

## Clinical and Clerical Staff Personalization for Clinical and Clerical Staff

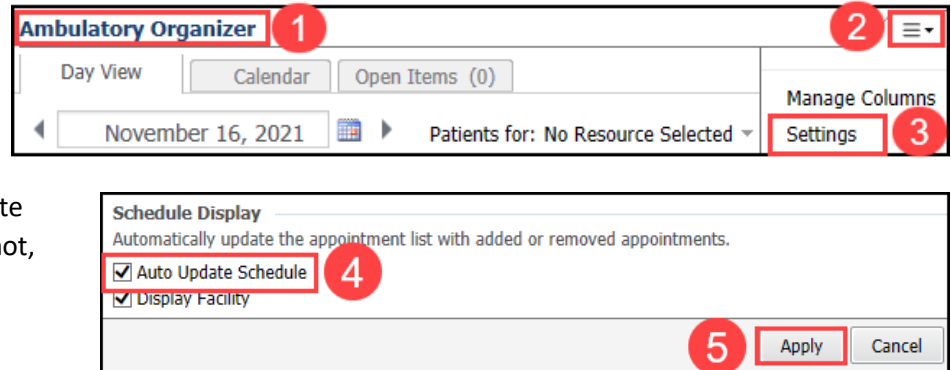
### Cerner Ambulatory Education

**Summary:** Instructions are below to help customize Cerner PowerChart Ambulatory and Revenue Cycle to help optimize user workflow.

#### Ambulatory Organizer

- Auto Update:**

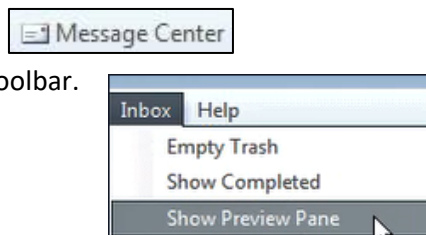
1. Open the Ambulatory Organizer.
2. Click the drop-down arrow next to the on the right side of the screen.
3. Select Settings.
4. Confirm that "Auto Update Schedule" is checked. If not, check the box.
5. Click Apply.



#### Message Center

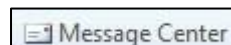
- Setting the Preview Pane:**

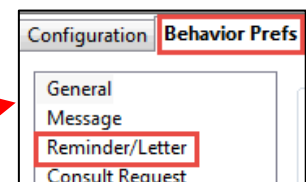
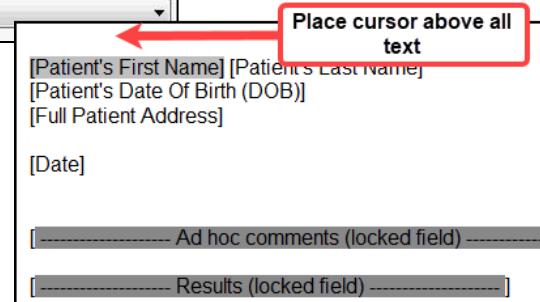
1. Click on Message Center.
2. Click on Inbox on the top toolbar.
3. Select show Preview Pane.



- Setting Letterhead Logo:**

1. Click on Message Center.
2. Click on Inbox. Manage Preferences.
3. Click on Behavior Pref Tab and click on Reminder/Letter.
4. Click the Header/Footer button.
5. Choose the first Template.
6. Click on the gray name text and move the cursor above all text using the left arrow key on the keyboard and the enter key to add space.
7. Click Import Graphic.
8. Navigate to the M: Drive.
9. Open the folder: DocuVault.

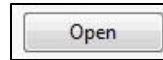


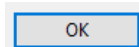
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10. Find and click on the folder: Ambulatory Services.
11. Find and click on the folder: !!!AmbulatoryLogos
12. Select the Appropriate Logo and click Open.
13. Click Apply.

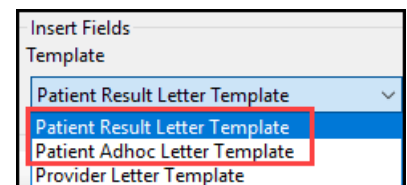


14. Repeat for each template:
  - Patient Result Letter
  - Patient AdHoc Letter
  - Provider Letter
15. Click OK when done.



#### • Setting Signature

1. Click on Message Center.
2. Click Inbox in the top toolbar.
3. Click Manage Preferences.
4. Click on the Behavior Prefs Tab and click on Reminder/Letter.
5. Click on Header/Footer.
6. Select the Template. **The following steps should be done for both the Patient Result Letter Template and Patient Adhoc Letter Template.**
7. Highlight the signature area between Sincerely and CC Providers.



Let me know if you have any questions or concerns.

Sincerely,

[Admitting Physician's First Name] [Attending Physician's Last Name][Attending Physician's Credentials]

CC Providers: [CC Letter Providers]

8. Type in your practice name and main practice phone number within this area.
9. Click OK.
10. Repeat for all Patient letter templates. **DO NOT DELETE** any information on the Provider Letter Template.

Let me know if you have any questions or concerns.

Sincerely,

(Your practice name here)  
(Your main practice phone number here)

CC Providers: [CC Letter Providers]

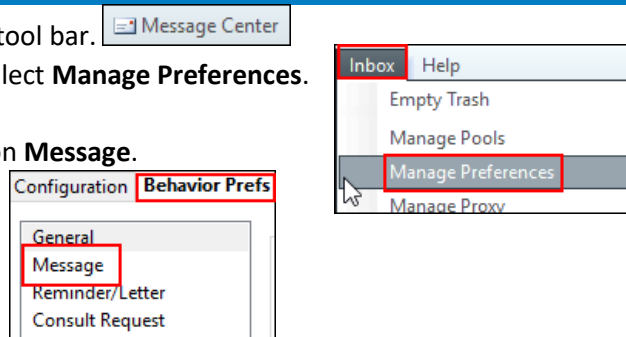
OK

## Clinical and Clerical Staff Personalization for Clinical and Clerical Staff

Cerner Ambulatory Education

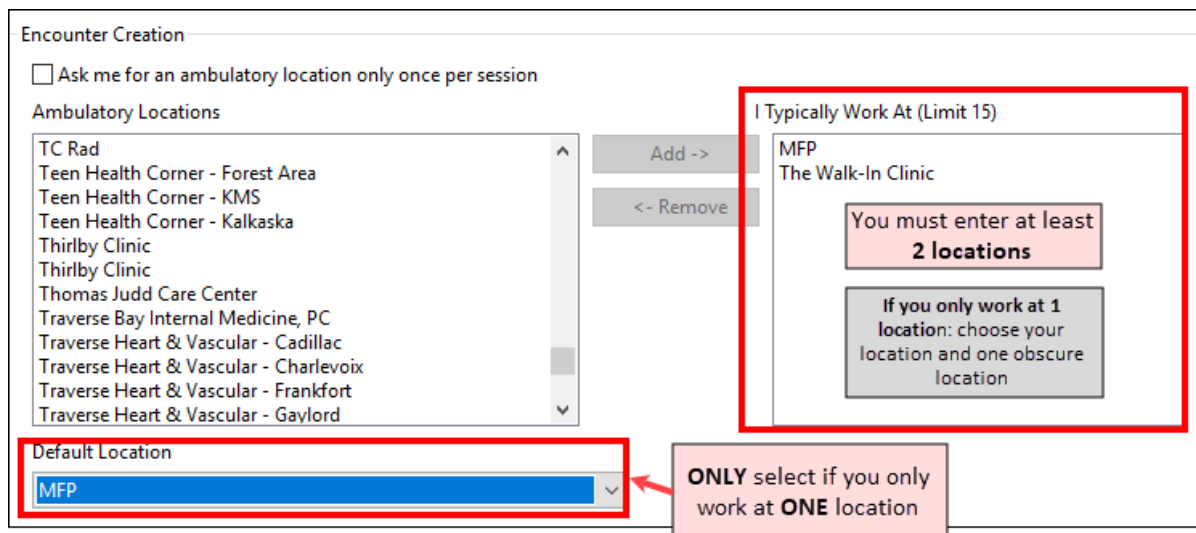
### Setting InBetween Visit Preferences

1. Click on **Message Center** on the top tool bar.
2. Click on **Inbox** on top task bar and select **Manage Preferences**.
3. Under the **Behavior Prefs** tab, click on **Message**.



4. Make sure the box under Encounter Creation is **UNCHECKED**.
5. Select your work locations from the "Ambulatory Locations" list on the left, click **Add** to add them to the list "I Typically Work At."

  - a. You must **enter at least two locations**.
  - b. **If you only work at one location:** choose your correct location plus one obscure location.
  - c. **Only if you work at one location:** select the Default Location of your correct location where you work.

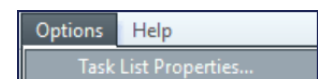
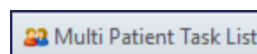


6. Click **OK**.

### Task Lists

#### Multi Patient Task List

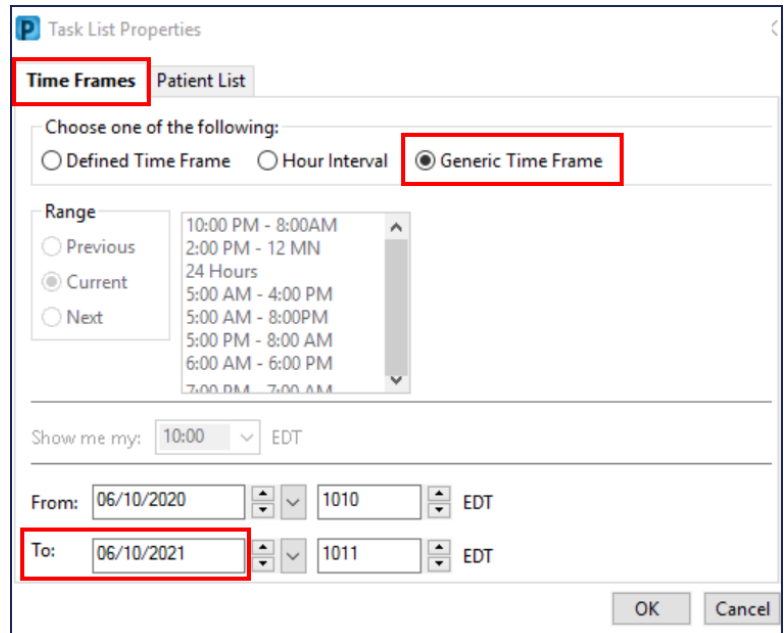
1. Click on Multi Patient Task List in the top tool bar.
2. Select **Options** on the top toolbar, **Task List Properties** then follow the steps below.



## Clinical and Clerical Staff Personalization for Clinical and Clerical Staff

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- Click on the Time Frames Tab.
- Select Generic Time frame.
- Change the time frame to a one year interval (ex: From: today's date, To: 1 year from today).



**Task List Properties**

**Time Frames** Patient List

Choose one of the following:

☐ Defined Time Frame ☐ Hour Interval ☒ Generic Time Frame

Range

☐ Previous ☒ Current ☐ Next

10:00 PM - 8:00AM  
2:00 PM - 12 MN  
24 Hours  
5:00 AM - 4:00 PM  
5:00 AM - 8:00PM  
5:00 PM - 8:00 AM  
6:00 AM - 6:00 PM  
7:00 PM - 7:00 AM

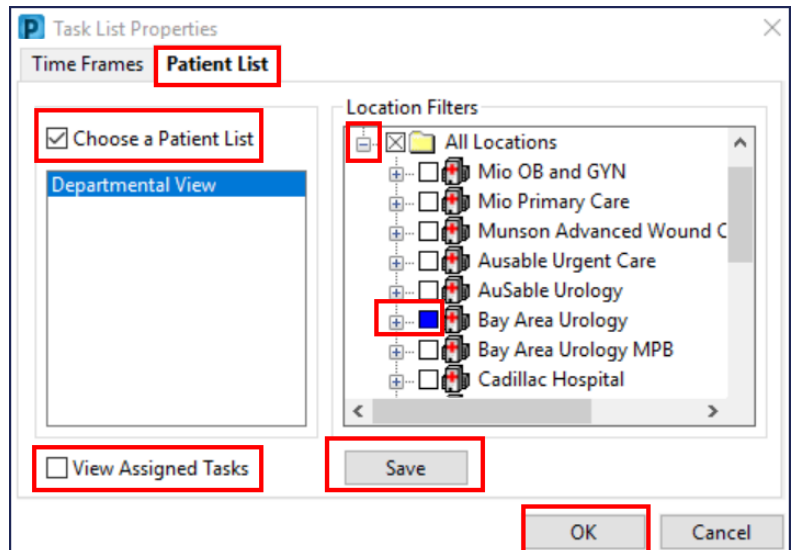
Show me my: 10:00 EDT

From: 06/10/2020 1010 EDT

To: 06/10/2021 1011 EDT

OK Cancel

- Click on the Patient List tab, check the box "Choose a Patient List," and uncheck the box "View Assigned Tasks."
- Under Location filters: click the + next to All Locations then select the facility or facilities that you will be completing tasks for.
- Click Save.
- Click OK.



**Task List Properties**

**Time Frames** **Patient List**

☒ Choose a Patient List

Departmental View

☐ View Assigned Tasks

Save

Location Filters

☒ All Locations

☐ Mio OB and GYN

☐ Mio Primary Care

☐ Munson Advanced Wound C

☐ Ausable Urgent Care

☐ AuSable Urology

☒ Bay Area Urology

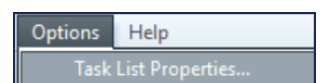
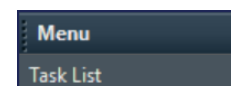
☐ Bay Area Urology MPB

☐ Cadillac Hospital

OK Cancel

#### • Single Patient Task List

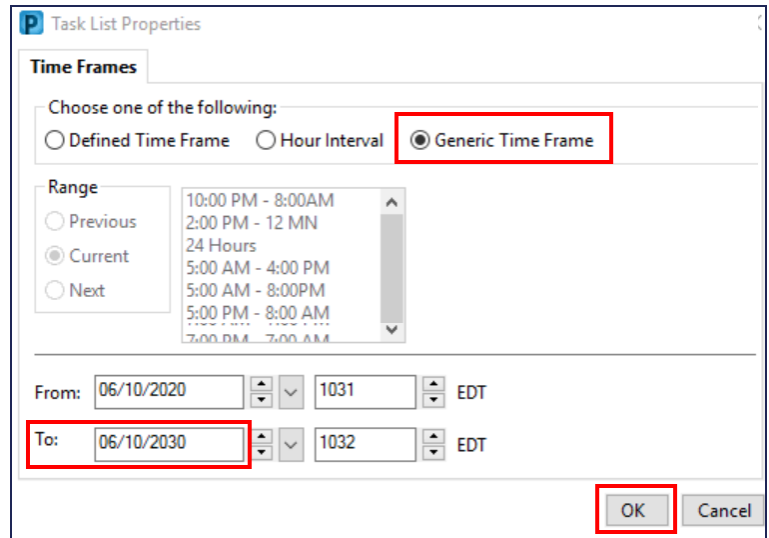
- Open a test patient chart (Use patient: Zzzrevcycle, Amb MR # M1032351).
- Click on Task List within the dark Table of Contents Menu.
- Click on Options on top toolbar then click on Task List Properties.



## Clinical and Clerical Staff Personalization for Clinical and Clerical Staff

### Cerner Ambulatory Education

4. Select Generic Time Frame.
5. Change the time frame to a ten year interval (ex: From: today's date, To: 10 years from today).
6. Click OK.

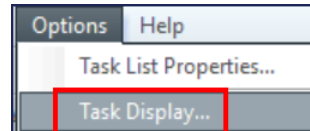


The 'Task List Properties' dialog box is shown. Under the 'Time Frames' tab, the 'Generic Time Frame' radio button is selected and highlighted with a red box. Below this, the 'Range' section shows 'Current' selected. The 'From' date is 06/10/2020 and the 'To' date is 06/10/2030, both highlighted with red boxes. The 'OK' button at the bottom right is also highlighted with a red box.

**Note:** Single Patient Task List is not set up by location. It will display all tasks on the patient.

#### Task Display

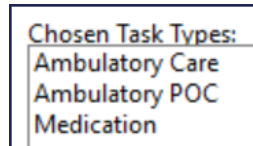
7. Click on Options and select Task Display.



The 'Options' menu is shown with 'Task Display...' highlighted by a red box.

8. Ensure the following are selected for **Chosen Task Types**:

- Ambulatory Care
- Ambulatory POC
- Medication

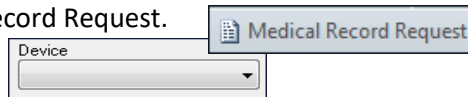


The 'Chosen Task Types' list is shown with the following items selected: Ambulatory Care, Ambulatory POC, and Medication.

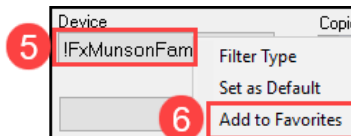
9. Click OK.

#### Fax Favorites

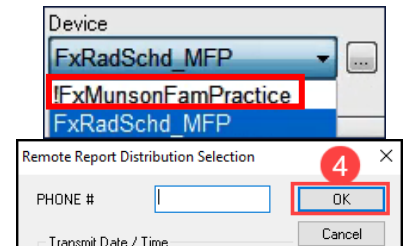
1. Click on Medical Record Request.
2. Click on Device.
3. Find the device: !Fxclicname. (Select the one with your primary clinic name).
4. A pop up with a PHONE # space appears. Click **OK**.
5. Right click on the Device name.
6. Select Add to Favorites.
7. Repeat the above steps for the other clinic assigned favorite with the device name: FXRadSchd\_clinicabbreviation.
8. When all Device Favorites are added, right click on Device name.
9. Hover over Filter Type and select Favorites.
10. The favorites selected will now display.
11. When selecting a device for faxing: choose FxRadSchd for Radiology Scheduling and !Fx\_\_ to free text the fax number.



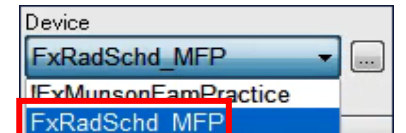
The 'Medical Record Request' dialog box is shown with the 'Device' dropdown menu open.



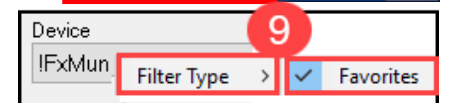
The context menu for the device '!FxmunsFam' is shown. The 'Add to Favorites' option is highlighted with a red box and a red circle with the number 6.



The 'Remote Report Distribution Selection' dialog box is shown. The 'OK' button is highlighted with a red box and a red circle with the number 4.



The 'Device' dropdown menu is shown with the following items: FxRadSchd\_MFP, !FxmunsFamPractice, and FxRadSchd\_MFP. The second item, !FxmunsFamPractice, is highlighted with a red box.



The 'Device' dropdown menu is shown with the 'Filter Type' button highlighted by a red box and a red circle with the number 9. The 'Favorites' option is also visible.

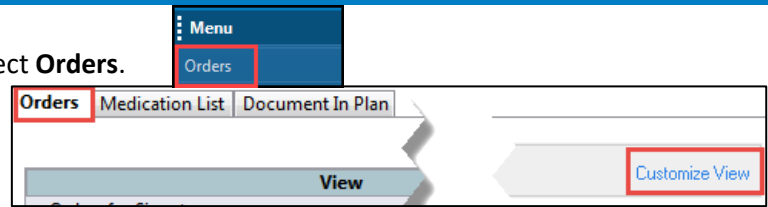
# Clinical and Clerical Staff Personalization for Clinical and Clerical Staff

## Cerner Ambulatory Education

### Orders and Medication List Settings

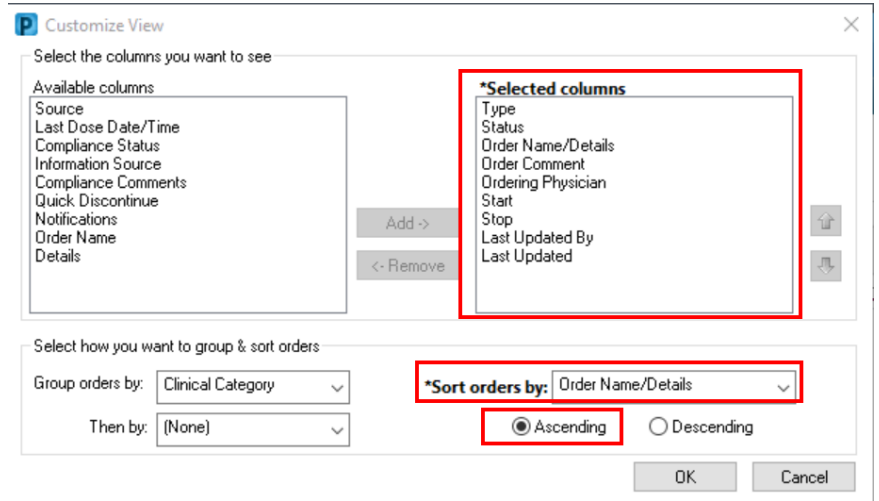
#### • Orders

1. Navigate to the Table of Contents Menu and select **Orders**.
2. Click **Customize View** on the right.

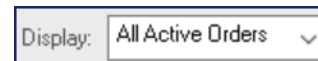


3. Add the following to the **\*Selected columns** on the right.

- a. Type
- b. Status
- c. Order Name/Details
- d. Order Comment
- e. Ordering Physician
- f. Start
- g. Stop
- h. Last Updated
- i. Last updated By



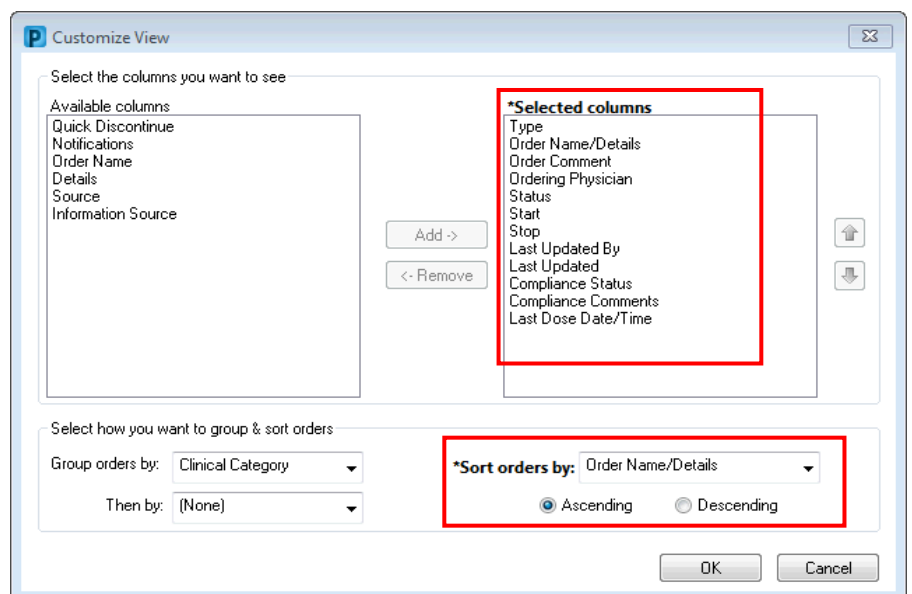
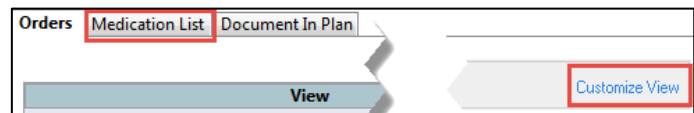
4. Select **Sort orders by: Order Name/Details** and select the **Ascending** radio button.
5. Click **OK**.
6. Click on the **Order Display** drop down, select **All Active Orders**.



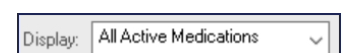
#### • Medication List

1. Click the **Medication List** tab. Click **Customize View**.
2. Add the following to the **\*Selected columns** on the right.

- j. Type
- k. Order Name/Details
- l. Order Comment
- m. Ordering Physician
- n. Status
- o. Start
- p. Stop
- q. Last Updated
- r. Last updated By
- s. Compliance Status
- t. Compliance Comments
- u. Last Dose Date/Time



3. Select **Sort orders by: Order Name/Details** and select **Ascending**.
4. Click **OK**.
5. Click the Medication List **Display** drop down and select **All Active Medications**.

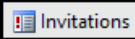


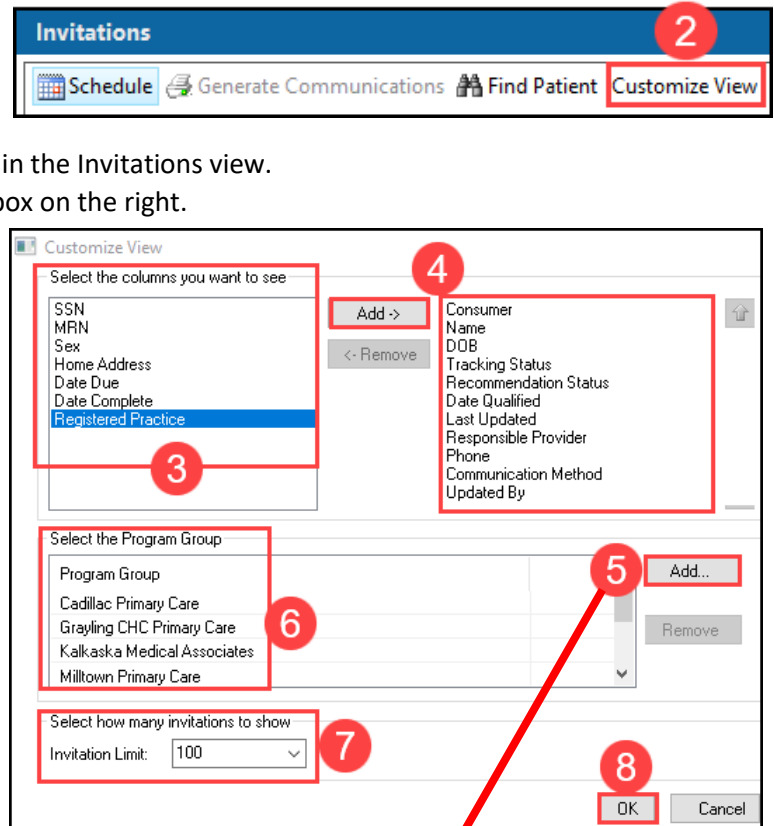
## Clinical and Clerical Staff Personalization for Clinical and Clerical Staff

### Cerner Ambulatory Education

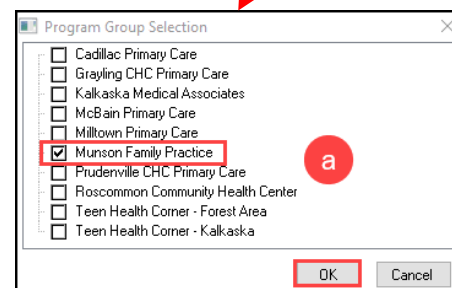
#### Invitations Preference Settings

##### Customize View:


1. Click **Invitations** on the toolbar. 
2. Click **Customize View**.
  - a. The Customize View dialog box opens.
3. From the left **Select the columns you want to see** box, select the columns you want displayed in the Invitations view.
4. Click **Add** to move the selected columns to the box on the right.
  - a. **Select the following columns:**
    - i. Consumer
    - ii. Name
    - iii. DOB
    - iv. Tracking Status
    - v. Recommendation Status
    - vi. Date Qualified
    - vii. Last Updated
    - viii. Responsible Provider
    - ix. Phone
    - x. Communication Method
    - xi. Updated By



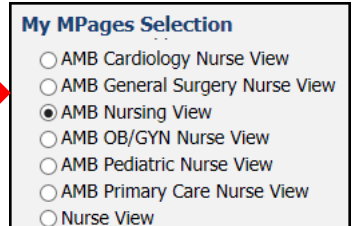
5. Select the **Program Group(s)** by clicking **Add**.
  - a. Select the desired location and click **OK**.
6. Programs are displayed in the Program Group list based on the selected locations.
7. Select a value for the **Invitation Limit**. This value determines how many patients are displayed before the More button becomes available and you must click it to move to the next group of patients.
8. Click **OK**.



#### MyExperience

1. All clinical staff may change their view using MyExperience as needed. (Ex: May switch your view from Primary Care Nurse to OB/GYN Nurse to view when working with OB population).
  - a. Click on MyExperience on the toolbar. 
  - b. Select the correct view.

- Cardiology MA's/NA's should set MyExperience to AMB Cardiology Nurse View.





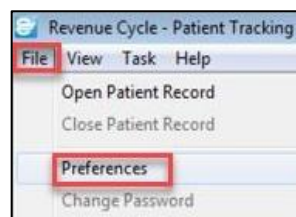
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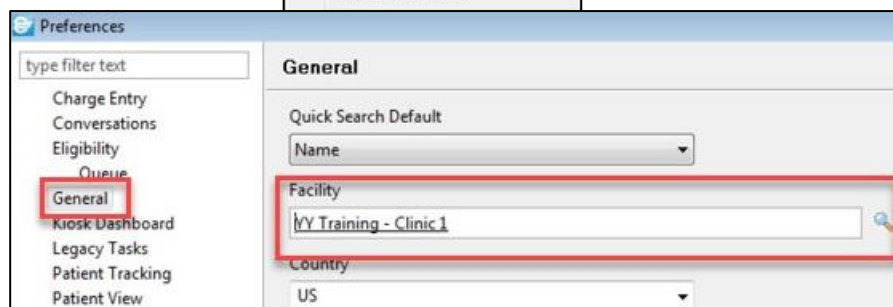
## Revenue Cycle

### • Setting Preferences

1. Click on **File** on the top toolbar. Select **Preferences**.



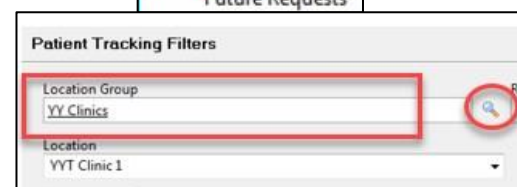
2. Click on **General** and enter your Facility using the magnifying glass to search.



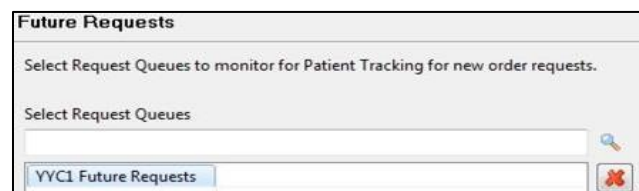
3. Click the arrow next to Patient Tracking on the menu, then click on filters.



4. Search for your location in the location group field and click on the magnifying glass, when location appears, double click and click Apply in the lower right hand corner.

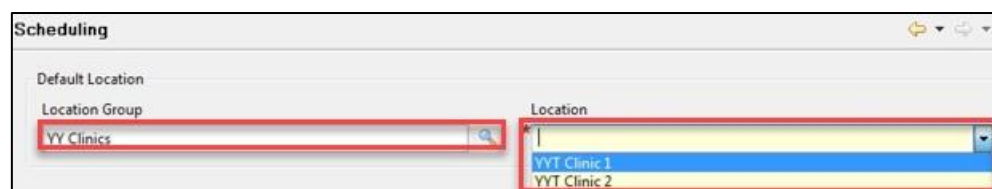


5. Under Patient Tracking click on **Future Requests**, find the location that you will monitor for Patient tracking for new order requests in the queues.

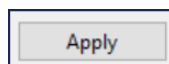


6. Next, Select **Scheduling** from the menu.

7. Set your default location group and location. These will be automatically selected in the Appointments view when scheduling a patient.



8. Click **Apply**.



9. Click on the arrow in front of Scheduling. Complete the following steps for **Appointment Requests**, **Future Appointments** and **Past Appointments**.

10. Click on Appointment Requests.

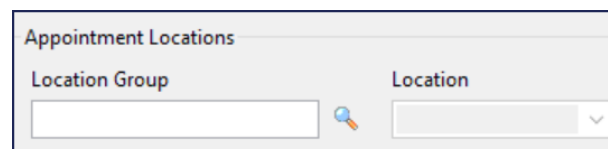






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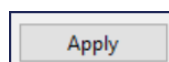
11. Search for your Location Group using the magnifying glass and select the Location from the drop down.



Appointment Locations

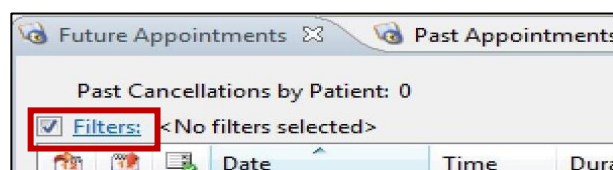
Location Group   Location  



12. Click **Apply**.



Apply






**NOTE:** There is a shortcut to the filters on the Future and Past Appointments tabs on the Appointments Patient Perspective.






Future Appointments  Past Appointments 

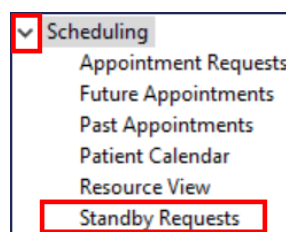
Past Cancellations by Patient: 0

☒ **Filters:** <No filters selected>

Date  Time  Duration 

9. Under Scheduling select **Standby Requests**.



 **Scheduling**

- Appointment Requests
- Future Appointments
- Past Appointments
- Patient Calendar
- Resource View
- Standby Requests**

10. Use the magnifying glass to search for and select the Standby Requests queue(s) for your location.

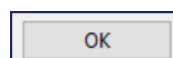


**Standby Requests**

Select Request Queues to monitor for Standby Appointment Requests.

Select Request Queues  

11. Finally, click OK to finish and save all Preferences.



OK