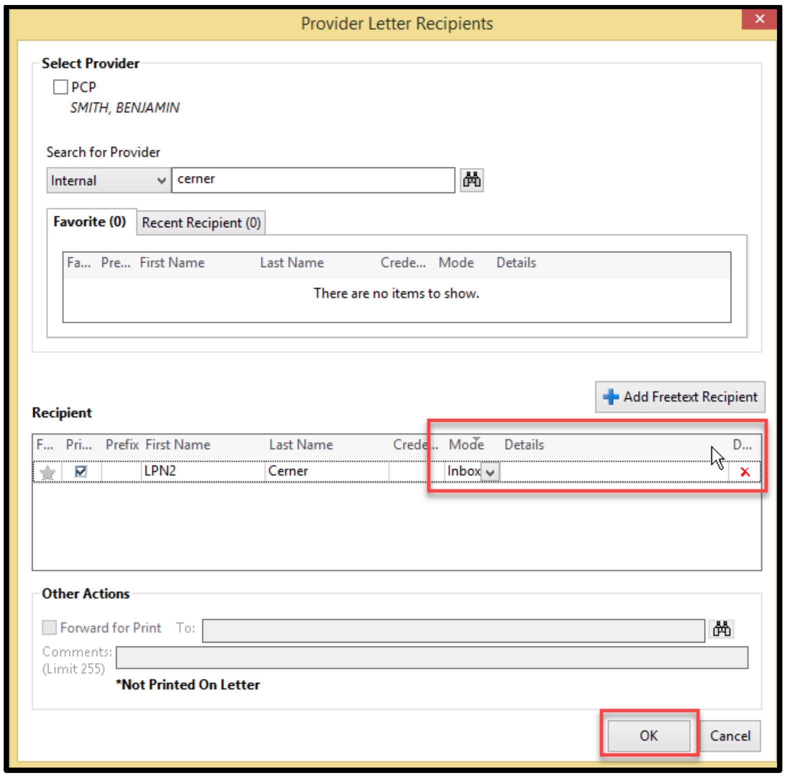


- Edit Details box opens, Type in the Mailing Address

- Click **OK**



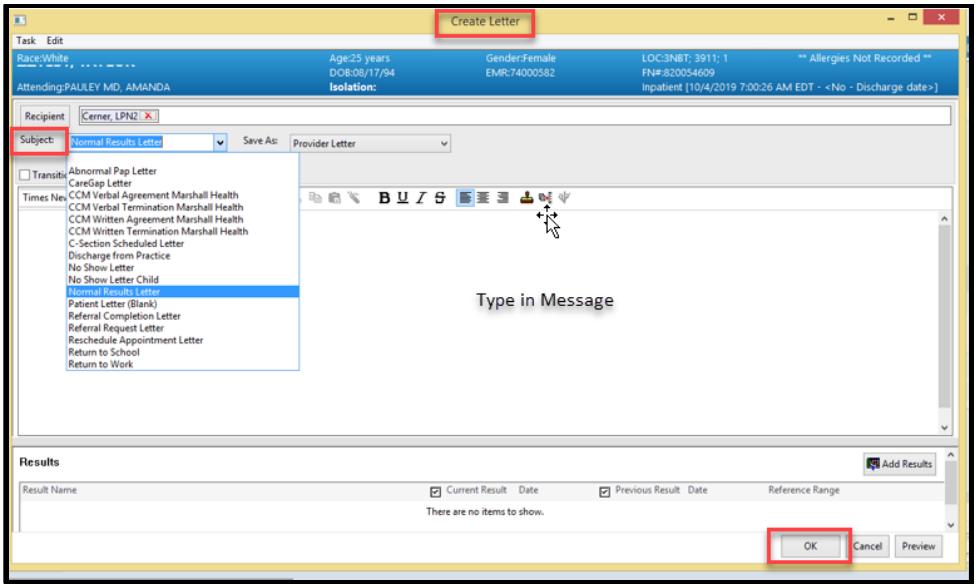
- Click **Inbox** (message will be sent to the Recipients Message Center Inbox)
- Click **OK**



Step 9

- Create Letter window opens
- Select **Subject** from the drop-down list
- Save As (**Provider Letter** is auto populated)
- Type in **Message** in message box area
- Click **Preview** (if you want to preview the Provider Letter)

- Click **OK**



Creating Patient Letters

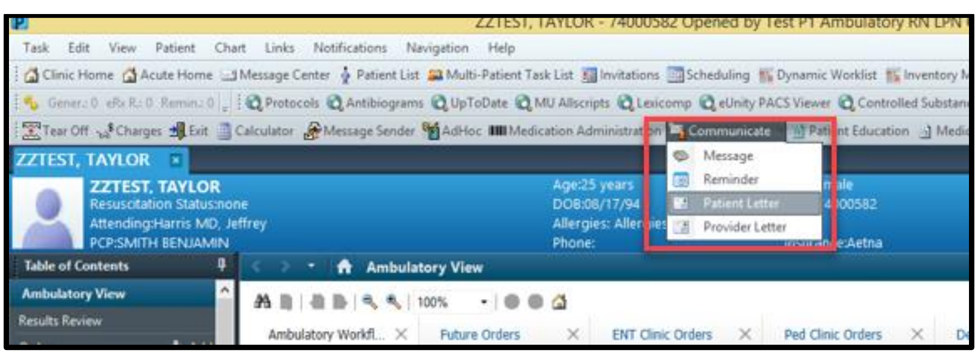
Patient Letters are available for providers to send lab results or other patient specific communications to patients by using the message center. Patient Letters will be saved to the patients' chart in the Documentation in TOC.

Step 1

- Access PowerChart.
- Select a patient.
- Ensure you select the correct encounter.

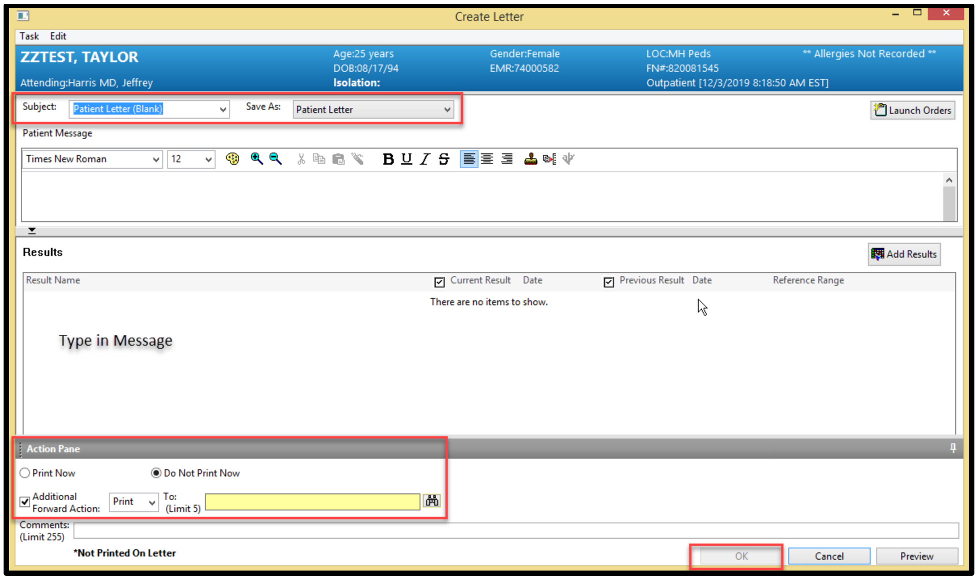
Step 2

- Select the Communicate menu on the PowerChart toolbar.
- Click the drop-down arrow on the Communicate menu.
- Select Patient Letter.



Step 3

- Create Letter window opens
- Select **Subject** from the drop-down list (i.e. Patient Letter Blank, Return to School, Return to Work)
- **Save As** (Patient Letter is auto populated)
- Type in **Message** in message box area
- Click **Preview** (if you want to preview the Provider Letter)
- Click **OK**



Overview of Patient's Chart

Find a Patient

Complete the following steps to find or identify a particular patient who has been entered into the system:

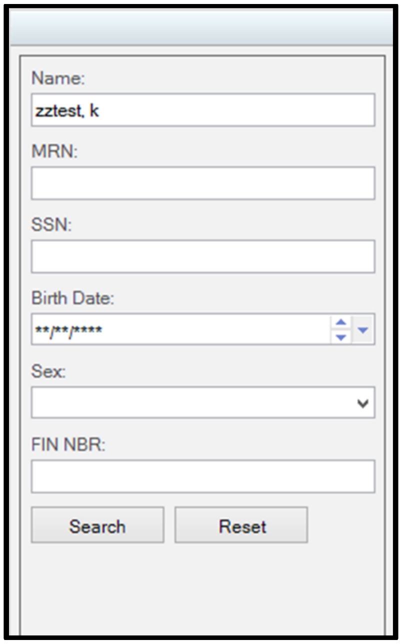
Step 1

- Use one of the following methods to open the Patient Search dialog box. From the Patient Menu of any view of the patient chart, Click **Search** ()

Step 2

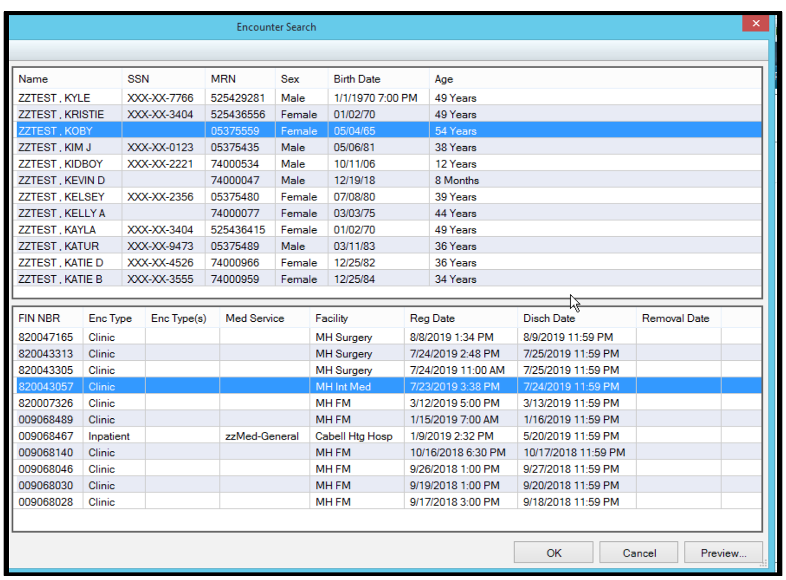
- In the Patient Search dialog box, enter information in one or more of the boxes to limit the search of the person database and press **ENTER**.
- **Note:** You can enter as little information as the initial letter of the patient's last name. Enter as many letters of the surname as you know are correct to narrow the

search. If you scroll down the displayed names and do not find the one you are looking for, click **Cancel** and make a different entry, altering the spelling.



Step 3

- The system displays a list of names alphabetically that follow your entry. Use the scroll bar to move down the list until you find the correct name.
- Select the **correct patient** and **correct Encounter**
- Click **OK**.

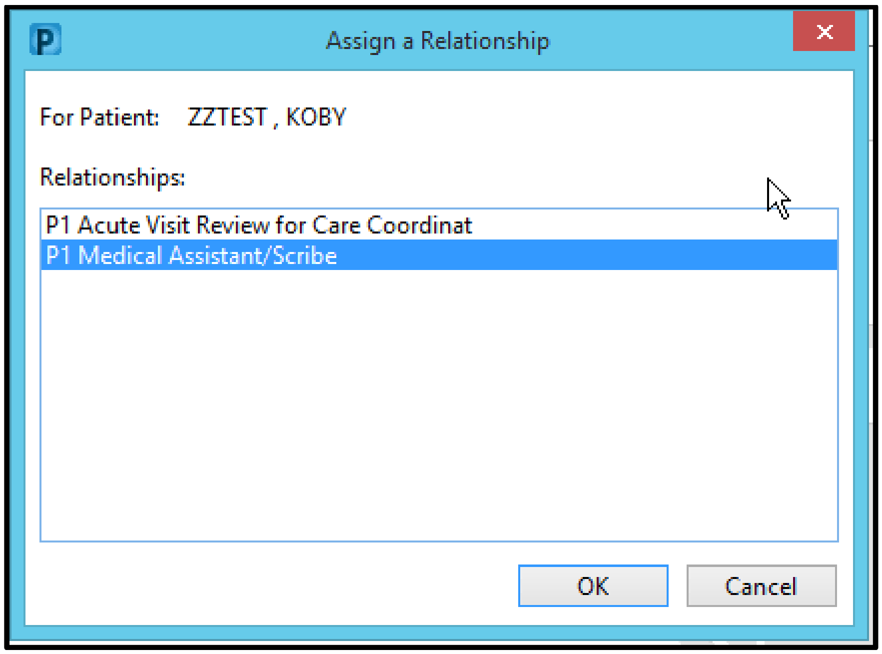


Name	SSN	MRN	Sex	Birth Date	Age
ZZTEST , KYLE	XXX-XX-7766	525429281	Male	1/1/1970 7:00 PM	49 Years
ZZTEST , KRISTIE	XXX-XX-3404	525436556	Female	01/02/70	49 Years
ZZTEST , KOBY		05375559	Female	05/04/65	54 Years
ZZTEST , KIM J	XXX-XX-0123	05375435	Male	05/06/81	38 Years
ZZTEST , KIDBOY	XXX-XX-2221	74000534	Male	10/11/06	12 Years
ZZTEST , KEVIN D		74000047	Male	12/19/18	8 Months
ZZTEST , KELSEY	XXX-XX-2356	05375480	Female	07/08/80	39 Years
ZZTEST , KELLY A		74000077	Female	03/03/75	44 Years
ZZTEST , KAYLA	XXX-XX-3404	525436415	Female	01/02/70	49 Years
ZZTEST , KATUR	XXX-XX-9473	05375489	Male	03/11/83	36 Years
ZZTEST , KATIE D	XXX-XX-4526	74000966	Female	12/25/82	36 Years
ZZTEST , KATIE B	XXX-XX-3555	74000959	Female	12/25/84	34 Years

FIN NBR	Enc Type	Enc Type(s)	Med Service	Facility	Reg Date	Disch Date	Removal Date
820047165	Clinic			MH Surgery	8/8/2019 1:34 PM	8/9/2019 11:59 PM	
820043313	Clinic			MH Surgery	7/24/2019 2:48 PM	7/25/2019 11:59 PM	
820043305	Clinic			MH Surgery	7/24/2019 11:00 AM	7/25/2019 11:59 PM	
820043057	Clinic			MH Int Med	7/23/2019 3:38 PM	7/24/2019 11:59 PM	
820007326	Clinic			MH FM	3/12/2019 5:00 PM	3/13/2019 11:59 PM	
009068489	Clinic			MH FM	1/15/2019 7:00 AM	1/16/2019 11:59 PM	
009068467	Inpatient		zzMed-General	Cabell Htg Hosp	1/9/2019 2:32 PM	5/20/2019 11:59 PM	
009068140	Clinic			MH FM	10/16/2018 6:30 PM	10/17/2018 11:59 PM	
009068046	Clinic			MH FM	9/26/2018 1:00 PM	9/27/2018 11:59 PM	
009068030	Clinic			MH FM	9/19/2018 1:00 PM	9/20/2018 11:59 PM	
009068028	Clinic			MH FM	9/17/2018 3:00 PM	9/18/2018 11:59 PM	

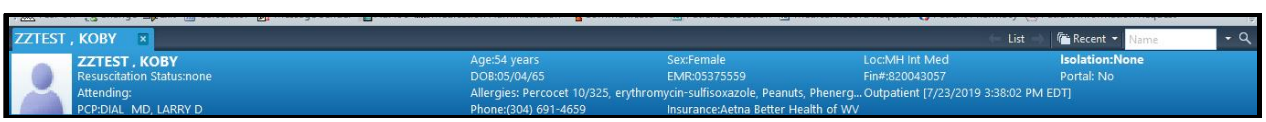
Step 4

- If you have not previously established a relationship with this patient, a dialog box opens to allow you to do so. The history of this proclaimed relationship is saved and viewable to others. Each time you enter a Patient chart for the first time, you must establish a relationship. Choose your **Relationship.**
- Click **OK** (patient's chart opens)



Demographic Banner Bar

Patient Name: A window displays a brief summary of important patient demographic information. This information, which is derived from the Patient Demographics tab, cannot be edited.
Allergy: A summary of any known allergies for the selected patient is displayed.
Loc: Patients' Location

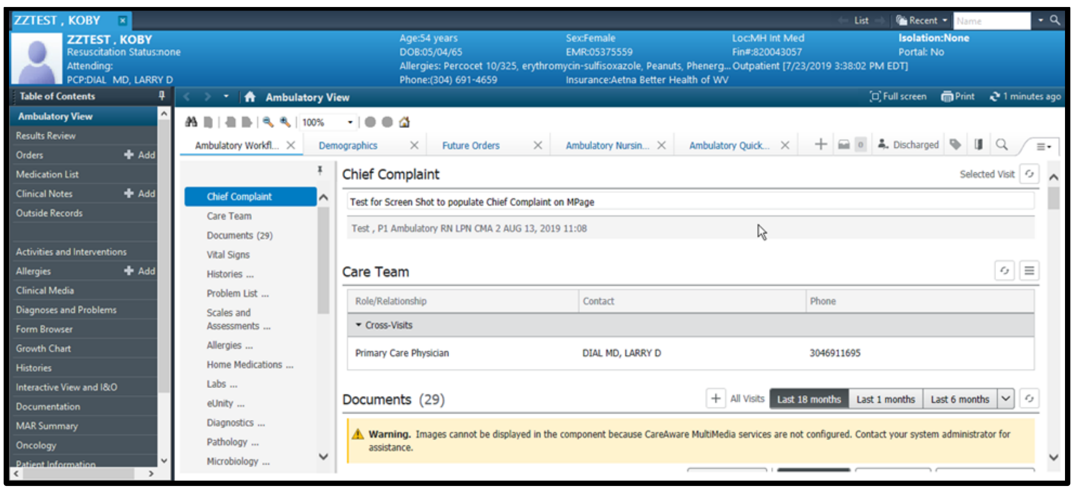


Overview of Table of Content

The Patient Chart view is made up of two panes: Table of Contents on the Left and Workspace Default View (i.e. Ambulatory Workflow)

The Chart components are accessed via the Table of Content. If all of the Chart components cannot be displayed in the Table of Contents within the vertical space available, a scroll bar is displayed, and the additional items are accessed via scroll.

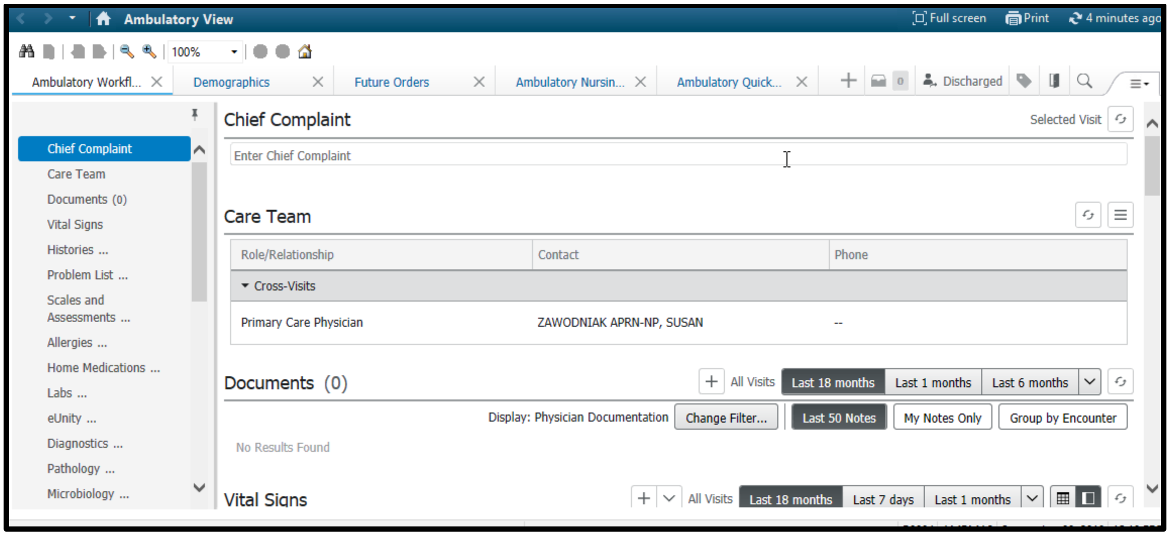
- The Table of Contents collapses and displays a menu tab on the edge of the Chart.
- The Menu is displayed on the left side of the window and allows you to quickly navigate to any area of the patient's chart. Clicking a *PowerChart* component in the Menu opens that component's workspace.
- By default, the Menu is always displayed, no matter which workspace is active in the patient chart; however, you can hide the Table of Contents to maximize the workspace. To unpin and hide the Table of Contents, click the **pin**.



MPage Overview and Summary

The Ambulatory Workflow *MPages* is focused on providing a patient summary view for Ambulatory clinicians. This section also allows clinicians to take actions directly from the summary page, including updating allergies, updating histories (Social, family, procedure, etc.), adding documentation (PowerForm and Clinical Notes), and adding new orders, etc.

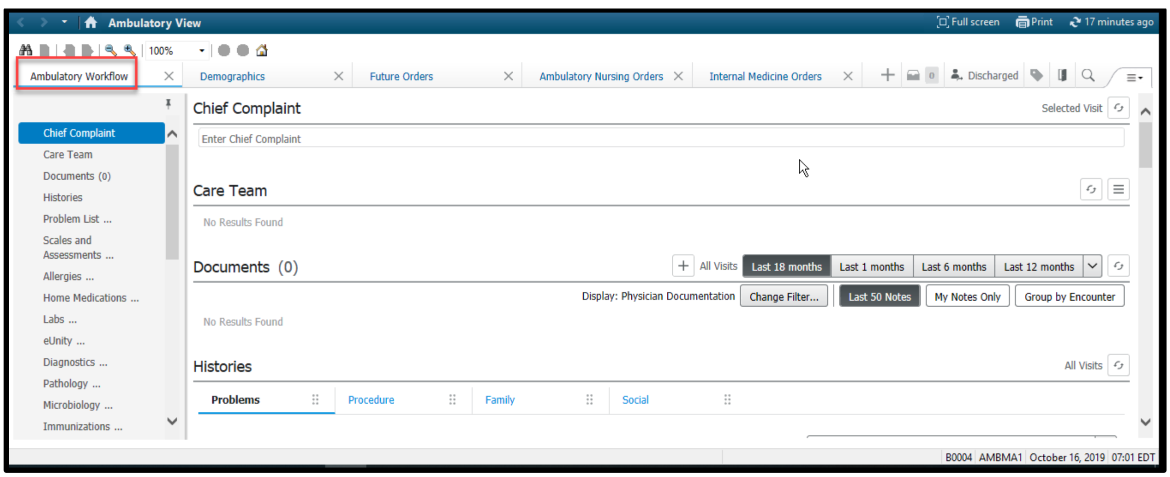
- Mpages allows user-based customization to the end user to select and rearrange components on the page and define the expand/collapse default for each component.



Rearranging Workflow MPage Components

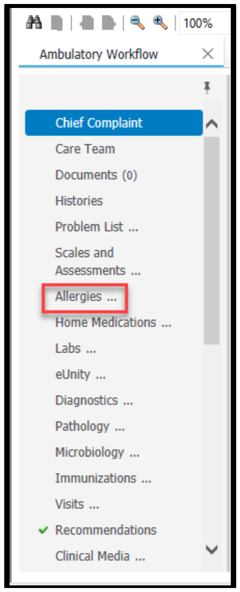
Step 1

- Navigate to the **Ambulatory Workflow MPage**.
- Repeat Steps 1-3 for any other Component.



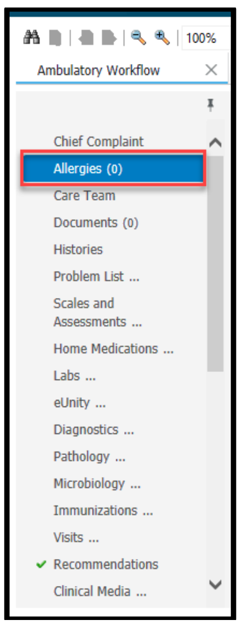
Step 2

- Start on the **Workflow Mpage.**
- **Click and hold on a Component** and **drag to desired location**. Dotted lines will appear to show you where you are moving the Component to.



Step 3

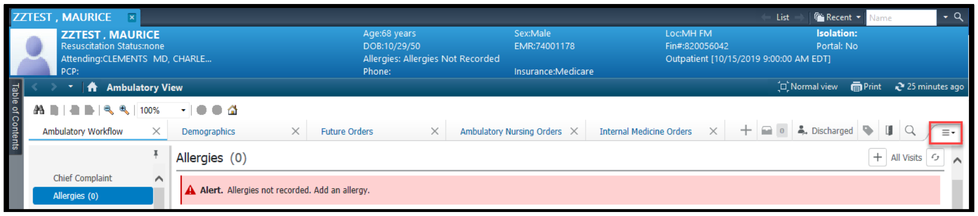
- Release the **click** and **hold action** and the Component will appear in the desired location.



Removing and Adding Components

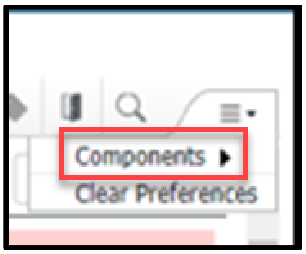
Step 1

- Click on the **drop-down menu** at the top right the corner of Ambulatory Summary.



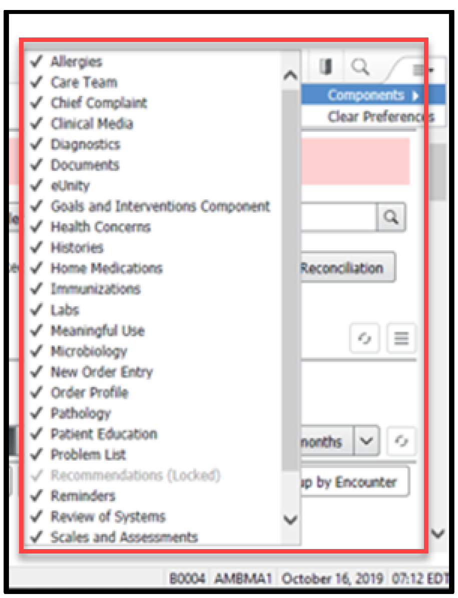
Step 2

- From the drop-down menu, Select **Components.**



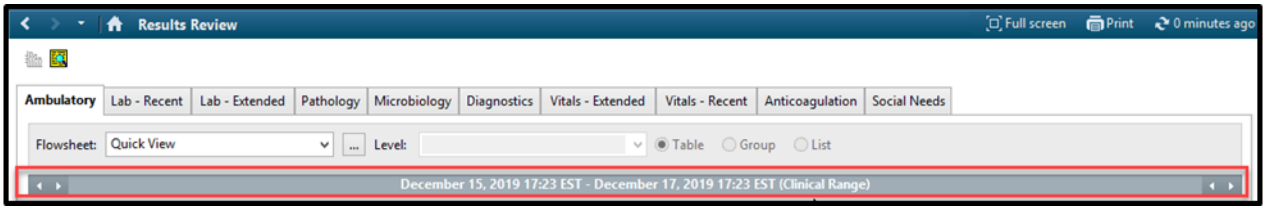
Step 3

- Users may add or remove components from the Ambulatory Summary.
- Click the **name** to check any components.
- Click to the name to **uncheck** any components.



Customizing Search Criteria Dialog

The Clinical Date Range (located above the Navigator and the Results Display) defaults to a specific range each time you open the Results Review tab. There may be times when the proper clinical range is not displaying the necessary range to show the data; thus, you must modify the clinical range.

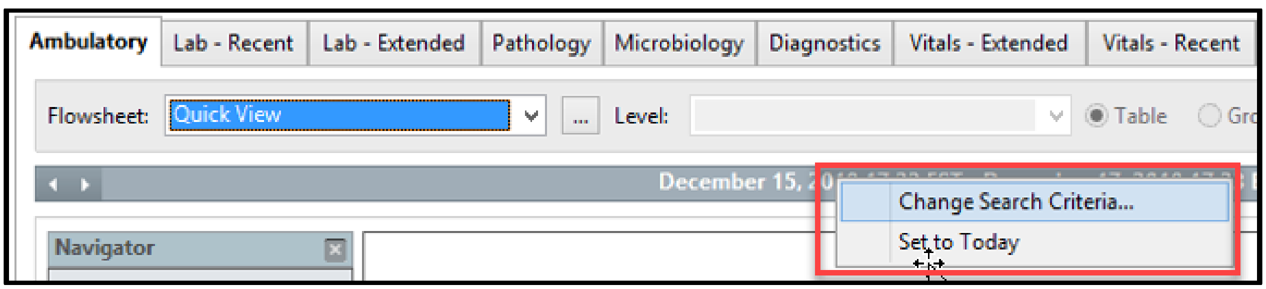


Step 1

- To modify the clinical range, click one of the scroll buttons located on the right and left sides  of the Clinical Range bar to advance the date incrementally

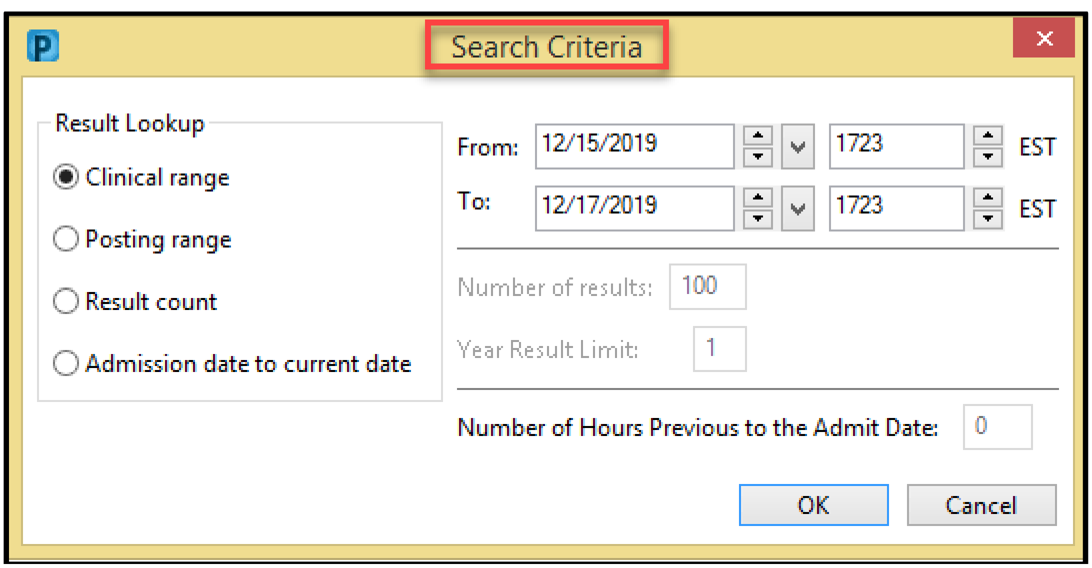
Step 2

- **Right-click** the Clinical Range bar.
- Select **Change Search Criteria**.



Step 3

- Search Criteria window opens

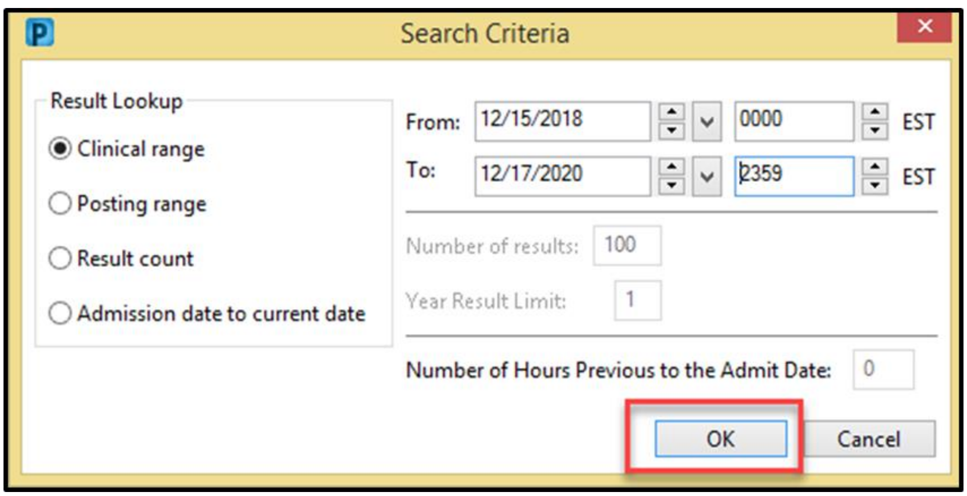


Step 4
You can define the way data is to be searched for and retrieved. The Search Criteria dialog box in Flowsheet includes the following elements:

Element	Description
Result Lookup	
Clinical Range	When selected, results displayed have clinical occurrence times in the specified time range.
Posting Range	When selected, results displayed have posting times in the specified time range. The events themselves can have happened earlier than the specified time range.
Result Count	When selected, results displayed fall in the last n occurrences. Selecting this option activates the Number of Results box where you can enter a number from 1 to 1000 and the Year Result Limit box where you can enter a number from 1 to 99.
New Results	When selected, results displayed are only those that you have not yet marked as reviewed.
Admission Date to Current Date	When selected, results displayed fall in the admission date to the current date. Selecting this option activates the Number of Hours Previous to the Admit Date box where you can enter a number between 1 and 999.
Time Span	
From	Enter a date in the first box to indicate the beginning date of the time span for which you want to retrieve results. To view a calendar, click the arrow and select a date. Enter a time of day in the second box using 24-hour time format (for example, 1300 for 1:30 p.m.). The search begins at the hour you indicate on the date you indicate.
To	Enter a date in the first box to indicate the ending date of the time span for which you want to retrieve results. To view a calendar, click the arrow and select a date. Enter a time of day in the second box using 24-hour time format. The search ends at the hour you indicate on the date you indicate. The data displayed is either the Clinical Range postings or the Posting Range postings for the time period defined.
Number of Results	Enter a number from 1 to 1000 to indicate the number of results retrieved when using the result count method of retrieval.

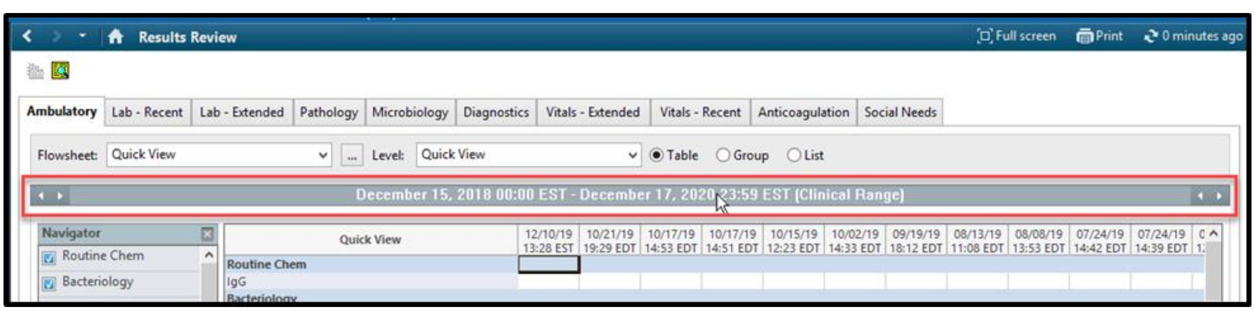
Year Result Limit	Enter a number from 1 to 99 to indicate the recentness of results retrieved when using the result count method of retrieval.
Number of Hours Previous to the Admit Date	Enter a number from 1 to 999 to extend an Admission Date to Current Date search to a number of hours prior to the patient's admission.
OK	Saves your changes and closes the dialog box.
Cancel	Closes this dialog box without saving your changes.

- Change the **From Date and Time of your choosing** (i.e. I went back a year from the current date and started the time at Midnight).
- Change the **To Date and Time of your choosing** (i.e. I went out a year from the current date and made the end time at 2359).
- Click **OK**.



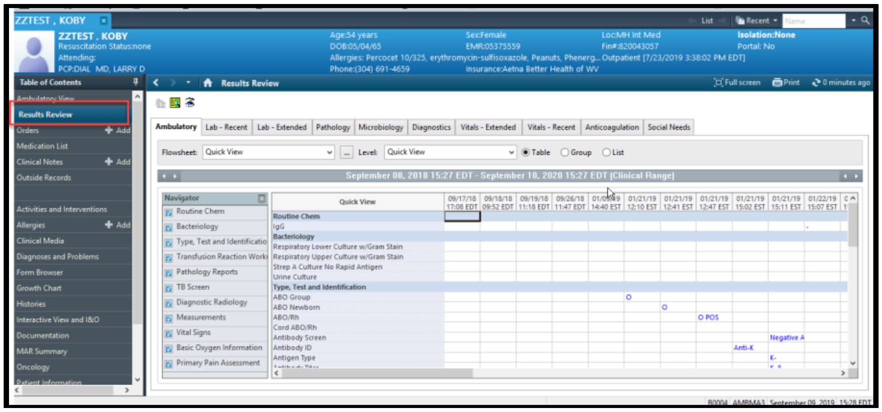
Step 5

- Clinical Range gray bar opens with the changes selected in the Search Criteria.



esults Overview

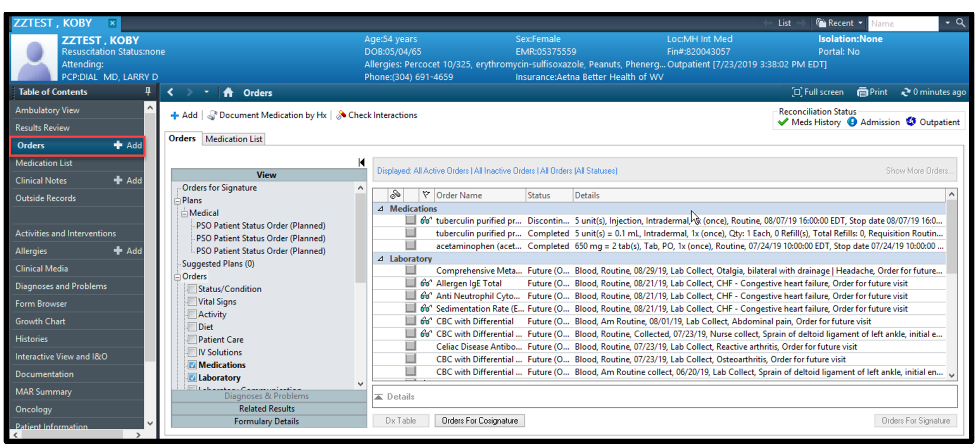
The **Results Review** page displays Results, New Results, Microbiology, Clinical Assessments, and Vital Signs. Results followed by an asterisk* denotes there is a comment. Those followed by a "**c**" means the result was corrected.



- While in Results Review, SELECT the type of results tab you wish to view (i.e. Labs – Recent, Pathology, Microbiology, etc.)
- Lab results will display in various colors:
  - **Red=Critical / Positive**
  - **Orange=High**
  - **Blue=Low**
  - **Brown=Abnormal**
  - **Purple=New**
  - **Black is the Default.**

Orders Overview

The **Orders tab** on the Table of Content (TOC) is used to view, add, cancel, modify, and work with various types of orders. Both medication orders and non-medication orders can be displayed and placed.

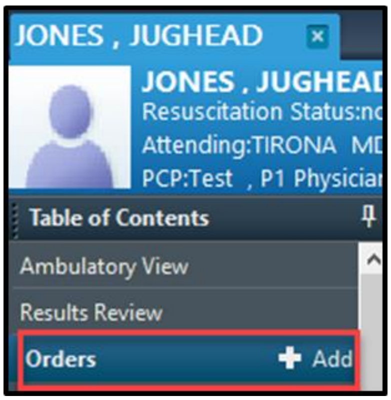


Placing Orders

Depending on your position you may have the ability to enter orders so that a task can be created. There may be occasions that an order for treatment will need to be placed so that a task can be completed due to a protocol.

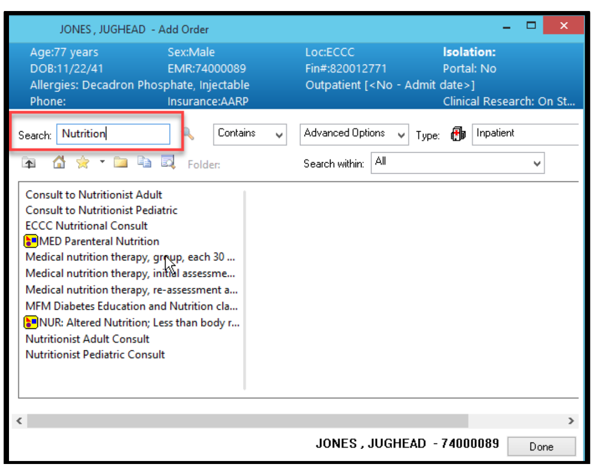
Step 1

- Select **Orders** on the Menu bar. The orders page opens, and all active orders are visible.
- Click the blue **+ Add.**



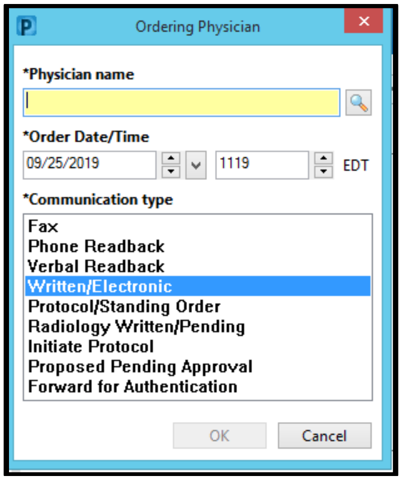
Step 2

- Enter the **order** that you would like to add (i.e. "Nutrition").
- Select which Order that you want (i.e. Consult to Nutritionist Adult).
- Click **Done.**



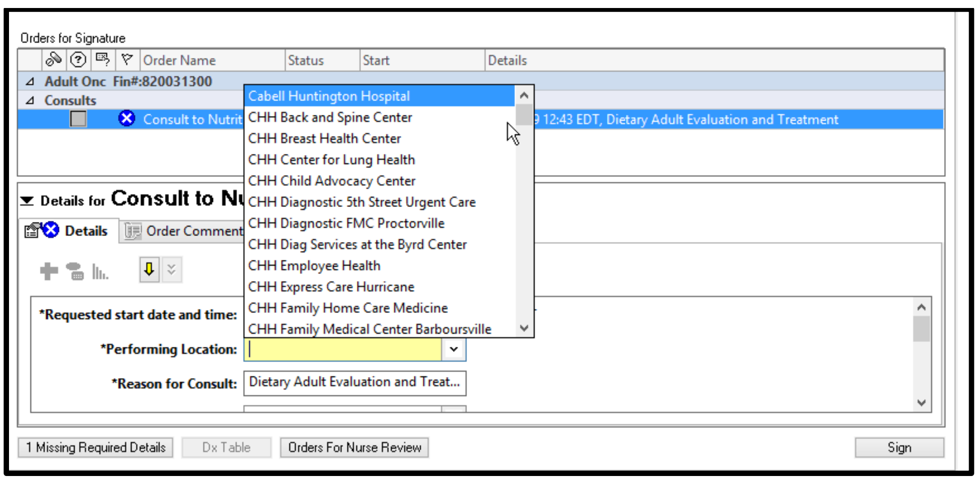
Step 3

- Window opens to enter provider and communication mode.
- When you enter the provider information, you will be able to click the OK button.



Step 4

- Complete any additional information in the order.
- Click **Sign.**

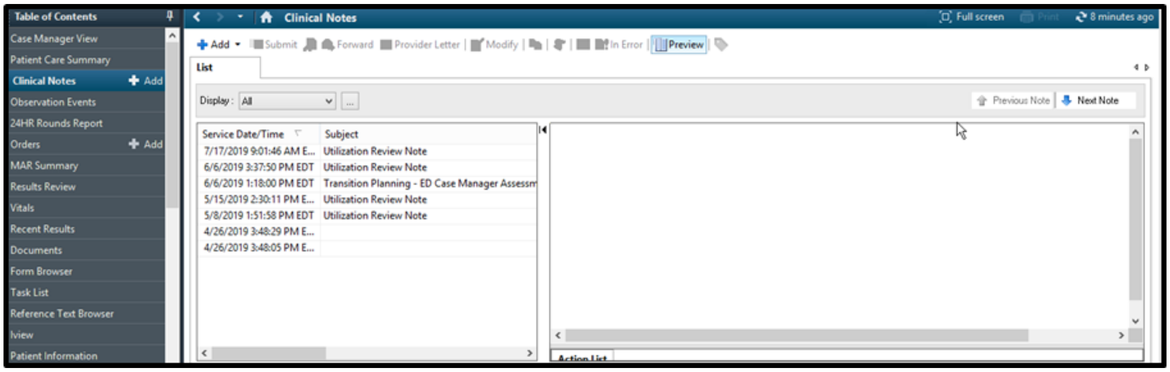


Clinical Notes Overview

Features of the Clinical Notes view include the following items:

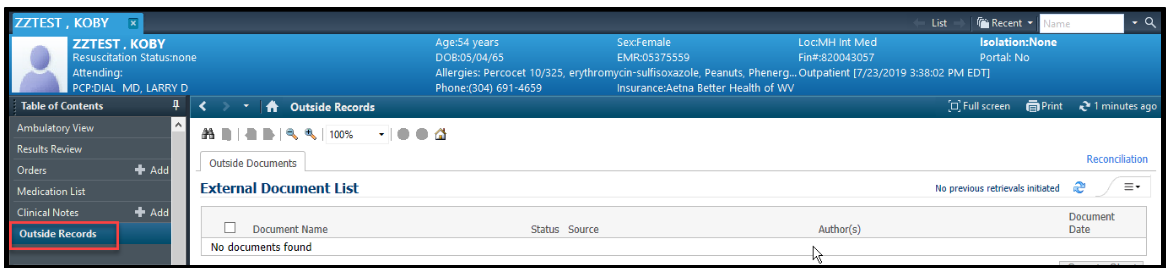
- Immediate availability of saved information.
- Allows the sorting of documents by date, type, author, status, or encounter.
- Accurate capture of document edits and addenda. The original document remains preserved with an unlimited number of corrections and emendations attached to it.
- Visual indicators in both icon and alphanumeric form alert caregivers that documentation for clinical results has been entered into the system.
- Sites can set user privileges to limit access to documents of a certain status or stage of completion.
- Electronic storage and organization of documents reduces the need for paper

reports and filing systems while providing immediate access to historical data, even from remote sites.



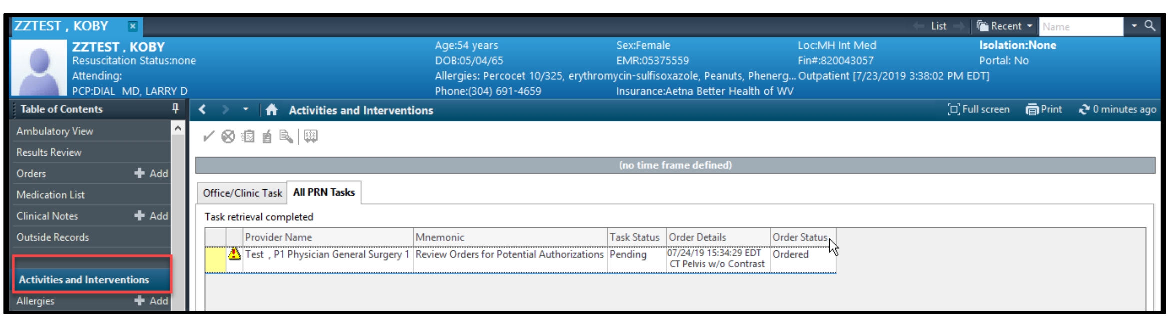
Outside Records

This view provides you with the patient's CommonWell status or the status of the sources contributing patient data for the CommonWell Person Record. You are able to view any outside documents that exist from Cerner Resonance.



Activities and Interventions

Use Activities and Interventions to identify the tasks clinicians need to perform, to facilitate access to information needed to perform those tasks, and to help caregivers document those tasks.

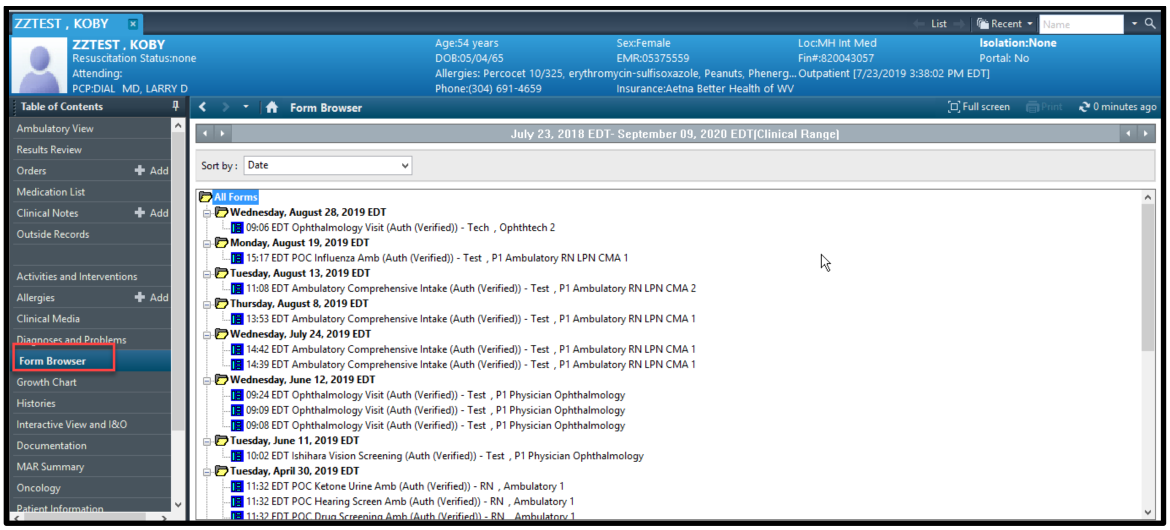


Form Browser Overview

Use Form Browser for a convenient way to view the complete details of any charting that has been completed using PowerForms. The user can see the charted information in its entirety and is better able to view related items.

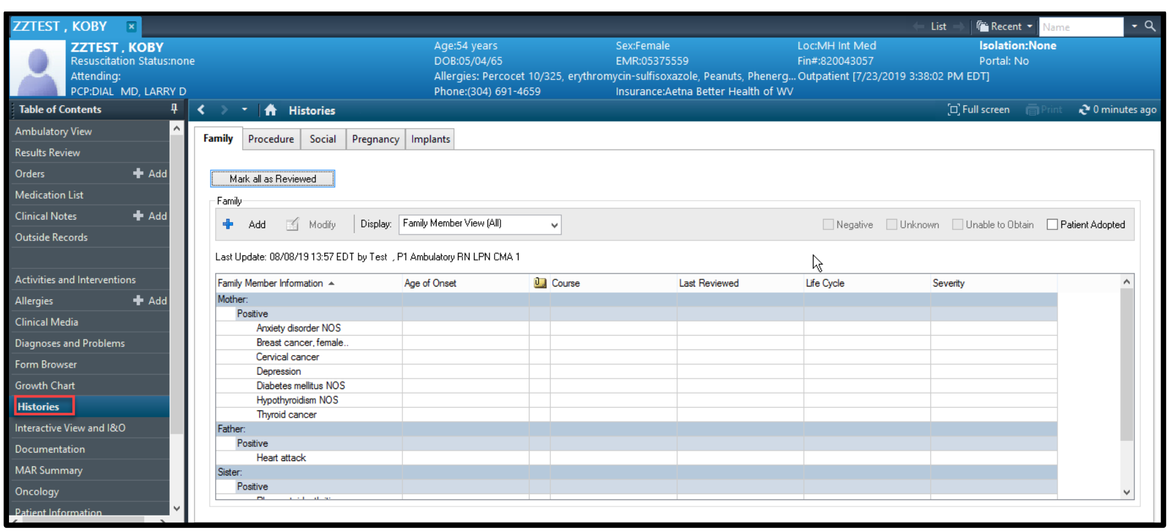
The Form Browser window displays a directory tree that lists all the completed forms for the selected patient. Open a form to view the information in the same format used to capture it.

- An icon is displayed to the left of an occurrence. A red icon indicates a required field was not completed, and a blue icon indicates that required fields are completed.
- A user can select the way they want the forms to be displayed on the tree. Options include by Form, by Date, by Status, by Encounter - Date, and by Encounter - Form.



Histories

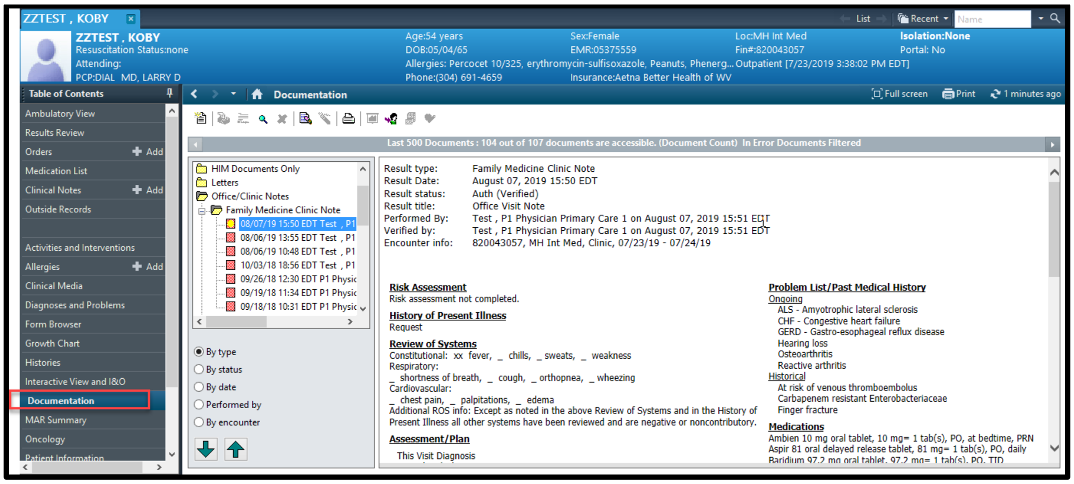
Allows you to review and document Family History, Procedure History, Social History, Pregnancy History, and Implant History.



Documentation Overview

When reviewing notes in Document Viewing, you can view the notes in the viewer pane – preliminary and final reports will display.

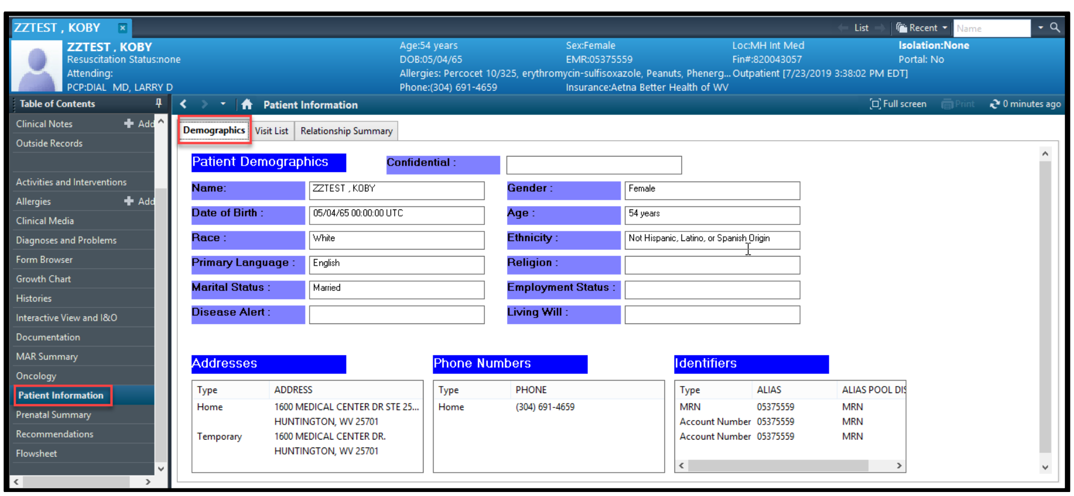
- From Document Viewing, you can also forward notes. Select the document you would like to forward.
- Notes that are still preliminary can be modified.



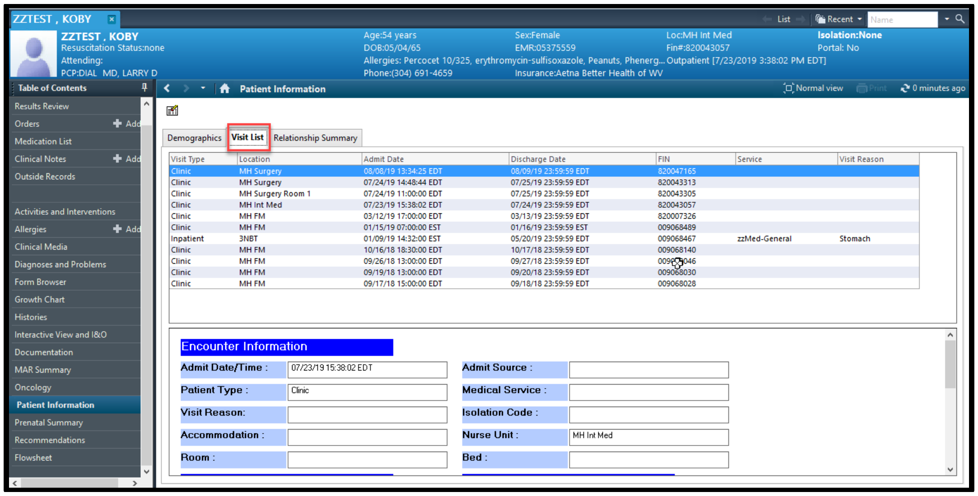
Patient Information Overview

The Patient Information component consists of three sub-tabs:

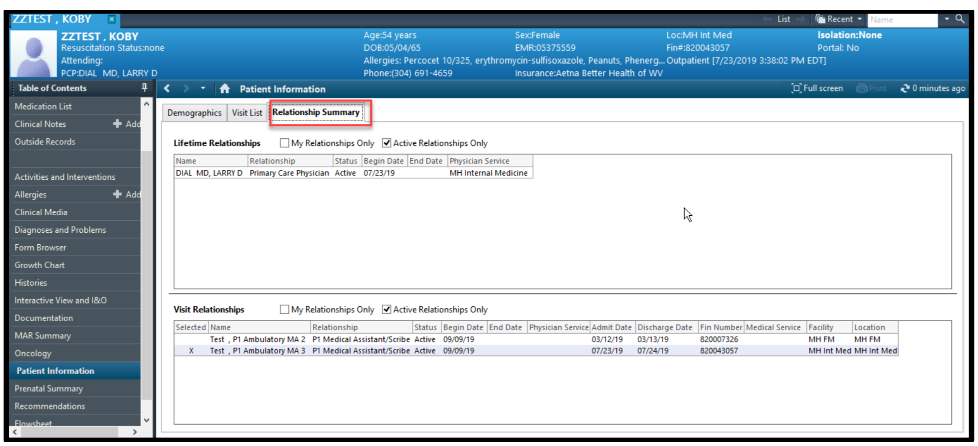
- Patient Demographics
  - Use the Patient Demographics tab in the Patient Information view the same way that you would a paper chart's face sheet. It displays general information regarding the selected patient. This is a read-only screen.



- Visit List
  - The Visit List tab displays a patient visit summary to help you outline past admissions. The **top** section of this tab displays a list of the patient's visits including the admission and discharge date, facility, location, medical service, and visit type and reason. The highlighted visit corresponds to the visit details listed in the lower section of this tab. If you double click on a previous visit, PowerChart will open the chart from that visit.



- Relationship Summary
  - Use Relationship Summary tab to display a patient's relationships with healthcare providers known to the system.
  - Separate lists are provided for lifetime and visit-specific relationships. You can filter the lists to display only your relationships or current active relationships. The default view displays all relationships.



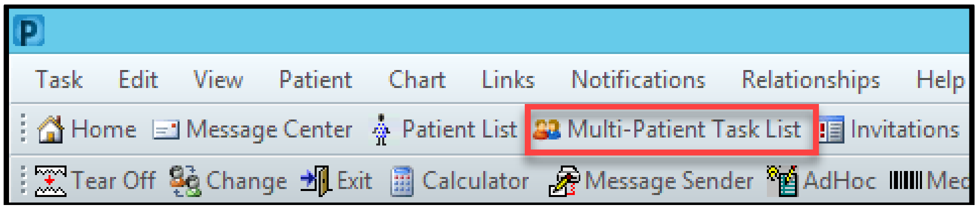
Multi-Patient Task List

Setting up Multi-Patient Task List (MPTL)

Multi-Patient Task List allows you to view and manage **tasks** (**patient** orders) for multiple **patients** in a specified location. Setting up the **Multi-Patient Task List** is a one-time set up. Once it is set up it will remain set.

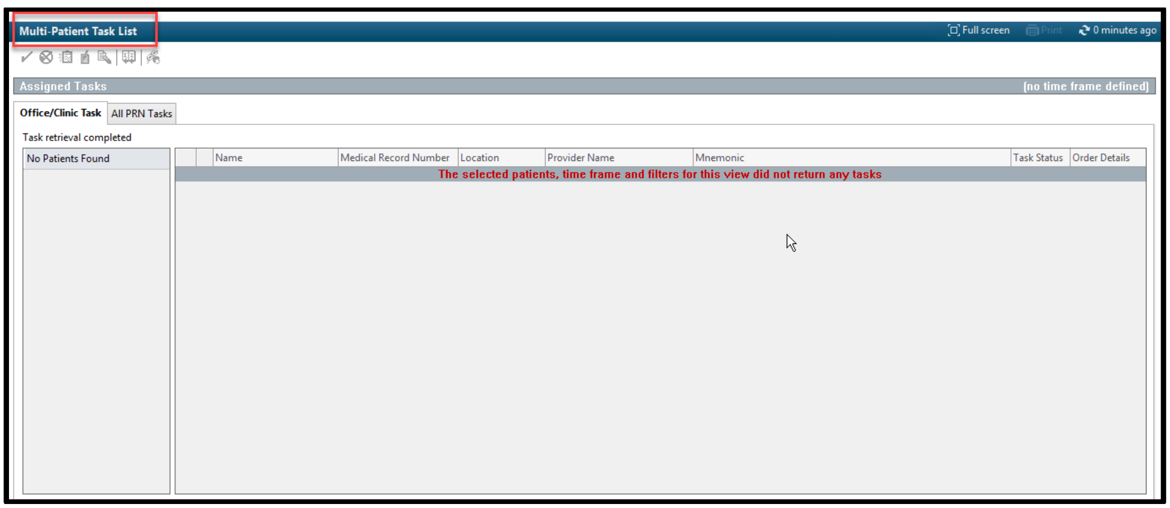
Step 1

- Click on the **Multi-Patient Task List** on the Toolbar icon.



Step 2

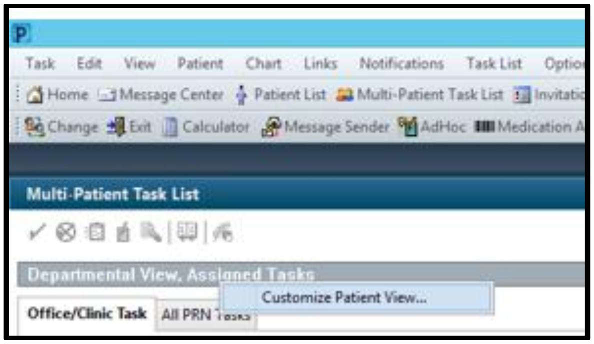
- The Multi-Patient Task List window opens.



Step 3

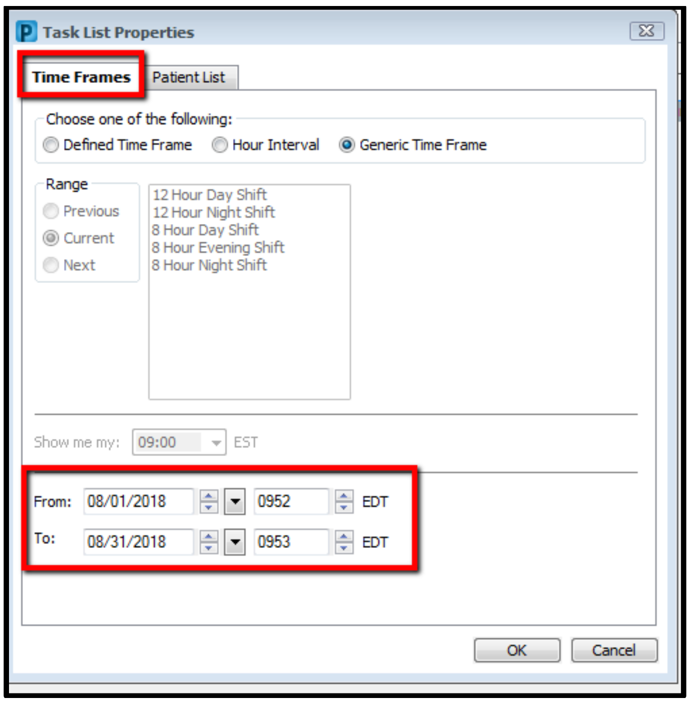
Customizing your view:

- Right click on the grey bar over assigned tasks then select Customize Patient View.



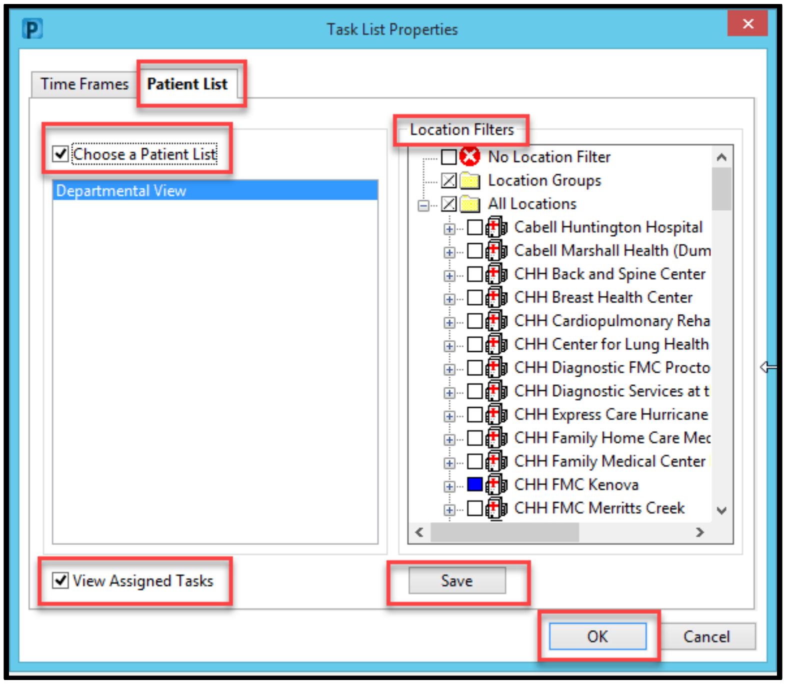
Step 4

- The Task List Properties window will open.
- There is a Time Frames tab that can be adjusted to meet specific time frames as needed.



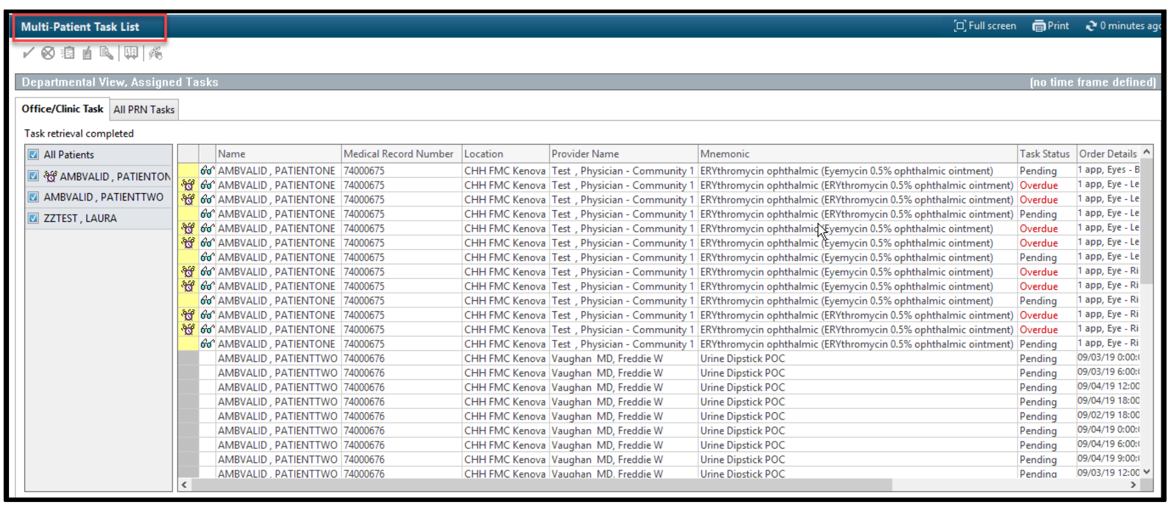
Step 5

- In the Patient List tab **CLICK** the Choose a Patient List check box and select Departmental View.
- Also make sure **View Assigned Tasks** box is checked.
- Click **Save.**
- Click **OK.**



Step 6

- Now when you go to your Multi-Patient Task list: you will see outstanding tasks for all patients for your location.

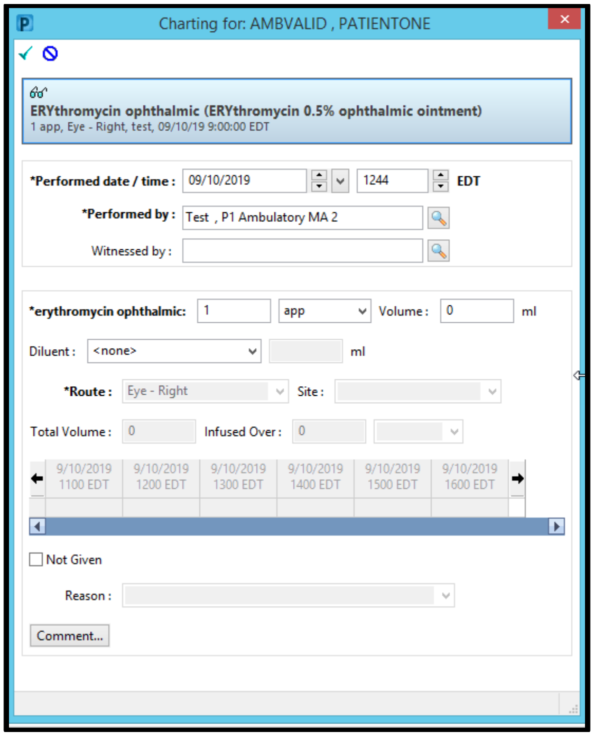


Documenting Completion of Tasks

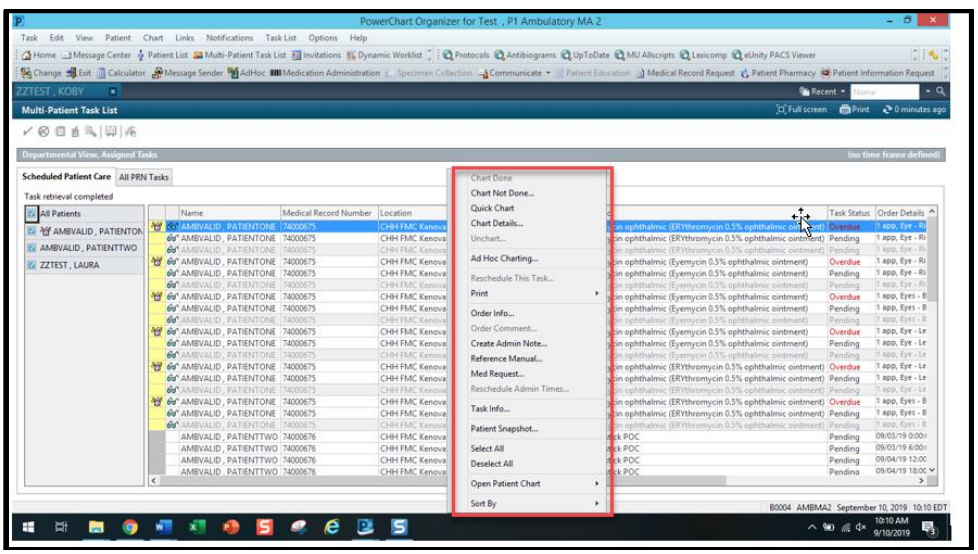
There are Two ways that you can document the completion of a task.

Step 1

- 1. To Document whether the Task was Completed or Not Completed, you can **Double Click on the Task.**
- The Task opens for you to complete the Documentation

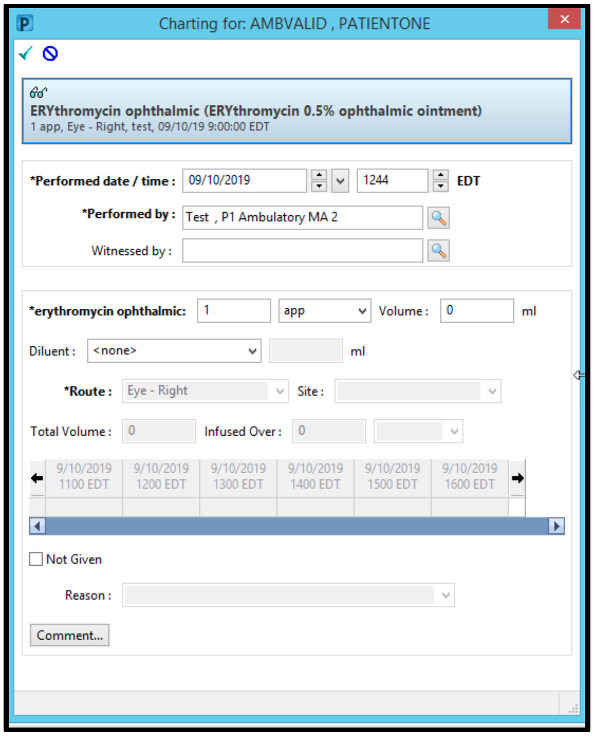


- 2. To Document whether the Task was Completed or Not Completed, you can **Right Click** and Click Chart Details or **Chart Not Done** (if you are not going to complete the Task).



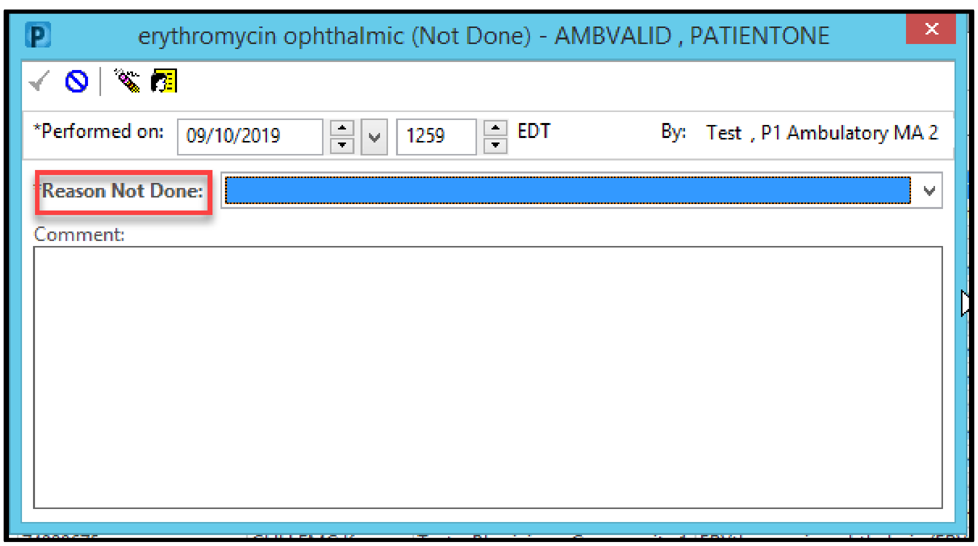
Step 2

- The Task opens for you to complete the Documentation



Step 3

- The Task opens for you to Chart Reason Not Done



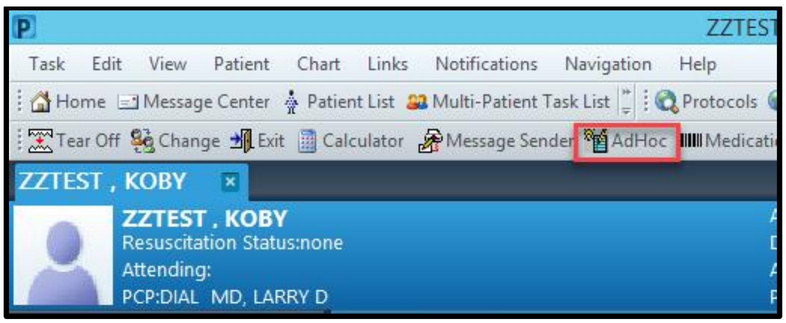
Ad Hoc Charting

These are the forms that display to chart patient information. Once a form is signed, the information is committed to the chart, and the form is listed in the **Form Browser** and can be reviewed from the patient's chart. In addition to the **Form Browser**, data entered in forms can display on the flowsheets**, MPages**, and any of the shared components such as Problem List, Allergies, and Medication Profile. In addition, forms can be accessed on an as-needed basis from the **Ad Hoc Charting** window.

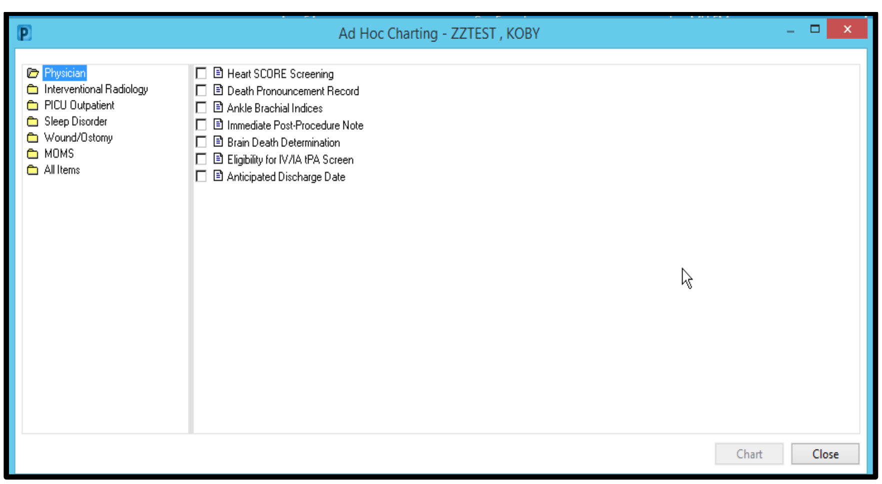
Ad Hoc Charting

Ad Hoc Charting allows a user to open any form, any time. Essentially, it is a file cabinet of blank forms. The Ad Hoc charting window contains two panes. The left side displays folders that group similar forms. The right side contains the forms grouped under the selected folder.

- The window can be opened from either the **Organizer** or the **Chart** by clicking the **AdHoc** on the toolbar.
- Click on the **AdHoc** icon.



- The Ad Hoc Charting window. (Ad hoc charting is not available to you unless you have privileges to perform ad hoc charting.)
- In the Ad Hoc Charting window, the available charting categories are organized in a tree.
- Double-click the category and, if necessary, the sub-category until a list of the types of charting available is displayed.
- Select the tasks you want to chart and click **Chart**. (Alternatively, you can right-click a task and click **Chart** or simply double-click the task.)

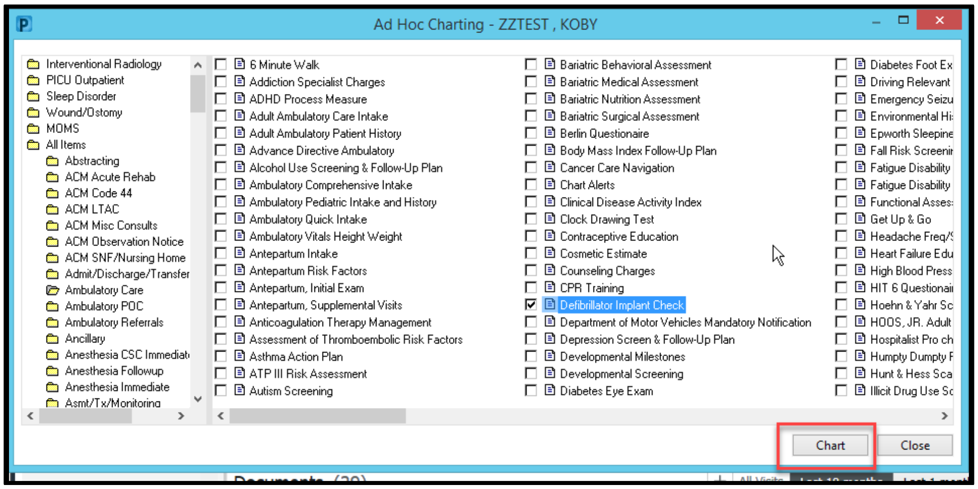


Complete a PowerForm

Although each **PowerForm** is going to vary in its requirements, a general guide to completing a form is as follows:

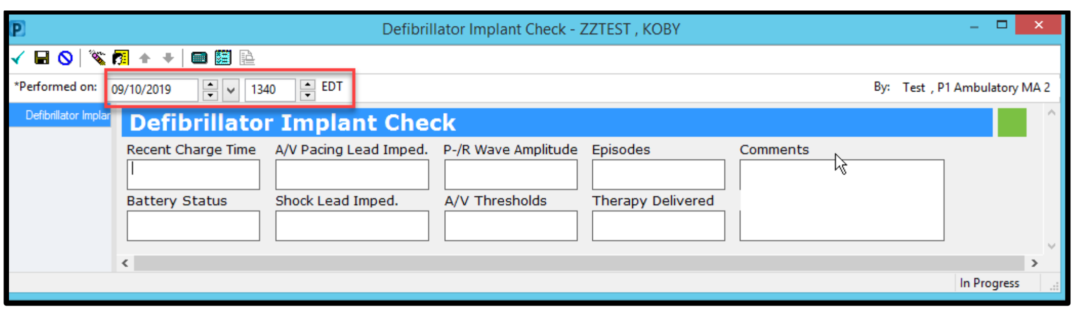
Step 1

- Select the appropriate from the **AdHoc Charting** list, and click **Chart**, the form opens.



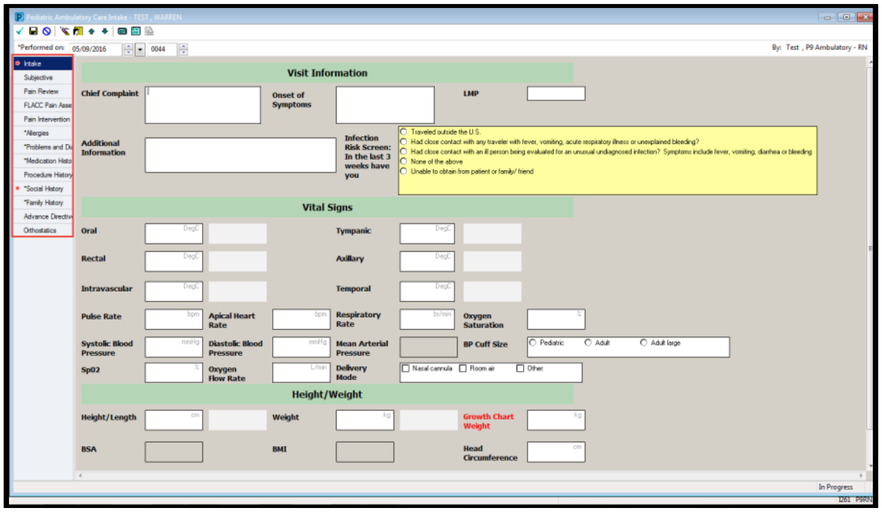
Step 2

- To change date and/or time information, click the **UP** or **DOWN** arrow to make the appropriate changes.



Step 3

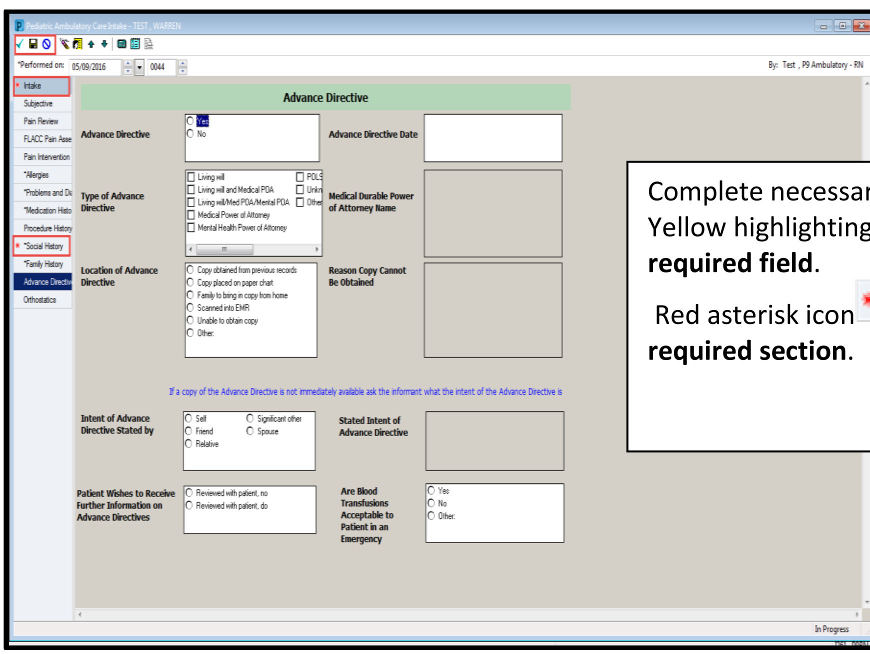
- Click on **each section** of the form.



NOTE: Sections with gray background are available and have been accessed, but are not currently open. Section with dark background and white letters is the section that is currently open. Sections with light background are available but have not been accessed.

Step 4

- Complete necessary fields.
  - Yellow highlighting indicates a **required field.**
  - Click green check icon .
  - You have to ability to save a form and return to it at a later time. To save, click .



Complete necessary fields. Yellow highlighting indicates a **required field**.

Red asterisk icon indicates a **required section**.

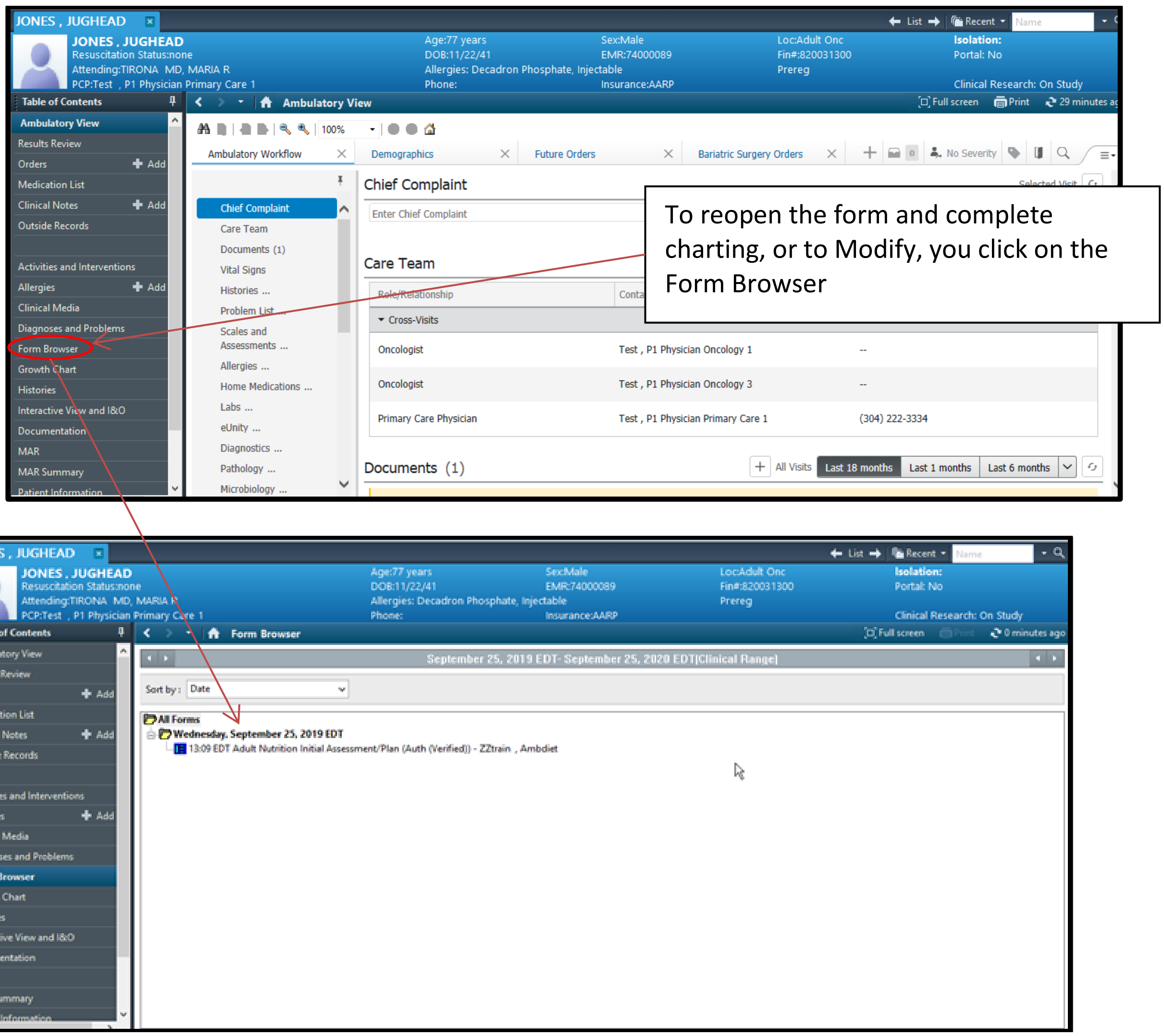
Reviewing and Modifying PowerForms

PowerForm charting can be viewed, modified, or In Error in three places: Form Browser, Documentation, and Clinical Notes.

View via Form Browser

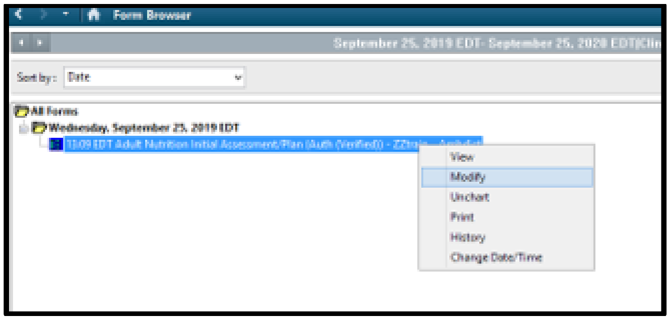
Step 1

- Click the **Form Browser** tab on the Table of Contents/Menu.
- Select **Adult Nutritionist Initial Assessment/Plan** or the PowerForm that you Saved or want to Modify.



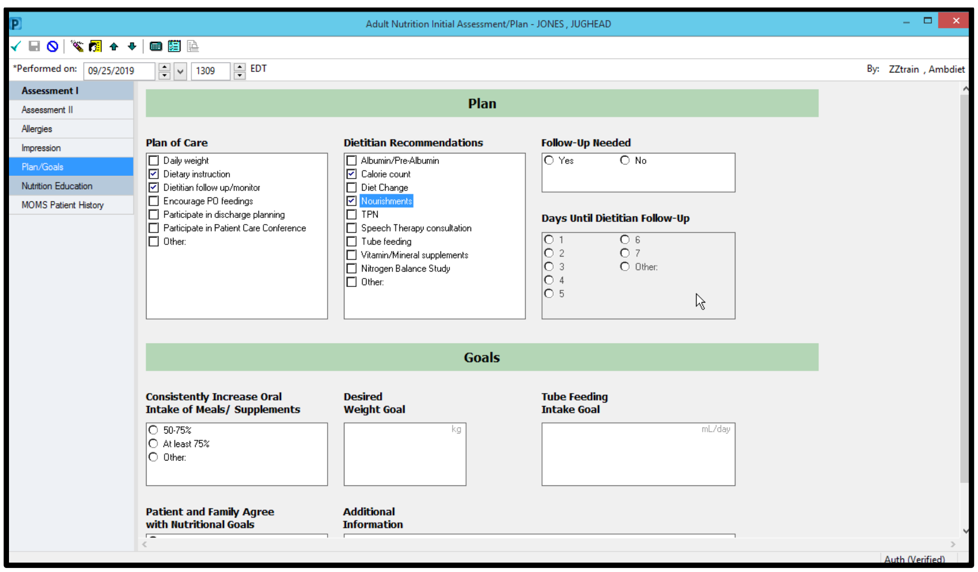
Step 2

- Right-click and select **Modify.**



Step 3

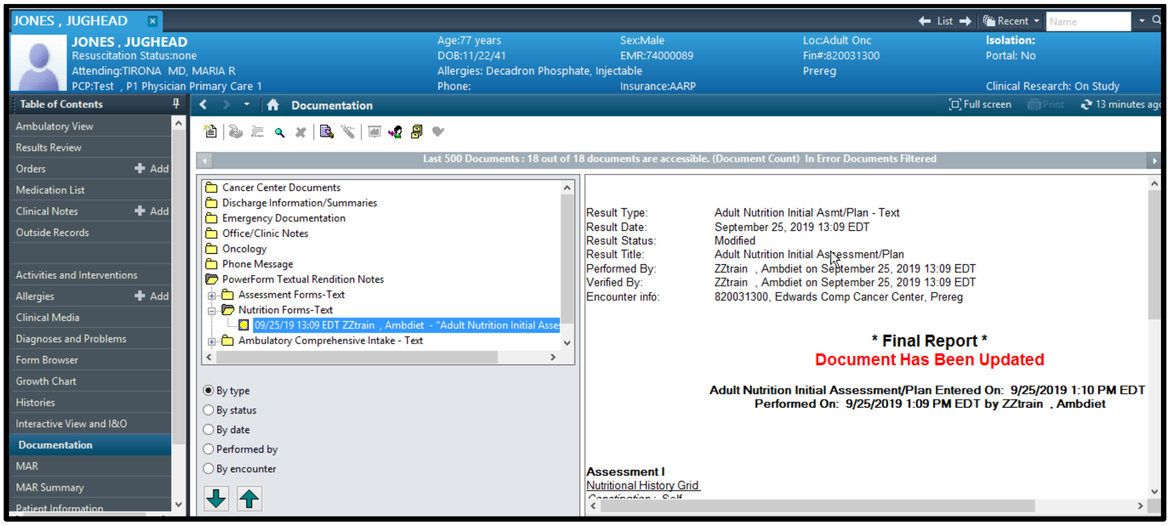
- Click the **Nutrition Education** section
- Change or enter information in the Nutrition Education boxes (checked Dietary instruction and Calorie count, see below)
- Click green check icon



View via Documentation

Step 1

- Click the **Documentation** tab on the Table of Contents/Menu.
- Double Click on PowerForm Textual Rendition.
- Click on **+** next to Nutrition Forms.
- Double Click on **Adult Nutrition Initial Assessment/Plan.**



View via Clinical Notes

- Click on **Clinical Notes** on the Table of Contents/Menu.
- **Single-click** on Adult Nutrition Initial Assessment/Plan Note and notice that “Document Has Been Updated” appears in red as well as it shows the Action List (i.e. perform, sign, verify, and modify).