Pocket Reference
Audience: Clinical Staff
Updated: January 16, 2023 (MES)

Clinical Staff Quick Tips

1	**How to find an existing order:** ❖ Navigate to the Ambulatory Nursing Workflow. ❖ Go to the Order Profile component to view all active orders. Modify the filter to display orders in other statuses. ❖ Navigate to the Outstanding Orders to view all outstanding orders dating back 13 months. This is helpful to find the date of the order when trying to locate the encounter that the order was entered on.
2	**How to document a patient phone call:** ❖ Click Communicate on the PowerChart toolbar. ❖ If follow up **IS** needed, or information needs to be communicated to another care team member, add a Recipient to the To: field (Select Include Me to send the message to yourself). ❖ If the information does **NOT** need to be communicated to another care team member, leave the To: field blank to only document to the patient's chart. ❖ Enter the responsible provider in the Provider field in every message. ❖ Select or type the subject (Tip: type the practice name acronym in the beginning of the subject to easily find messages in the patient's chart). ❖ When the message is complete, click Send.
3	**How to create a patient letter:** ❖ Within a patient's chart, click the down-arrow next to communicate on the PowerChart toolbar. Select Patient Letter. Select the appropriate Subject from the drop-down menu. Add or edit any text in the body of the letter needed. Click Add Results to attach patient results to the letter. When complete, print the letter.
4	**How to find a document:** ❖ Navigate to the Ambulatory Nursing Workflow and click on the Documents component. Filters can be used as needed to narrow the list. ❖ Documents can also be found in Documentation or Clinical Notes within the dark blue PowerChart Menu.
5	**How to order an Ambulatory Referral:** ❖ Navigate to the Clinical Staff Orders tab within the Nursing Workflow View. ❖ Navigate to the Referral component and click on the correct Ambulatory Referral. ❖ Complete the Ordering Physician pop-up as a *proposed* order. ❖ Click the Orders for Signature icon and click Modify Details. ❖ Click the Missing Required Details button in the bottom center of the screen. ❖ Select the correct medical service and enter the referral reason. ❖ Click the binoculars next to Refer to and search for a specific provider/clinic. ❖ Review the Order Comments and Diagnoses tabs in the lower half of the screen to ensure accuracy and update as needed. ❖ Click Sign.
6	**How to order Point of Care (POC) testing:** ❖ Navigate to the Clinical Staff Orders Tab within the Nursing Workflow View. ❖ Navigate to the POC Orders Component and click on the correct order, or search for the POC order if needed. ❖ Complete the Ordering Physician pop-up as a *proposed* order unless a standing order applies (see Policy Stat for all standing orders). ❖ Click the Orders for Signature icon. ❖ Ensure that the order (row) is associated with the correct diagnosis (column). ❖ If the correct diagnosis is not available, click Modify Details. ❖ Make any needed adjustments and click Sign.

7	**Documenting on an In-office Order Task (such as POC test or medication):** ❖ Open the single patient Task List while in a patient's chart by clicking on Task List in the dark blue PowerChart menu. Within the Office/Clinic Task tab, right click on the appropriate task and select Chart Details, or double click on the task, to open the task documentation. Enter all available details and click the green check mark in the upper left to sign.
8	**How to view a Resource schedule:** ❖ **Within PowerChart**: Click the Home button on the PowerChart toolbar. In the Ambulatory Organizer click the down arrow next to the Patients for field. Search for, then select the box beside the desired Resource(s) and click Apply. ❖ **Within Revenue Cycle**: Click on the Resources icon on the left of the screen. Search for the desired Resource and select the desired date on the calendar. The calendar may be viewed as a Day View or Multiday View.
9	**How to view patient appointments:** ❖ Within Revenue Cycle, search for the patient. Click on the Appointments at the top of the screen. The Future appointment tab will open.
10	**How to fax or print documents and orders:** ❖ Click the Medical Records Request on the PowerChart toolbar. In the Template field, click the down-arrow and select the template based on the need. (If selecting AMB CP Scheduling Comprehensive, the Sections needed must be selected). Select the correct Purpose, if not selected. ❖ If faxing: o Click the ellipsis next to the Destination field to search for a provider or clinic, or free type the Destination, Sender and Comments. Click the drop-down arrow for the device to select the correct Fax selection. Select !FxClinicName to free type the recipient's fax number. Enter the number as a 10-digit number (ex: 2319999999). Click Send. ❖ If printing: o Click Preview and then click the print icon within the document preview screen.
Clinical EHR Education Website Reference: Order Profile Component Overview (1), Phone Call Documentation(2), Patient Letter Creation(3), Document Viewing Guide(4), Ambulatory Referral Order(5), In-Office Order Task Documentation(7), Ambulatory Organizer Overview (8) and Printing or Faxing Using Medical Records Request (10)	