

Place cursor above all

text

Ad hoc comments (locked field)

Results (locked field)

[Patient's First Name] [Patient's Last Name]

[Patient's Date Of Birth (DOB)]

[Full Patient Address]

[Date]

Open

Personalizations for Urgent Care for Clerical Staff

Cerner PowerChart and Revenue Cycle Ambulatory Education

NOTE: Work multiple locations?

- 1. First login to PowerChart. Select MyExperience and then select the Urgent Care position.
- 2. Continue with Urgent Care PowerChart and Revenue Cycle preference settings.

Message Center Letter Personalizations

If you do NOT use Patient or Provider Letters start with Personalization settings on page 3.

Setting Letterhead Logo:

Message Center 1. Click on Message Center.

- 2. Click on Inbox and select Manage Preferences.
- 3. Click on the Behavior Prefs tab and click on Reminder/Letter.

3.	Click on the Benavior Prefs tab and click on Reminder/Letter.		~	C
4.	Click the Header/Footer button.	Header / Footer	C	onfiguration Behavior Prefs
				General
5.	Choose the first Template.	Insert Fields		Message
		Template		Reminder/Letter
		Provider Letter Template		Consult Request

- 6. Click on the gray highlighted text. 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. Click on This PC and then open Network Drive (M:).
- 9. Open the folder: DocuVault.
- 10. Find and open the folder: Ambulatory Services.
- 11. Find and open the folder: Ambulatory Logos.
- 12. Select the Appropriate Logo and click **Open**.

Resize the image if needed to make it fit onto the page.

Import Graphic

13. Click Apply.

Apply

14. Repeat for each template:Patient Result Letter		Insert Fields Template	
 Patient AdHoc Letter 		Patient Result Letter Template	/
 Provider Letter 		Patient Result Letter Template Patient Adhoc Letter Template	
15. Click OK when done.	ОК	Provider Letter Template	

Message Center

Setting Signature

- 1. Click on Message Center.
- Inbox 2. Click Inbox in the top toolbar.



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- 3. Select 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. Delete the signature area between Sincerely and CC Providers.

ting Physician's First Name] [Attending Physician's Last Name][Attending	desition - Discontation	and a Freed Manual (Adda a dian Dhuai si a ta Land Manual)(Adda a dian
ians credentials	lysician's Crede	

- 8. Type in your practice name and main practice phone number within this area.
- 9.
- 10. Click OK.
- 11.
- 12. Repeat for all Patient letter templates. DO NOT DELETE any information on the Provider Letter Template.

OK

Let me know if you have any questions or concern	S.

Configuration Behavior Prefs

Sincerely,

(Y our practice name here) (Y our main practice phone number here)

CC Providers: [CC Letter Providers]

General

Message

Reminder/Letter Consult Request

Verify Provider Letter Settings are correct:

- 1. Click on Message Center.
- 2. Click on Inbox on the top toolbar.
- 3. Click Manage Preferences.
- 4. Click on the Behavior Prefs tab and click on Reminder/Letter on the left.

Message Center

Inbox

 Locate Defaults When Creating a New Letter and select Provider Letter as the Document Type (Provider Letter) and the Template (Provider Letter).

Defaults When Creating a New Letter	
Document Type (Patient Letter)	Document Type (Provider Letter)
Patient Letter 🗸	Provider Letter 🗸 🗸
Template (Patient Letter)	Template(Provider Letter)
~	Provider Letter 🗸 🗸

6. Click **OK.**



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Medic	al Record Request Favorites	
Must h	ave a patient chart open. (Use ZZZZREVCYC	ILE, Test Patient MR # M1032351).
1.	Click on Medical Record Request.	edical Record Request
		IFxMunsonFamPractice
2.	Click on Device .	[FXRadScrid_MFP
-		
3.	Find the device: !Fxclinicname. (Select the	
4.	A pop up with a PHONE # space appears. (Click OK. Remote Report Distribution Selection
5.	Right click on the Device name.	PHONE # OK
6.	Select Add to Favorites.	Transmit Date / Time Cancel
7.	Repeat the above steps for the other clinic	-
	device name: FXRadSchd_clinicabbreviatic	
		5 ExMunsonFam Filter Type ExManSon AMER
		Set as Default
8.	When all Device Favorites are added, right	t click
	on Device name.	
	Hover over Filter Type and select Favorite	S.
	The favorites selected will now display.	
11.	When selecting a device for faxing: choose	
	Scheduling and !Fx to free text the fax	
	a. Note: Follow the same steps to ad	d printer favorites.
Reven	ue Cycle Preferences	
Setting	Preferences	
	1. In Devenue Coole slick on File on the t	an ta allan. Calant Duafanan an
	1. In Revenue Cycle click on File on the to	op toolbar. Select Preferences .
	Revenue Cycle -	
	File View Task Help Open Patient Record	
	1 Close Patient Record	E Preferences
		type filter text General <pre></pre>
	Preferences	Charge Entry Person Quick Search Conversations
	2. Click on General.	Demographics Default Filter Name Vame
	3. Enter the correct Default Location	Kiosk Dashboard Show Guarantor Search in Person Search
		Legacy Tasks Locator Default Location
	using the magnifying glass to search.	MyExperience Facility 5 Vatient Arrival MHC Urgent Care Gaylord
	4. Click Apply .	Patient Tracking Building Nurse Unit
	5. Click the arrow next to Patient	Filters UC Gaylord VC
	Tracking and select Filters.	> Queues Country
	6. Click Apply.	Encounter
	7. Search for and select the correct	Walk-In Visit Remittance Posting
	Location Group using the magnifying g	zlass.
	Then select the correct	Patient Tracking Filters
	Location from the drop-down.	
		Location Group Resource
	8. Click Apply.	

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- 9. Click the arrow next to **Registration** and select **Walk-In Visit**.
- 10. Click Apply.
- 11. Click Apply and Close.

Preferences Walk-In Visit type filter text > Charge Enty 10 Scheduling and Order Actions Conversati Check the Check In and Activate Orders > Demograp box Set Patient Status to Arrived > General MyExperience > Patient Arrival Patient Tracking Filters Future Requests > Queues gistration 9 Encounter Walk-In Visit **Remittance** Posting

NOTE: Done working at the Urgent Care location?

- 1. Login to PowerChart. Select MyExperience and then unselect the Urgent Care position.
- 2. Continue with PowerChart and Revenue Cycle preference settings for the next location.

Referral Management Settings

Referral Management Settings must be done for staff who manage incoming and/or outgoing referrals. See additional education documents in the Clerical section of the <u>Clinical EHR Education</u> Ambulatory Clerical website.