

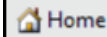
Ambulatory Organizer Overview for Providers and Clinical Staff

Cerner PowerChart Ambulatory EDUCATION

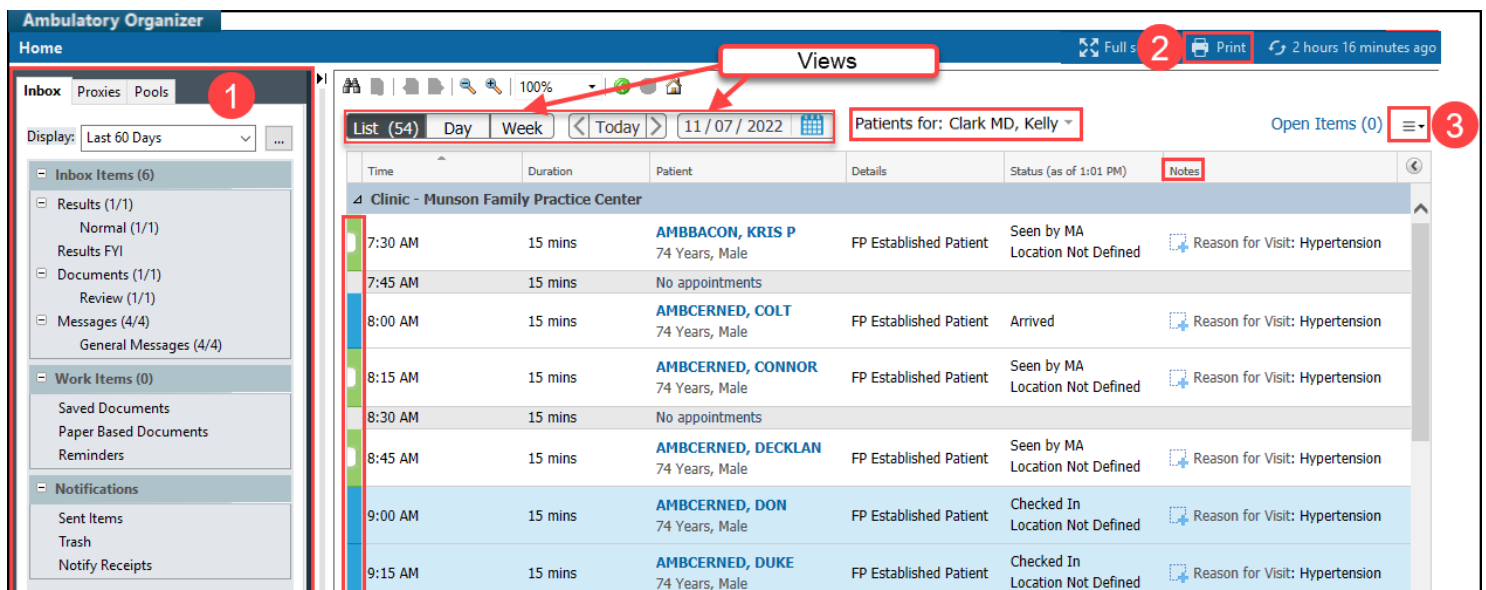
The Ambulatory Organizer is a comprehensive display of scheduled appointments for ambulatory providers and clinical staff. It provides details of the current day's appointments, including appointment details, open items to be completed at each visit, and meaningful use reminders.

Ambulatory Organizer

The Ambulatory Organizer is found on the Home screen once logged into PowerChart.

Click on the **Home**  icon to open the Ambulatory Organizer.

1. The Message Center Overview is displayed on the left side of the screen. This displays messages, documents, orders tasks, or reminders to complete or sign.
2. The **Print** button will print the schedule of the selected resource displayed on the Day view.
3. **Settings** can be changed for the schedule display and reminders in the Ambulatory Organizer.

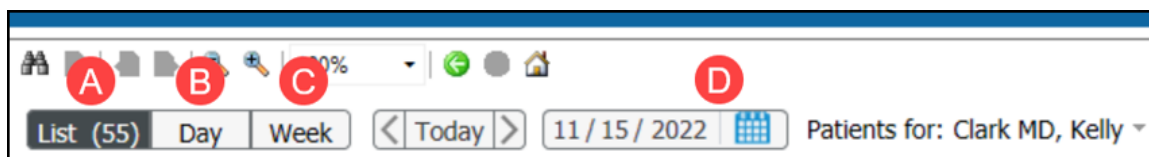


The screenshot shows the Ambulatory Organizer interface. On the left is the 'Inbox' panel with categories like 'Inbox Items (6)', 'Results (1/1)', 'Documents (1/1)', 'Messages (4/4)', 'Work Items (0)', and 'Notifications'. The main area displays a patient schedule for 'Clinic - Munson Family Practice Center' on 11/07/2022. The schedule table has columns for Time, Duration, Patient, Details, Status, and Notes. Red annotations include: '1' pointing to the Inbox panel, '2' pointing to the 'Views' and 'Print' buttons, and '3' pointing to the 'Open Items (0)' button.

Time	Duration	Patient	Details	Status (as of 1:01 PM)	Notes
Clinic - Munson Family Practice Center					
7:30 AM	15 mins	AMBACON, KRIS P 74 Years, Male	FP Established Patient	Seen by MA Location Not Defined	Reason for Visit: Hypertension
7:45 AM	15 mins	No appointments			
8:00 AM	15 mins	AMBCERNED, COLT 74 Years, Male	FP Established Patient	Arrived	Reason for Visit: Hypertension
8:15 AM	15 mins	AMBCERNED, CONNOR 74 Years, Male	FP Established Patient	Seen by MA Location Not Defined	Reason for Visit: Hypertension
8:30 AM	15 mins	No appointments			
8:45 AM	15 mins	AMBCERNED, DECKLAN 74 Years, Male	FP Established Patient	Seen by MA Location Not Defined	Reason for Visit: Hypertension
9:00 AM	15 mins	AMBCERNED, DON 74 Years, Male	FP Established Patient	Checked In Location Not Defined	Reason for Visit: Hypertension
9:15 AM	15 mins	AMBCERNED, DUKE 74 Years, Male	FP Established Patient	Checked In Location Not Defined	Reason for Visit: Hypertension

Organizer Views

- A. List: displays the selected resource(s) detailed patient list for the day. The Time, Duration, Patient demographic information, Details, Status, and Notes are listed. This is the most frequently used organizer view.
- B. Day: displays the selected resource(s) patient schedule of the day.
- C. Week: displays the selected resource(s) patient schedule for the week.
- D. Calendar view is available to select a date to view the selected resource(s) schedule.



This close-up shows the view selection area. It includes buttons for 'List (55)', 'Day', 'Week', and a calendar icon. Red letters A, B, C, and D are positioned above these buttons to correspond with the list items in the previous section.

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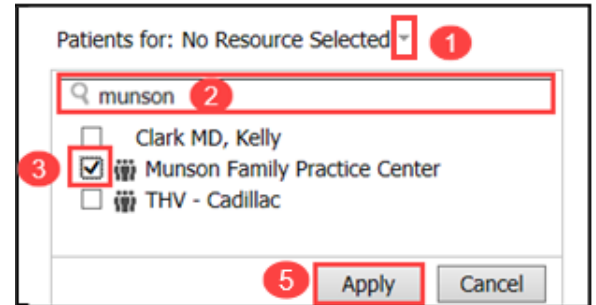
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Resource Selection


The Resource Selection allows for selection of a single resource or resource group to display. Resources include providers, procedure rooms, specialty rooms (ultrasound, x- ray, nurse visit), and groups of providers.

To select the resource(s) to be displayed in each view:


1. Click the drop-down arrow next to Patients for:
 - a. There may be a resource already selected.
2. Type the resource name in the search box.
 - a. A resource group can also be added by searching for the group name. Munson Family Practice Center
3. Select the resource by checking the box next to the desired resource.
 - a. Multiple resources may be selected to display on the organizer at once.
4. Click Apply.



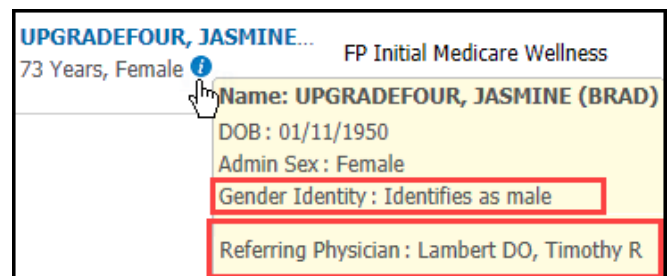
To remove a resource from the organizer display:

1. Click on the drop-down arrow next to Patients for:
2. Deselect/uncheck the correct resource.
 - a. Deselecting a resource will only remove them from the organizer display, but it will remain in the drop-down pick list to quickly select in the future.
 - b. To delete the resource from the quick pick list, click the  icon.

Patient Name information

Hover over the  icon in the Ambulatory Organizer to display demographic information including:

- Last name, First name (preferred name).
- DOB.
- Admin Sex/ Birth Sex.
- Gender Identity (if this differed from Admin/Birth Sex).
- Phone number.
- Referring Physician name.

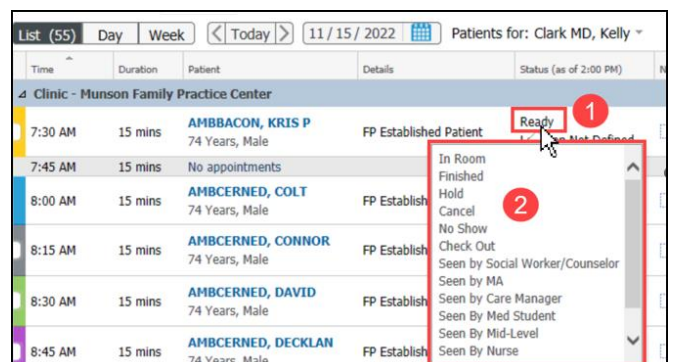


Color Status

The color status displays and updates with each change in patient status. The status will change automatically based on actions completed in the EHR but may be adjusted manually if needed.

Changing a patient's status:

1. Select the patient's current status.
2. Select a new status.



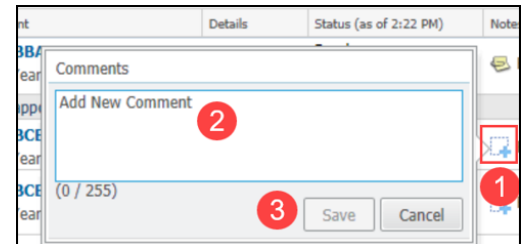
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Adding a Temporary Note

Adding a temporary Comment to the notes section:

1. Click on the notes button icon.
2. Free text to add a comment.
3. Click Save or press **Enter**.
Note: Multiple comments can be added.
4. The sticky note icon indicates a note or comment has been added for the appointment displayed. Click on the icon to view the note.



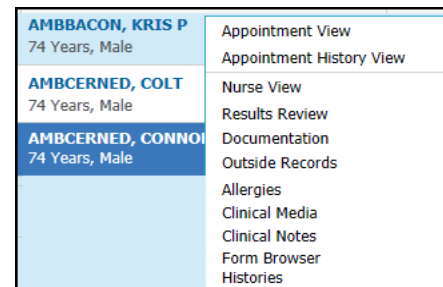
Opening a Patient Chart from the Ambulatory Organizer

Left click on the patients name to open the chart.

Right click on the patient's name to select a specific area within the patient's chart.

Appointment View is available to see information about this appointment.

Appointment History View dialog box opens once selected to show information about this appointments' history.

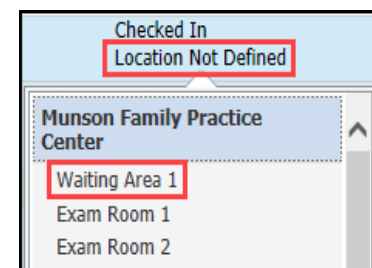


Note: Opening a patient's chart from the Ambulatory Organizer will open to the visit encounter for the appointment displayed on the organizer.

Patient Location Selection

A patient location or room designation can be selected to show where the patient is located. Location selections may vary by clinic.

Click on the location below the status and select the correct location.



Open Items

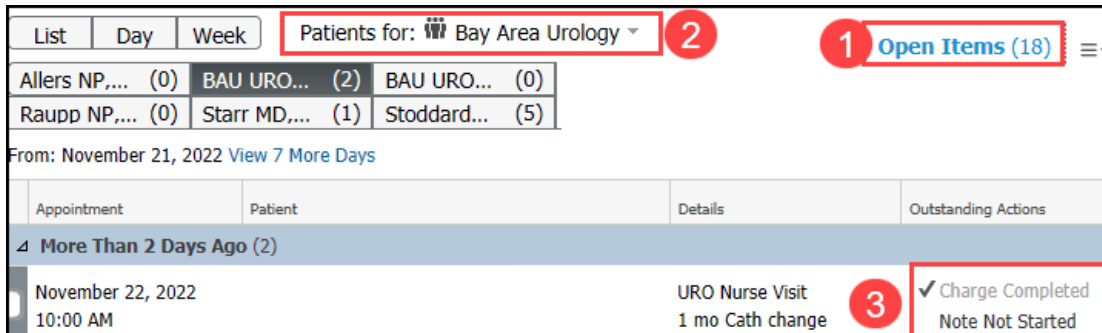
Satisfying Outstanding Actions:

1. Select the Open Items tab.
2. Select a resource(s).
3. Click on the outstanding action to be completed to display the proper location in the patient's chart.
4. Complete the outstanding action to complete the task.



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Manually Satisfying Outstanding Actions:

1. Select the Open Items tab.
2. Click the outstanding action item to display the check box then select the check box.

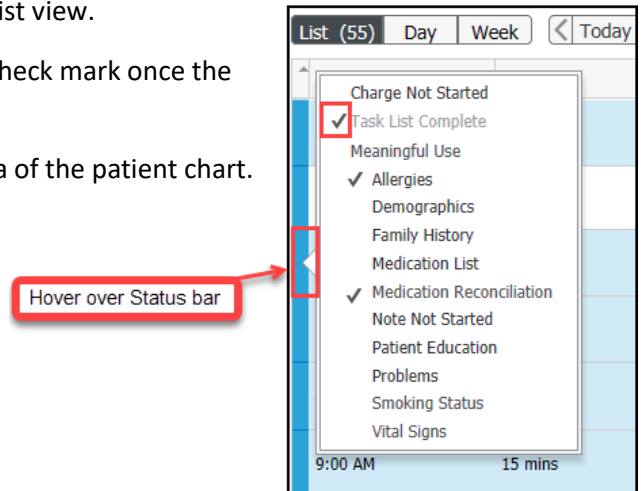
Note: Displays 7 days, to see previous outstanding action items click on [View 7 More Days](#)

Satisfying Meaningful Use Reminders

Right click on the Color Status bar of the selected patient within List view.

A meaningful use reminder will be displayed as complete with a check mark once the documentation has been completed.

Select a Meaningful Use reminder to navigate to the selected area of the patient chart.



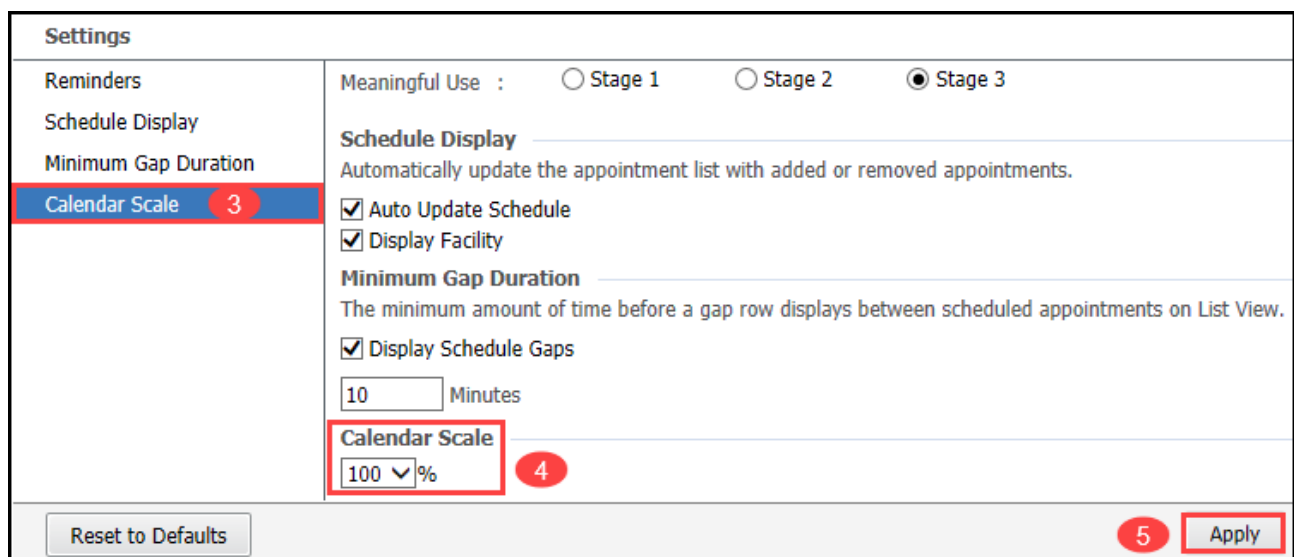
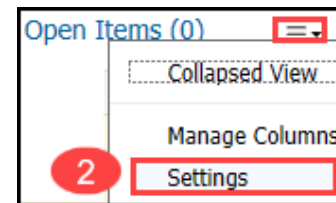
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Managing Calendar Scale

Once this step is complete it will be saved as a preference.

1. Click drop-down in the Ambulatory Organizer.
2. Select Settings.
3. Select Calendar Scale.
4. Select desired percentage.
5. Click Apply to close the menu.

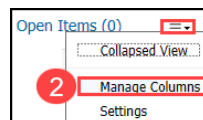


Managing Columns

Once this step is complete it will be saved as a preference.

From List View:

1. Click the drop-down in the Ambulatory Organizer menu.
2. Select Manage Columns.



Note: A few columns (Time, Patient) are locked not allowing them to be moved, or hidden. If a locked column is selected the left and right arrows are disabled.

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Managing Columns cont,

3. Select the column to hide from the Displayed Columns list.
4. Click on the arrow to move to the selected column to the Available Columns list on the left.
5. Select any columns from the Available Columns list and click on the right arrow to move to the Displayed Columns list.
6. Select any column from the Displayed Columns list and click the up or down arrows to rearrange the order. This will rearrange the order of the Displayed Columns list in the Ambulatory Organizer view.
7. Click Save to save preferences and close Manage Columns display.

