

Cerner PowerChart Ambulatory EDUCATION

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Inbox Overview

- 1. Inbox summary includes three tabs:
 - Inbox: Personal Inbox.
 - **Proxies:** Primarily a provider function, allows one person to view and manage another's inbox.
 - **Pools:** A shared inbox between a group with a similar role (ex. admin pool or nursing pool).
- 2. The Display: date range may be adjusted as needed.
- 3. Inbox Items are displayed by categories.
 - Click the plus sign (+) next to the category to expand it; click the minus sign (-) next to the category to collapse it. Click a folder to display the items in that category.
 - The numbers displayed next to each Inbox category indicate the number of unread items and the total number of items in the inbox in that category.
 - For example: (2/2) indicates that there are 2 unread messages and a total of 2 messages in that Inbox category.
- 4. Select the item in the viewing pane and double-click or click the Open icon to open and view the Item or Message details.

Mes	sage Center								
Inb	ох Summary Д								
Inbo	x Proxies Pools								
Display: Last 60 Days 🗸 🛄									
Inbox Items (8)									
Results (1/1)									
	Other (1/1)								
	Results FYI								
Ξ	Orders (3/3)								
	Cosign Orders (2/2)								
	Proposed Orders (1/1)								
Ξ	Documents (1/1)								
	Review (1/1)								
Ξ	Messages (3/3)								
	General Messages (2/2)								
	Renewal Requests (1/1)								
=	Work Items (2)								
	Saved Documents								
	Paper Based Documents								
	Reminders								
	Documents to Dictate (2/2)								
-	Notifications								
	Sent Items								
	Trash								
	Notify Receipts								

Proxy Capabilities

The proxy feature within the Message Center allows a user to view and fully manage another user's inbox.

Note: To view another user's Inbox, proxy rights must be given or requested. For further information please see the Granting and Taking Proxy document on the CEE website.

Complete the following steps to view another user's Inbox:

Inbox Summary				
Inbox P	roxies	Pools		
Proxy:	Inbox,	Phy 🗸 🏾	Manage	
Display	Lact 10	Days	•	

- 1. Click the **Proxies** tab in the Inbox summary.
- 2. From the Proxy list, select the Inbox you would like to view.
- 3. If necessary, select a specific date range.
- 4. The selected user's Inbox opens, allowing full access to the inbox.

Note: the level of access can be limited by the Systems Administrator or by the owner of the inbox.



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Read Only Capabilities

Read Only allows another user's or pool's inbox in a read only mode. To view a Read Only Inbox:

1.



Click on Inbox then click on Select Read Only Inbox.

Note: A pop up will appear notifying access to another inbox is being requested. Click OK.

/pe a name or select from list:		Show names from
	2	-
est	2	Global Address Book 🛛 🗸
Personnel OPool O	Distribution List	_
ght click to add/remove a name in	the personal address book	Send to
Name	Position	Name
Test , EMR Sunquest	External Provider - No Access	Name
Test MD, Physician 3		
Test, Protected	Nurse - Acute Care	
Testerman RT(R), Shannon M	Radiology Systems Admin	
		4
		Add
		Remove
		Renore

- Search for the appropriate name.
- Click on the correct person's name.
- 4. Click Add.
- 5. Click OK.
- A Read Only tab will now appear in the Message Center.

Message Center						
Inbox Summary 7	Orders ×					
Inbox Proxies Pools Read Only	📴 Communicate 👻 📸 Open 😰 Forward Only 🔤					
Read Only: Test MD, Physician	Create Date Details From					
Itead only rest mor hysician	10/9/2022 12 02/14/22 12:4					
Display: Last 30 Days 🗸 🛄	10/9/2022 12 02/14/22 12:4					
	10/9/2022 12 02/14/22 12:4					
Inbox Items (1632)	10/9/2022 12 02/14/22 12:4					
Results FYI	10/9/2022 12 02/14/22 12:4					
Documents	10/9/2022 1: 02/14/22 12:5					
Messages	10/9/2022 1: 02/14/22 12:5					
Orders (1632/1632)	10/9/2022 1: 02/14/22 12:5					
Cosign Orders (38/38)	10/9/2022 1: 02/14/22 12:5					
Renewal Orders (1594/1594)	10/9/2022 1: 02/14/22 12:5					
Kenewar Ofders (1554/1554)	10/9/2022 12 02/14/22 12:4					

Note: Users can also read only into a Pool. In the search box type in the pool name (step #2) and change the search criteria from Personnel to Pool.

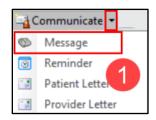


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Creating a New Message

To create a new message:

- 1. From the toolbar, select the Communicate drop-down arrow and select Message.
- 2. A new window will open. To associate a message with a patient, click on the binoculars next to the Patient to search the patient.



💿 New I	Message
	dit
📍 High	🕻 Notify 📓 Message Journal 🥾 Portal Op 🙎 Jessage View Surk
Patient:	Caller:
To:	
CC:	Provider: Edup

- 3. From the Patient Search window, select the patient and click OK.
- If an encounter is selected the new message will be associated with the selected encounter.
- If no encounter is selected, A new InBetween Visit encounter will be created. Unless the new message is directly connected to a previous encounter, a new encounter should be created.

🔍 Patient Search								
Recent Persons								
Last Name:	Name		Deceased	MRN		Sex		
AMBCERNRESULTS	AMBCERNRESU	LTS, DAVID		AE410	69037	Male		
First Name:	s	elect the correct	patient.					
Birth Date:								
** ** ****								
FIN NBR:	<							
	FIN NBR	Nurse Unit			Room	Bed		
Phone Number:	AE0056006388	Munson Fam	nily Practice Ce	enter				
Search Reset			encounter ON is directly con					
	<							
		ОК	Cano	el	Pre	view		



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🛇 New Message			– 🗆 X
Task Edit			
📍 High 🐧 Notify 📓 Message Journal 🚡 Portal Options 🛛 Message View	Summary View		🞢 Launch Order
Patient: CERNBH, EMERSON	Caller: CERNBH, EMERSON	Caller #: H (239) 872-9387	6
To:		6	include me
сс: 4	产 Provider: [5]	To consumer	Disable further replies
Subject: General Message 8	~	Save to Chart As: General Message	~
Attachments			
Transition of Care Browse Documents Other Atta	achments		
Message			
- 12 - 😵 🔍 🙏 🗈 💼	🤏 🖪 U / S 📑 🗏 🛎 🕷 🏘		
General Message:			^
			Ŷ
Actions			
Patient Needs Appointment		Remind on:	
Please Call Patient with Results		Due on:	
Message Left for Patient to Return Call			
Agree with Message		13	
See Note In Chart		U	Send Cancel

- 4. Type a recipient or click the binoculars to search for a recipient of the message.
- The Provider Should be entered if the message is related to a patient. If a provider has created the message, their name will autofill. All other staff are to search and select the correct provider to associated to the message.
- 6. Select Include me to receive a copy of the message.
- 7. Select To consumer to include the patient as a message recipient, this function is only available if the patient has a patient portal account or a secure email.
- The Subject field may be changed by selecting a new subject template from the drop-down. Change the Subject title by highlighting and deleting the text and typing the desired subject.
 Note: Entering the clinic according and detailed subject is helpful in locating documentation.

Note: Entering the clinic acronym and detailed subject is helpful in locating documentation.

- 9. Confirm that Save to Chart is selected.
- 10. Compose the message.
- 11. A Reminder or Due on date may be selected if desired.
- 12. The Actions are not recommended for use.
- 13. Click Send when the message is complete.

Note: The user can also create a message regarding any Result or Document by right-clicking on the desired Result or Document, hover over Communicate and the select Message.

Message Center						
Inbox Summary 🛛	Results ×					
Inbox Proxies Pools	📇 Communicate 🝷 📸 Open 😹 Message Journal 🕃 Forward Only 🖺 Select Patient 🖏 Select All 🖉 Result	Journal				
Display Last 60 Days	Patient Name Outstanding O Status Result Type Result Status From No	otificatio				
Display: Last 60 Days 🗸	AMBCERNRES Pending Discrete Auth (Verified) Edufam, 12 Se	nd Norm				
Inbox Items (5)	Open					
Results (1/1)	Communicate > Message					
Normal (1/1)	Message Journal Reminder					
Results FYI	Print					
Documents (1/1)	Item Information					
Review (1/1)	Forward Only					



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Creating a New Reminder	
Reminders will appear in the Reminders folder in Message Center	er on a predetermined day.
1. From the toolbar, select the Communicate drop-down a	S Keminder
New Reminder/Task	Patient Letter
Task Edit	Provider Letter
📍 High 🐧 Notify 📓 Message Journal 🛛 Message View 🛛 Summary View	
Patient: AMBCERNRESULTS, DAVID 2 B Show in: Recipient's Inbox To: 3 Chart CC: Provider:	✓] → Include me → To consumer
Subject: Reminder Message 5	ve to Chart As: Reminder 6
Attachments Browse Documents Other Attachments	
Message	
✓ 12 ✓ ③ ④ ④ ▲ ¾ ħ € ¾ B U Z S	E Ξ Ξ ▲ Φ{ Φ
7	~ ~
Actions	
Due for Labs Due for Appointment Due for Exam See Note Confirm Follow-up	Show up: 1 minute(s) 11/15/2022 Image: Constrained on the state of the
Send Referral Call Patient See Note	10 Send Cancel

2. If the reminder is related to a patient, search for and select the correct patient.

Note: If the reminder is directly connected to an encounter, select the relevant encounter. If no encounter is selected, a new InBetween Encounter will be created.

- 3. Select an option from the Show In list.
 - a. Select Recipient's Inbox to send the reminder to the recipients designated in the To and CC boxes.
 - b. Select Chart to send the reminder to the selected patient's Overview or Ambulatory Summary.
- 4. Enter the correct Recipient or Select Include me to send the reminder to the one creating the reminder.
 - Note: A recipient can be added by double clicking the name in the Personal Address List.
- 5. Change the Subject field as needed.
- 6. Confirm that Save to Chart is selected.
- 7. Compose the reminder message.
- 8. Set Show up or Due on, as needed.
- 9. DO NOT use the Actions.
- 10. Click Send.

Option	Action
	Sets the date when the reminder displays in the recipient's Inbox. This option does not function if the reminder is sent to the patient's chart.
	Sets the due date for the reminder. Reminders that are overdue are indicated in red and displayed in the Priority folder.



Cancel

Message Center Guide for Providers, Clinical and Clerical Staff

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Send

2

Delete

🎦 Communicate 🝷 💕 Open 🛛 🙈 Reply 🖓 Reply All 🙈 Forward

Responding to a Message

To respond to a message:

- 1. Within an open message, Click Reply.
- 2. Click Reply, Reply All or Forward.
- 3. Compose the message.
- 4. Select the Delete check box, if the original message is no longer needed.
- 5. Click Send.

Deleting Messages

Messages can be deleted in three ways:

 Select the desired message and click Delete.

Messages X								
💁 Communicate 👻 📸 Open 🚑 Reply 🆓 Reply All 🙈 Forward 🎽 Delete 🔰 Message Journal 🐁								
Priority	Patient Name	From	Subject	Due Date	Create Da 7			
	AMBCERNRES	Edufam, 12	Coumadin Ma		11/21/2022 9:02			
		Klee MD, David K	General Message		11/21/2022 9:24			
	AMPCEDNDEC	Charle MD Kaller I	D-f		44/24/2022 4			

Messages X

• Open the message, click Delete.

🙈 Reply 🎕 Reply All 🎭 Forward 🎽 Delete 🍯 Print 🦕 Select Patient 👚 🐥 🍓 Mark Unread 🛛 Inbox View Summary View 🔭 Launch Orders					
AMBCI DOB:5/5/	ERNRESULTS, BRIAN 1948	Age:74 years	MRN:AE4169036 Sex:Male	FIN:AE0056006387 Provider:	
From:	Edufam, 12			Caller:	AMBC
Sent:	11/21/2022 9:02:24 AM EST			Action:	
Subject:	Coumadin Management			Due:	

Select the Delete	Actions	
checkbox and then	Patient Needs Appointment	Remind on:
click Send when	Needs Lab Before Refill Please Call Patient with Results	Due on:
composing a message. Message Left for Patient to Return Call Agree with Message		
	See Note In Chart	Delete Send Cancel

Restoring Deleted Messages

To restore a message:

- 1. Click on the Trash folder.
- 2. Select the desired message.
- 3. Click Restore.

Message Center					
Inbox Summary 4	Trash X				
Inbox Proxies Pools	Communicate	🝷 💕 Open 🎦 I	Delete 🏾 🎦 Message	e Journal 🕼 Restor	re 🥡 En
 Messages (3/3) General Messages (3/3) 	Assigned	Create Da / 11/16/2022 10:1	From Clark MD, Kelly J	Patient Name AMBCERNRES	Priority
Notifications					
Sent Items Trash					



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Viewing Sent Items

To view a sent item in the Message Center:

- 1. Click Sent Items.
- Click on the desired message once to preview and click twice to open.

Message Center					
Inbox Summary 4	Sent Items X				
Inbox Proxies Pools	🎦 Communicate 👻 🚔 Open 🚘	orward 📓 Messa	ge Journal		
Display: Last 60 Days	Create Da / From	Notification C	Patient Name		
Last of Days	11/20/2022 10: Ambrnlpn, 19	2	AMBMEDTEST,		
Inbox Items (5)	11/20/2022 10: Ambrnlpn, 19		AMBMEDTEST,		
	11/20/2022 10: Ambrnlpn, 19		AMBMEDTEST,		
 Results (1/1) 	11/20/2022 10: Ambrnlpn, 19		AMBMEDTEST,		
Messages (3/4)	11/20/2022 10: Ambrnlpn, 19		AMBMEDTEST,		
Notifications	11/20/2022 10: Ambrnlpn, 19		AMBMEDTEST,		
	11/20/2022 10: Ambrnlpn, 19		AMBMEDTEST,		
Sent Items 1	11/20/2022 10: AmbrnIpn, 19		AMBMEDTEST,		
Trash	11/20/2022 10 Amberlag 10		ANADMEDTECT		

Understanding In-Between Encounters

In-between visit encounters are used when patient interactions are not related to a specific clinic visit and can be created by:

- Creating a new message: select the patient, but do not select an encounter.
- Replying to a message from the patient portal.

Creating a staff message	Inbox Summary 🛛 🕈	Critical × Results to Endorse: ANDERSSON, HANS ×		
from a result.	Inbox Proxies Pools Display: Last 90 Days Priority Items (39) Messages (39/49) General Messages (37/45) Labor Items (26)	Create		
Note: An ambulatory location must be selected, then click OK.	Ambulatory Location Select the location to use when auto-cree RC Family Pract RC Internal Med RC Pediatrics	eating an encounter:		

Message Center Tips:

- When replying to a consumer messages, the To Consumer box is automatically is selected.
- It is best practice to:
 - Enter a provider's name in every message and reminder
 - o Leave the Save to Chart box checked
 - Include the consumer, if indicated.
- When messages are sent through message pools, the message is displayed as being from the users Inbox and the heading includes the name of the person who composed the message.
- The user can also forward a message without opening it by selecting the message and clicking Forward.