

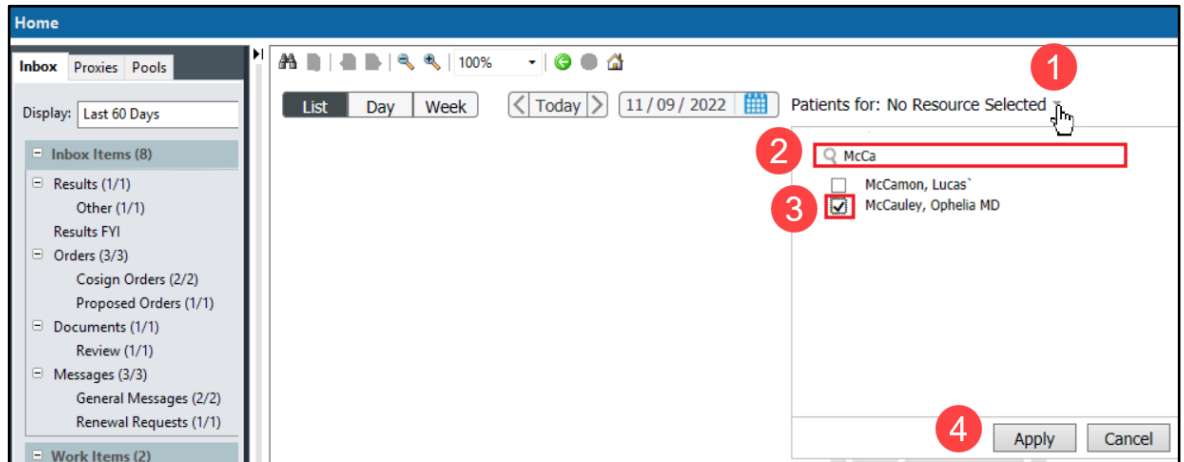
Ambulatory Organizer Personalizations

To access the Ambulatory Organizer, click on the Home icon in the toolbar.

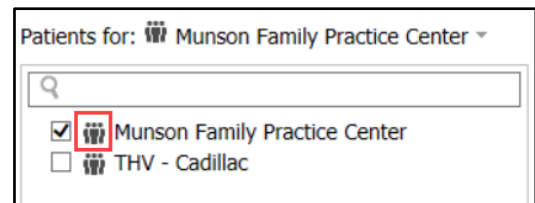


To select a resource(s) to be displayed:

1. In the Ambulatory Organizer, select the drop-down arrow next to **Patients for: No Resource Selected**.
2. Type the provider's name in the search box.
3. Select the resource to add to the Patients for: menu.
 - a. **Note:** Users can select multiple resources to display at once.
4. Click Apply.



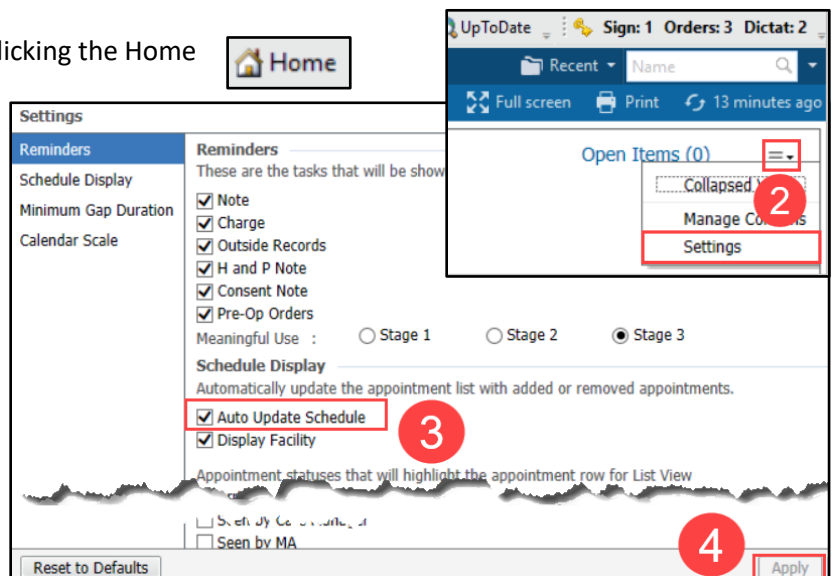
Users can also add a resource group by following the steps above. A resource group (i.e., an ambulatory clinic) is signified with a person group icon.



Auto Update Schedule

To auto update the schedule:

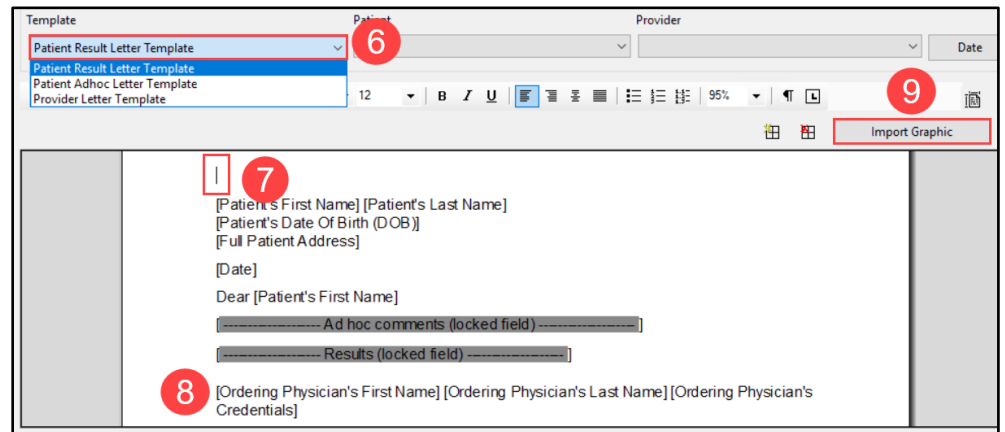
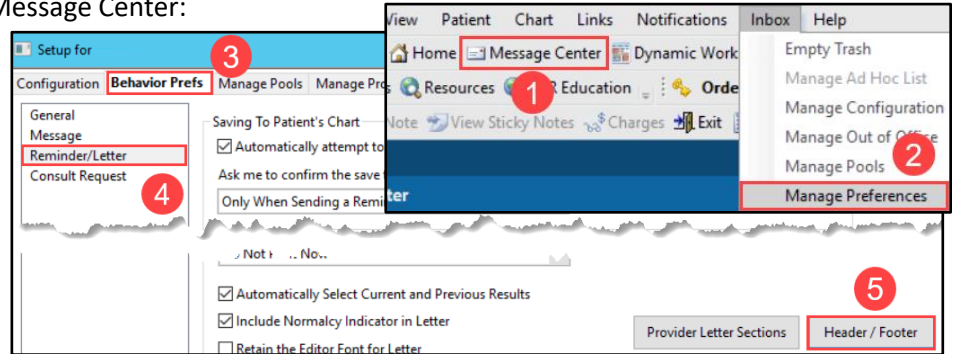
1. Navigate to the Ambulatory Organizer by clicking the Home button in the top toolbar.
2. Click on the icon and select settings.
3. Place a check mark next to **Auto Update Schedule**.
4. Click **Apply**.



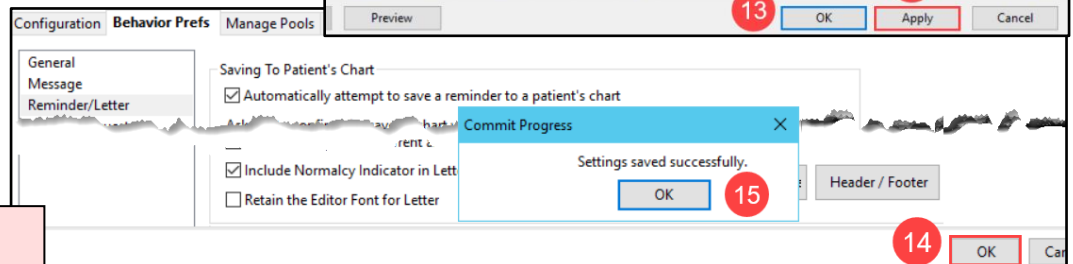
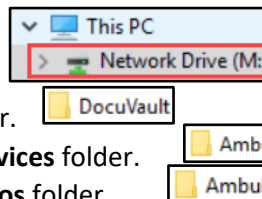
Message Center Letterhead

To set a letterhead and signature in the Message Center:

1. Click **Message Center**.
2. Under the Inbox tab in the top toolbar, select **Manage Preferences**.
3. Select the **Behavior Prefs** tab.
4. Click **Reminder/Letter**.
5. Click **Header/Footer**. A sample letter will pop up.
6. Use the drop-down Template menu to select the first template listed.
7. Insert two blank lines above all text to allow space for the graphic.
8. Highlight and remove the sample credentials and add providers credentials.



9. Click on **Import Graphic**.
 - a. Navigate to the **M: Drive**.
 - b. Select the **DocuVault** folder.
 - c. Select the **Ambulatory Services** folder.
 - d. Select the **Ambulatory Logos** folder.
 - e. Select an image and click **Open**.
10. Drag or resize the image to fit on the template.
11. Click **Apply**.
12. Repeat steps 6-11 for all three Templates: Patient Result Letter Template, Patient Ad Hoc Letter Template, and Provider Letter Template.
13. Click **OK** to save.
14. Click **OK** to save.
15. Click **OK** once settings have been saved.

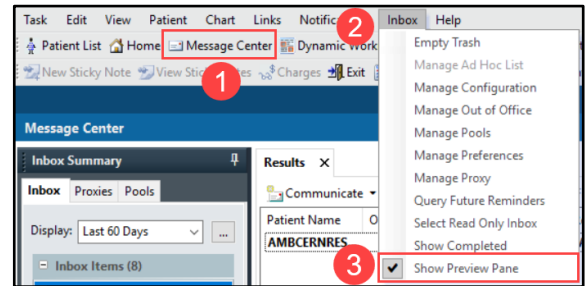


Note: Users **MUST** complete steps 13-15 or changes will NOT be saved.

Message Center Preview Pane

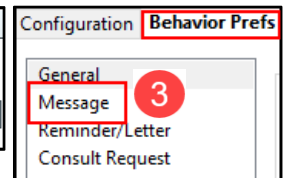
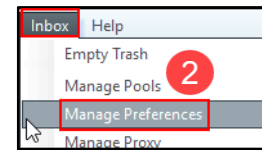
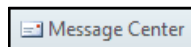
To show the Preview Pane when viewing items in the Message Center:

1. Click on **Message Center**.
2. Click the **Inbox** tab in the taskbar.
3. Click **Show Preview Pane** (a checkmark will be placed).

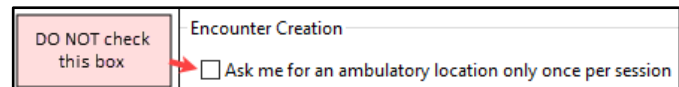


InBetween Visit Encounter Settings

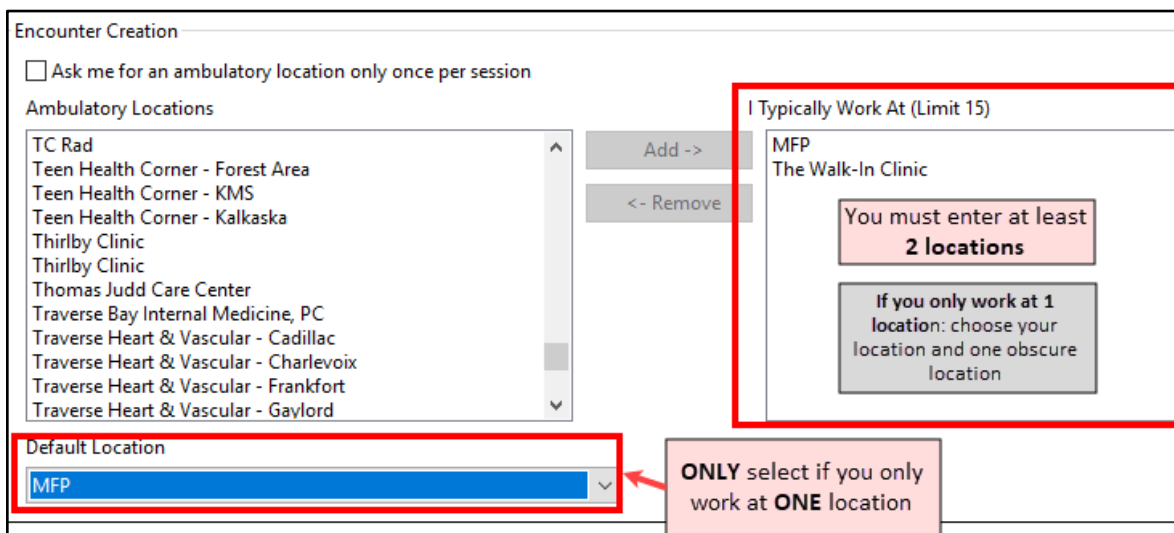
1. Click on **Message Center** on the top tool bar.
2. Click on **Inbox** on the top taskbar and select **Manage Preferences**.
3. Under the **Behavior Prefs** tab, click on **Message**.



4. Make sure the box under Encounter Creation is **UNCHECKED**.



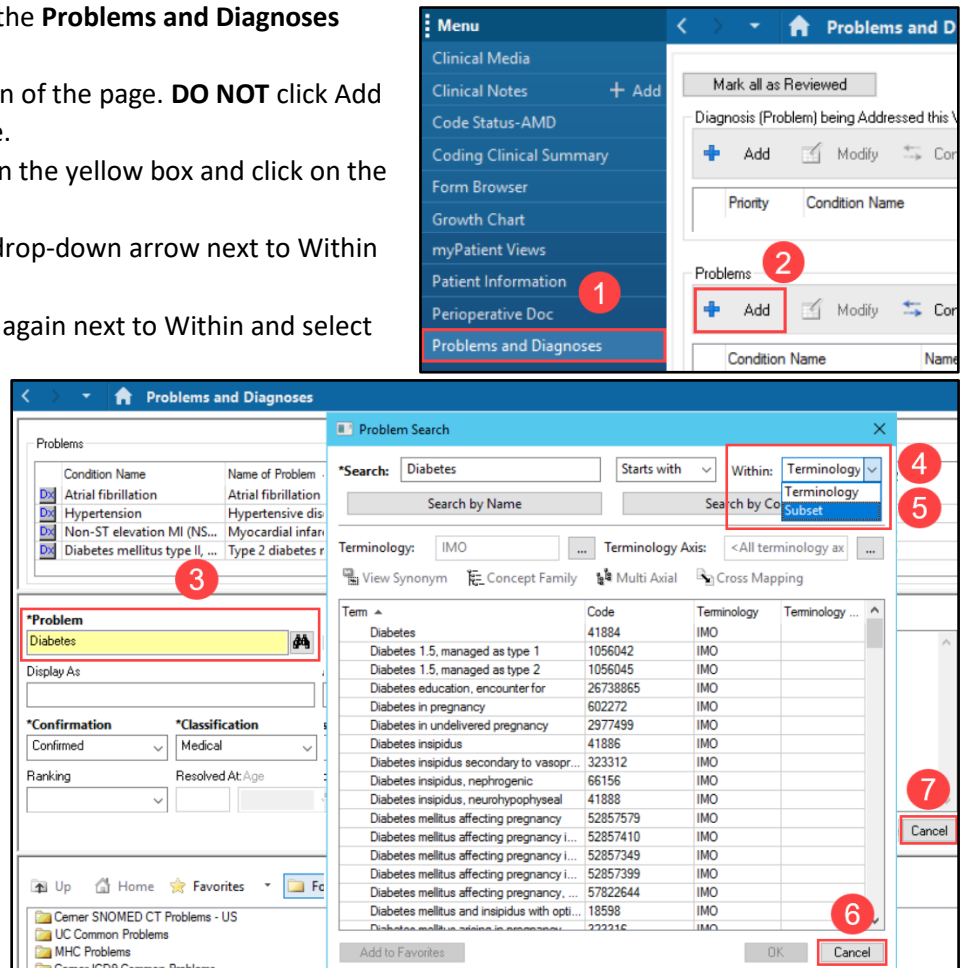
5. Select your work locations from the **Ambulatory Locations** list on the left. Then click **Add** to add the locations to the **I Typically Work At** list.
 - a. You must **enter at least two locations**.
 - b. **If you only work at one location:** choose your correct location, plus one obscure location.
 - c. Select the Default Location of the correct location where you work **only if you work at one location**.



6. Click **OK**.

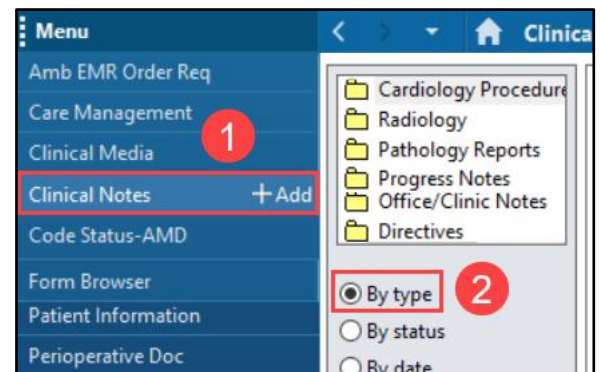
Problems and Diagnosis Search Fix

1. In a patient's chart, navigate to the **Problems and Diagnoses** page from the dark blue Menu.
2. Click **Add** in the Problems section of the page. **DO NOT** click Add in the Diagnosis part of the page.
3. Type a diagnosis (ex: Diabetes) in the yellow box and click on the binocular's icon.
4. In the pop-up window, use the drop-down arrow next to Within and select **Subset**.
5. Use the same drop-down arrow again next to Within and select **Terminology**.
6. Click **Cancel** to close the pop-up window.
7. Click **Cancel** again to cancel the problem.



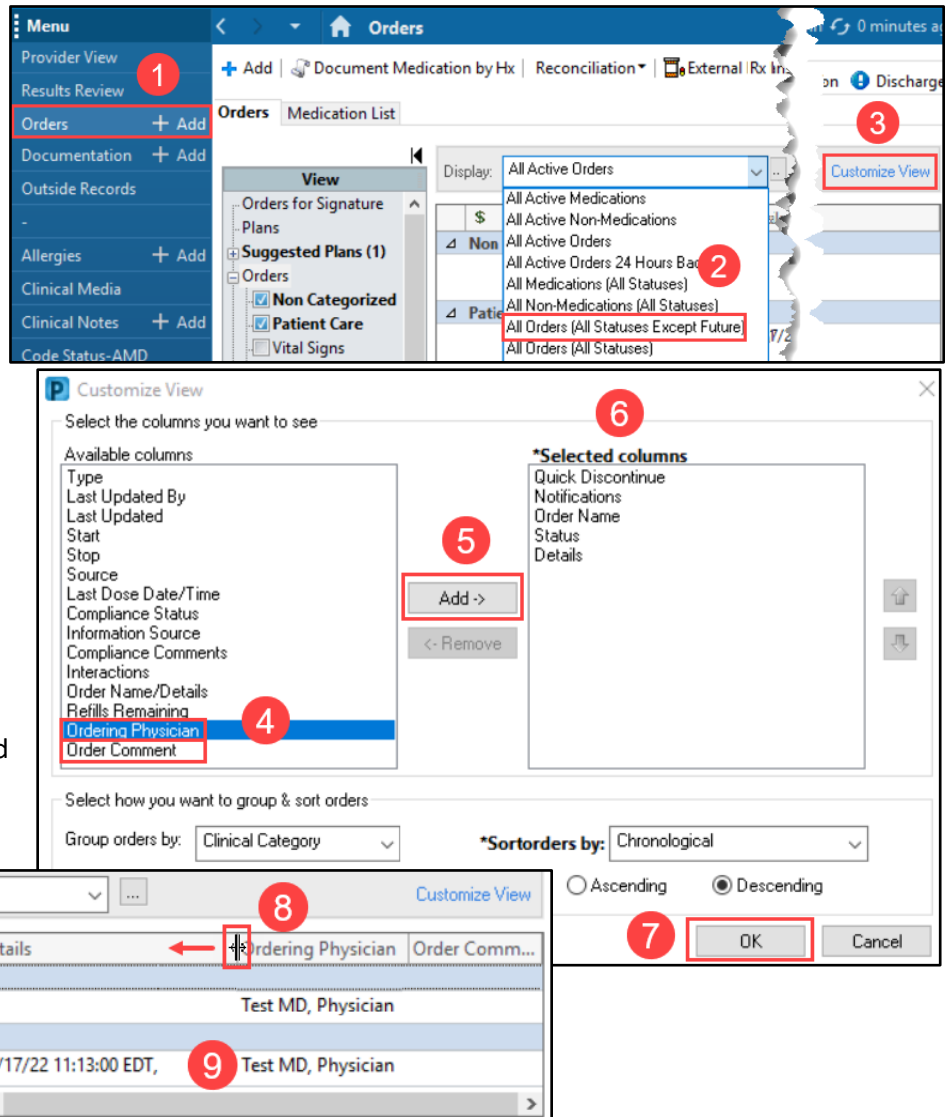
Clinical Notes

1. In a patient's chart, navigate to the **Clinical Notes** page from the dark blue Menu.
2. Select **By type**, to display the clinical notes in folders by type of note.



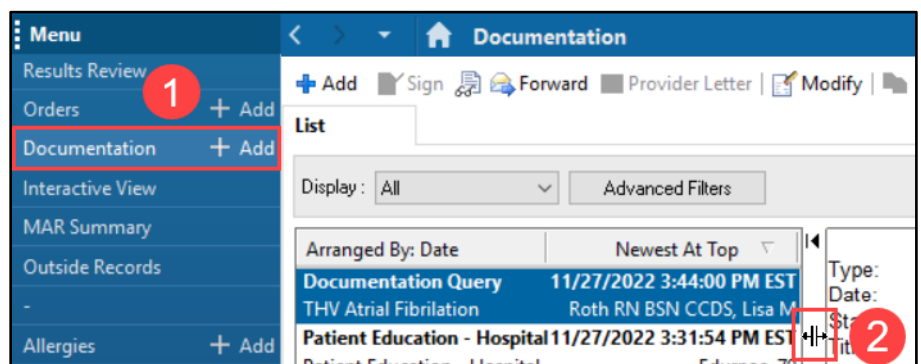
Orders Page View Personalizations

1. Navigate to the **Orders** tab in the dark blue Menu.
2. Click the drop-down arrow next to Display and select **All Orders (All Statuses Except Future)**.
3. Select **Customize View**.
4. Under Available Columns, select **Ordering Physician**.
5. Click **Add**.
6. Ordering Physician will now display under *Selected columns. Repeat step 4 for **Order Comment**.
7. Then click **OK**.
8. On the Orders page, scroll to find the vertical column line next to Ordering Physician. Hover over the line until the icon appears. Click and drag the column line to the left, so the user does not need to scroll to see more information.
9. Move the scrollbar to the left to ensure all columns now fit on the page. The scrollbar should disappear.



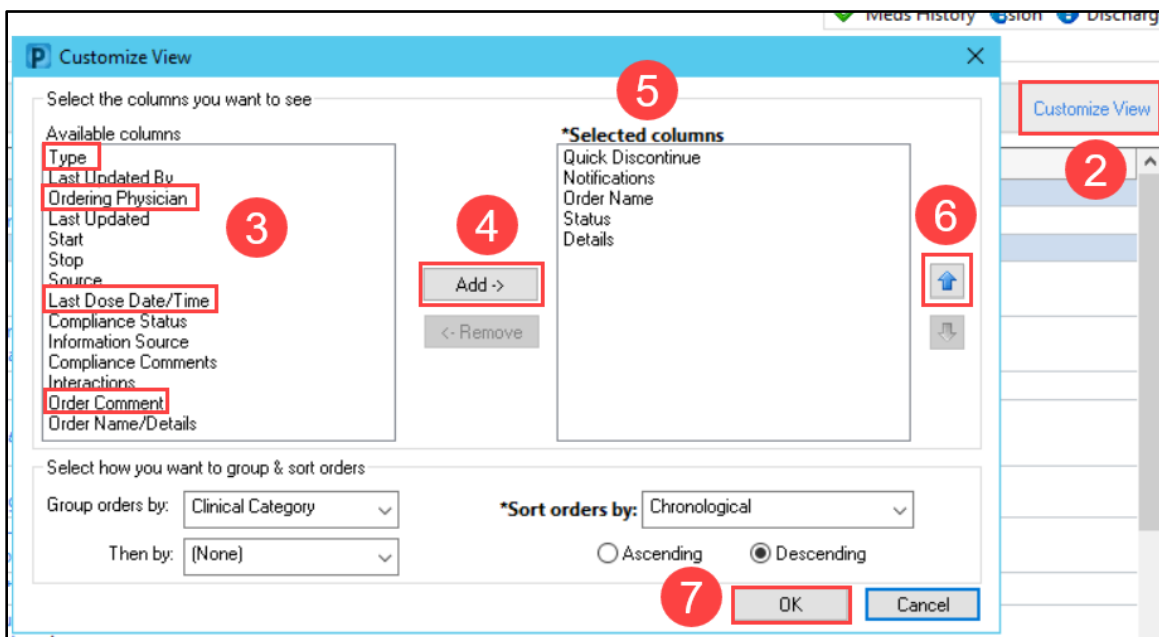
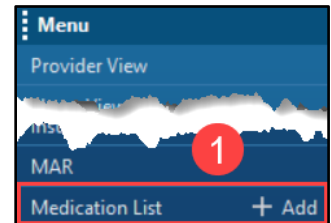
Documentation

1. In a patient's chart, navigate to the **Documentation** tab from the dark blue Menu.
2. Hover over the blank space between the two columns until the icon appears. Click and **drag the column to the left** to condense the left column to wrap the text, as shown in this example.

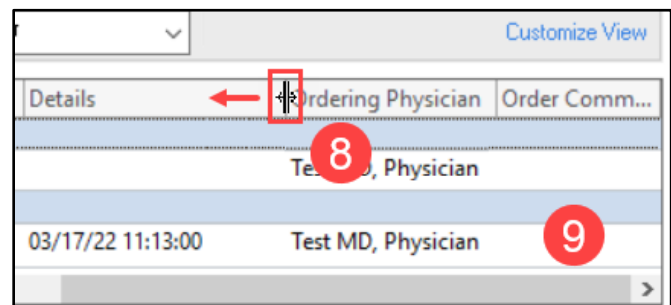


Medication List View Personalizations

1. In a patient's chart, navigate to the **Medication List** page from the dark blue Menu.
2. Click **Customize View** in the gray toolbar.
3. Under Available columns, hold the Ctrl key and select **Type**, **Ordering Physician**, **Order Comment** and **Last Dose Date/Time**.
4. Click **Add**.
5. Type, Ordering Physician, Order Comment and Last Dose Date/Time will now show in *Selected columns.
6. Select **Type** under *Selected columns and click the **up arrow** to move it to the top of the list.
7. Click OK.



8. On the Medication List page, scroll to find the vertical column line next to Ordering Physician. Hover over the line until the **icon** appears. Click and drag the column line to the left, so the user no longer needs to scroll to see more information.
9. Move the scrollbar to the left to ensure all columns now fit on the page. The scrollbar should disappear.



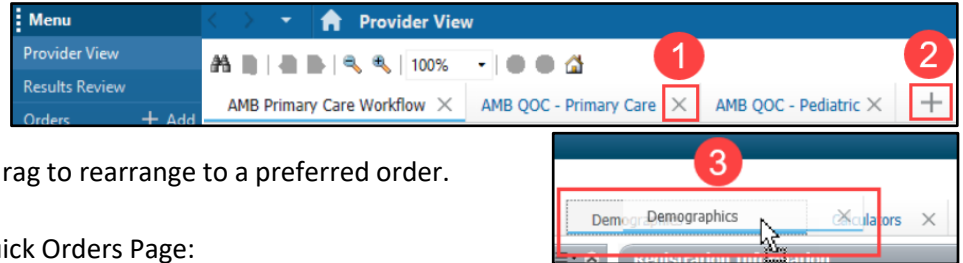
PowerChart Personalizations for Providers

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MPage Personalizations

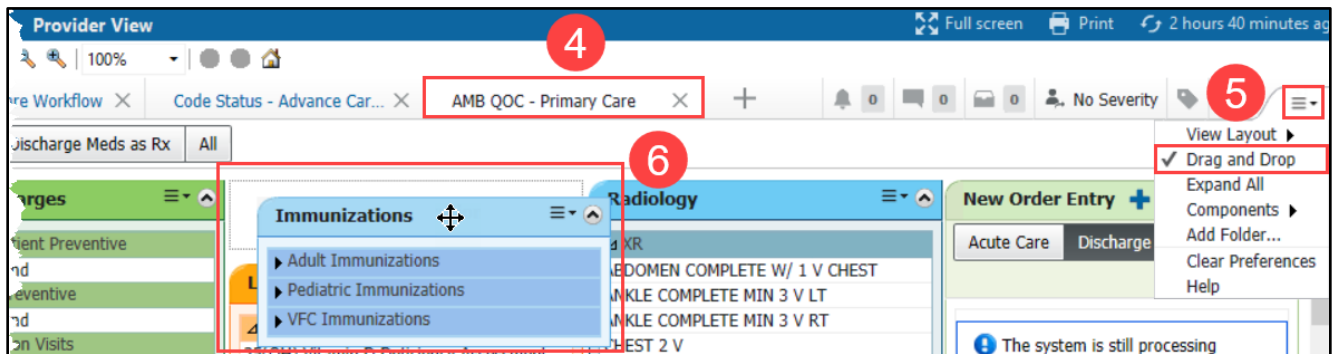
To add, remove or rearrange MPages in the Provider View:

1. Click the X to remove an MPage.
2. Click the + to add an MPage from a list.
3. Left click on an MPage tab and drag to rearrange to a preferred order.



To rearrange Components within the Quick Orders Page:

4. Navigate to the AMB QOC MPage.
5. Click on the Page Menu icon ≡ and select Drag and Drop (a checkmark will be placed).
6. Left click and drag a component to a new location.

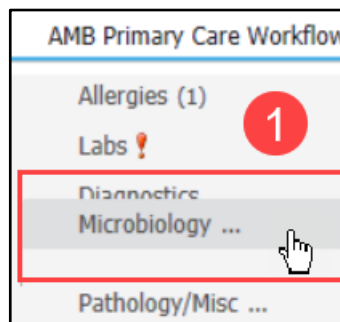


Components Personalizations

To rearrange Components in a Workflow:

1. Left click and drag to the preferred order.

Note: It is preferred to keep the **Notes/Reminders/Queries** and the **Problem List** Components at the top of the Workflow.



To add or remove Components in a Workflow:

2. Click on the Page Menu ≡ icon.
3. Click Components.
4. Check to show a Component and uncheck to hide a Component.
5. Select Clear Preferences to clear ALL preferences with the Workflow.

