MUNSON HEALTHCARE

Cerner PowerChart Ambulatory **EDUCATION**

**Pocket Reference**
Audience: Clerical Staff
Updated: March 2, 2023 (CTM)

## How to Find an Order in the Chart

| | |
|---|---|
| 1 | From within PowerChart, search for the patient and open the patient's chart to the correct encounter. |
| 2 | Click OK. |
| 3 | Navigate to the dark blue PowerChart Menu and select Orders. |
| 4 | Orders that were entered on the selected encounter will display as well as all orders in Future status. |
| 5 | Note: The drop-down display offers filter options, ex. All Orders All Statuses. |

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## How to Document a Patient Phone Call

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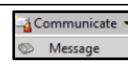
|---|---|
| 1 | From PowerChart, search for the patient. Select correct patient and encounter type.<br>a. Clinic: use for documentation related to a clinic visit.<br>b. InBetween Visit: use for documentation not related to a clinic visit.<br>c. Create a new InBetween Visit to document a new message topic.<br>d. Click OK. |
| 2 | Within the patient's chart, click Communicate and select Message.   |
| 3 | A new message window will open with the patient's name already populated. |
| 4 | Fill in all necessary information:<br>a. To, Provider, Include me, CC. (Note: Leave the To field blank to save the document to the chart without sending to another user).<br>b. Subject: Prepopulates but should be deleted and free text added to specify what the subject of the message is regarding. Add clinic abbreviation before subject (MFP: Patient is Short of Breath). |
| 5 | Message: Document phone call details by typing the message into the message area. |
| 6 | Click Send. |

**Clinical EHR Education Website Reference**: Phone Call Documentation

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## How to Find Documentation in a Patient Chart

| | |
|---|---|
| 1 | From within PowerChart, search for the patient and open the patient's chart to the correct encounter. |
| 2 | Navigate to the dark blue PowerChart Menu and select Documentation or Clinical Notes. |
| 3 | From Documentation:<br>a. Search through the list of documents.<br>b. Click to open a preview of the document.<br>c. Double click to open the full view. |
| 4 | From Clinical Notes:<br>a. Filter By type, locate the appropriate folder and double click to open.<br>b. Once the correct document is found, select the document to preview. |

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Cerner Revenue Cycle Ambulatory **EDUCATION**

**Pocket Reference**
Audience: Clerical Staff
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## How to Schedule a Patient Appointment

| | |
|---|---|
| 1 | From within Revenue Cycle, search for the patient and navigate to **Appointments**. |
| 2 | Fill in all required fields in the Add Appointment section. |
| 3 | Select First Available. |
| 4 | Add any search criteria to fit the patient's needs (ex: Tuesday and Wednesday appointments in the AM). Select Location or Resource as needed. |
| 5 | Click **Suggest**. Select the desired appointment date and time. Click Next Set to view more appointment options. |
| 6 | Click Select and verify the correct date, time, and resource. Click **Confirm**. |

**Clinical EHR Education Website Reference**: Appointment Scheduling Guide

MUNSON HEALTHCARE

Cerner Revenue Cycle Ambulatory **EDUCATION**

**Pocket Reference**
Audience: Clerical Staff
Updated: March 2, 2023 (CTM)

## How to Manually Check In/Out a Patient

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|---|---|
| 1 | From the Patient Tracking Screen in Revenue Cycle:<br>a. Locate the patient<br>b. Set status to **Arrived**.<br>c. This will launch the check-in conversation. |
| 2 | Verify/update demographic information by selecting each tab from **Modify Patient: Modify Full Registration**. |
| 3 | Click Save and Continue. |
| 4 | Verify/update Encounter specific information from the **Modify Encounter** conversation window. |
| 5 | Click Save and Close. |
| 6 | Within the **Add Images** window:<br>a. Click Add Images.<br>b. Select **New**, select **Scan** or **Import** to add a Driver's License and/or Insurance cards.<br>c. If not needed select **Close**. |
| 7 | Apply Self Remittance window:<br>a. Complete Remittance and Payment Alias fields. Click Add.<br>b. Complete Amount Tendered and Method of Payment fields. Click Add.<br>c. Click Submit.<br>**Note**: If no copay, not collected, or payment is via credit card click **Cancel**. |
| 8 | From Patient Tracking screen, update status to **Check In**. |
| 9 | Check Out:<br>a. From Patient Tracking screen update status to **Check Out**. |

**Clinical EHR Education Website Reference**: Patient Check in

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## Faxing using Medical Record Request

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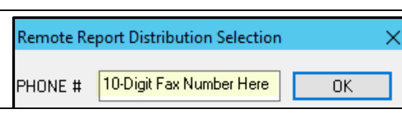
|---|---|
| 1 | Open a patient's chart and click on Medical Record Request from the top toolbar. |
| 2 | Select the correct Template and Purpose from the drop-down. |
| 3 | Select the radio button Device selected from the Related Providers tab. |
| 4 | Click on the Sections tab to verify the correct Sections are selected.<br>**Note**: If AMB CP Scheduling Comprehensive Template is selected, specific Sections need to be checked otherwise ALL sections of the patient chart will be sent. |
| 5 | Fill in Cover Page information: Destination, Requester, Comment. |
| 6 | Click the Device drop-down and select the desired device the fax is coming from (! Fx_your clinic). |
| 7 | Add the Destination Fax number into the Remote Report Distribution Selection window using a 10-digit format (231999999) and click OK.   |
| 8 | Click Preview to Preview first. Click Send when ready to send. |

**Clinical EHR Education Website Reference**: Printing or Faxing using Medical Record Request

## How to Register a Patient

| | |
|---|---|
| 1 | Search for the patient using at least two patient identifiers to double check they do not have an account. If no account, click Add Person. |
| 2 | Confirm the patient's full name. |
| 3 | Fill in recommended fields on the **Patient Demographic** screen:<br>a. Yellow fields are required.<br>b. Pink fields are recommended.<br>c. Best practice is to fill in as many fields as possible at time of registration. |
| 4 | **Guarantor** screen:<br>a. Click on the blue +Add.<br>b. Will default to self, you can select search if guarantor is not self.<br>c. Click OK. |
| 5 | **Insurance** screen: Add insurance to the person level **NOT** to an encounter level.<br>a. Click blue +Add.<br>b. Subscriber tab-guarantor (person responsible for payment/carries insurance). |
| 6 | **Insurance tab**: Search for health plan (do not use YY plans, these are hospital only).<br>a. Click arrow to the left to expand the health plan details and verify correct insurance based on the address listed.<br>b. Click on the correct plan address and then select.<br>c. Fill in additional details: begin date (must be at least one day prior to encounter date), subscriber member number, group number.<br>d. Add Insured Name on card, if different than name on medical record. Click OK.<br>e. **Manage Profiles**: select Insurance Profile drop-down then select insurance from Available Insurances and move right to Selected Insurances. Click OK.<br>f. Click Save. **Note**: if patient does not have insurance select Self-Pay.<br>g. Repeat steps above for each additional insurance plan. |