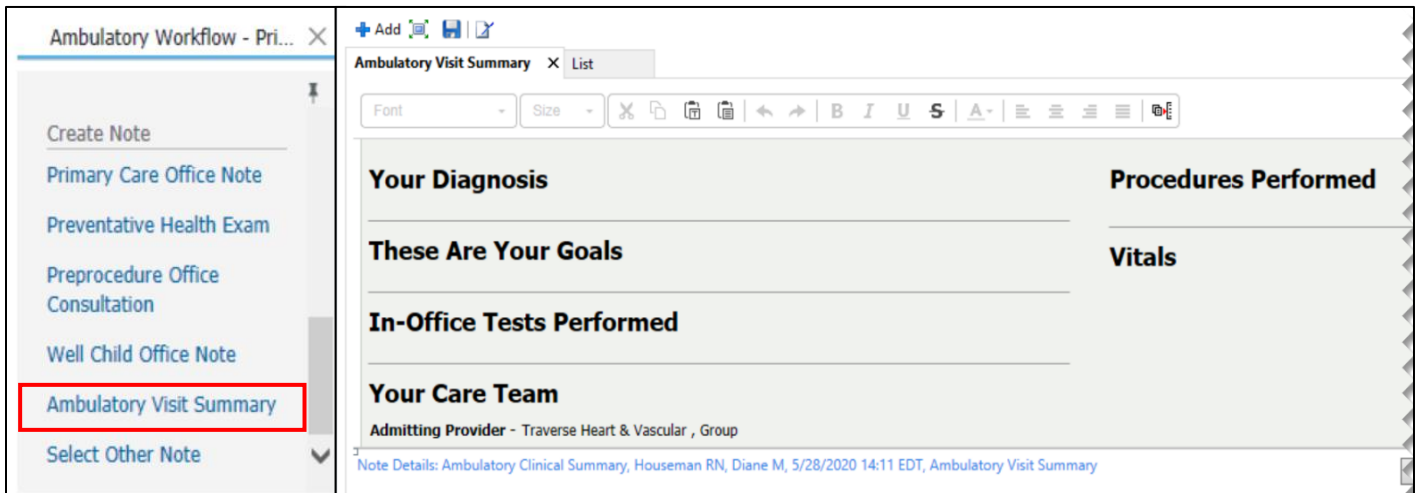


# Visit Summary Creation and Printing

for Providers, Clinical and Clerical Staff

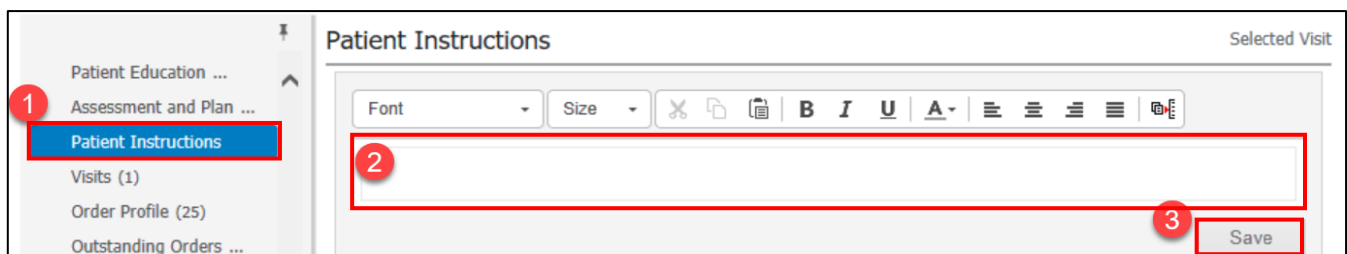
## Creating Visit Summary

1. Select **Ambulatory Visit Summary** from Create Note on the Ambulatory Workflow navigator to create a Dynamic Documentation Visit Summary.
  - a. The Visit Summary can also be created from the Documents component on the Ambulatory Workflow page by clicking +. Documents (8) +



**NOTE: The patient plan will not populate into the Ambulatory Visit Summary by default. Patient instructions must be added separately.**

- **To add patient instructions:**
  1. Locate the **Patient Instructions** component on the Ambulatory Workflow navigator.
  2. Type instructions in the text box.
  3. Click **Save**. Patient Instructions will now pull through to the Ambulatory Visit Summary.
    - a. Multiple users i.e., other providers, clinical and clerical staff can contribute to the Patient Instructions by following these same steps.



2. Click Sign/Submit once the Ambulatory Visit Summary is complete to create the Visit Summary Document.



# Visit Summary Creation and Printing for Providers, Clinical and Clerical Staff

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## Printing Visit Summary

1. Navigate to Documents on the Ambulatory Workflow Page or Documentation on the Table of Contents Menu.
2. Select the Ambulatory Visit Summary.
3. Click the Print button or Print icon.
4. Follow the Single Document printing process.

### Table of Contents Menu

Service Date/Ti...	Subject
9/2/2021 09:33:57 EDT	Ambulatory Visit Summary

### Ambulatory Workflow

Time of Se...	Subject	Note Type
▼ In Progress (0)		
▼ Completed (5)		
SEP 02, 2021 09:...	Ambulatory Visit...	Ambulatory Clini