

Cerner PowerChart Ambulatory EDUCATION

Case List Overview

Care Manager Organizer						
🏔 📄 📥 📄 🔍 🔍 100%	4					
Overview ×	Case List	\times +				
Case List for: TSTAcctBeltran, CareMgAmb1 Case Relationship: Primary and Secondary						
Patient Information	Case Status	Case Type				
*demographics 1, pati 5 DOB: JAN 09, 1970	New 148 days	High Risk Adult				

1. Within the Care Manager Organizer, select the Case List tab to view assigned patients

HealtheCare Component Overview

〉 🔹 🏫 HealtheCare			💱 Full screer	n 🖶 Print 🎝 2
Patient Summary 1 × Enroll	ment 2 Active Case 3 × Close Case 4 +			🖬 🛛 🔖 Q
Manage Case		≣∙⊗	Documents (22)	≡•
⊿ Case Details			Notes/Reminders (0)	≡•
Program:			Result Range: All	
Referral Source:	Primary Care Provider		⊿ Sticky Notes (0)	
Referral Reason:	Multiple ED/Inpatient visits		⊿ Reminders (0)	
Case Type:	High Risk Adult		No results found	
Health Plan(s)		≡•⊗		
Demographics		≡•⊗		
demographics 1, patinfo 52 Years F DOB: 01/09/1970 Patient Portal: No Results FYI: No				
⊿ Addresses (1)				
△ Phone Numbers (1)				
person_id: 1428/1/35 , encritr_id: 103796781				
Care Team		≡ • ⊙		
Role / Relationship	Contact	Phone		
Cross Visit				

- 1. Patient Summary tab includes information at a glance including: Case Details, Health Plan(s), Demographics, Care Team, Documents, and Notes/Reminders.
- 2. Enrollment tab Includes Activity Log, Consents and Reminders for initial patient interaction.
- 3. Active Case tab Includes Activity Log for on-going patient interactions and documentation.
- 4. Closed Case tab Prior Case Information.



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Initial Patient Outreach

Patient Summary × Patient Information Health Plans Manage Case Enrollment and Consent Reminders (0) Activity Log (0)	Active Case Patient Information Information Sticky Notes (0)	Close Case × + ✓ Activity Log ✓ Enrollment and Conse ✓ Health Plans ✓ Math Plans ✓ Patient Information	Select the Enrollment Clear Preferences opening the chart
	Addresses Home 0111 MUNSON AVE TRAVERSE CITY, MI 49684	Alternate Home (989) 888-8888 (989) 225-0526 Preferred	patient's name in the Case list.
	Emergency Contact No Results Found	Health Plans Note No Results Found can b	: the workflow components e added/removed or

Patient Summary	\times	Enrollment	×	
	¥	Enrollment and	d Consent	+ V All Visits Last 5 years
Manage Case			OCT 25	CM Enrollment & Consent
Health Plans			10:43	10.00
Enrollment and Consen	t 3	The Automatical of Station		and the result of

- 1. Click on the Enrollment and Consent Component.
- a. Click on the plus sign next to the component name and then select CM Enrollment & Consent.

nrollment & Cons	Enrollment & Consent
	This call may be monitored for training and quality assurance Agreed to continue call Refused to continue call
	Full name, street address and date of birth verified Refused to verify Consent for Care Management Enrollment
	Provides verbal consent for enrollment Written consent pending Written consent completed Refused to enroll in the program
	Consent for Sharing of Personal Health Information O Written consent pending for release of information O Written consent completed O Refused to release information d

- 2. Complete the form and click the green check mark to sign.
- a. Field should be left blank.
- b. Required Field.
- c. Required Field.
- d. Field should be left blank as the release of information document should be on file.



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Add an Activity Log Entry

The Activity Log is used to document a brief record of the interaction with the patient. The Activity Log is the primary record for the duration and type of contact with the patient (this information is used for billing and productivity data).

- 1. Select the Activity Log component.
- 2. Click the plus sign in the component header.
- 3. Complete the required fields.
- Document a short summary of the interaction with the patient in the Notes field (this field has a 250-character limit).
- 5. Click Save.







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Update Manage Case Component Status to Active

Patient Summary	×	Enrollment	X	Active Case	×	Close Case	×	+	
	Ŧ	Manage Case			Update	e Case Status			×
Patient Information		Case Details			The ca	se status currently is N	ew. Select an	available case statu	5 ^
Manage Case		Program:			below	to update the status of	the case.		
Mallage Case		Referral Source:	Pri	mary Care Provider	0.	1. F	1		
Enrollment and Consen	it	Referral Reason:	Ca	re coordination	OP	ending Enrollment			
Reminders (0)		Case Type:	Hig	h Risk Adult	OE	nrolled			
Activity Log (0)		Case Status:	Ne	w (56 days) 2	• A	ctive			U
		FIN:	27		OP	endina Closure			· ·
		Case Risk Score:					•	Undate Case	Cancol
		Case Priority:	No	ne				opuale Case	Cancer

Pending Closure are not required.

- 1. Click Manage Case.
- 2. Click the Case Status hyperlink.
- 3. Select Active.
- 4. Click Update Case.

Initial Encounter Documentation



	100%	• • • •			
Patient Summary	×	Enrollment	×	Active Case	2
	Ŧ	Automatica and	100		
Activity Log (1)	~	and the			
Create Note					
Care Management Office Note				100.000	
Case Summary Note 3					
Care Plan Note					
Select Other Note		Pattern Infor	- allow		

1. Click on the desired patient name to open the chart.

Note: The patient will be automatically changed to Enrolled

when the Consent form is completed. Pending Enrollment and

- 2. Click on the Active Case tab.
- 3. Scroll to the bottom of the component list and click on Case Summary Note.



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< > - A Documentation	
Case Summary Note × List 5 Tahoma 9 × B I U S A E	 Click on the Progress Note section. Click on the Manage Auto text icon.
7 Sign/Submit Save Save & Close Cancel	
역 툴 Manage Auto Text	
My Phrases Public Phrases	
Abbreviation 6. Within the Manage Auto	Text window, search for the desired
,cm_assessment_basic Phone/Basic Assessment CCM auto text as needed.	
,cm_assessment_comp Comprehensive Assessment/Office Note CCM 7. Click sign, when complet	e and the Sign/Submit Note pop-up
,cm_Care_Coord_nonMedicare Coordinated Care Contact nonMCR CCM will open.	
,cm_CCM_Medicare Medicare Wellness CCM	
,cm_hpi_MWV Medicare Wellness HPI	
,cm_PCP_Team_CCCD Coordinated Care Conference CCM	
,cm_plan_MWV Medicare Wellness Plan	
,cm_ROS Review of Systems CCM	
P Sign/Submit Note	— — ×
*Type: Note Type List Filter:	
Author:	
Ambrilipin, 19 Care Summary Note 12/20/2022 1424 I	EST
⊗ Forward Options │ □ Create provider letter	
Favorites Recent Relationships Q Provider Name 9	
Contacts Recipients	Sign Review/CC
	ign Cancel

- 8. Ensure that Care Summary Note is selected.
- 9. Search for the desired provider.
- 10. Click on the star to make the provider a favorite.
- 11. Click the Sign radial button.
- 12. Click Sign.



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Follow Up Documentation

Save	Cancel						
Add Communication Event							
*Date 12/15/2022	*Time (24-hr) 15:59						
Duration (min)	1						
*Method	•						
*Contact type	>						
Notes							

- 1. Complete an Activity Log, the following are required fields:
- Duration must be completed •
- Method •
- Contact type •
- Notes (255 character limit) •

- 2. Complete a Case Summary Note:
 - a. Ensure that Care Summary Note is selected.
 - b. Search for the desired provider.
 - c. Click on the star to make the provider a favorite.

Reminders (0)

No Results Found

- d. Click the Review/CC radial button.
- e. Click Sign.

*Type: Care Summary Note	Note Type List Filter:	
*Author: Ambrnipn, 19	Title: *Date: Care Summary Note 12/20/2022 1424	EST
Favorites Recent Relationships	rovider Name	
🔶 Defauit Name	Default Name Comment Test MD, Physician Juscoperified - Physician	Sign Review/
	Chispeenied Physician	

+

Manage Case Reminders (0)



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Reminders

This component can be used to assist in planning for the next outreach.

Recommendations	Reminders (0) 2 + All Today Tomorrow Next week
Patient Education	Show Only My Reminders All Subtype
Assessment and Plan	📴 New Reminder/Task – 🗆 🗙
Visits Order Profile	Task Edit Image: Provide the state of
Outstanding Orders	Patient: Doe, Jason Jon 🕅 Show in: Recipient's Inbox 🗸
Goals and Interventions Component	To*: Image: CC:
Half Course DecarMala 21 Rafes Respond	Subject: Reminder Message Attachments Browse Documents Other Attachments
Notion Recomment	Message ✓ 12 ✓ ④ ● ▲ № ■ ■ ※ В U 7 号 ■ ≡ ℁® ♥
Can Task -	
and the later	Actions □Due for Labs Show up*: 1 minute(s) 6 12/05/2022 ♀ ♥ 09:42 ♀ EST
No. Concession	Due for Appointment Due for Exam See Note Confirm Follow-up
	Send Referral Send Referral Send Cancel

- 1. Click on the Reminders component.
- 2. Click on the plus sign in the component header.
- 3. Ensure that the Include me box is checked.
- 4. Ensure that the Save to Chart box is checked.
- 5. Enter the message.
- 6. Set the Show up* date and time.
- 7. Click Send.

Screenings and Assessments

P	atient Summary	\times	Enrollment ×	Active Case	1 a	lose Case X	3
		Ŧ	Screenings an	d Assessmer	nts (0)	+	~
	Observation Notifications	^	No Results Found			WellRx Questionnaire-	~
	Health Plans	Ľ.				Revised	
	Assessment and Plan				_	M-CHAT-R Screening	
	Screenings and 2 Assessments (0)		House, No.	Teacher -		Opioid Risk Tool - Opioid Use Disorder	
	Immunizations			Transfer 1		PHQ-2 and PHQ-9	

Screenings are not required as a part of each contact but can be documented as applicable.

- 1. Select the Active Case tab.
- 2. Select the Screenings and Assessments component.
- 3. Select the down-arrow in the component header line.
- 4. Select and complete the desired assessment.