

Advanced Personalization Quick Tips for Clinical and Clerical Staff

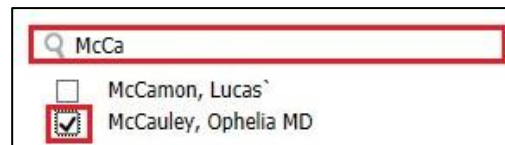
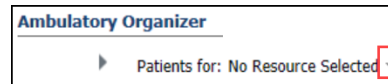
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Summary: Advanced Personalization settings are available to further customize individual settings to help optimize workflow. All settings listed on the Clinical and/or Clerical Staff Personalization documents should be completed first.

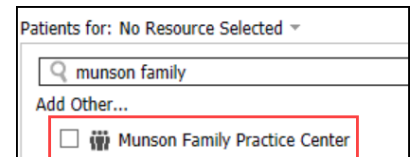
Ambulatory Organizer

Selecting Resources displayed

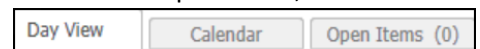
1. Click the drop-down arrow next to Patients for:
2. Select the resource(s) you wish to display the scheduled appointments for.
 - a. If the resource is not available to select, search for the resource in the search box and select the resource(s).



3. To add a resource group, search for the resource group in the search box and select the desired resource group. The resource group is signified by a person group icon. The patients are displayed on the schedule with the identified resource to which the patient is scheduled.
4. To remove a resource from being displayed, deselect (uncheck) the resource.
5. To remove a resource from the Patients For menu, click the  on the far right of the resource. If you are a resource, you cannot remove yourself from the menu.



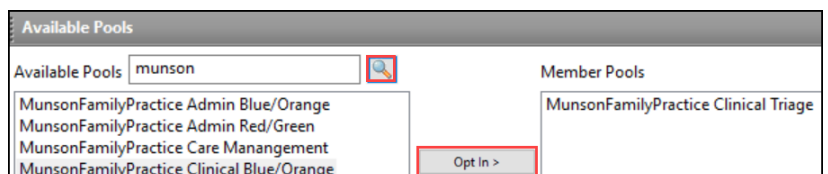
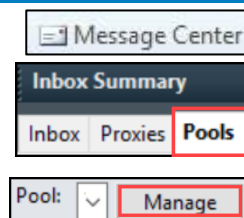
6. Click **Apply** to save your changes. When you switch between Day View, Calendar and Open Items, each view displays the resources that you last selected to be displayed in that individual view. Resources must be selected for each view.



Message Center

Managing Pools

1. Click on Message Center.
2. Click on the Pools tab.
3. Click Manage.
4. Search using the magnifying glass and select the desired pool(s) in Available Pools on the left and Click Opt in to move it to Member Pools on the right.
5. Click OK.



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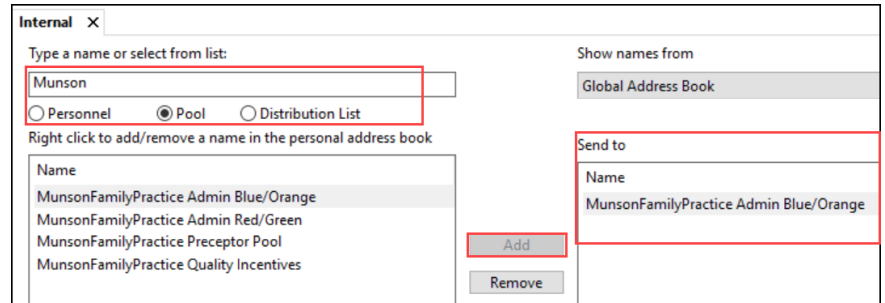
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Recipient Favorites

1. Click on Communicate to open a New Message
2. Next to the To: field, click on the binoculars.



3. Search for recipient(s) and add them into the Send to box. This may be individual Personnel or Pools.
4. When all favorite recipients are in the Send to box, click OK.

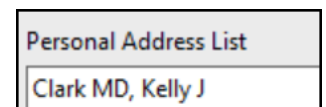


5. Recipient name(s) will appear in the To: field.

6. Right click on each name and click Add as Favorite.



7. Recipient favorites will now display in your Personal Address List when your cursor is in a field where recipients may be added (To:, CC:, Provider:).



8. To add the recipient in the send to field, double click on their name from your Personal Address List.
9. Click Cancel on the New Message screen.

Ambulatory Workflow Pages


1. Search and open a patient chart. Use the following test patient: ZZZZREVCYCLE, AMB TESTING. Open to an ambulatory encounter.
2. Remove any mPages that will not be used by clicking on the "x" at the end of the page name.
3. To add mPages that will be used, click on the + Sign.



4. Arrange the order of display of the mPages by clicking and dragging on each tab.
 - a. **Note:** Patient charts will open to the first mPage therefore it is best that your most used workflow page will be in the first position.

Components & Component order

- Each page can be configured to your own preference based on your workflow.

1. Click on the Components Drop Down menu  and navigate to components.
2. Ensure there are check marks next to the components you would like to be displayed in your workflow page.
3. To move components in the order of a preferred workflow, click and drag the Components on the Workflow navigation menu.

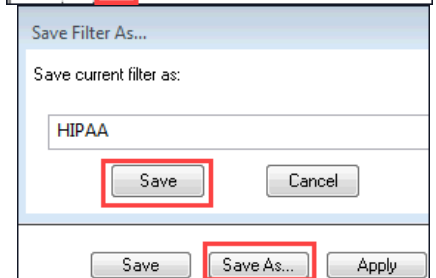
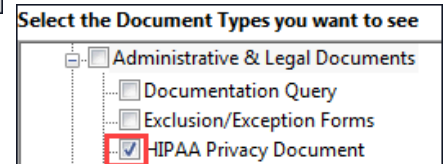
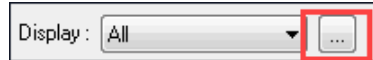
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Documents/Documentation

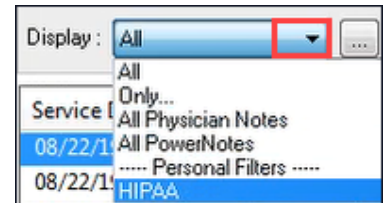
Creating Personal Advanced Display Filters

1. On the Ambulatory Workflow Page, click on the Documents Component Header.
2. Click on the ellipsis button next to Display.
3. Select the Document Type(s) you want to set a filter for. Check the box next to the document type(s).
4. Click Save As... Type the name of the filter you are creating. Click Save.
5. Click New and repeat the process to add additional filters.
6. Click Apply and Close when done.



To use the Display Filters:

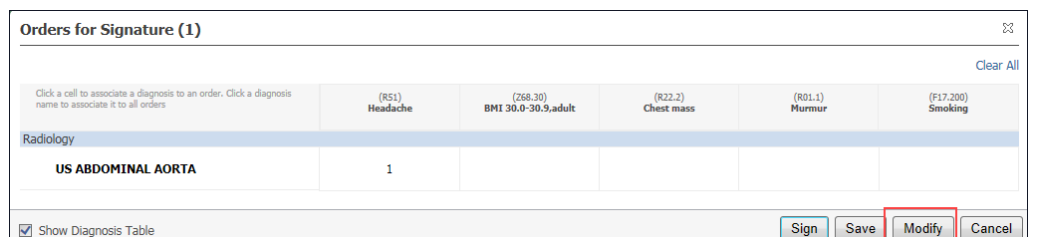
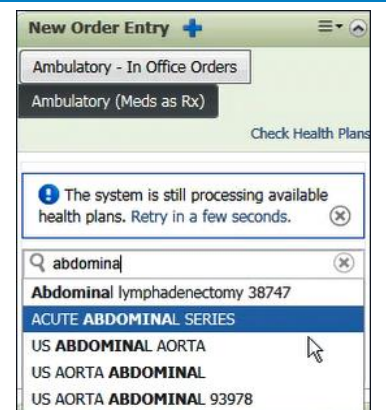
1. Click the drop-down arrow for Display. Click on the Personal Filter you would like to view.
2. Change the Display back to All when done reviewing documents.



Quick Order Favorites

Creating Quick Order Favorites

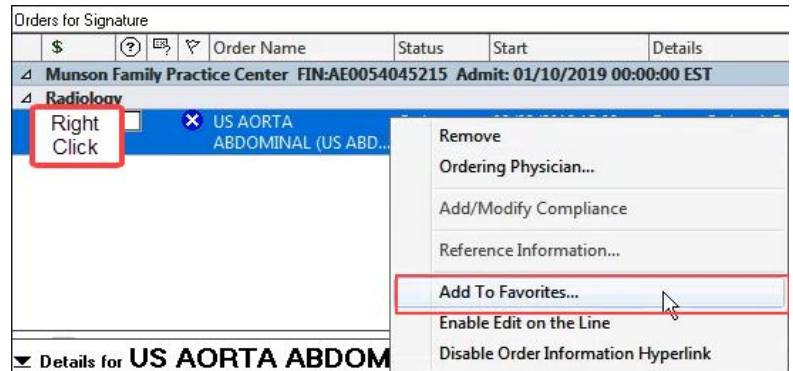
1. Go to the Orders Workflow Page (Quick Orders Page).
2. Under New Order Entry, search for the order(s) you want to add as a favorite and select the order.
3. Fill in the Ordering Physician Box if prompted.
4. Click on the Green Orders For Signature Box.
5. Click Modify on Orders for Signature.



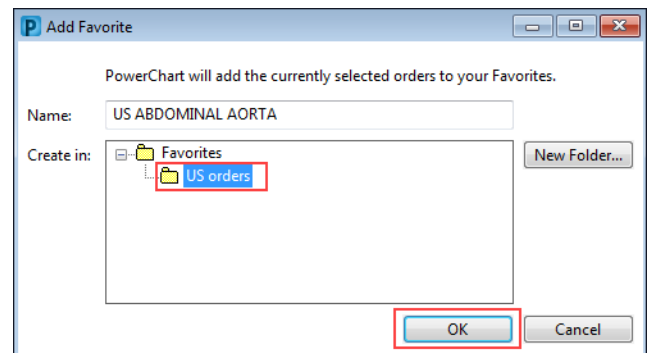
Advanced Personalization Quick Tips for Clinical and Clerical Staff

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6. Fill in any Order Details that should be saved as a favorite.
7. Right Click on the order name.
8. Click on Add To Favorites.



9. Select an existing Folder or click New Folder.
 - a. If creating a new folder, click on the New Folder name to rename and click OK.

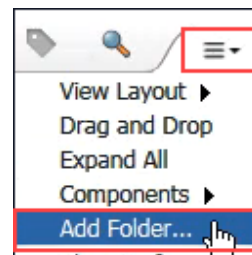


10. Click Cancel if you are not placing the current order or click Sign if you are placing the order.

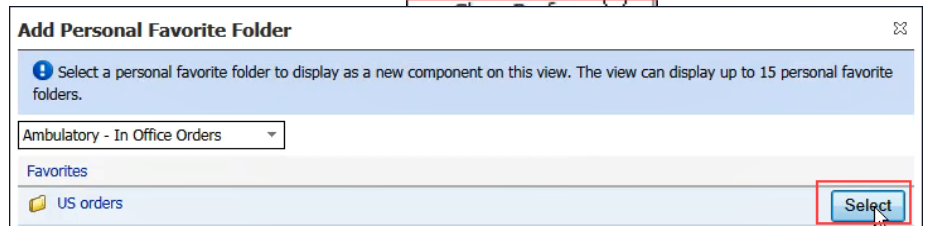


Creating a Quick Order Component from a Personal Order Favorite Folder:

1. Go to the Orders Workflow Page (Quick Orders Page).
2. Click on the Customization Drop Down.
3. Select Add Folder.



4. Click Select next to the Folder you are creating an order component on.



5. You should now see a separate order component with your favorite.




Proper Exit out of Power Chart

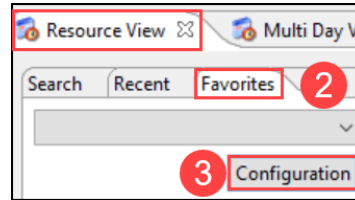
To save preferences and effectively log off system, **ALWAYS** exit using the Exit Door.



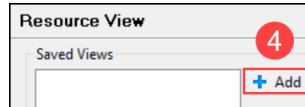
Revenue Cycle

Resource View Favorites

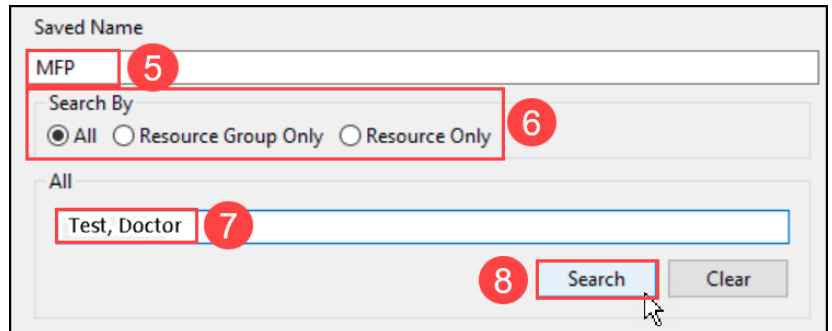
1. Click on the Resource View icon. 
2. Click on the Favorites tab under Resource View.
3. Click Configuration.



4. Click Add.

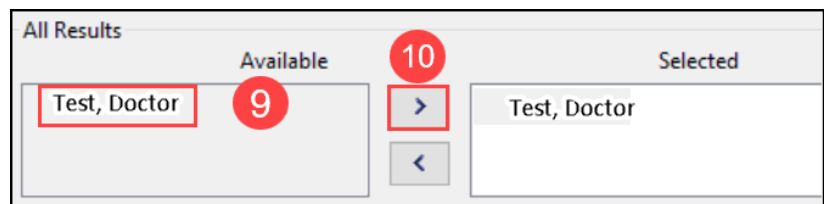


5. Type to create a name for the Favorite list of Resources.
6. Change the Search By criteria as needed.

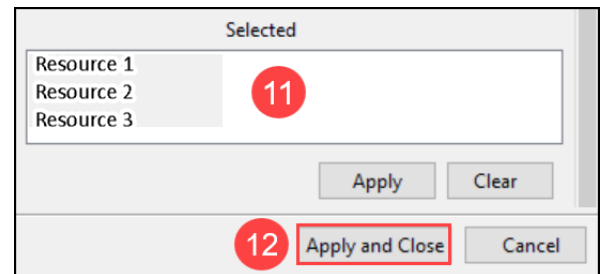


7. Type the resource name.
8. Click Search.

9. Highlight the correct resource.
10. Click the arrow to add the resource to Selected.



11. Continue adding resources as needed.
12. Click Apply and Close.



13. The Favorite list created will be available for selection within the Favorites dropdown.

