

Documentation Tab Filters for All Staff

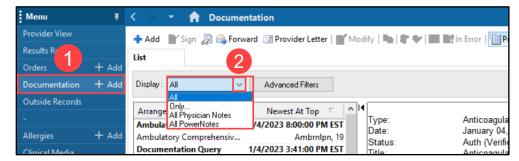
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Filtering the Document List

In the Documentation tab of the dark blue Menu, the document list defaults to display all available clinical documents for a patient. Filter options are available to filter the list to display all or only document types.

To filter the document list:

- Navigate to the Documentation tab in the dark blue Menu.
- 2. Click the drop-down arrow to see the following filtering options:



- a. All Displays all currently available documents for the patient.
- Only... Provides an option to choose which kind of documents to view from a second menu. Those
 options include:
 - i. Author: The person who completes the clinical document and is the first to sign, submit, or save it.
 - ii. Contributor: Anyone who signs, co-signs, or verifies a document.

Display : Only 🗸	~
	Author
Arranged By: Date	Contributor Date
Ambulatory Comprehensiv	Encounter Type
Ambulatory Comprehensive	Note Type Status

- iii. Date.
- iv. Encounter type.
- v. Note type.
- vi. Status.
- c. All Physician Notes Filters the documents to only display documents documented by physicians.
- d. All PowerNotes Filters the documents to display all the PowerNotes completed for the patient.

Note: After selecting the Only... filter, select an option from the second menu. A third menu will display with options based on the second menu selection.



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Creating Personal Filters

From the Documentation tab of the dark blue Menu:

- 1. Select Advanced Filters.
- Select the document type(s) from the list or click on the plus sign to expand the options.
 - Multiple document types may be added to one filter list.
- 3. Select the time range (optional).
- 4. Click Save and name the filter.
- 5. Select New when adding additional filters.
- 6. Click **Close** when finished.

Menu	Ŧ	< > 👻 🏫 Documentation
Provider View		🕂 Add 📑 Sign 🐊 🙈 Forward 📑 Provider Letter 💕 Modify 🐚 🍧
Results Review		List
Orders +	Add	
Documentation +	Add	Display : All V Advanced Filters
Outside Records		
-		Arranged By: Date Newest At Top ∇ Ambulatory Comprehensive Int 1/5/2023 8:00:00 PM FST Typ
		Ambulatory Comprehensive Int 1/5/2023 8:00:00 PM EST
Allergies + /	Add	Ambulatory Comprehensive Intake AmbrnIpn, 19 Sta
		Decumentation Query 1/5/2022 2.41.00 PM EST Sta

Advanced Filters	;					
Filter:	Set As Default Shared					
Select the Status you want to see	Select the Encounter Types you want to see					
? Unknown Superseded Active Transcribed Anticipated Preliminary (Unouth) Auth (Verified) Transcribed (corrected) Canceled REJECTED Dictated Preliminary Report In Error Started In Progress Modified Not Done Verticipate	Blood donation Wait List Emergency Case Management Home Health Skilled Nursing Inpatient Inbox Message Observation community health record Outpatient Unknown - External Prione Msg Preadmit Private Duty Recurring Research 3					
Select the Document Types you want to see	Select How Far Back to get Documents					
ClinicalDoc Cardiology Procedures/Studies Deumonology Procedures/Studies Cardiology Procedures/Studies Cardiology Cardiol	Select the Document author Select the Document contributor					
Cardiac Monitoring	Restrict the Documents displayed by:					
Cardiovascular Research Care Coordination	Physician Notes Only					
Filter selections for exact date range and encounter restriction will be applied to the current session only. They will not be saved with a user-defined advanced filter.						
Restrict the Documents displayed by the specified dates	4 5 6					
·	Save Save As Apply New Remove Close					

7. Personal Filters will appear in the Display drop-down.

< >	 Documentation 		
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List			
Display :	All 🗸	Advanced Filters	
	All		
Arrange	Only All Physician Notes	Newes	
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Ambula	Personal Filters Brittany		
Docum	entation Query	1/5/2023 3	