Ambulatory Behavioral Health Provider PowerChart Class Outline for Providers

Class Name: OPR – Ambulatory Behavioral Health Provider PowerChart Class
Audience: MHC Charlevoix Behavioral Health Boyne, MHC Charlevoix Behavioral Health Charlevoix, MHC MMC Behavioral Health Outpatient

Goals and Objectives

Goal: To give an overview of PowerChart functionality to new Behavioral Health Providers.

Objectives: In a single (4-hour) course, introduce PowerChart concepts that will prepare the provider to use the EHR to deliver effective patient care.

By the end of this course, participants will be able to:

1. Navigate PowerChart toolbar icons, patient search, and manual refresh.
2. Demonstrate understanding of the Ambulatory Organizer and how to check out patients from Group Therapy.
3. Utilize the Message Center for signing orders, reviewing results, and communicating via staff messages.
4. Demonstrate understanding of the AMB BH Workflow to complete the Outpatient medication reconciliation (if applicable) and create an office note.
5. Place orders and charges using the QOC page.
6. Navigate and complete Group Therapy Notes.
7. Demonstrate basic use of Dragon Medical One including dictation, vocabulary word creation, and Auto Text.

Content Outline

- **Instructor introduction**
  - Name, role, etc.
  - Ask the provider's background.

- **Review agenda**
  - Login to TRAIN B education domain
    - PowerChart Navigation
    - Message Center
    - Ambulatory Organizer
    - AMB BH Workflow.
    - Quick Orders.
    - Dynamic Documentation.
    - Group Therapy Notes.
    - Check out process on the Ambulatory Organizer.
    - Teach Dragon Medical One basics.
  - Provision Providers to Electronically Prescribe Controlled Substances (EPCS) (only Psychiatrists).

Basic Navigation

Navigate through the PowerChart toolbar icons, patient search, and manual refresh.

Icons - Tool Bar: Along the top of the screen, you will see the toolbar with a variety of icons.

Home: If you click on the home icon, it will bring you back to the ambulatory organizer. This is the page where you will find your schedule and a preview of the Message Center on the left-hand side.

Message Center: The internal email system of PowerChart. (Will come back to this later in class).

Copy Auto Text: This is the master button for Auto Text. (Will come back to this later in class).

Resource Webpage: Contains resources such as:
Note: most of these links will be more pertinent to the Psychiatrists/NPs/etc.

- Inteleconnect: Web-based image viewing platform, use Munson credentials.
- LexiComp: medication guidelines/manual. Don't need a login.
- MAPS and MCIR: Full website login to be used if access in the chart is currently not working.
- MHC Antibiogram and Guidelines
  - Help guide decision-making strategies for treatment. An antibiogram identifies antibiotics' susceptibility based on individual microorganisms to each antibiotic.

EHR Education Website: Resource for online documents and videos for using PowerChart.

- Show the website: expand the page to show the Hospital and Ambulatory Provider link on the banner.
- **EHR Provider Website:** Show how to favorite the website from their web browser.
- Show the OPR Wave 2 project page on the EHR website and have providers favorite the website.

UpToDate: Free to Munson staff. Can register for an account in the live environment using Munson email.

Refresh icon: Cerner is a **manual refresh** system. It is recommended to refresh before and after any documentation or order entry.

Exit Door: Quits the application completely and saves any Personalizations. Click at the end of the day or if moving between locations.

Any questions? Okay, let's take a closer look at a few icons we touched on already.

Copy Auto Text

The master icon for Auto Text. This will show your library of Auto Text (dot phrases) and allow you to copy other providers' auto text, make your own, and duplicate our public auto text.

Copy Auto Text

- **Copy another Provider's Auto Text:** Search for a provider. Find an Auto Text and Click Copy.

    - Change the abbreviation to .yourinitials
- **Make your own Auto Text:**
    - Click on the manage Auto Text icon. Then click the blue + icon.
        - demonstrate
- **Public Auto Text:** Can search for a public phrase.
    - Click duplicate. C
    - Change the abbreviation to .yourinitials
- **Edit Auto Text:** You can edit any of your auto text by clicking on one from your My Phrases list and then by clicking Edit.
- **Using Auto Text to pull in HPI:** From the nursing intake form
    - *If the providers have clinical staff entering a nursing HPI in their intake PowerForm, providers can use a specialty-specific dot phrase to pull in that HPR information in the note. For example, .pc_hpis_intake or .card_hpi_intake*

Do you want to take a few minutes and explore making auto texts?

Ambulatory Organizer

The Ambulatory Organizer is the default landing page when you open PowerChart. The organizer is divided into 2 sections. On the left-hand side is a preview of the message center. The right section is your schedule.

Resource: your name will appear after Patients for:.

- To select a resource, type in the provider's name or one of the Group Therapy names under **Patients for:** and then click apply.
- Note: Group therapy in Train is scheduled under the MMC BH PHP Group Therapy resource

Information in the Organizer

- **Appointment Time**
- **Name, Age, and Date of Birth (DOB)**
- **Patient Status:** This shows the progression of the patient's appointment status. For instance, when the patient arrives at their appointment or after the MA or nurse has finished their intake form.
- **Reason for Visit:** Derived from what the scheduler entered during the creation of the appointment.
- **Chief Complaint:** Listed if the clinical staff or the provider has already documented it.
- **Blue circle with a white I**: When you encounter a blue circle with a white "I" next to the birth sex on the organizer, it signifies that there is additional information related to the patient's social history. Alternatively, you can access this information from the Histories component in the provider view
- **Sticky notes:** Informal communication between staff members that does not save to the patient's chart.
- **Opening a chart:** by clicking on a patient's name

    NOTE: The Ambulatory organizer of PowerChart is unique—it automatically refreshes.

Date: Can filter your schedule by list, day, or week. You can also change the date to look forward and back in time.

- Show schedule filters and how to look forward

- Show week view with the MMC BH PHP Group Therapy resource selected.
- Show how to navigate forward and back a week at a time.
- Explain that the template will show how many patients are in the group session and how many spots are still available. This might be nice to know when requesting clinical staff to schedule a patient (see general message section).

Patient Search

Patient Search

- Patient search field
  - Default is to search by Name. Can also search by MRN or FIN number in the dropdown. MRN is the patient's lifetime number. FIN is the encounter specific number.
  - Highlight the magnifying glass option to search for a patient.
- Recent dropdown
  - Can see the last 5 patient charts the user has been in.

Any questions?

Message Center

Essentially the e-mail system of PowerChart. Execute signing orders and documents as needed in the Message Center. Message Center responsibility will depend on what position ie therapists/psychologists vs psychiatrists/NPs.

Overview

- **Inbox**: This area is for items assigned to that provider who is logged in.
- **Proxy:** This area is where the provider can assign another person to monitor his/her message center when he/she will be off or on PTO. Practice managers will help with setting up proxies when needed.
- **Pools:** Shared inbox by a group of users that receive the same message. Each clinic will have their own clinical and clerical pools.
- Buttons to explain during the first Inbox item example:
  - **Next:** Moves to the next item in that folder.
  - **Ok & Close and Ok & Next:** OK is signing your legal signature.
  - Single click opens item as a preview, double click opens item fully

Results: For Psychiatrists/NPs. Reports from tests, diagnostics, labs, etc. that you have ordered

- Double-click on the item to **review the result**. You might get a result in the folder that you need to just review. With that type of result, you would choose OK & Next or OK & Close to sign off that you reviewed the result. Do not click this now!
- **Wrong Provider:** if the result is sent to the wrong person, there is an option to forward the message. Do not do this now!
- **Create a Staff Message from a result**: to follow up in 6 months & update the patient.
  - **Create:** Click the drop-down arrow next to Create and select staff message.
  - **Choose clinic:** User will be promoted to choose clinic
  - **To field:** Type in provider to send a message to or the clinic/pool
    - Demonstrate using the binoculars.

- Demonstrate adding a favorite.
- **Include me**: Allows the user to receive a copy of the message.
- **To consumer**: Allows the message to be sent to the patient's portal is the patient has Opted Into patient portal.
- **High priority**: select this is the message is very important.
- **Notify**: select this is user wants to be notified when the recipient opens/reads the message
- **Subject**: User may retitle General Message subject line to something more specific.
- **Save to chart**: This is preselected to save to the patient's chart.
- **Actions:** At the bottom of the screen, you will see actions. Do not use these options because they do not generate an action. Instead, use the message area to communicate the actions needed.
- **Message:** Fill in the message. Type: **Please call the patient with normal results. Repeat x-ray in 6 months.**
- **Add an order to the Message:**
  - The user can also select Launch Orders from this message to place an order (for example, order another x-ray in 6 months).
  - Demonstrate adding a follow-up x-ray in 6 months. Make sure to fill in the missing details, associate the order with a diagnosis, and indicate that the order should happen in 6 months.
  - Once the order is signed, the order will display in the message area as Submitted with the order listed.
- Then **send** the message.
- Once a message has been sent, the Result still needs to be acted upon. Use Action Pane to Approve or Refuse. Then click Next, OK & Close, or OK & Next. If the user selects refuse, the user will have to forward it to someone else. Have the additional forward actions box checked.

Results FYI: It is designed for providers with lifetime relationship established with a patient. It allows subscription to specific sets of patient lab results, diagnostics, and documentation about their patients.

Orders: For Psychiatrists/NPs. The Orders folder is broken up into cosign and proposed orders.

- **Cosign Orders**: A verbal order read back was placed by a nurse and is an item in the provider's message center for final signature. These can be acted upon before the final signature.
  - Double-click on the item. Review the order. Use Action Pane to Approve or Refuse. Then click Next, OK & Close, or OK & Next.
- **Proposed Orders:** These are proposed orders from students, residents, or APPs that need to be signed by the provider before they can be acted upon.
  - Double-click on the item. Review the order(s). Show that on each order there is an Accept, Reject, and Accept with Modify. Otherwise, could use Reject All and Next or Accept All and Next.
  - **Summary View**: The ability to review information in a patient's chart without leaving the Message Center.
  - **Hyperlink to Patient's Chart**—Also, there is a link to the full chart next to the recent drop-down menu. Do not click on this for class purposes.

Documents

- Documents that have been sent to the provider **for signature or review**. To sign the document:

- Double-click on the message in the Sign subfolder. Select Sign in the Action Pane and then click OK & Close or OK & Next.
- Show adding an Addendum.

Messages: the area where Messages and medication renewal requests are located.

- General Message: Click reply to reply to the message.
- Critical lab value: For Psychiatrists/NPs. Munson calls the provider first to notify them of critical lab value and will send a message of critical lab value. The provider should ask the manager how to handle this.
- Renewal request: For Psychiatrists/NPs Double click to open the Renewal request enter in by a nurse.
  - Request tab: Select a refill amount and where to send medication renewal. Patient's preferred pharmacy will be listed if already entered into the chart.
  - Response tab: Area for user to type a response, if needed (ex. This has been completed). Once request tab has been completed, the response tab will have the completed medication renewal listed.

Reminders

- Provider may send a reminder to another staff member or to themselves.
- Click the drop-down arrow next to communicate and select Reminder. May also save it to the patient's chart as a reminder.

Sent Item: Shows any sent or completed items from the Message Center.

Trash: Show the Restore functionality if a Message Center item was accidentally deleted.

Notify Receipts: Area where the provider will receive notification that the recipient opened an item that the provider selected the notify icon when sending that item.

Any questions on the message center?

BREAK TIME FOR 10 MINUTES

Chart & Provider View Overview

Demonstrate understanding of the AMB Specialty Workflow. Go into a **class patient's chart** (from Amb Organizer, Resource Kelly Bedford). Have the providers use their class patient on their login slip.

Assign a relationship options:

- Ambulatory BH Therapist
- Crisis Worker
- Mental Health Care Provider
- Primary BH Therapist (lifetime):
  - This option is used to run reports. Ie how many patients a therapist has, how often the patient is seen.
  - Note: The BH Lifetime relationship is not set up to automatically get any results currently. Each user can manually set up Results FYI, but we are not going there right now. – Per Ashley

Overview of Patient's Chart

- 2 patient charts can be opened at a time.

- **Patient demographic bar**
  - Name, DOB, Sex, MRN, FIN, Code Status
  - Location: which is a link and when clicked can show the other encounters for that patient.
  - Allergies: which is a link and when clicked can show more detail.
- The Menu: Older way of navigating PowerChart
- Provider View: Main area to work in with Workflows/MPages.
- **Small Home Icon Button**: takes you back to provider view when elsewhere in the chart.

Overview of Provider View

- MPages are the tabs along the top.
  - Includes AMB BH Workflow, AMB QOC for quick orders and charges, Manage Psychology Workflow (hospital workflow), Code Status – Advance Care Planning, Discharge – Provider (hospital workflow) MPages.
  - Can add or remove, show by clicking on the X or the +. Review available workflows.
  - rearrange by clicking and dragging.
- **Components**: Within the Workflows are Components to review and use to create a note.
  - Can add or remove some components using the 3 lines (pancake) filter, then hover over Components and check to show or uncheck to hide.
  - Can rearrange by left clicking and dragging.
  - Main refresh icon vs. individual component refresh icon.
  - Show filters on each Component.
- **Contextual view (Split screen mode):** Highlight that the boxes on the right side of the screen are set in contextual view (split screen mode) and show that you can document in those boxes as you scroll through the chart.
- **Preset Note Templates:** Then once you have viewed and/or completed the necessary components, at the bottom are quick links to create a note.
- Show the blue Menu.
  - As we scroll through the components some of the headers link out to somewhere in the menu.

***Remember the only way the system will save your customizations is if you use the exit door to quit the system.**

Any questions about the provider view or the chart?

Workflow Components

Demonstrate understanding of the AMB BH Workflow. The use of these components varies depending on position.

Providers must enter charges and/or orders (in the AMB QOC MPage) before generating a note in order to associate a diagnosis with each order and for it to appear in the note under the correct diagnosis.

Chief Complaint: All positions

- If no Chief Complaint has been entered, free text the chief complaint.
- If the Chief Complaint has been entered by nursing, review it by clicking into it and modify as needed.
- Click Sign.

Problem List: All positions

- All previous problems/diagnoses will be listed as chronic at the beginning of the visit. Provider will need to select This Visit for problem being addressed at that visit.
- Can search for and add problems in the upper left search field. The problem added will add as what it selected in the drop down to the left of the search field (This Visit, This Visit and Chronic, or Chronic).
- Can click on already Chronic problems and make those This Visit by click that button.
- Can change the priorities of problems, click on the number for drop down.
- Only active diagnosis, this visit, pulls to the progress note.
- Diagnosis assistant is available by clicking on the exclamation symbol.
    1. Then can narrow the results available by selecting the appropriate choices in any column.
    2. Then click save.
    3. This problem doesn't meet specificity and laterality, so the diagnosis needs to be more specific
- Be careful when resolving problems because this is a shared list across the system. If the provider who is currently logged in resolve a problem, it resolves it for all other providers.

****Return to the PowerPoint slides to show how to Reconciliate Problems, Procedures, allergies, and immunizations.****

Histories: All positions will view, Psychiatrists/NPs have to reconcile

- Patient's histories are listed here.
- **The problems and procedure tabs should be reconciled by the Psychiatrist/NP if the clinical staff hasn't reconciled them yet.**
    1. Click Complete Reconciliation to reconcile.

Allergies: All positions will view, Psychiatrists/NPs have to reconcile

- Patient's allergies are listed here. Provider may add allergies, if needed.
- It is the provider's responsibility to make sure this section is reconciled by either themselves or clinical staff. If clinical staff did not click the Complete reconciliation button, review the patient's allergies, and click Complete Reconciliation.

Scales and Assessments: All positions

- Multiple assessments providers can fill out. Show the drop-down arrow that lists all the scales.
- Select the PHQ-2 and PHQ-9 scale.
- Fill it out and show providers how to sign the form using the green check. Depending on the scale it might pull into the note

Forms: All positions

- Click on the drop-down arrow to show access to BH Patient Safety Plan and BH OP Therapy Visit form.
- Quickly Create a BH Patient Safety Plan. The information in the form will pull into all notes except BH Treatment Plan note.

Home Medications: All positions will view, Psychiatrists/NPs have to reconcile. The outpatient home medication reconciliation needs to be completed at each visit. Normally, the clinical staff handles the medication history during intake, which is denoted by a green check mark next to the medication history. To complete the medication reconciliation process, simply click on the Outpatient hyperlink. You are only responsible for rectifying the medications that you prescribe and acknowledging the remaining medications.

- **Icons:**
  - **A white paper scroll** indicates a home medication.
  - **A pill bottle** Cerner prescribed home medication.
  - An **orange circle with a white star** is a medication that needs to be acknowledged or reconciled.
  - **Continue, Create New & Not Continue:** The columns in the middle allow you to continue medications using the green triangle, create a new prescription using the pill bottle, or not continue the medication using the red square.

  - Provider will need to complete the Medication Reconciliation at each visit.
    1. Click on the blue outpatient hyperlink next to the blue exclamation point.
    2. For each medication, select Continue, Prescribe or Not Continue
    3. There may be some medications the provider does not manage (ex. Warfarin is managed by the cardiologist)
       1. In that case, the Provider will need to select Acknowledge Remaining Home Medications at the bottom to acknowledge the medications but not manage them.
    4. Then click reconcile and sign.
  - The status bar will display that the Meds History was completed when there is a green check mark.

<u>Opioid Review:</u> All positions will view, Psychiatrists/NPs have to complete if prescribing controlled substances.

- MAPS score or all 000 will display if they have their **NPI and DEA number** registered.
- Shows the MAPS score for the last **2 years**.
- Click **View Drug Report** to view more details. This will automatically check the 'I certify box.' Click 'Mark as Reviewed.' Then recheck the box next to 'I certify that I have reviewed…'
- To look beyond the last 2 years, login into the full MAPS site in the Resources link in the toolbar.

<u>Documents:</u> All positions

- A variety of documentation can be found here, such as Clinic Notes, Histories and Physicals, Consultation notes, Progress notes, Operative/Procedure notes, Hospital Summaries, Therapy documentation, and Case Management documentation.
  - If the provider wants to view the note in another window, single click first, then click View Document at the top.
- Can also check Enable Continuous Scrolling to scroll through all notes at once on the right-hand side.
- Tagging functionality – The ability to use text in other documents to populate the note a provider is making today. Essentially a copy and paste functionality. It will only tag information on that specific patient.
  - Without Contextual Viewing
    - Highlight the text to copy.
    - Click the Tag button. This will put the text in the Tagged Items clipboard.
    - Later once a note is created the Tagged Items will appear on the left side of the note and can be dragged a dropped into the appropriate free text field.
  - With Contextual Viewing

        - Highlight the text to copy.
        - Click and drag the highlighted text to the appropriate free text field.

Patient Education: All positions

- Provider may select “pre-made” education based on Problem list problems listed as This Visit
- Single click on education to give to the patient. Education can be printed for the patient or encourage them to use their patient portal to see the education, which the education should automatically flow over to the portal.
- Provider can modify, print, or remove.

Recommendations: All positions

- Allows access to a list of one-time-only or recurring task notifications that are due for the patient based on age, risk factors, gender, documented conditions, and procedures.
- This is where you can add the recommendation for the review frequency of a BH treatment plan.
    - Demonstrate the steps
        - Plus button
        - Select BH Treatment Plan Review
        - Fill in form
        - Submit

Subjective/HPI, Assessment and Plan, Patient Instructions

- These are free text boxes locked to the right side of the screen. This allows you to build your note as you review the chart.
- You can re-organize the order of these boxes using the arrow icon. [*Demonstrate as needed.*].
- Free text component where the provider can type, use Auto-Texts (dot phrases) or Dragon Medical One.

Orders

The QOC (Quick Orders and Charges) page shows the most commonly used orders for the specialty. Behavioral Health Therapists/psychologists will only place charges for the visit. Psychiatrists/NPs will place charges for the visit but also some meds or labs if needed.

Quick Order Preferences: You can use the page menu to customize this page.

- Drag and drop
- Expand all/collapse all

Placing Orders:

- Common labs, orders and charges are face up on the QOC MPage.
- Placing charges
    - Single click on any orders you would like that are face up. Provider may select multiple.
        - For class purposes, select **Psychotherapy 30 min 90832**.
        - Explain that **Group Therapy 90853** is for an in-person group therapy charge.
        - Explain that there is a **video Group Therapy** charge as well.

- Provider may also search for another order if it is not face up, by using the search bar in the New Order Entry section.
- Charges/orders will then appear in the Orders for Signature area (green envelope) for signature.
  - Click on the Orders for Signature icon (green envelope)
  - All desired orders will be listed, and the provider need to associate at least 1 diagnosis with each order from the Problem List.
    - User can switch the priorities of diagnoses if there are multiple associated with 1 order.
  - For orders: Click Modify Details to modify the order (ex. Frequency). This leads you to the Orders area of the Menu. The blue circle with an X means there is more information that is needed, so the provider must complete all yellow highlighted sections to sign orders. Single-click and modify the order details that populate as needed. To favorite that order for quick access later on: right-click on the order and click Add to Favorites.
  - Click Sign to sign the order.

Navigate back to the AMB BH Workflow

Dynamic Documentation

Once your orders/charges are signed and associated with a problem, you will see the orders attached to the problem in the assessment and plan section of your note. Next, it is time to generate your note.

Choose a Note Template: The available note templates are listed below the component section. Remember, anything that you have entered into the text boxes on the right-hand side of your screen will flow into the note type you choose.

Note: show how a psychiatrists get to their note. There is not a dynamic doc hyperlink.

- To get to the psychiatrist note for eduphys56-60, We pre-favorited the note on eduphys56-60
  - Select more -> other notes: will go straight to their favorites.
  - Choose BH psychiatric office note
- To favorite it themselves:
  - Select more-> other note
  - Search BH Psychiatric Office NOTE. (See image below)
  - Use the star to favorite this note type for use later.

Creating a note

- Show how the fixed text boxes pull into the Initial Note
- **Dynamic Documentation Note**
  - **Edit functions:** Within the note, you still have the ability to edit. You can also use dragon dictation from this screen, type, or use auto text. There are three symbols when hovering in the note. (Hover by the Vitals in class).
    - **Refresh:** Refresh the details to a more updated set of vital signs.
    - **Arrow:** Will add a line of free text.
    - **Remove:** Will remove the section/subsection
  - **Tagged items:** Any unused tagged items will be listed on the right side of the screen. You can pull these items into your note.
  - **Returning to provider view**:
    - use the drop-down next to the forward-back arrows
  - **Refreshing a section**: If you add something in a free text box in provider view and then return to your note template, use the refresh icon to update the section. [*Demonstrate as needed*].
  - **Save the note:** The note will appear as 'In Progress' within the Documents component. To finalize the note, simply click on the hyperlink.
  - **Sign/submit/forward note**: When you are ready to sign your note, click Sign/Submit. A screen will pop up to allow you to forward your note to another provider to sign or review.

Creating a Treatment Plan (See BH Treatment Plan Document)

- Click on BH Treatment Plan Dyn Doc hyperlink
- Use .bh_tx
- Fill in the plan
- Sign
- Remember you can create a Recommendation for review frequency.

Group Therapy Notes – see document

Located in the top toolbar. Most group therapy sessions are done by Zoom now with a maximum of 12 people. Clerical staff will check in all patients.

Note: MyExperience Position Change for NPs: Only for nurse practitioners when they lead group therapy sessions. They will need to switch their position to behavior health. See document for details. *Note: NPs should choose Ambulatory BH Therapist as the relationship.

Complete these steps for a group therapy session note:

- Return to the Amb Organizer, select MMC BH PHP Group Therapy or MMC BH OP Group Therapy as the resource.
- Select Group Therapy Notes from the toolbar 

- Click Edit next to the Therapy name.
- Select the Schedule tab
  - In the **Scheduled Resource** field, search by the MMC BH PHP Group Therapy schedule.
  - Click **Search**.

- Select the desired group.
- Click **Select**.

- Therapy Name and Location
  - Complete all required yellow fields and then click Ok:
    - Therapy Name:
    - Mode: Group
    - Category: Mental Wellness Group
    - Topic: Coping Skills
    - Date, Verified By, Facilitated By, Start Time and End Time will automatically populate.
- Use the drop-down next to Patient List to select the correct patient list for the group (made by clerical staff).
- Assign a relationship to each patient then click Establish. This only has to be completed one time.
- Complete a group note in the free text box at the top of the window. This text will copy to each individual patient's group therapy note upon signature. You can use Auto Text here.
- Click on the arrow next to an individual patient's name.
  - Use the drop-down next to Problems and Diagnosis to select a problem from the problem list. Can't add problems (would need to do that in the patient's chart).
  - Can use Remove patient if the provider knew the patient would not be attending that session. Use the drop-down below Remove patient to mark whether the patient attended the full session, partial session or no show.
  - Make goals by clicking the plus sign and mark them as Not Met, Met or Progressing.
  - Complete a Narrative Note for the patient. Can use Auto Text.
  - Use the drop-downs to complete Participation, Behavior, Affect Quality and Mood. HIGHLY recommend filling out all of those drop downs.
  - Sign the note or Save it if not finished.
    - A Group Therapy Note cannot be signed until after the scheduled session has ended.
  - Signed Group Therapy Notes can be found in the Documents component in the AMB BH Workflow within Provider View
- Proceed to each individual patient's chart to place the Video Group Therapy Visit charge on the QOC.

Reminder: Charges must be separately entered on each individual patient's chart.

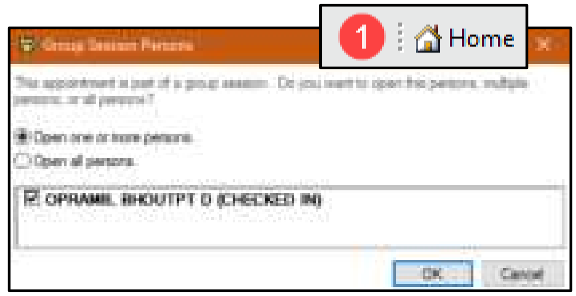
Creating a General Message: This will be useful to let the clerical staff know to schedule a follow-up appointment for a patient.

- From the Amb Organizer, click on the patient's name to enter the chart.
- Click the communicate button on the toolbar, this will bring up the form for a general message.
- Enter Admin pool
- Fill in the message body
  - Provide specific dates/times to schedule the patient (admin staff will schedule without calling the patient)
  - Provide a range of dates/times. (admin staff will call the patient and schedule).
- Click send

<u>**Check Out**</u>

To check out the patients after a group therapy session, follow the steps below:

1. Navigate to the Ambulatory Organizer by clicking on the **Home** icon in the toolbar.
2. In the Status column, click **Checked In** to open a list of other options.
3. Select **Check Out** from the drop-down.
4. Select **Open one or more persons** to individually choose the patients to be checked out, or select **Open all persons**, which will automatically select every patient in the group at once to be checked out.
5. Click **OK** to complete the checkout process.



Any questions?

****Return to the PowerPoint Slide to complete the remaining slides (Launch support, class eval, continuing education credit, etc.)****

If providers need more practice, try the following:

- Sending a message to clinical staff
- Writing a note and then modifying the note
- Add more orders
- Practice tagging items
- Create an auto text and use it in a note