MUNSON HEALTHCARE

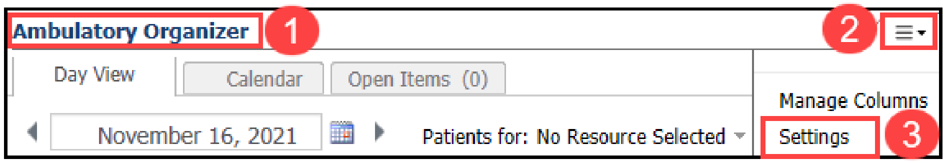
Clinical Staff Personalization for Clinical Staff

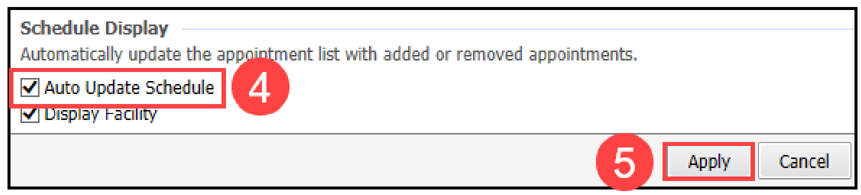
Cerner PowerChart and Revenue Cycle Ambulatory **Education**

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

Ambulatory Organizer

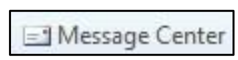
- **Auto Update:**
    1. Open the Ambulatory Organizer.
    2. Click the component-level menu ☰▾ on the right side of the screen.
    3. Select **Settings**.
    4. Confirm that "Auto Update Schedule" is checked. If not, check the box.
    5. Click **Apply**.

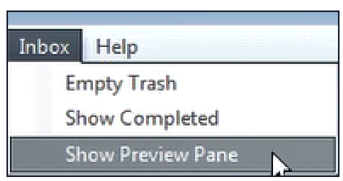




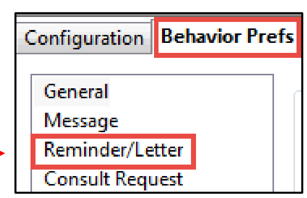
Message Center

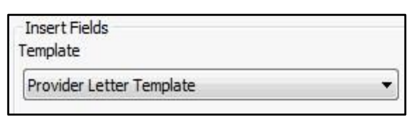
- **Setting the Preview Pane:**
    1. Click on **Message Center** on the toolbar in PowerChart.
    2. Click on **Inbox** on the top toolbar.
    3. Select **Show Preview Pane**.

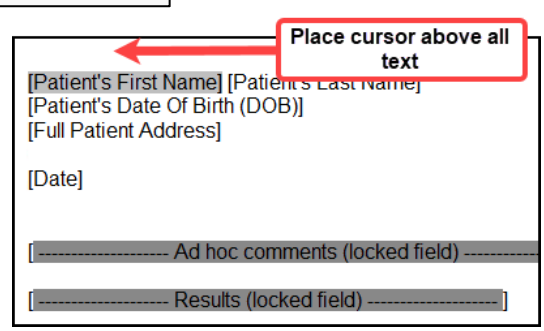


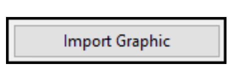


- **Setting Letterhead Logo:**
    1. Click on **Message Center**.
    2. Click on **Inbox** and select **Manage Preferences**.
    3. Click on the **Behavior Prefs** tab and click on **Reminder/Letter**.
    4. Click the **Header/Footer** button.
    5. Choose the first Template.
    6. Click on the 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.

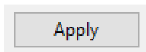


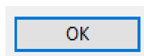




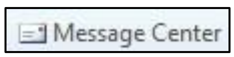


9. Open the folder: **DocuVault.**
10. Find and open the folder: **Ambulatory Services**.
11. Find and open the folder: **Ambulatory Logos**.
12. Select the Appropriate Logo and click **Open**. 

    - Resize the image if needed to make it fit onto the page.
13. Click **Apply**. 

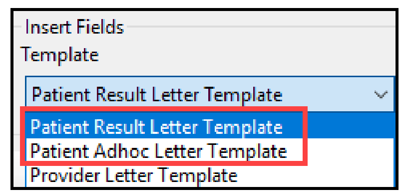
14. Repeat for each template:
    - Patient Result Letter
    - Patient AdHoc Letter
    - Provider Letter
15. Click **OK** when done. 

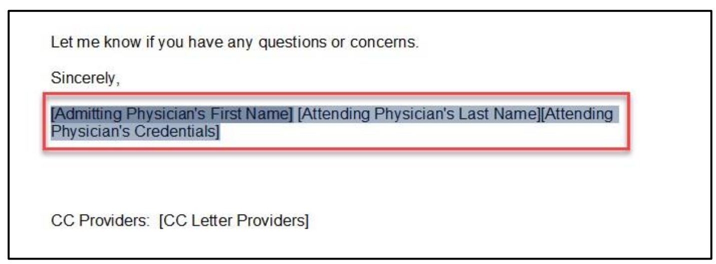
- **Setting Signature**

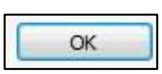
1. Click on **Message Center**. 

2. Click **Inbox** in the top toolbar. 

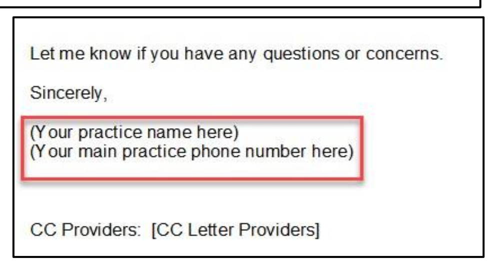
3. Select **Manage Preferences**.
4. Click on the **Behavior Prefs** tab and click on **Reminder/Letter**.
5. Click on **Header/Footer**.
6. Select the Template**.** The following steps should be done for **both** the Patient Result Letter Template and Patient Adhoc Letter Template.
7. Delete the signature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



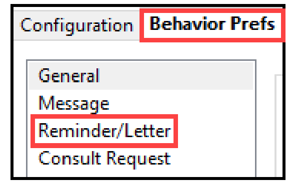


8. Type in your practice name and main practice phone number within this area.
9. Click **OK**. 

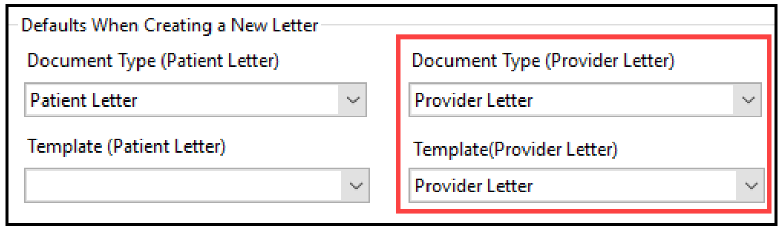
10. Repeat for all Patient letter templates. **DO NOT DELETE** any information on the Provider Letter Template.



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

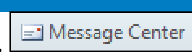


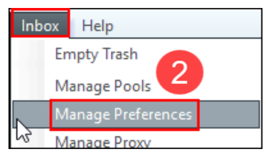
1. Click on **Message Center**.
2. Click on **Inbox** on the top toolbar.
3. Click **Manage Preferences**.
4. Click on the **Behavior Prefs** tab and click on **Reminder/Letter** on the left.

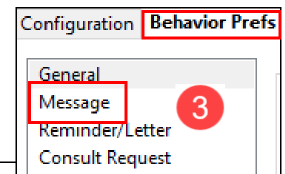


5. Locate **Defaults When Creating a New Letter** and select **Provider Letter** as the **Document Type (Provider Letter)** and the **Template (Provider Letter).**
6. Click **OK.**

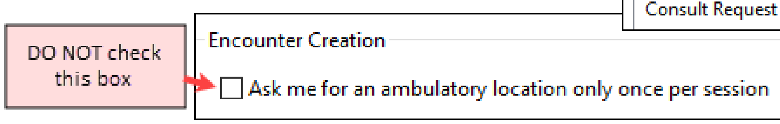
InBetween Visit Encounter Settings



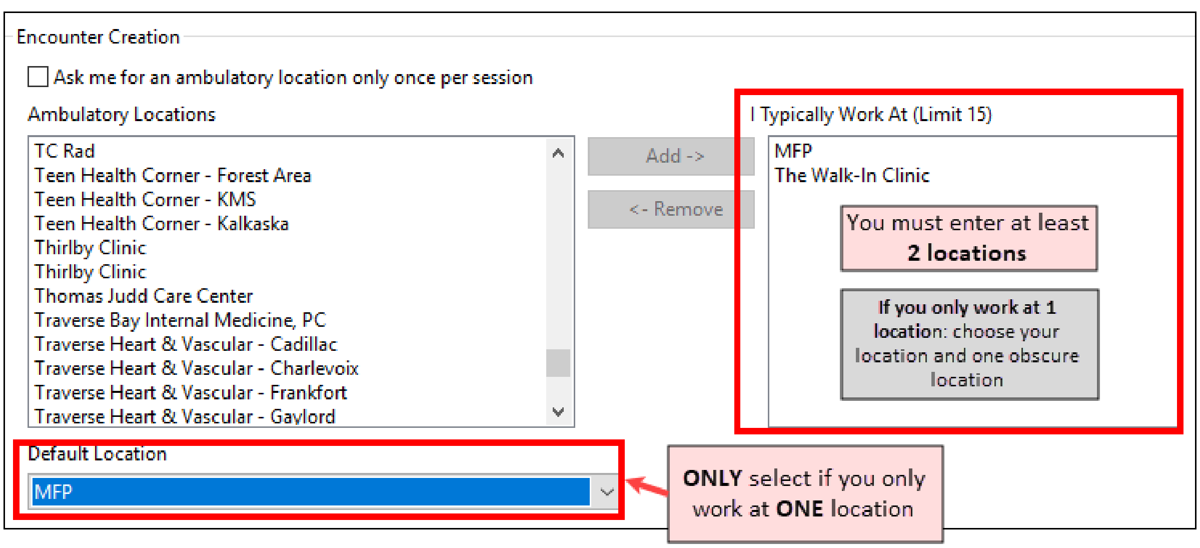




1. Click on **Message Center** on the top tool bar.
2. Click on **Inbox** on top task bar and select **Manage Preferences**.
3. Under the **Behavior Prefs** tab, click on **Message**.
4. Make sure the box under Encounter Creation is **UNCHECKED**.



5. Select your work locations from the "Ambulatory Locations" list on the left, click **Add** to add them to the list "I Typically Work At."
    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.



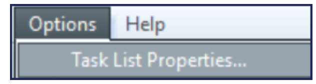
6. Click **OK**.

Task List Settings

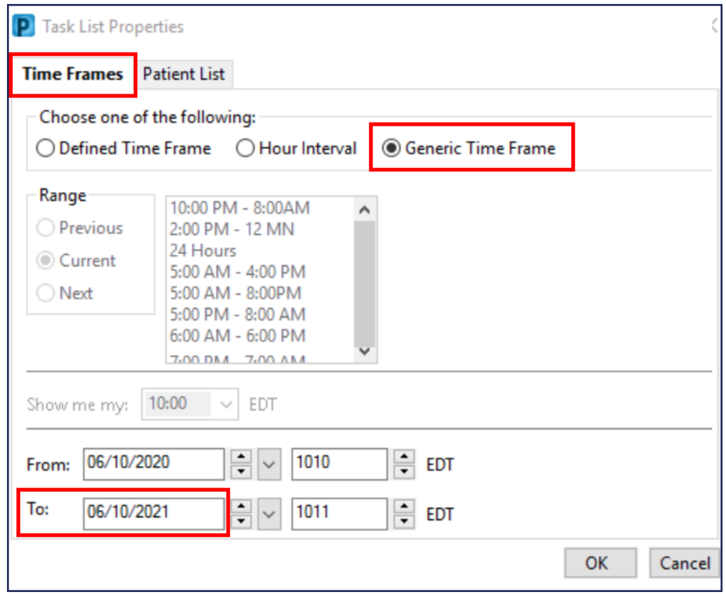
- **Multi Patient Task List**

    1. Click on **Multi Patient Task List** in the top tool bar.

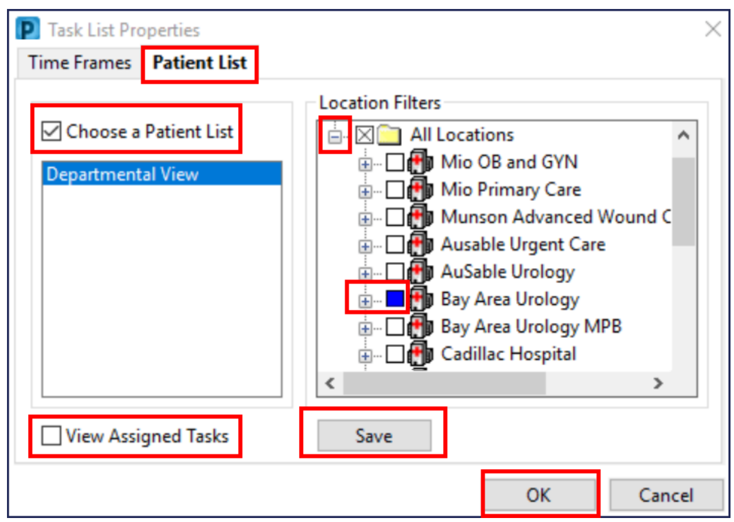
    2. Click on **Options** on the top toolbar, select **Task List Properties** then follow the steps below.



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



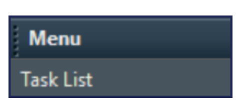
    6. Click on the **Patient List** tab, check the box "Choose a Patient List," and uncheck the box "View Assigned Tasks."
    7. Under Location filters: click the **+** next to All Locations then select the facility or facilities that you will be completing tasks for.
    8. Click **Save**.
    9. Click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



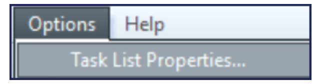
- **Single Patient Task List**

    1. Open a test patient chart (Use patient: ZZZZREVCYCLE, Test Patient MR # M1032351).

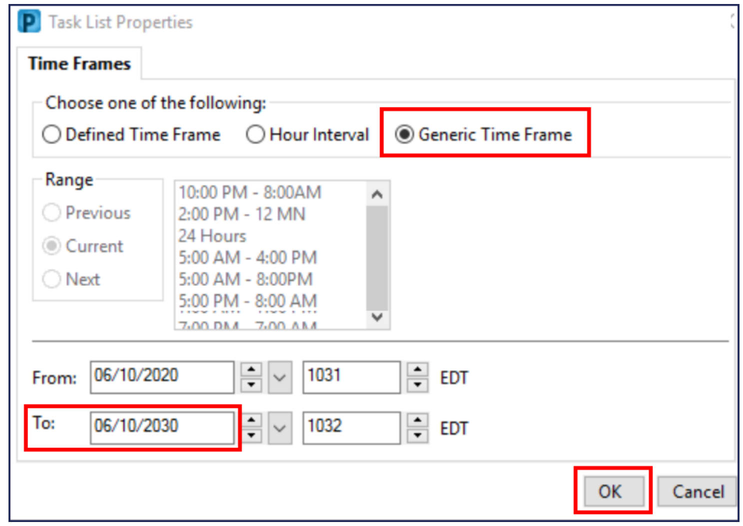
    2. Click on Task List within the dark Table of Contents Menu.



3. Click on Options on top toolbar then click on Task List Properties.



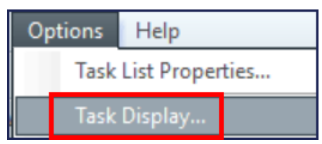
4. Select Generic Time Frame.
5. Change the time frame to a ten year interval (ex: From: today's date, To: 10 years from today).
6. Click **OK**.



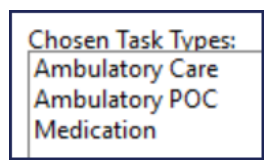
Note: Single Patient Task List is not set up by location. It will display **all** tasks on the patient, regardless of location where the order was placed.

- **Task Display**

7. Click on Options and select Task Display.



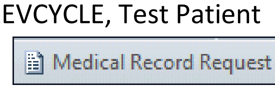
8. Ensure the following are selected for **Chosen Task Types**:
   - Ambulatory Care
   - Ambulatory POC
   - Medication
9. Click OK.



Medical Record Request Fax Favorites

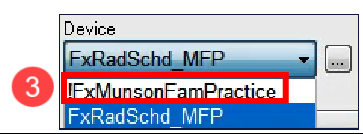
Must have a patient chart open. (Use ZZZZREVCYCLE, Test Patient MR # M1032351).

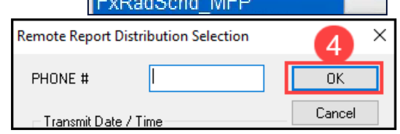
1. Click on **Medical Record Request**.



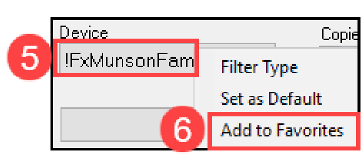
2. Click on **Device**.

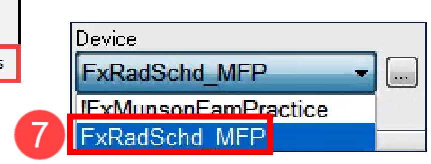
3. Find the device: !Fxclinicname. (Select the one with your primary clinic name).
4. A pop up with a PHONE # space appears. Click **OK**.



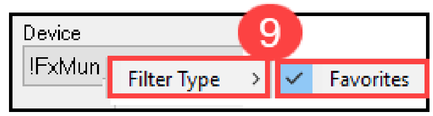


5. Right click on the Device name.
6. Select **Add to Favorites**.
7. Repeat the above steps for the other clinic assigned favorite with the device name: FXRadSchd_clinicabbreviation.





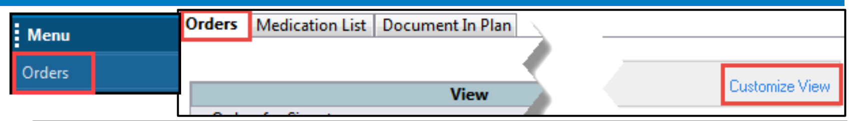
8. When all Device Favorites are added, right click on Device name.
9. Hover over Filter Type and select **Favorites.**
10. The favorites selected will now display.

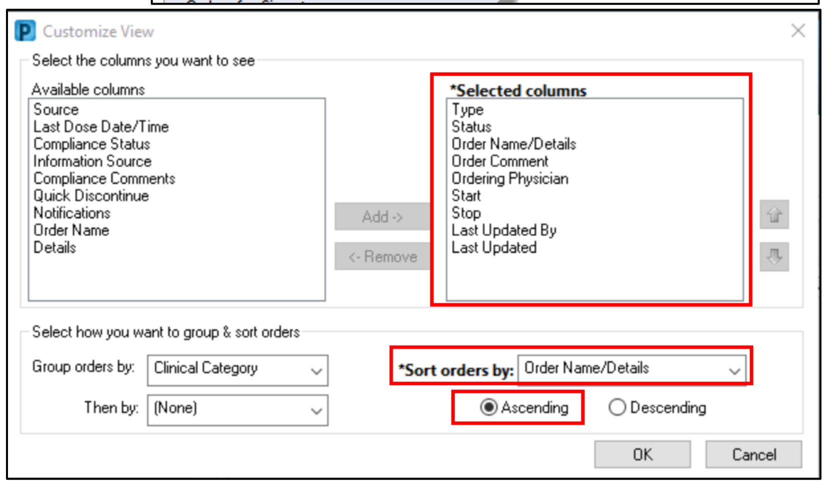


- When selecting a device for faxing: choose FxRadSchd for Radiology Scheduling and !Fx___ to free text the fax number.

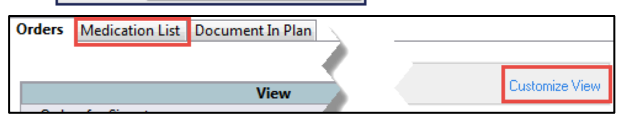
Orders and Medication List Settings

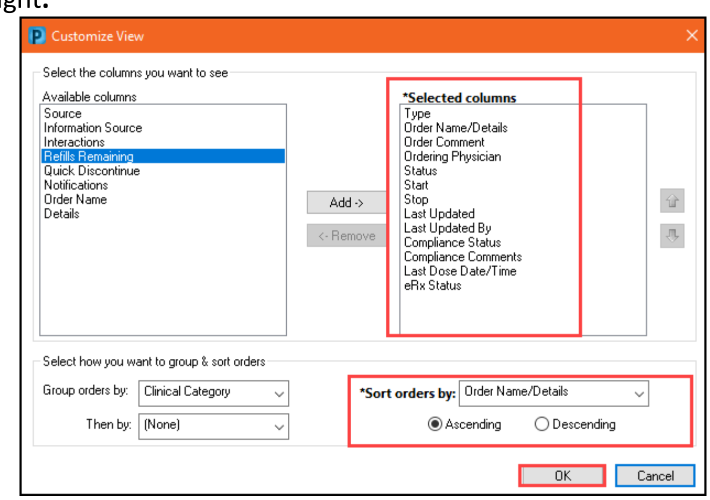
- **Orders**
  1. Navigate to the Table of Contents Menu and select **Orders**.
  2. Click **Customize View** on the right.
  3. Add the following to the ***Selected columns** on the right.
     a. Type
     b. Status
     c. Order Name/Details
     d. Order Comment
     e. Ordering Physician
     f. Start
     g. Stop
     h. Last Updated
     i. Last updated By
  4. Select **Sort orders by**: **Order Name/Details** and select the **Ascending** radio button.
  5. Click **OK**.
  6. Click on the **Order Display** drop down, select **All Active Orders**.

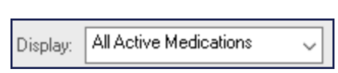




- **Medication List**
  1. Click the **Medication List** tab. Click **Customize View**.
  2. Add the following to the ***Selected columns** on the right.
     j. Type
     k. Order Name/Details
     l. Order Comment
     m. Ordering Physician
     n. Status
     o. Start
     p. Stop
     q. Last Updated
     r. Last updated By
     s. Compliance Status
     t. Compliance Comments
     u. Last Dose Date/Time
     v. eRx Status
  3. Select **Sort orders by: Order Name/Details** and select **Ascending**.
  4. Click **OK.**
  5. Click the Medication List **Display** drop down and select **All Active Medications**.





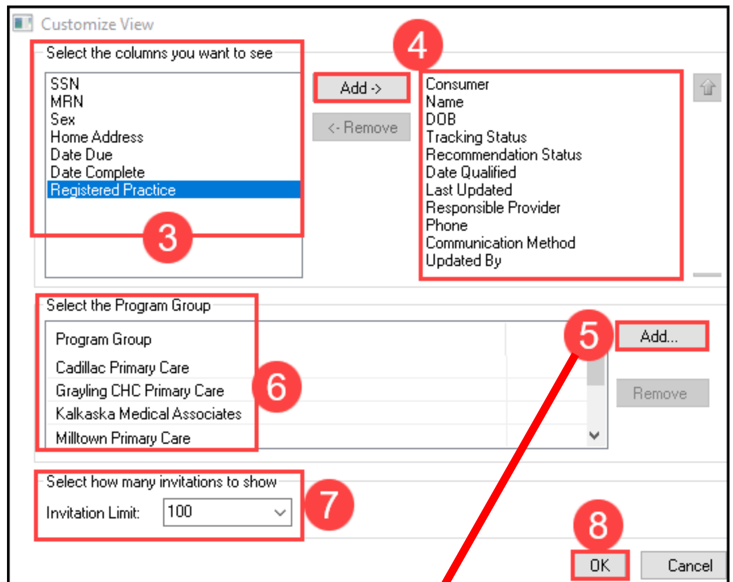


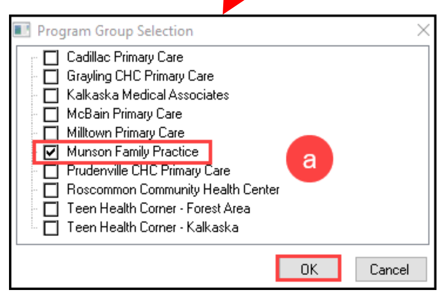
Invitations Preference Settings

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

Customize View:

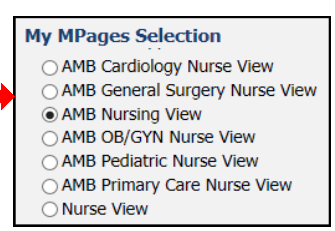
1. Click **Invitations** on the toolbar.
2. Click **Customize View**.
    a. The Customize View dialog box opens.
3. From the left **Select the columns you want to see** box, select the columns you want displayed in the Invitations view.
4. Click **Add** to move the selected columns to the box on the right.
    a. **Select the following columns**:
        i. Consumer
        ii. Name
        iii. DOB
        iv. Tracking Status
        v. Recommendation Status
        vi. Date Qualified
        vii. Last Updated
        viii. Responsible Provider
        ix. Phone
        x. Communication Method
        xi. Updated By
5. Select the **Program Group(s)** by clicking **Add**.
    a. Select the desired location and click **OK**.
6. Programs are displayed in the Program Group list based on the selected locations.
7. 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.
8. Click **OK**.





MyExperience

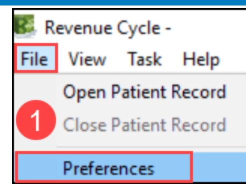
1. All clinical staff may change their view using MyExperience as needed. (Ex: May switch your view from Primary Care Nurse to OB/GYN Nurse to view when working with OB population).
    a. Click on MyExperience on the toolbar.
    b. Select the correct view.

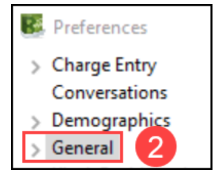


- **MA's/NA's** should set MyExperience to the correct AMB Specialty Nurse View.

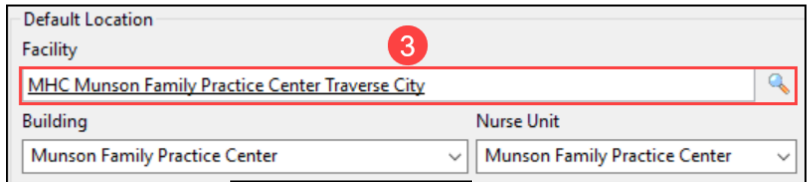
Revenue Cycle

- **Setting Preferences**
  1. Click on **File** on the top toolbar. Select **Preferences**.
  2. Click on **General.**

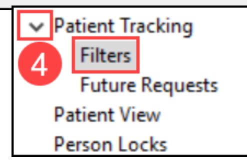




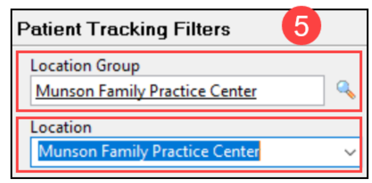
  3. Enter the correct Facility using the magnifying glass to search.
     - **Note:** Highlight and delete to remove any incorrect information.



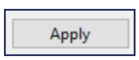
  4. Click the arrow next to Patient Tracking and select **Filters**.



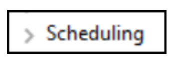
  5. Search for and select the correct Location Group field using the magnifying glass. Select the correct Location from the drop down after adding the Location Group.



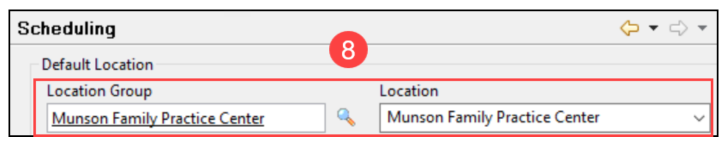
  6. Click **Apply.**



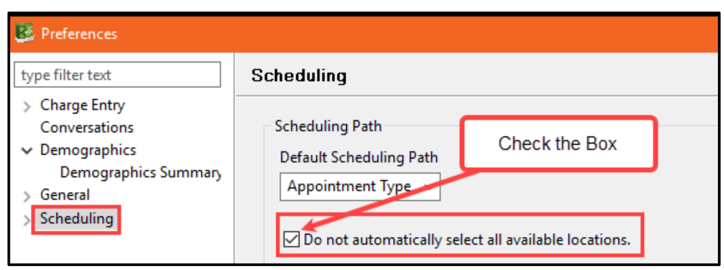
  7. Click on **Scheduling** from the menu.



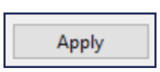
  8. Select the correct Default Location Group and Location.
     - These will be automatically selected in the Appointments view when scheduling a patient.



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



  10. Click **Apply**.

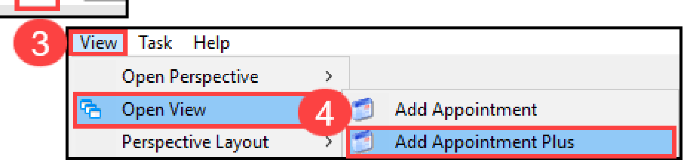


  11. Click **Apply and Close** to finish and save all Preferences.

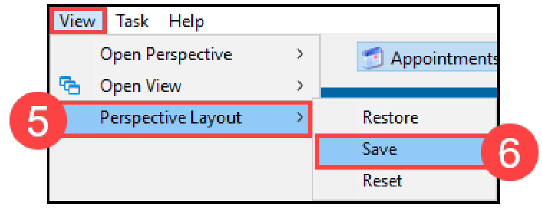
Set Add Appointment Plus as daily perspective:

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.



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



Referral Management Settings

Referral Management Settings must be done for staff who manage incoming and/or outgoing referrals. See additional personalization documents on the Clerical section of the Clinical EHR Education website.