

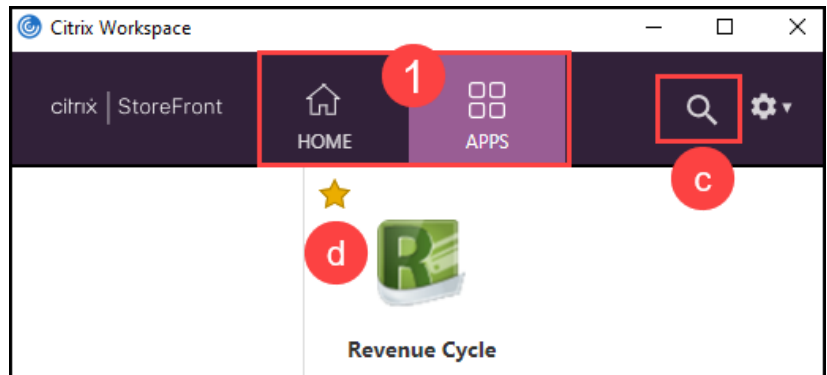
# Revenue Cycle Overview for all Healthcare Team Members

## Cerner Revenue Cycle Ambulatory EDUCATION

Revenue Cycle Cerner Practice Management is used by ambulatory practices for patient registration, scheduling, check in, and referral management.

### How to Access Revenue Cycle

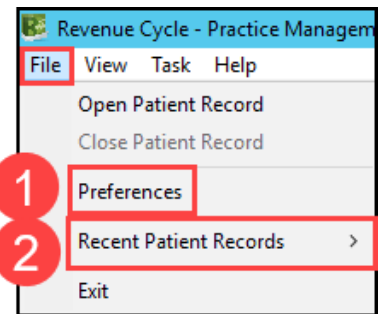
1. Navigate to the Citrix Workspace and locate Cerner Revenue Cycle from either APPS or HOME.
  - a. **APPS** displays all applications available.
  - b. **HOME** displays only favorited applications.
  - c. Click the magnifying glass to search for an application.
  - d. Click on the star icon to favorite an application. Favorited applications display with a gold star.
2. Click on Revenue Cycle to open.



### Revenue Cycle Toolbar

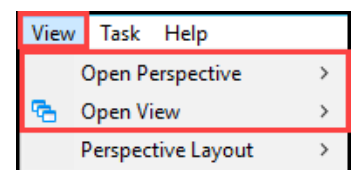
#### File:

1. Preferences:
  - a. Preferences is used to set individual preferences for each healthcare team member's experience, including location settings.
  - b. Clicking on Preferences launches a separate window. Update preferences as needed and click Apply or Apply and Close to save changes.
2. Recent Patient Records
  - a. Displays the last five patient names that have been opened in Revenue Cycle.
  - b. Hover over Recent Patient Records to display the patient names.



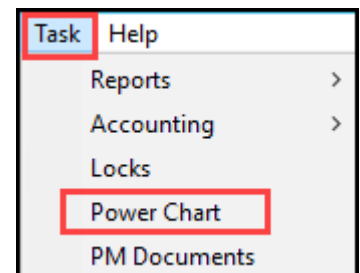
#### View:

1. View is a Revenue Cycle navigation tool.
  - a. Open Perspective allows opening of both non-patient perspectives and patient perspectives.
  - b. Open View displays options to open view tabs that are non-patient related or patient related if a patient's chart is open.



#### Task:

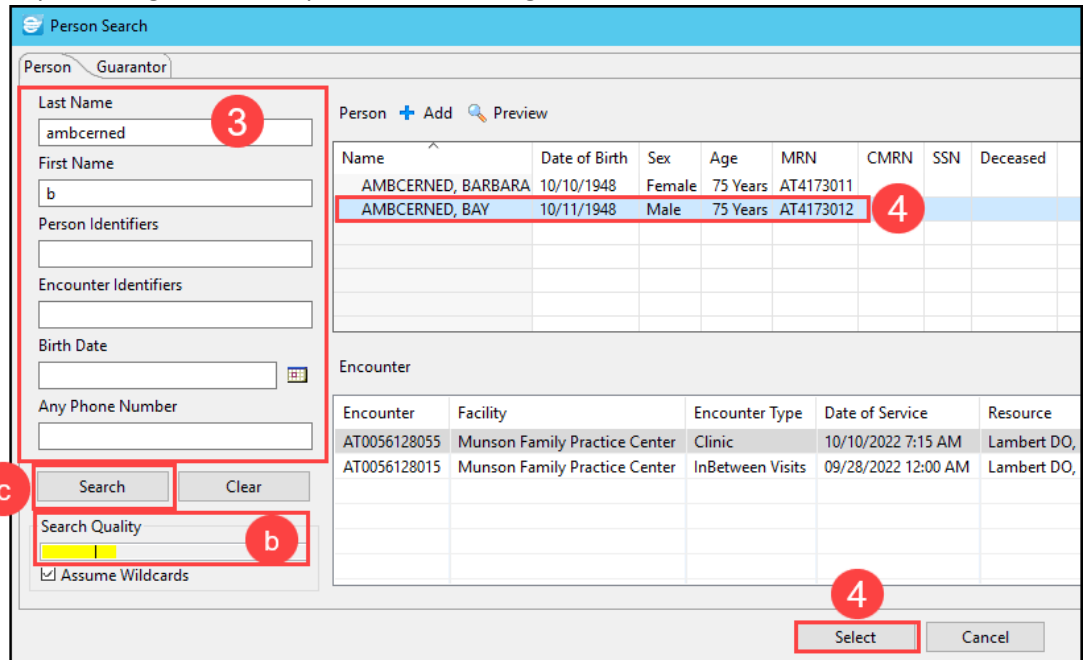
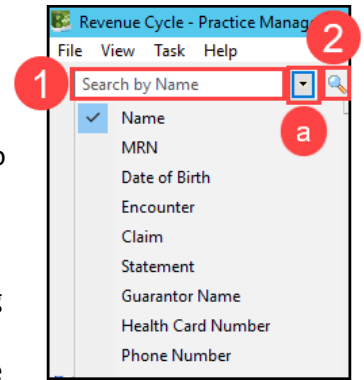
1. Access additional Revenue Cycle options including Scheduling Reports.
2. Click on PowerChart to open PowerChart. If a patient's chart is open, clicking on PowerChart will directly open the patient's chart in PowerChart.



## Opening and Closing a Patient's Chart

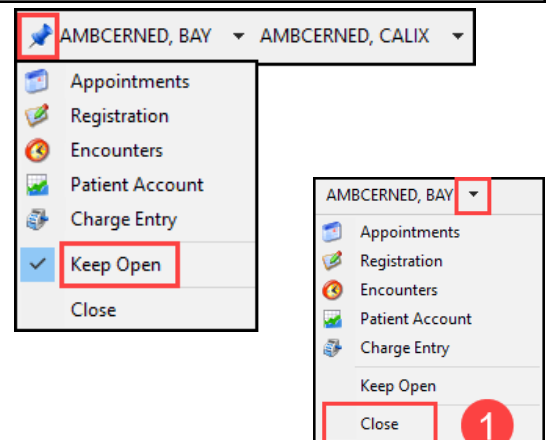
### Opening a patient's chart:

1. Search for a patient using the Patient Search bar.
  - a. Change the Search by terms by clicking on the drop-down arrow.
2. Enter the search criteria into the Patient Search bar and click the magnifying glass to search.
3. Enter additional patient identifiers to narrow the search results and verify the correct patient.
  - a. Use three patient identifiers when searching for a patient before registering a new patient to make sure they are not already in the system.
  - b. The Search Quality indicates the accuracy of the search results based on the number of patient identifiers entered.
  - c. Click the Search button to re-run the search after entering information.
4. Open the patient's chart by selecting the correct patient and clicking the Select button.



### Pinning a patient's chart open:

1. Click on the arrow next to the patient's name on the patient perspective toolbar and select Keep Open to pin the patient's chart open on the toolbar.



### Closing a patient's chart:

1. Click on the arrow next to the patient's name on the patient perspective toolbar and select Close.

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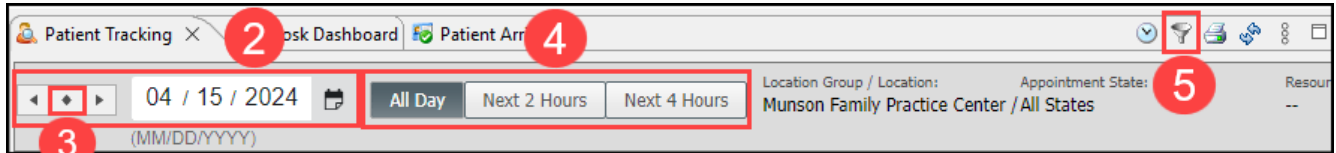
## Cerner Revenue Cycle Ambulatory EDUCATION

### Non-Patient Perspectives

The non-patient perspectives are icons located on the left side of the application.


#### Patient Tracking

- Filters:
  - Scheduled appointments display based on the filters selected.
  - The date displayed can be changed by clicking the back or forward arrows to move to the previous or next day, or by clicking on the calendar icon and selecting a specific date.
  - Navigate back to the current date by clicking the diamond.
  - The timeframe displayed can be set to All Day, Next 2 Hours, or Next 4 Hours.
  - The Location can be changed by clicking on the Patient Tracking Filter icon.



- Navigation
  - The Patient Tracking Perspective shows specific appointment details face up.
  - Open a patient's chart directly from the Patient Tracking Perspective by clicking on the patient's name.
  - An **i** icon indicates an alert has been added for the patient. Click the **i** to display the alert.
  - The Status column is used to initiate the manual check-in or complete the check-in process for a patient who completed e-registration.
  - To view additional appointment details, click on Show within the desired patient's appointment row.
  - Registration information can be reviewed in the expanded view. Items with a red x indicate items to be reviewed. These items are addressed during the check-in process.
  - The areas indicated may be accessed by clicking on the blue hyperlink text.

Appointment Time	Patient	Status	Encounter	Appointment Type	Reason	Resource	Location	Authorization	Insurance	Payment In
07:00 AM	AMBCERNED, BARBARA <b>i</b> MRN: AT4173011 Age: 75 years	Appointment: Checked In Patient: Arrived Wait Time: 24777 min	AT00561280 54	FP Established Patient	Hypertensi on	Lambert DO, Timothy	Munson Family Practice Center (15 min)	--	Medicare Plus Blue	Due Today: ( ) Paid Today: ( ) Charges: (-)

Demographics	Details	Insurance	Financial
 AMBCERNED, BARBARA	Date Of Birth: 10/10/1948 Home Address: 1105 SIXTH ST TRAVERSE CITY MI 49684-2345 Employer: -- Home Phone: (231) 555-5555 Mobile Ph:	Primary Guarantor: AMBCERNED, BARBARA Encounter Number: AT0056128054 Encounter Date: Oct 10, 2022 7:00:00 AM Referring Physician: --	Payer: Blue Cross Blue Shield Michigan - Institutional Start Date: Sep 22, 2022 12:00:00 AM Group Number: -- Member Number: 111111111111 Guarantor Balance: \$0.00 Insurance Balance: \$0.00 Notifications: --

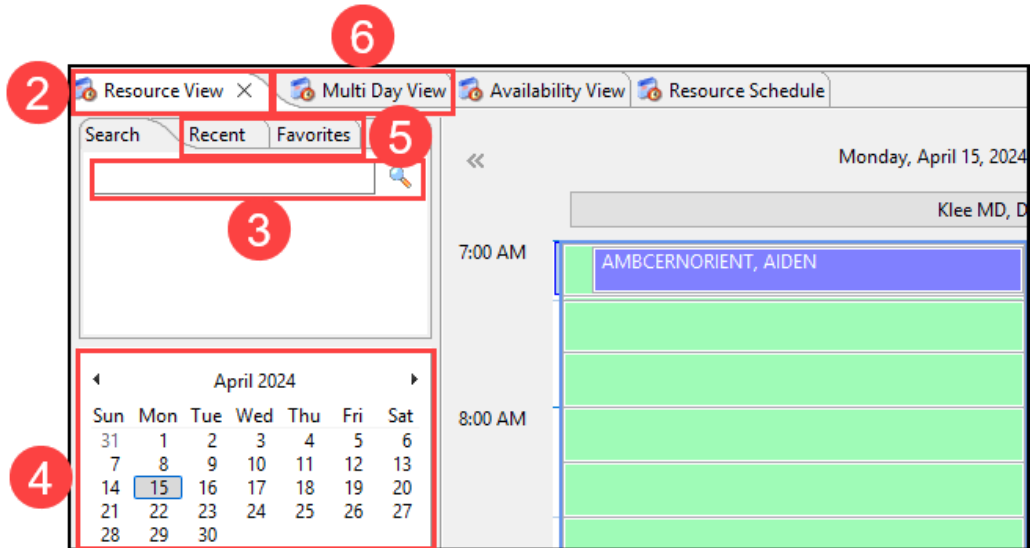
✗ Address Validation | 
 ✗ Eligibility | 
 ✓ POS Balance and Payments | 
 Images | 
 Hide

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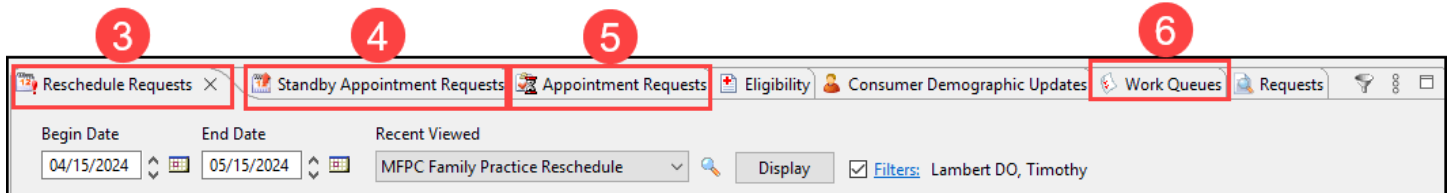
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### Resource View

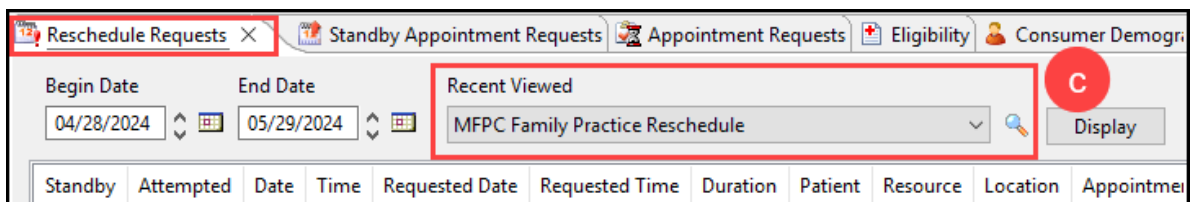
1. Resource View is available to view the schedule for a provider, room, or resource group.
2. Resource View offers a view of one or more resource.
3. Search for a resource using the search bar and magnifying glass.
4. Use the calendars to navigate to a different date.
5. The Recent and Favorites tabs are available.
6. Multi Day View displays four days at a time for the resource selected. Navigate to another date range by clicking the date on the calendar or using the back or forward arrows.



### Queues



1. Queues are clinic worklists to work from.
2. Navigate to each queue by clicking on the tab.
3. Reschedule Requests Queue:
  - a. Provides a worklist of patient appointments that need to be rescheduled, which may occur when a resource schedule is blocked and scheduled appointments are canceled.
  - b. Once the new appointment is scheduled, the patient will drop from this work queue list.
  - c. Set the Recent Viewed Queue to display the queue for the desired location by searching and selecting the correct location or locations. This must be done for each Queue individually.

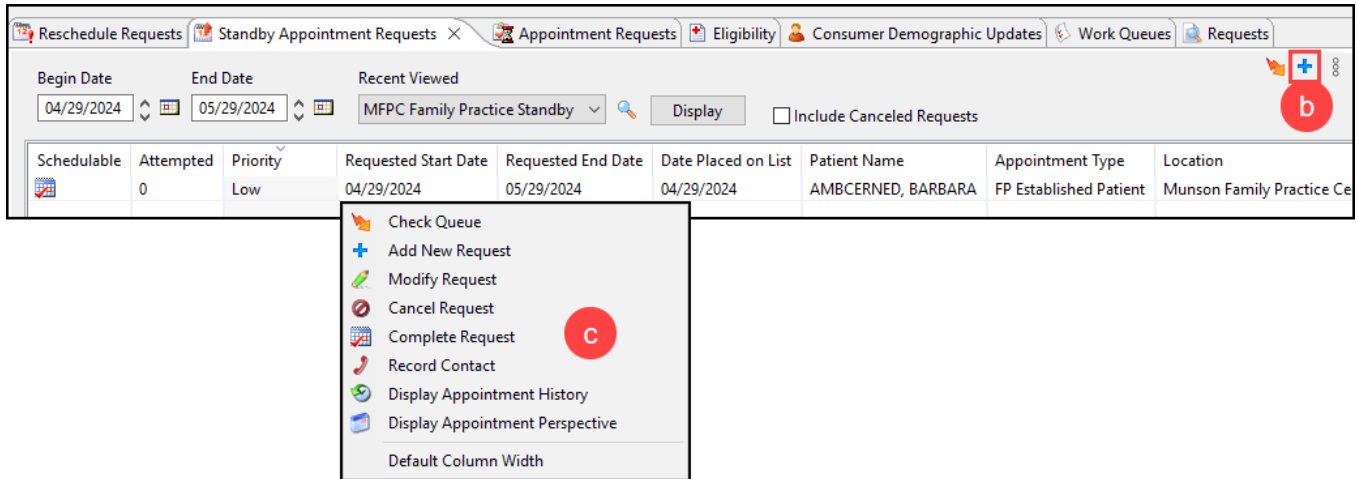


4. Standby Appointment Requests Queue:
  - a. Functions as a waiting list for patients requesting to be seen sooner than their current scheduled appointment.

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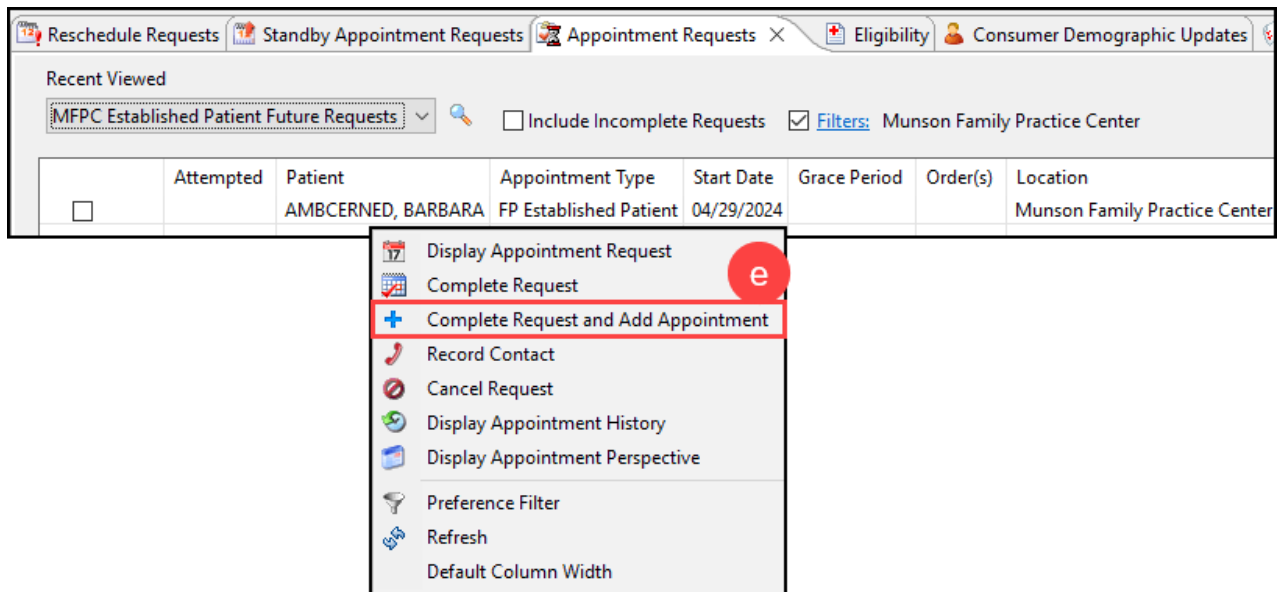
## Cerner Revenue Cycle Ambulatory EDUCATION

- b. This worklist may be used to fill open appointment slots. Patients can be manually added to this queue by clicking the blue Add icon. The patient must have a future appointment scheduled before adding a standby appointment request.
- c. Right-click on an individual request to select Complete Request or access more options.



### 5. Appointment Requests Queue:

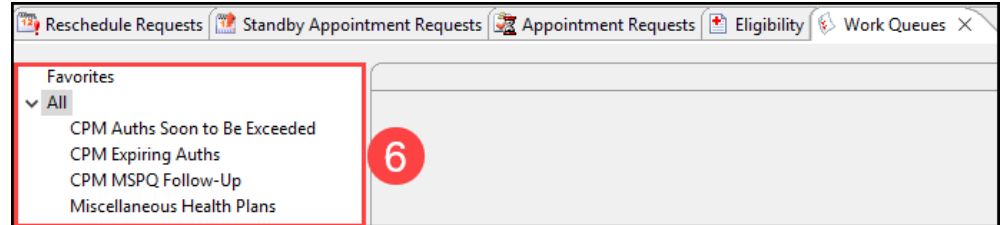
- a. Worklist of patient appointments needing to be scheduled. Appointment requests are generated when a return to clinic order is placed by a provider or clinical health care team member.
- b. A manual appointment request can also be made from Add Appointment Plus.
- c. Appointments scheduled correctly from this queue will cause the patient name to drop from this work queue list.
- d. Right-click on the patient's name to view action options.
- e. Complete Request and Add Appointment will allow scheduling of the requested appointment and completes the request.



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- The Work Queues tab will only be visible if there are other queues assigned to an individual. Click on the queue from the list on the left to view each individual worklist.

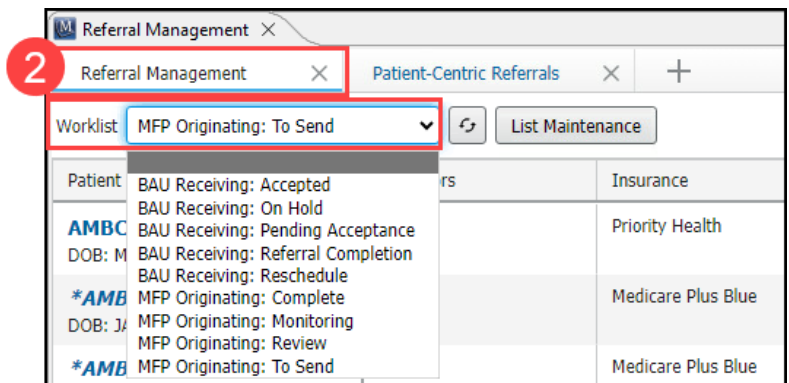


### My Workflow

- Available to view Reports, Charge Batches, and Refunds.
- The Registration Edit Failure Queue is found here, which contains any registration or insurance errors found by the billing and coding team that need to be reviewed and corrected by the practice staff.

### Referrals

- The Referrals Perspective opens Referral Management. Referral management is used by all Munson Cerner ambulatory practices and offers a seamless workflow to manage incoming and outgoing referrals.
- The Referral Management tab contains Worklists that are created and used by referral managers to process referrals.
- The Patient-Centric Referrals tab within Referral Management is available for all healthcare team members to search for and view referral information for a single patient.
- For detailed information regarding Referral Management, refer to the Referral Management education resources on the [Clinical EHR Education website](#).

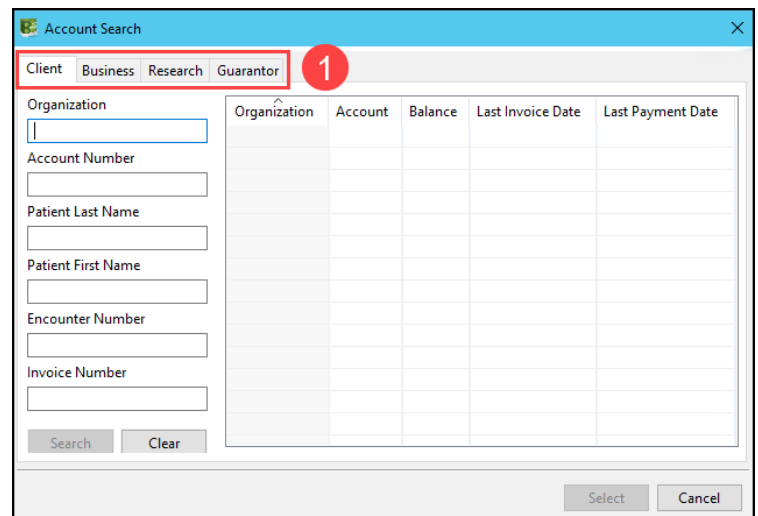


### Charge Batch Entry and the Create Remittance

perspective are billing tools.

### Client Business Account Search

- An Account Search tool available to search for Client, Business, Research, and Guarantor.

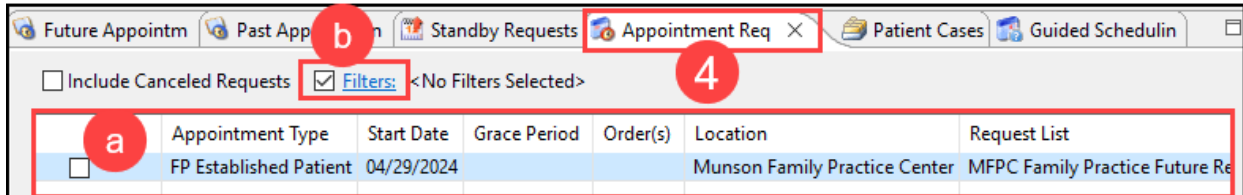




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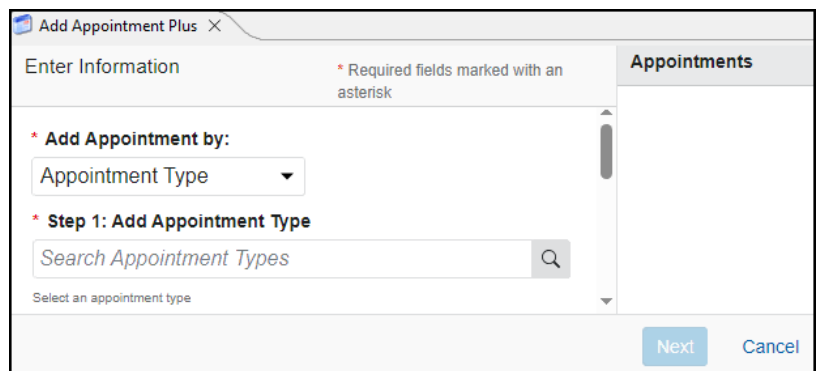
4. Appointment Requests:
  - a. Displays individual patient appointment requests until scheduled from the Appointment Request Queue.
  - b. Select Filters as needed.



5. Additional tabs may or may not be viewable, depending on the position.

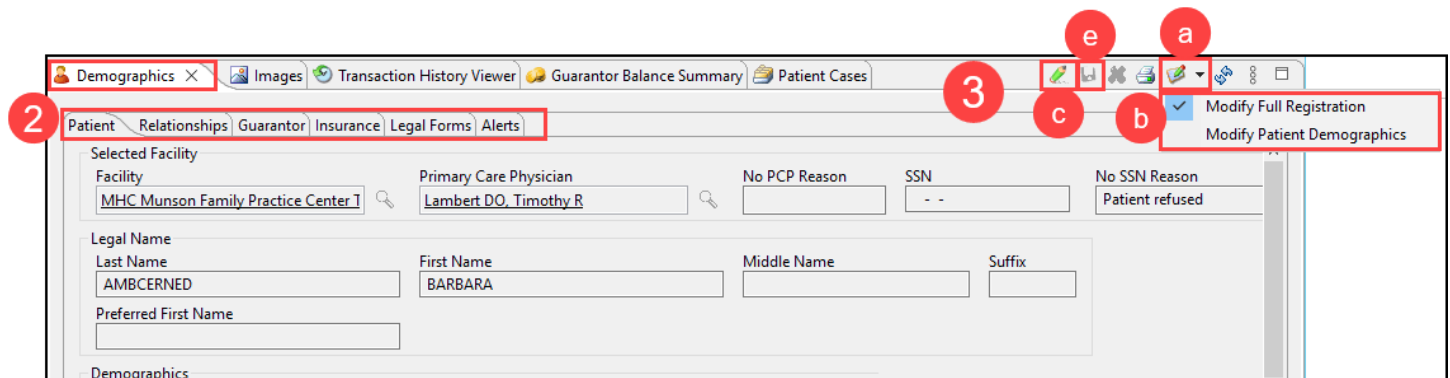
### Add Appointment Plus:

- Add Appointment Plus is located on the bottom half of the screen within the Appointments perspective and is used for scheduling new appointments.
- For detailed information, refer to the Appointment Scheduling educational resources on the [Clinical EHR Education website](#).

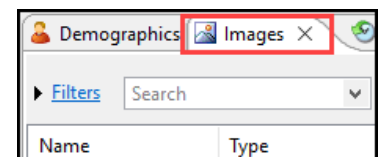


### Registration

1. Click on the individual tabs to navigate to the desired area.
2. Demographics contains tabs for Patient, Relationships, Guarantor, Insurance, Legal Forms, and Alerts.
3. To modify information:
  - a. Select the Change Conversation icon to choose what to modify.
  - b. Select either Modify Full Registration or Modify Patient Demographics.
  - c. Click the Modify pencil icon.
  - d. Add or update information as needed.
  - e. Click the Save icon.



4. Images
  - a. View images of scanned patient registration information, such as insurance or identification cards.





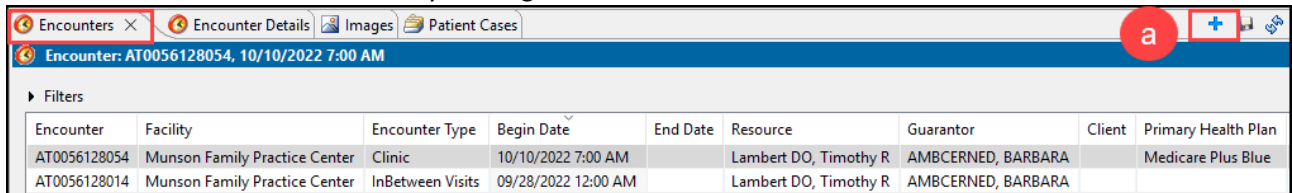
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### Encounters

1. Encounters is a list of all patient encounters. The list may be sorted by clicking on the column headers.

a. A new encounter is created by clicking the blue Add icon.



2. Encounter Details contains details for the selected encounter.

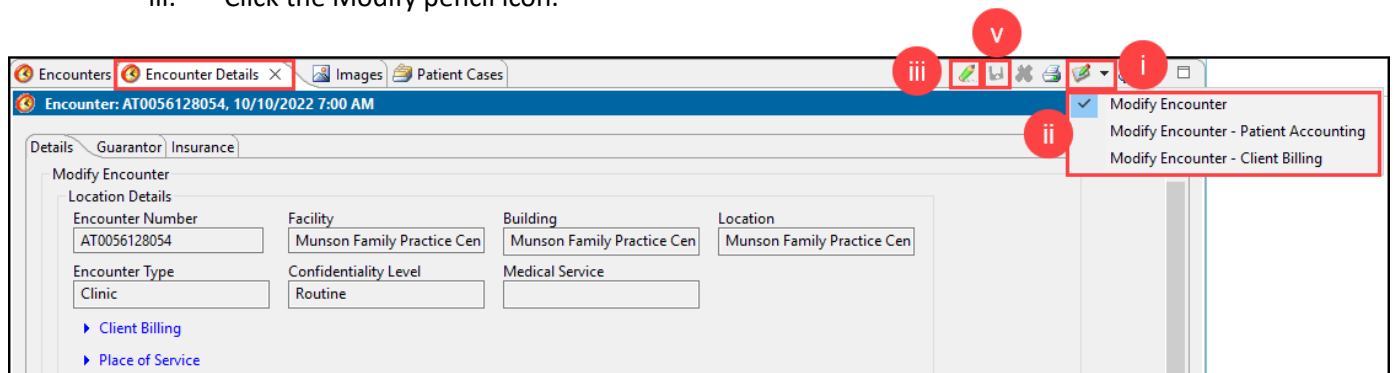
a. Double clicking on an Encounter opens the Encounter Details.

b. To modify Encounter Details:

i. Select the Change Conversation icon to choose what to modify.

ii. Select the correct Modify Encounter conversation.

iii. Click the Modify pencil icon.



iv. Add or update information as needed.

v. Click the Save icon.