Personalizations for Urgent Care for Clerical Staff

Cerner PowerChart and Revenue Cycle Ambulatory **Education**

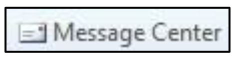
NOTE: Work multiple locations?

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.

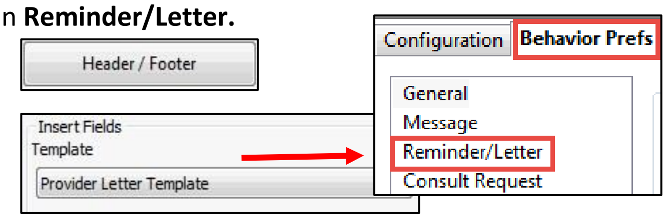
Message Center Letter Personalizations

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

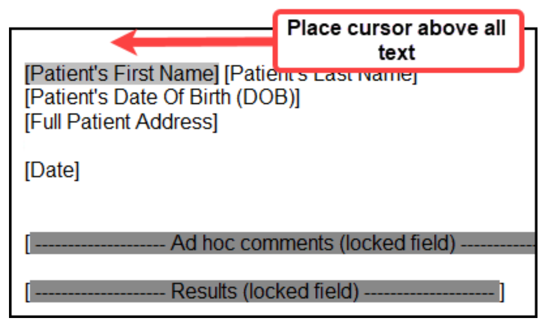
Setting Letterhead Logo:

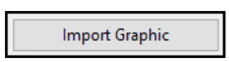
1. Click on **Message Center**. 

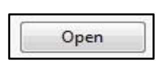
2. Click on **Inbox** and select **Manage Preferences**.
3. Click on the **Behavior Prefs** tab and click on **Reminder/Letter.**
4. Click the **Header/Footer** button.
5. Choose the first Template.

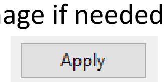


6. Click on the gray highlighted text. Move the cursor above all text using the left arrow key on the keyboard and the enter key to add space.

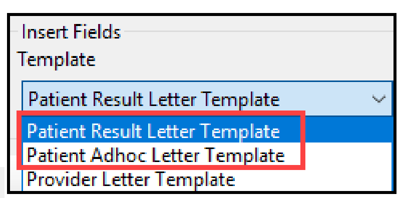


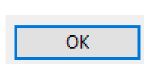
7. Click **Import Graphic**. 

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.
13. Click **Apply**. 

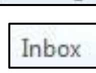
14. Repeat for each template:
    - Patient Result Letter
    - Patient AdHoc Letter
    - Provider Letter



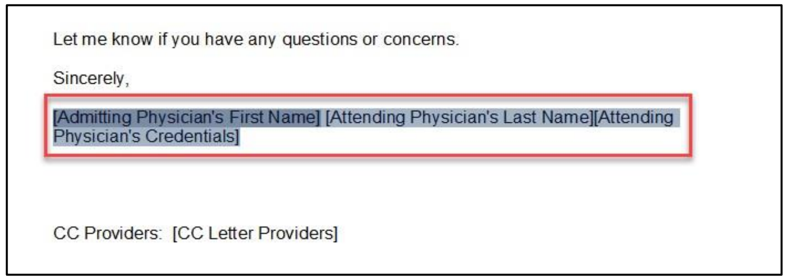
15. Click **OK** when done. 

Setting Signature

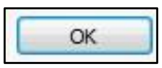
1. Click on **Message Center**. 

2. Click Inbox in the top toolbar. 

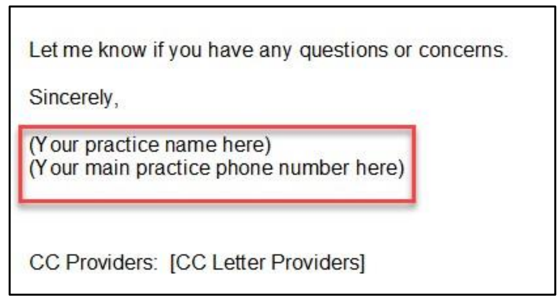
3. Select Manage Preferences.
4. Click on the Behavior Prefs tab and click on Reminder/Letter.
5. Click on Header/Footer.
6. Select the Template. The following steps should be done for both the Patient Result Letter Template and Patient Adhoc Letter Template.
7. Delete the signature area between Sincerely and CC Providers.



8. Type in your practice name and main practice phone number within this area.
9.
10. Click OK.

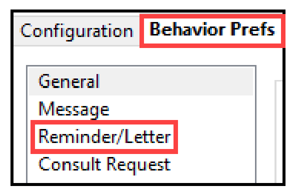


11.
12. Repeat for all Patient letter templates. DO NOT DELETE any information on the Provider Letter Template.

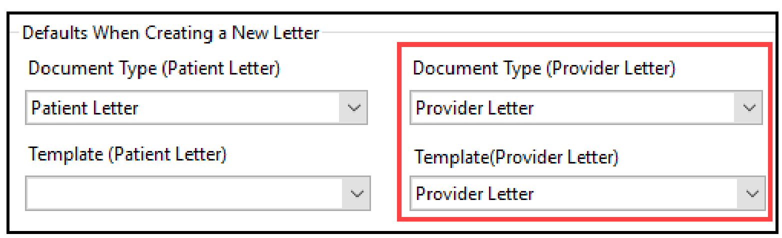


Verify Provider Letter Settings are correct:

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.



5. Locate **Defaults When Creating a New Letter** and select **Provider Letter** as the **Document Type (Provider Letter)** and the **Template (Provider Letter).**
6. Click **OK.**



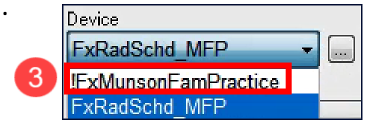
Personalizations for Urgent Care for Clerical Staff

Medical Record Request Favorites

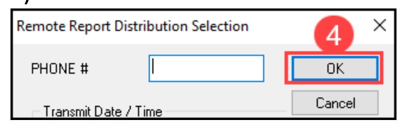
Must have a patient chart open. (Use ZZZZREVCYCLE, Test Patient MR # M1032351).

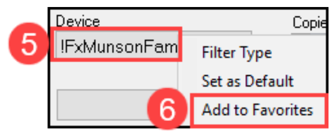
1. Click on **Medical Record Request**.

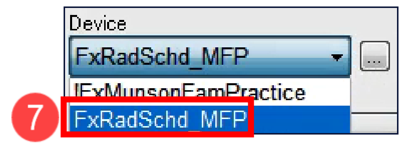
2. Click on **Device**.

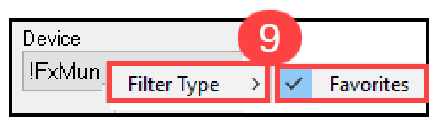


3. Find the device: !Fxclinicname. (Select the one with your primary clinic name).
4. A pop up with a PHONE # space appears. Click **OK**.
5. Right click on the Device name.
6. Select **Add to Favorites**.
7. Repeat the above steps for the other clinic assigned favorite with the device name: FXRadSchd_clinicabbreviation.
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.
    a. **Note**: Follow the same steps to add printer favorites.





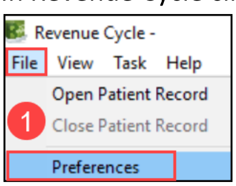




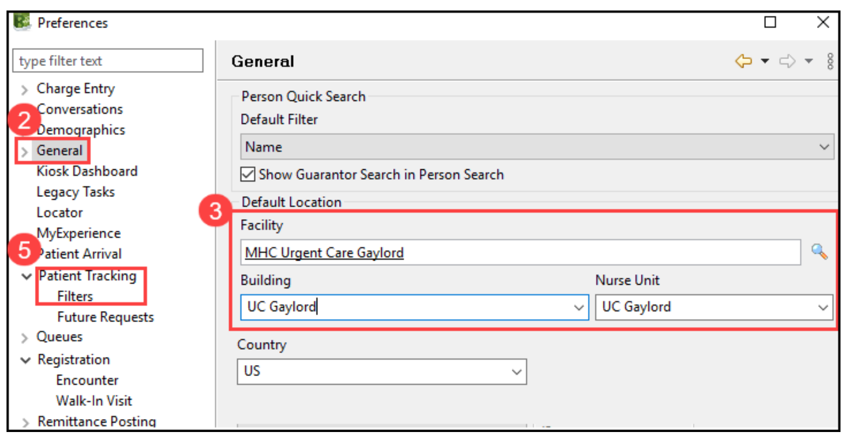
Revenue Cycle Preferences

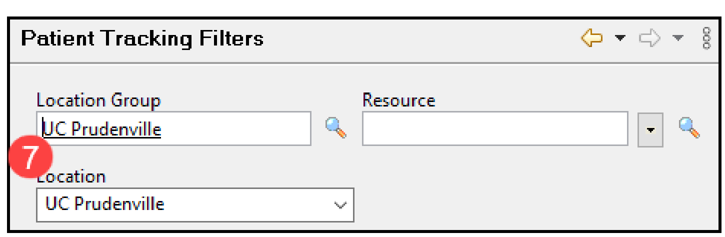
Setting Preferences

1. In Revenue Cycle click on **File** on the top toolbar. Select **Preferences**.

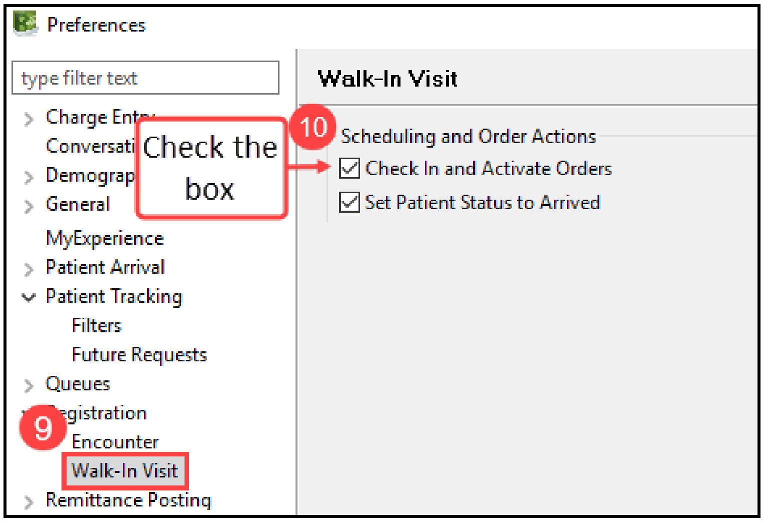


2. Click on **General.**
3. Enter the correct Default Location using the magnifying glass to search.
4. Click **Apply**.
5. Click the arrow next to **Patient Tracking** and select **Filters**.
6. Click **Apply**.
7. Search for and select the correct Location Group using the magnifying glass. Then select the correct Location from the drop-down.
8. Click **Apply.**





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



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 Clinical EHR Education Ambulatory Clerical website.