

Clerical Staff Personalization for Clerical Staff

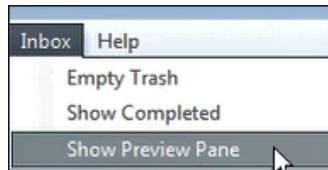
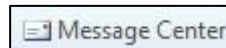
Cerner PowerChart and Revenue Cycle Ambulatory Education

Summary: Instructions below are to align settings and preferences within PowerChart and Revenue Cycle to help optimize workflows.

Message Center

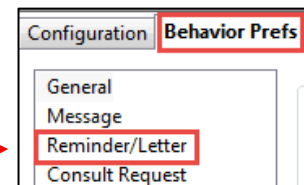
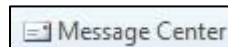
- **Setting the Preview Pane:**

1. Click on Message Center on the toolbar in PowerChart.
2. Click on Inbox on the top toolbar.
3. Select show Preview Pane.

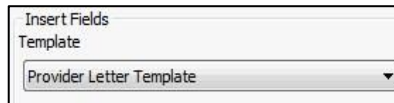


- **Setting Letterhead Logo:**

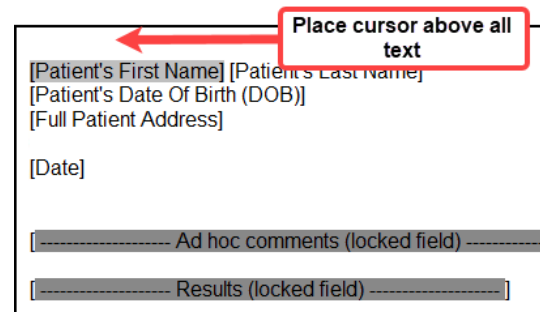
1. Click on **Message Center**.
2. Click on **Inbox** and select **Manage Preferences**.
3. Click on the **Behavior Prefs** tab and click on **Reminder/Letter**.
4. Click the **Header/Footer** button.



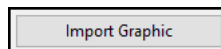
5. Choose the first Template.



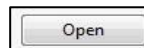
6. Click on the gray highlighted text and move the cursor above all text using the left arrow key on the keyboard and the enter key to add space. (Move the cursor until the gray highlight disappears).



7. Click **Import Graphic**.

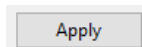


8. Click on **This PC** and navigate to **Network Drive (M:___)** and open.
9. Open the folder: **DocuVault**.
10. Find and open the folder: **Ambulatory Services**.
11. Find and open the folder: **Ambulatory Logos**.



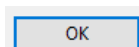
12. Select the Appropriate Logo and click **Open**.
 - Resize the image if needed to make it fit onto the page.

13. Click **Apply**.



14. Repeat for each template:
 - Patient Result Letter
 - Patient AdHoc Letter
 - Provider Letter



15. Click **OK** when done.

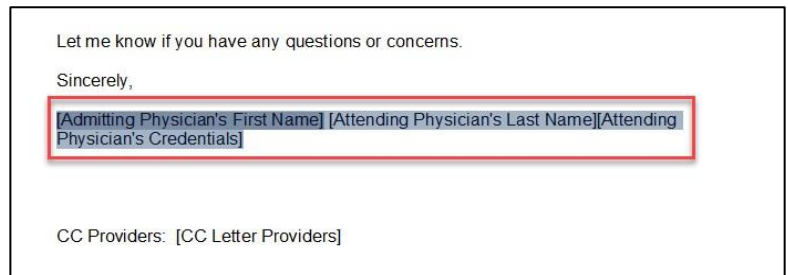
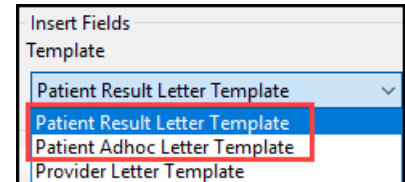


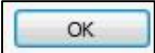
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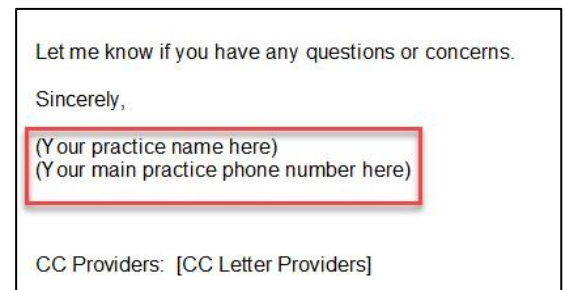
Cerner PowerChart and Revenue Cycle Ambulatory Education

- **Setting Signature**

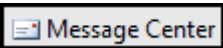

1. Click on **Message Center**. 
2. Click **Inbox** in the top toolbar. 
3. Select **Manage Preferences**.
4. Click on the **Behavior Prefs** tab and click on **Reminder/Letter**.
5. Click on **Header/Footer**.
6. Select the Template. The following steps should be done for **both** the **Patient Result Letter Template** and **Patient Adhoc Letter Template**.
7. Delete the signature area between Sincerely and CC Providers.

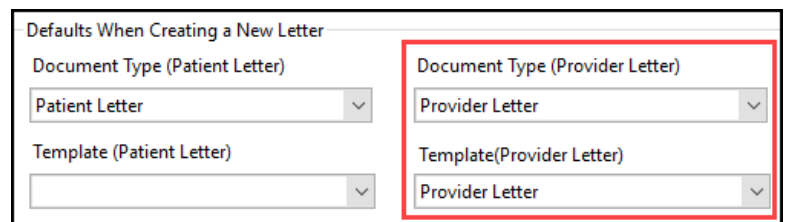
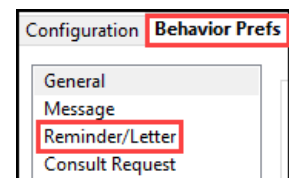


8. Type in your practice name and main practice phone number within this area.
9. Click **OK**. 
10. Repeat for all Patient letter templates. **DO NOT DELETE** any information on the Provider Letter Template.



- **Verify Provider Letter Settings are correct:**

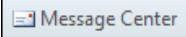
1. Click on **Message Center**. 
2. Click on **Inbox** on the top toolbar. 
3. Click **Manage Preferences**.
4. Click on the **Behavior Prefs** tab and click on **Reminder/Letter** on the left.
5. Locate **Defaults When Creating a New Letter** and select **Provider Letter** as the **Document Type (Provider Letter)** and the **Template (Provider Letter)**.
6. Click **OK**.

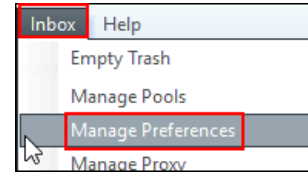
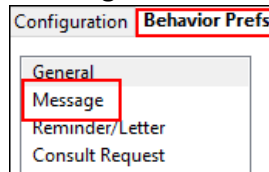


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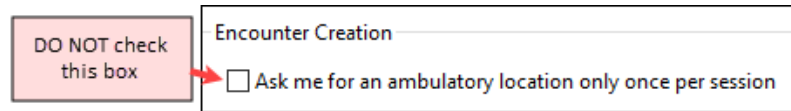
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InBetween Visit Encounter Settings

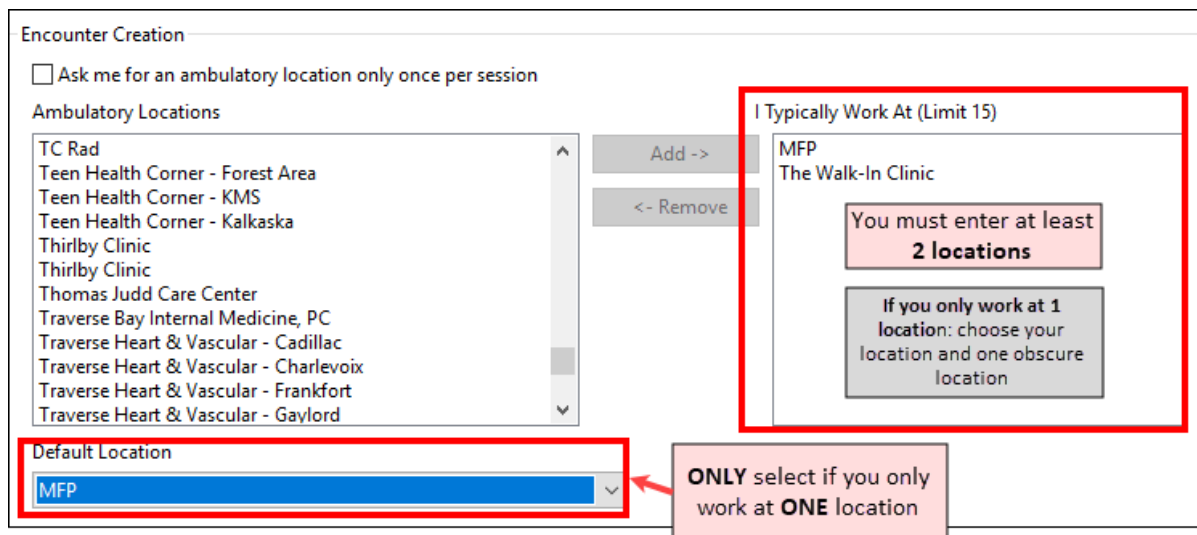
1. Click on **Message Center** on the top tool bar. 
2. Click on **Inbox** on the top task bar and select **Manage Preferences**.
3. Under the **Behavior Prefs** tab, click on **Message**.



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



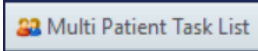
5. Select your work locations from the **Ambulatory Locations** list on the left, click **Add** to add them to the **I Typically Work At** list.
 - a. You must **enter at least two locations**.
 - b. **If you only work at one location:** choose your correct location plus one obscure location.
 - c. **Only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

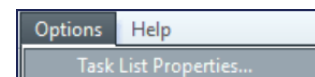


6. Click **OK**.

Multi Patient Task List

For staff who need to view Procedure Scheduling Request Tasks, such as prior authorization tasks for procedure scheduling.

1. Click on **Multi Patient Task List** in the top tool bar. 
2. Select **Options** on the top toolbar, **Task List Properties** then follow the steps below.



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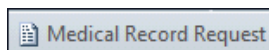
- Click on the **Time Frames** tab.
- Select **Generic Time Frame**.
- Change the time frame to a one-year interval (ex: From: today's date, To: 1 year from today).

- Click on the **Patient List** tab, check the box next to Choose a Patient List, then uncheck the box View Assigned Tasks.
- Under Location filters: click the + next to All Locations then select the facility or facilities that you will be completing tasks for.
- Click **Save**.
- Click **OK**.

Medical Record Request Fax Favorites

Must have a patient chart open. (Use ZZZREVCYCLE, Test Patient MR # M1032351).

- Click on **Medical Record Request**.



- Click on **Device**.

- Find the device: !Fxmclinicname. (Select the one with your primary clinic name).

- A pop up with a PHONE # space appears. Click **OK**.

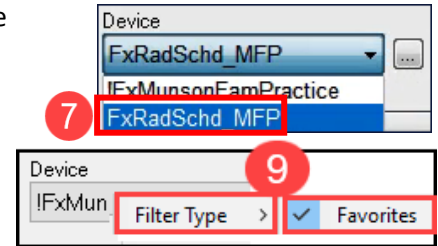
- Right click on the Device name.

- Select **Add to Favorites**.

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- Repeat the above steps for the other clinic assigned favorite with the device name: FXRadSchd_clinicabbreviation.

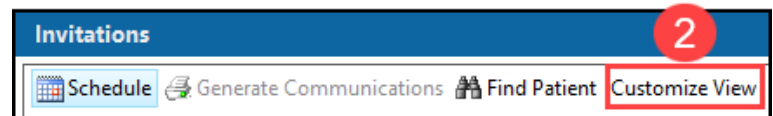


- When all Device Favorites are added, right click on Device name.
- Hover over Filter Type and select **Favorites**.
- The favorites selected will now display.
- When selecting a device for faxing: choose FxRadSchd for Radiology Scheduling and !Fx___ to free text the fax number.
 - Note:** Follow the same steps to add printer favorites.

Invitations Preference Settings

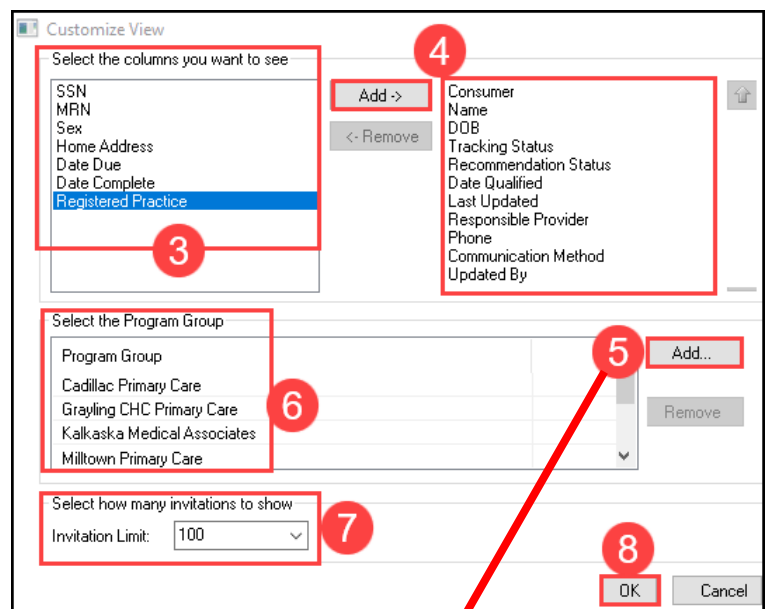
For Staff who will be sending Wellness Visit Invitations for patients who are due or overdue for Wellness visits.

- Click **Invitations** on the toolbar.
- Click **Customize View**.
 - The Customize View dialog box opens.

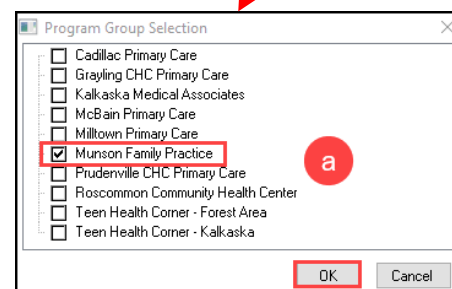


- From the left **Select the columns you want to see** box; select the columns you want displayed in the Invitations view.
- Click **Add** to move the selected columns to the box on the right.

- Select the following columns:**
 - Consumer
 - Name
 - DOB
 - Tracking Status
 - Recommendation Status
 - Date Qualified
 - Last Updated
 - Responsible Provider
 - Phone
 - Communication Method
 - Updated By



- Select the **Program Group(s)** by clicking **Add**.
 - Select the desired location and click **OK**.
- Programs are displayed in the Program Group list based on the selected locations.
- Select a value for the **Invitation Limit**. This value determines how many patients are displayed before the More button becomes available and you must click it to move to the next group of patients.
- Click **OK**.



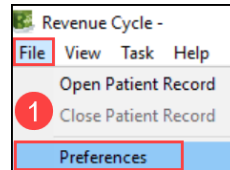
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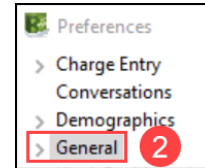
Revenue Cycle Settings

Setting Preferences

1. Click on **File** on the top toolbar. Select **Preferences**.

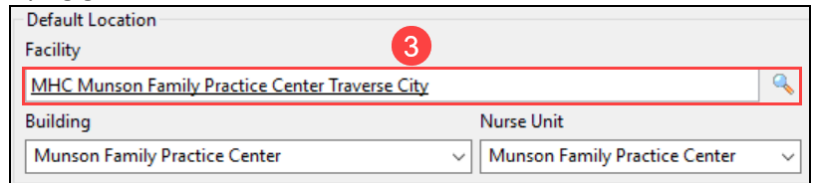


2. Click on **General**.

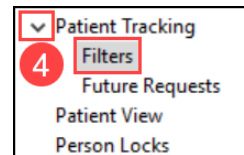


3. Enter the correct Facility using the magnifying glass to search.

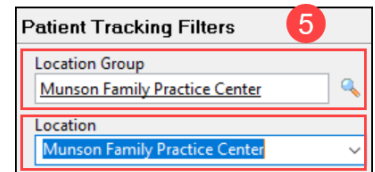
a. **Note:** Highlight and delete to remove any incorrect information.



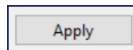
4. Click the arrow next to Patient Tracking and select **Filters**.



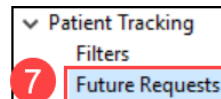
5. Search for and select the correct Location Group field using the magnifying glass. Select the correct Location from the drop down after adding the Location Group.



6. Click **Apply**.

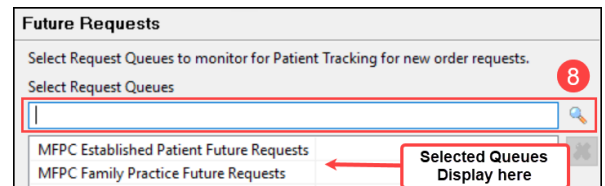


7. Under Patient Tracking click on **Future Requests**.

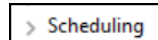


8. Find the Future Requests for the location(s) that you will monitor patient tracking for new order requests in the queues.

a. You may select multiple Queues for each location.

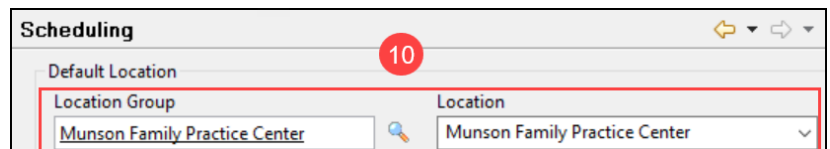


9. Click on **Scheduling** from the menu.



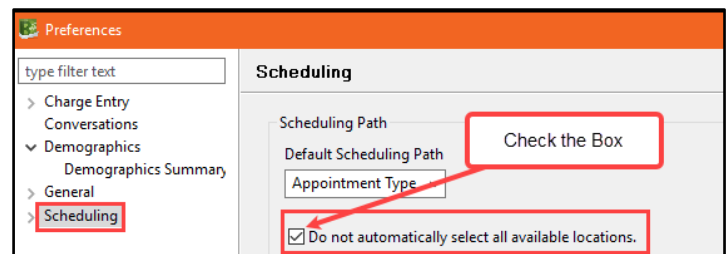
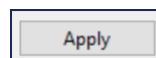
10. Select the correct Default Location Group and Location.

a. These will be automatically selected in the Appointments view when scheduling a patient.



11. Check the box: **Do not automatically select all available locations**.

12. Click **Apply**.

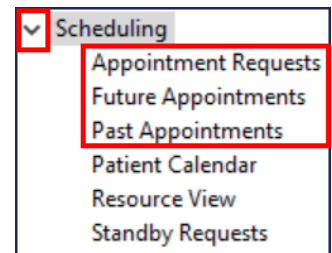


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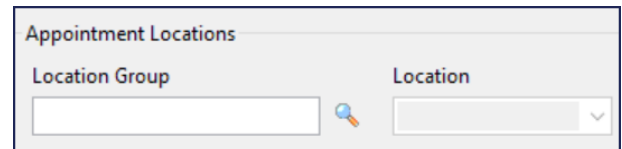
Complete the following steps for **Appointment Requests**, **Future Appointments**, and **Past Appointments**.

13. Click on the arrow in front of Scheduling.

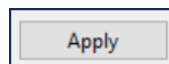


14. Click on **Appointment Requests**.

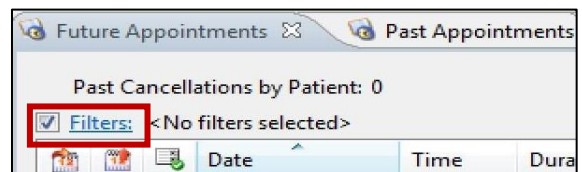
15. Search for your Location Group using the magnifying glass and select the Location from the drop down.



16. Click **Apply**.



17. Click on **Future Appointments** under Scheduling. Search for your Location Group using the magnifying glass and select the Location from the drop down and click Apply.



18. Click on **Past Appointments** under Scheduling. Search for your Location Group using the magnifying glass and select the Location from the drop down and click Apply.

NOTE: There is a shortcut to the filters on the Future and Past Appointments tabs on the Appointments Patient Perspective.

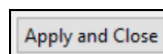
19. Click the arrow next to Scheduling and select **Standby Requests**.



20. Use the magnifying glass to search for and select the Standby Requests queue(s) for your location.



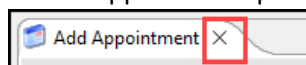
21. Click **Apply and Close** to finish and save all Preferences.



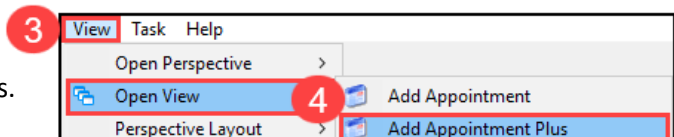
To Set Add Appointment Plus as daily perspective:

1. From within a patient's chart navigate to the Appointment patient perspective.

2. Click the X next Add Appointment.



3. Click on View from the top toolbar.

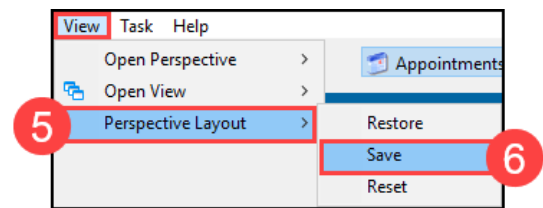


4. Click on Open View and select Add Appointment Plus.

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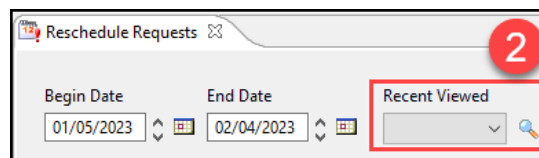
5. Click on View and select Perspective Layout.
6. Select Save. And **OK**.
Note: These preferences will save once the steps have been completed.



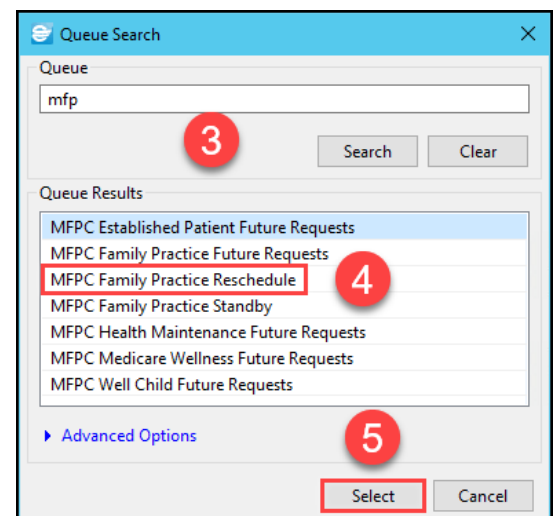
• Work Queue Preferences

Reschedule Requests Tab

1. Click on the **Queues** icon on the left-hand side of the screen.
2. In the **Reschedule Requests** tab, click the magnifying glass next to the Recent Viewed drop-down box to open the Queue Search box.



3. Search for the correct facility by typing the first few letters and clicking the Search button.
4. Highlight the **Reschedule** list.
5. **Click Select**.
6. The Reschedule list will now appear in the Recent Viewed drop-down box.
 - a. Search for and add any additional location Reschedule lists needed.



Standby Appointment Requests Tab

1. Follow the steps above in the Standby Appointment Requests tab.
2. In the Queue Search window, search for the correct location and select the Standby list.
 - a. Search for and add any additional location Standby lists needed.

Appointment Requests Tab

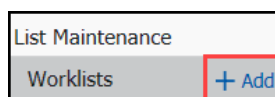
1. Follow the steps above in the Appointment Requests tab.
2. In the Queue Search window, select all Future Requests lists.
 - a. **Note:** Each Future Request list must be selected individually. Repeat the previous steps until each Future Request list needed is added to the Recent Viewed drop-down.

Referral Management Settings

The following settings are for staff who manage incoming and/or outgoing referrals.

• Creating Referral Management Worklists:

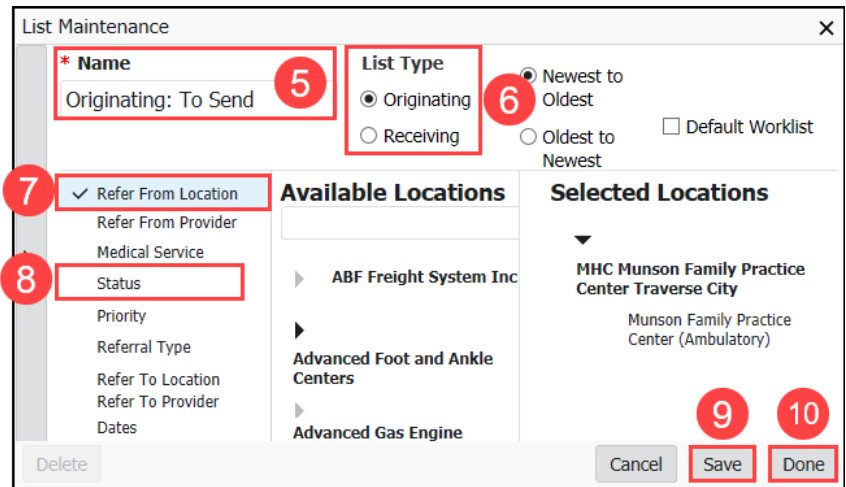
1. Navigate to Referral Management within Revenue Cycle or PowerChart. (The Worklists created in one will flow to the other application).
2. Click on **List Maintenance**.
3. Click on **Add** to create a new Worklist.



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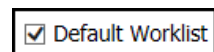
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4. Following the [worklist specifications below](#), create a separate Worklist for each.
5. Type in the correct **name**.
6. Select the **List Type**.
7. Select the **Refer From/To Location**. This is the location(s) that you will be managing referrals for.
8. Select the **Status(es)**.
9. Click **Save**.
10. Click **Done**.
11. Click **Add** again to continue creating the next list.



Note: The Default Worklist is automatically selected when you create your first worklist.

- This check box defines which Worklist the system displays by default when opening/refreshing Referral Management. If a default worklist is not selected, a worklist must be manually selected each time Referral Management is opened.



- **Worklists To Create:**

Originating Worklists:

1. Originating: To Send

- Name: Originating: To Send
- List Type: Originating
- Status:
 - Not Started
 - Prep for Send
- Description: Referrals that need to be sent to the receiving location.

2. Originating: Review

- Name: Originating: Review
- List Type: Originating
- Status:
 - Rejected
 - Canceled
- Description: Outbound referrals that have come back from the refer to location with a reason. They need to be triaged for further action.

3. Originating: Monitoring

- Name: Originating: Monitoring
- List Type: Originating
- Status:
 - Sent
 - Scheduled
- Description: To assist with ease of monitoring sent referrals to ensure that outbound external referrals are being scheduled and patients are being seen for their referrals.

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4. Originating: Complete

- Name: Originating: Complete
- List Type: Originating
- Status:
 - Complete
 - Closed
- Description: Outbound referrals that have been completed and documentation sent back from the referred to provider. Documentation needs to be reviewed and attached to the referral and the status updated to Closed.

Receiving Worklists:

1. Receiving: Pending Acceptance

- Name: Receiving: Pending Acceptance
- List Type: Receiving
- Status:
 - Pending Acceptance
- Description: Inbound referrals that need to be accepted prior to scheduling.

2. Receiving: Accepted

- Name: Receiving: Accepted
- List Type: Receiving
- Status:
 - Accepted
- Description: Inbound referrals that have been accepted and are awaiting scheduling.

3. Receiving: Reschedule

- Name: Receiving: Reschedule
- List Type: Receiving
- Status:
 - Pending Rescheduled
- Description: Inbound referrals that need to be rescheduled.

4. Receiving: On Hold

- Name: Receiving: On Hold
- List Type: Receiving
- Status:
 - On Hold
- Description: Inbound referrals awaiting information prior to moving on in the workflow, such as waiting for pre-authorization information.

5. Receiving: Referral Completion

- Name: Receiving: Referral Completion
- List Type: Receiving
- Status:
 - Patient Seen
- Description: Inbound referrals that have been completed. Documentation needs to be attached and sent back for any external inbound referrals and the status updated to Completed. (Documentation will be in the chart if it's internal).

Clerical Staff Personalization for Clerical Staff

Cerner PowerChart and Revenue Cycle Ambulatory Education

- **Modifying a Worklist:**

1. Navigate to Referral Management within Revenue Cycle or PowerChart.
2. Click on **List Maintenance**.
3. Select the Worklist to modify.
4. Make one or more changes to your Worklist.
5. Click **Save** to save your Worklist.
6. Click **Done** to save your Worklist and close the List Maintenance screen.

