

#### **Clerical Staff:**

- 1. Navigate to **Work Queue Monitor**, this can be done two ways:
  - a. Through your **App Bar**, locate the purple icon with two pieces of paper.



b. Through Powerchart you can open your **Scheduling Appointment Book**, within the appointment book locate the purple icon in the top banner bar.

PowerChart Organizer for NHS Test01, Clerk		- 0 ×
Task Edit View Patient Chart Links Navigation Help		
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	Conversation 🝷 🔄 Medical Record Request 🐘 Related Records 🕈 Add 🗮 Scheduling Appointment Book 🤊 Documents 🖷 Conversation Launcher 📓 Encounter Location History Viewer 🗟 Discent Reporting Portal 🎕	Charge Viewer
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# Scheduling Scheduling Appointment Book 4월 13 张 맨 왕 양 전 전 계 時 御 상 1 4 월 18 문 수 규 명 웹 N 사 I 포 스 I 옥 옥		- 0 X
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2024      Books Appointment	Work in progress:	
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2. When in Work Queue Monitor, select the tab corresponding to your department's queue (e.g., Ambulatory Clinic). You are now able to see all of your incoming faxes on the left window pane, they present in chronological order.





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cheduling Ambulatory C	-	al Clinic WFCC U	nknown Queue	1			
erson Name	Health Card Number		Elapsed Time	Status	Reason		
CHED, AAINA	2222012345	2024-Jun-03 13:57		In Process			
CHED, AAINA	2222012345	2024-Jun-03 13:57	148 d 7 hr	Available			
REHAB, WQMREFERRAL	5586453575	2024-Jun-03 13:57	148 d 7 hr	Available			
		2024-Jun-17 10:04	134 d 11 hr	In Process			
ZZTEST, REG		2024-Jul-29 09:29	92 d 11 hr	In Process			
		2024-Jul-31 12:29	90 d 8 hr	In Process	Awaiting Physician I		
TEST, ONC TEST	1258945687	2024-Jul-31 12:30	90 d 8 hr	Supplemental			
		2024-Aug-19 13:12	71 d 7 hr	In Process			
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		2024-Aug-19 13:41	71 d 7 hr	Available			
		2024-Aug-19 13:41	71 d 7 hr	Available			
		2024-Oct-10 12:34	19 d 8 hr	In Process			

- **Single Click** on each work item for a quick view.
- **Double Click** on the thumbnail to the right of the preview pane to preview a page, **or use the blue arrows at the bottom** of the preview pane.
- 3. Now select the item you will associate your referral with, to do so click the work item you want to work on. **Double click** the highlighted work item.







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abulatory Clinic test SCS			<u>.</u>								
Person Name SCHED, AAINA	Health Card Number 2222012345	Date/Time 2024-Jun-03 13:57	Bapsed Time 56 d 20 br	Status F Available	Reason Encounter Number	MRN Docu 88000043 Physic	ment Type	Owner NHS Test01, HUC			
SCHED, AAINA	2222012345	2024-Jun-03 13:57		Available		88000043		NHS Test01, HUC			
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Energies, manifest entrie		2024-Jun-03 13:57		In Process		00000145 11000	tor bester	NHS Test01. Oncology Reg.	CCC Ontario Renal Network	Kidney	
		2024-Jul-29 09:26	1 d 1 hr	Available				NHS Test01, HUC		Wise Detect + Protect	
		2024-Jul-29 09:27	1d1hr	Available				Little, Robert	Outpatient Nephrology Referral Form for Primary C	are Providers	
		2024-Jul-29 09:27		Available				Little, Robert	- mpanantepinology neterial control rinnary e		
		2024-Jul-29 09:28		Available				Little, Robert	To our primary care provider colleagues:		
		2024-Jul-29 09:28		Available				NHS Test01, HUC			
		2024-Jul-29 09:28		Available				Little, Robert	Please find an Outpatient Nephrology Referral Form developed by the Ontario Renal Network	The KidneyWise Clinical	
		2024-Jul-29 09:29		Available				Lttle, Robert	(ORN). Recommended reasons for referral of patients with nephrological problems are outlined, and these closely mirror the ORN's KidneyWise Clinical Algorithm and Evidence Summary. While	Toolkit helps primary care providers identify, detect,	
		2024-Jul-29 09:29		Available				Little, Robert	and these closely mirror the ORN's Noneywise Clinical Augorithm and Evidence summary, while patients (and their primary care providers) often want to arrange a timely appointment so that	and manage chronic	
		2024-Jul-29 09:30		Available				Little, Robert	their clinical concerns can be addressed and/or alleviated guickly, most nephrologists will	kidney disease (CKD).	
		2024-Jul-29 09:31	1d 1hr	Available				Lttle, Robert	triage referred patients based on level of need. Those patients who are at high risk of progressing	The KidneyWise Clinical Toolkit	
									<ul> <li>Rapidly declining renal function (cER decline 2: 10 mUnitri/12m<sup>2</sup> vidtha 2 to 4 vereks, confermed on repeat testing)</li> <li>Respirately conforme indexem with severe proteinative - La wine ACB : 150 mg/mmol or 24 Adva with proteins 3.5 dg/stg/stg and semail barriers 2.5 gg/stg.)</li> <li>Suppected glomenulonghethis or renal vascalits (hematuria with &gt; 20 BCE) of cRE Config and Exact severe and the second severe proteinative and the severe proteination of the severe severe</li></ul>	on how to properly diagnose and best manage the disaste to robust risk for further of calide chickers on which palatest night benefit from referral to nephrology. www.kidneywise.ca	>>
< tems 1 - 16			_	_			ious Page	Next Poor 10	patient needs to be seen within 24 hours, contact the neptrologist on call in your region for further discussion. Dr. Alla Grill, MD, CCM MPH Provincial Phrane Can Lack CMN Provincial Phrane CMN Provincial Ph		~

4. The **Add/Modify Work Item** window will now open. Within this window you will search the patient using the patient and magnifying glass icon in the top left-hand corner.

Add/Modify Work Item	-			- 5 ×
Task View Work Item Help				
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NFS ^				
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Referral Letter				
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Sign date			Route	OK Cancel
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5. Search for the patient by entering the patient's details (last name, first name). Click search. Note: The more information you enter, the more accurate your results.

\*When you find the correct patient be sure to select ALL ENCOUNTERS. \*

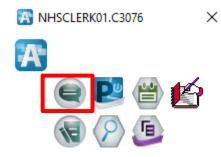
	Name			Pronouns	SSN	MRN	Sex	Birth Date	Age	
ic, strawberry	ZZONC, STF	RAWBERRYPI	E	She/Her		11054513	Female	06/Oct/1999	25 Years	
	ZZONC, STF	AWBERRYM	ILKMOB	She/Her		11054590	Female	15/Apr/1997	27 Years	
	ZZONC, STF	RAWBERRYJA	M	She/Her		11054589	Female	10/Oct/2000	24 Years	
	ZZONC, STF	AWBERRYIC	ECREAM	He/Him		11054438	Male	02/Oct/2001	23 Years	
	ZZONC, STF	RAWBERRYC	AKE	He/Him		11054374	Male	10/Oct/2000	24 Years	
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You will notice no MRN or FIN number will populate, this is intentional as we do not want to associate this referral with an encounter yet until it is accepted, this is just the initial intake.

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#### \*\*\*IF THE PATIENT IS NOT BUILT INTO THE SYSTEM\*\*\*

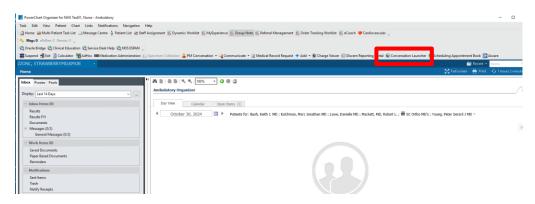
Navigate to Conversation Launcher in your App Bar or in PowerChart



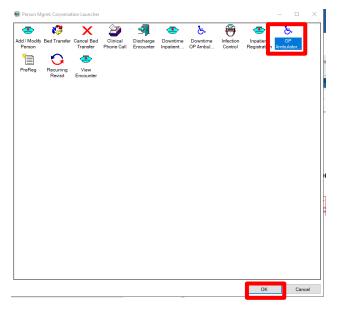








Then select OP Ambulatory Registration and select OK.



- Now you will input all of their information and select Search then select Add Person.







🔍 Person Search					×
Health Card Number:	No persons found.				
Phone Number:					
Deceased?:					
Search Reset					
		ОК	Cancel	Preview	Add Person

- Now the organization window populates. For **Facility Name**, it cannot use abbreviations, **Faculty Alias** can ie. SCS. Select **OK**.

Organization Select the facilit egistered.		vhich the end	x counter should be
Facility Name	Facility Alias		
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acility:			
		ок	Cancel

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- The registration page will pop off after requiring more extensive info, complete this and select **OK.** You can now complete the previous steps which involved searching for the patient.





😻 Add / Modify Person						-	□ ×
Images							
*Last Name: *First Name: Middle Name: ZZT55T / JULA / · · · · · · · · · · · · · · · · · ·	Preferred First Name: Medical Record Number:	Previous Last Name:	Previous First Name:	* What was your sex assigned at bir	• What is your current sex?: Female	~	
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Patient Information Patient Addresses Contacts Alerts           Maintal Status:							
Religion:         Place of Wonhip:         Fundmising Opt Out:	v						∧
Previous Collection Notes:							<b>^</b>
L					(	Ж	Cancel

6. You can now modify the details on the left-hand side of the window that are applicable.

Location: Can be modified using the building icon beside the box.

Location:		
NFS	^	
	$\sim$	<u></u>

**Subject:** Since many forms will be called *"Referral Form"* it is highly recommended to rename the subject line to be clinic specific.

Subject:	
Referral Letter	

**Selecting Document Type:** Click "Document Type" drop down arrow. Scroll the list, find the **Referral Form** Type, and click on it to populate the field.

**Click Status Drop-down Arrow:** Scroll down further to the "Status" drop-down and select "Complete" for the status.







Status:	
Complete	$\sim$
Available Canceled Clarify	
Complete	
Supplemental	
Comment:	

Edit the "Date of Service" if desired.

- 7. When documentation is complete, select OK.
- 8. Now when navigating back to Powerchart and opening the patient chart, this form will be visible under **Documentation.**

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Now that the documentation has been added to the patient chart. We can create an inbound referral to add it to the clinic's referral list.

9. Navigate to Referral Management from the top banner bar.

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Task Edit View Patient Chart Links Notifications Navigation Help		
🕍 Home 🚨 Multi-Patient Task List 🖃 Message Centre 🖕 Patient List 😂 Staff Assign	ment 🌇 Dynamic Worklist 🔢 MyEuperience 🔚 Group Note 🌇 Referal Management 🌇 Order Tracking Worklist 🌇 eCoach 🤎 Cardiovascular	
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Reminders (0/1)  Notifications		
Sent Items Tash Notify Receipts		
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	C3076 NH55AMBRNIPN01 07-0-	et-2024 12:00 EDT

10. Ensure the correct worklist is selected, each clinic should have an **Originating** and **Receiving** list. For this you can select either list as we will be creating an **Inbound Referral.** 

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ED Referrals ED SCS of GMRAC GMRAC GMRAC Receiving K krD		Last Updated Date	✓ Status	Priority	Referred By	Referred To	Assigned To	Requested Service	Indicators	Add Inbound Refers	
ED SCS     ED SCS	V List Meintenance	Last Updated Date v 22/08/2024 11:48	<ul> <li>Status</li> <li>Scheduled 22/04/2024 14:30</li> </ul>	Priority Standard	Referred By NHS Tast01, Physician - Hospit 22/08/2024 09:53	Refored To Generatic Assessment Program Cutpatient Clinic MPS	Assigned To NHS Text01, Reg/Sched Cl	Repussed Service Gerlatrics Referral to GAP-Scenario 3	Indicators		
OF DE Referais     ED SCS     SCS     Reprint Claic Referais Receiving     CONAC     CONAC	List Maintenance Requested Start Date		Scheduled		NHS Test01. Physician - Hospit			Geriatrics			_

11. If you do not have the correct worklist to add a worklist select List Maintenance.







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*TESTHDU, OKSANA 52 yrs F	03/10/2024	23/10/2024 13:10	Scheduled 23/10/2024 08:00	Standard	NHS Test01, Physician - Interna 03/10/2024 09:59	CH Paediatric Clinic SCS		Peediatrics test	D		
*TEST, LEZLIE 54 yrs F	17/05/2024	17/05/2024 11:54	Scheduled 20/05/2024 08:00	Standard	NHS Test01, Physician - Emerg 17/05/2024 11:44	Orthopaedic Clinic WS		Orthopaedic Surgery fractured ankle	D		
*TESTHDU, OKSANA 52 yrs F	07/10/2024	07/10/2024 11:26	Prep for Send	Standard	NHS Test01, Physician - Interna 07/10/2024 11:21	Thromboals Clinic SCS		Vascular Surgery Blood Clots			
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STEMTEST, AMBONE 29 yrs F	21/05/2024	21/05/2024 19:16	Not Started	Standard	NHS Test01, Physician - Interna 21/05/2024 19:16			General Internal Medicine testing			
YSTEST, VENO 44 ym U	11/10/2024	27/10/2024 09:14	Accepted	Standard	NHS Test01, Physician - Interna 11/10/2024 09:13	Clinical Nutrition SCS		Rehab clinical nutrition consult an	D		
*ZZTEST, JAYNE 44 ys F	23/10/2024	23/10/2024 10:05	Accepted	Standard	NHS Test01, Physician - Interna 23/10/2024 10:03	Orthopaedic Clinic NFS		Orthopaedic Surgery fracture wrist	D		

12. Then select **+Add**, here you will input a name of the clinic, then select **Originating** or **Receiving** for the List Type.

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13. Then select **Refer from Location**, and input your clinic, click the name of the clinic then click **Add.** Then press **Save.** 

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Delete					Cancel Save Done

#### 14. Now when in your correct worklist, select Add Inbound Referral.

P PowerChart Organizer for NHS Test01, Nurse - Ambulatory			σ×
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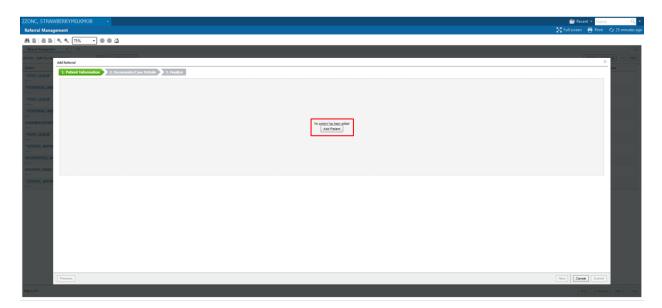
15. Now you will add the patient using the Add Patient button.

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C3076 NHSAMBRNLPN01 31-Oct-2024 10:26 EDT





16. Now you can input the **Documents/Case Details.** 

a. To add a document, select the **Add** button to the left of the patient documents.

b. Now in the Case Details tab, input all yellow fields and anything else applicable.

Medical Service: Ambulatory





13



Add Referral - ZZONC, STRAWBERRYMILKMOB 04/15/1997	
1. Patient Information 2. Documents/Case Details 3. Finalize	
Documents Case Details	
*Medical Service	
*Referral Reason	
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Codified Reason	
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Treatment to Date	
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Referral Type	
Refer from Provider	
Refer from Location	
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*Refer to Provider	
Not Specified	٩,
*Refer to Location	
*Priority	
Instructions to Staff	▼
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\*For **Refer to Provider**, since we are just adding this to the clinic and there is not a specific provider yet since we have not accepted/rejected we will refer to a location. Complete the following:

- Select the magnifying glass to open the Provider Search
- Then select the drop down beside Search by: here you will click Practice.

•	
	- Select -
Search by:	Provider
	Practice

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Provider Search	25
Search pozza	
Qualifiers:	+
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Protate Diag Assessment Prog SCS	Urology Within Health System 6 Providers Available
	Accept Cancel

- Click the clinic and Select Accept

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17. Now review the details and select Submit.

dd Referral - ZZONC, STRAWBERRYMILKMOB 04/15 1. Patient Information 2. Documents/C					22
Status: Pending Acceptance Accept Referral	Reject Referral				Unassigned Assign to me Assign
Case Details					
Medical Service Ambulatory	Referral Reason	Codified Reason	Treatment to Date	Referral Type	
Refer from Provider	Refer from Location	Referral Written Date 10/31/2024	Requested Start Date	Service By Date	
Refer to Provider	Refer to Location Prostate Diag Assessment Prog SCS	Priority Standard (next available)	Instructions to Staff	Comment	
Attached Documents					
Date	Subject	Author	Type	Source	

Previous



Next Cancel Subn



#### **Nursing Staff:**

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1. Navigate to **Referral Management** from the top banner bar.

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2. Ensure the correct worklist is selected, you will select the clinic's Receiving list.

Here you will see the referral sent by the clerical staff, it will be shown in a **Pending Acceptance** status.

ZZONC, STRAWBERRYMILKMOB									😁 Recent -	Name Q -
Referral Management								53	Full screen 🛛 🖨 Print	🤣 1 hours 30 minutes ago
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Patient	Requested Start Date	Last Updated Date 🗸 🗸	Status	Priority	Referred By	Referred To	Assigned To	Requested Service	Indicators	Service By Date
ZZONC, STRAWBERRYHILKHOB 27 3rs F		31/10/2024 11:35	Pending Acceptance	Standard (next available)	31/10/2024 00:00	Prostate Diag Assessment Prog SCS		Ambulatory test		

3. Clicking the white space beside the patient name you can open the referral and review its details, any attached documents, and add in any applicable comments.





C, STRAWBERRYMILKMOB	Concectori Filami	nasaaton 🦕 spean er corection 🍊 Pri Ca		nequest 🗣 Add 👻 🕲 Charge Viewer 🕥 Discern nepr	oning Ponal @ Conversition Launcher @ Scheduling	y Appointment Book @ iAware @ Point Of Care Result Entry @ Recent = Name 5℃ Full screen
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, STRAWBERRYMILKMOB 27 yrs F		ZZONC, STRAWBERRYMILKMOB 27 yrs Female DOI: 15 APR 1997				101
	<	Please Accept or Reject the referral.				Accept
		Status: Pending Acceptance Ede Substatus Ede				Linassigned Action Case Run
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		Refer from Provider	Rafer from Location	Referral Written Date 10/31/2024	Requested Start Date	Service By Date
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		Patient Information				
		Preferred Method of Contact Telephone	Home Phone	Hobie Pione	Business Phone	Nome Address 12 test - Ontario 6406HS

4. You can also review the patient's chart by selecting their name in the referral management table, their name acts as a hyper link.

ZZONC, STRAWBERRYMILKMOB									😁 Recent 🝷	Name Q -
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5. You can now Accept or Reject the referral.

#### Accepting

6. Select Accept to accept the internal referral.









In PowerChart (PowerChart.exe), the system prompts you to create an encounter or select an existing one. For your clinics, you will mostly create a new encounter.

7. To create a new encounter, select the **Create** option in the Encounter Information dialog box. For the encounter type select **PreReg**, then select a **Location**, and press **Submit**.

Create O Select Encounter	ZTEST, OREO I yrs Female DOB: 26 APR	1990				M	RN: <b>110014</b>	48
Status: Yending Acceptance Edit         Substatus: Yending Acceptance Edit         Substatus: Yending Acceptance Edit         Substatus: Yending Acceptance Edit         Summary       Comments (1) Insurance Scheduling         Case Details         Medical Service       Referral Reason         Ambulatory       test         refer from Provider       Refer from Location         Refer al Written Date       Requested Start Date         Service By Date	se Accept or Reject the referral					Accept	Rejec	:t
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Case Details     Recurring Telephone Visit     Submit       Medical Service Ambulatory     Referral Reason     Codified Reason     Treatment to Date Referral Type Refer from Provider     Refer from Location     Referral Written Date     Requested Start Date     Service By Date	ummary Comments	Documents (1) Insurance Scheduling	Outp	patient Recurring		~		R
Ambulatory         test              Refer from Provider         Refer from Location         Referral Written Date         Requested Start Date         Service By Date	se Details		Reci	urring		Submit	Edit	
	er from Provider							
Refer to Provider         Refer to Location         Priority         Instructions to Staff         Order Comment            General Internal Medicine Rapid Assessment / GIMRAC         Next available appointment	er to Provider	General Internal Medicine Rapid						

An encounter is created and associated with the referral case, then the status of the referral case is updated to **Accepted**.

Status: Accepted Edit Substatus: Edit				L Unassigned	Assign to me Assign Case Number: 24444
Summary Comments	Documents (1) Insurance Schedulin	Ig			Edit
Medical Service Ambulatory	Referral Reason test	Codified Reason	Treatment to Date	Referral Type	
Refer from Provider 	Refer from Location	Referral Written Date 10/22/2024	Requested Start Date	Service By Date	
Refer to Provider 	Refer to Location General Internal Medicine Rapid Assessment / GIMRAC	Priority Next available appointment	Instructions to Staff 	Order Comment 	
Patient Information					
Preferred Method of Contact	Home Phone	Mobile Phone	Business Phone	Home Address	

#### <u>Rejecting</u>

1. Select **Reject** to reject the referral or indicate that a referral sent was rejected.





18



Patient, Test 5 yrs Female DOB: OCT 26, 2013 MRN: 10000655 FIN: 20000670		
Please Accept or Reject the referral.	A	ccept Reject
Status: Pending Edit Substatus: Pending Review Edit Clear		Assign to me Assign Case Number: 12062

2. Enter a codified rejection reason, and, optionally, a free-text rejection reason. The system updates the status of the referral to Rejected.

*Reason		
		~
Comment		
		~
		~

The referral status is updated to Rejected.

3. Now you inform the provider of the rejection reason, a provider letter would be used. Click on the black dropdown next to **Communicate** and select **Provider Letter.** 

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4. Search for and select a provider from the Search for Provider list, or select a provider from the Favorite or Recent Recipient tab. If you need to manually enter a recipient's click **Add Freetext Recipient**. The provider is added to the Recipient list.

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5. Select a cell from the Recipient list and update the provider's information as needed.







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6. Click **OK**. The Create Letter dialog box is displayed and you can input why the referral was rejected. When complete select **OK** to send the provider letter.

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Recipient Hayes, Lawrence X Subject: Provider Letter V Save As: Pro	evider Letter			
Transition of Care Browse Documents	L	J		
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- 7. Within the provider letter there is an autotext icon.
- 8. Within the auto text "library", there are three functions.

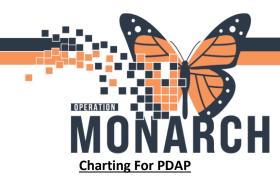
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- a. "My Phrases"-contains the auto texts you have created.
- b. "Public Phrases"-contains all model auto text that are built in Cerner.
- c. The "Add/+" button -allows the user to create a custom auto text.

The following are currently built out as PDAP Autotexts.

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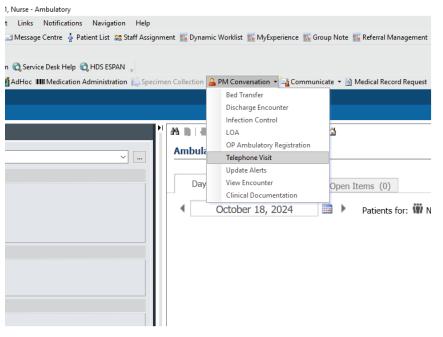




*Initial Intake, since most of the intake pertaining to your clinic occurs on the phone, you would utilize* **PM** *Conversation.* 

The use of PM Conversations: Telephone Visits is for patient interactions that are not booked appointments, but need to be logged as visits for the purpose of keeping statics on the amount of time staff are spending with patients. This feature is to be used for any patient telephone interaction over 5mins in length that is not a pre-booked telephone visit.

1. From the home page on the screen choose PM Conversation and Telephone Visit.



- 2. Type patient name in the search field and click the search button.
- 3. Once you find the patient click Add Encounter to make a telephone visit encounter.

**NOTE:** if you do not find the patient, connect with your Ward Clerk to ensure patient information has been entered in the system.







🔍 Person Search										×
									1	
	^	MRN	Patient N	ame	Health	Card Number	VC	Sex	Birth Date (DD-	MMM-YYYY) A
Patient Last Name:		11054541	I TESTNU	TRITION, LEZL	.IE   1234-4	44-888		Female	02/Oct/1980	2
test		11001524	TEST, LE	ZLIE	12 345	6 7890		Female	02/Oct/1970	5
Patient First Name: lezlie MRN:										
Birth Date (DD-MMM-YYYY):		<								
Sex:										
×		Facility	MRN	FIN	Visit Id	Patient Type		Reg Date (D	D-MMM-YYYY)	Expected Date
FIN:		SCS	11054541	22-005950	22-007145	PreReg				2024-Oct-18 13
		NFS	11054541	22-005931	22-007126	Telephone Vi	sit 🗄	2024-Oct-18	08:13	2024-Oct-18 09
		SCS	11054541	22-005920	22-007115	Outpatient		2024-Oct-17	16:01	
Phone Number: Deceased?: Search Reset	~	<								>
				ОК	С	ancel	Previe	ew A	dd Person	Add Encounter

4. Select the facility to which the encounter should be registered

Facility Name: Is the Name (ie: St Catharines)

Facility Alias: Is the Short Form (ie: SCS, NF, WS, FE, PC, HDS)





DEFENSION MONARCH	<b>TIP SHEET</b> HOSPITAL INFORMATION SYSTEM (HIS)
Organization	X Organization X
Select the facility and/or client to which the encount registered.          Facility Name       Facility Alias         St.       St.	
Facility:	Facility:
St. Catharines Site	Cancel OK Cancel

5. Complete the required fields marked in "yellow" and with an "\*" to register the telephone visit to the appropriate clinic location. Can click complete when done.

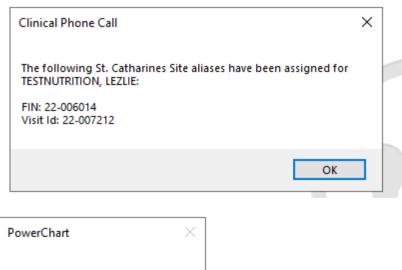
Vinical Phone Call				-		×
Images	Last Name: TESTNUTRITION	First Name:	Middle Name:	Preferred First Name:		
Previous Last Name:	Previous First Name:	What was your sex assigned at bir Female	What is your current sex?: Female	What pronoun(s) do you use?: She/Her	~	
Birth Date (DD-MMM-YYYY):	Age: 44Y	Medical Record Number:	FIN:			
Phone Number:	Alternate Phone Number:					
- Provincial Health Card Information Health Card Available?: Yes	*Health Card Number: ON <> 1234-444-888	Version Code:	Health Card Expiry Date:			
Facility: SCS	*Building: SCS	*Inpatient/Ambulatory Unit:	Previous Encounter Type: Telephone Visit	Encounter Type: Telephone Visit	~	
Respirology						
*Registration Date: 18/Oct/2024	*Registration Time: 21:31					
				Complete	Canc	
ady				NHSAMBRNLP	)ct/2024	21:32







6. You will receive the following message and click "OK". You will get the following message asking if you would like to open the chart. Click "Yes".



7.	Launch into the patient chart and locate the powerform you would like to complete. This can be
	done either through adhoc charting or through the vital sign drop down "carrot".

#### **Adhoc Charting**

Do you want to open the chart?

<u>N</u>o

<u>Y</u>es







PowerChart Organizer for NHS Test01, Nurse - Ambulatory		- a ×
Task Edit View Patient Chart Links Notifications Navig		
	t 🎎 Staff Assignment 🔠 Dynamic Worklist 🔝 MyEsperience 🜇 Group Note 🜇 Referal Management 🔛 Order Tracking Worklist 🌇 eCosch 🤎 Cardiovascular 🖕	
Sum Serie Contraction Statement Stat		
Q Oracle Bridge Q Clinical Education Q Service Desk Help Q HDS E		
	👷 Charge Viewer 🛞 Discense Reporting Portal 🖉 Conversation - 🔒 PM Conversation - 🔒 Charge Viewer 🛞 Scheduling Appointment Book 🔤 Unaver 🐰 Port Of C	
ZZONC, STRAWBERRYMILKMOB		et 🔹 Name 🔍 🗣
Inbox Proxies Pools	<sup>N</sup> A3 (b) (d) (d) (d) (d) (d) (d) (d) (d) (d) (d	
Display: Last 14 Days	V - Ambulatory Organizer	
😑 Inbox Items (0)	Day View Calendar Goen Items (1)	
Results Results FVI	4 October 30, 2024 💷 🕨 Patients for; Bush, Kath J. HD ; Kalchman, Marc Jonathan MD ; Lowe, Danielle MD ; Mackett, MD, Robert L. ; 🗰 SC Ortho MD's ; Young, Peter Gerard J MD =	
Documents		
<ul> <li>Messages (0/2)</li> <li>General Messages (0/2)</li> </ul>		۲
= Work Items (0)		
Saved Documents Paper Based Documents		
Reminders		
- Notifications		
Sent Items		
Trash		
Notify Receipts		
	No Patients Found	
	Catos InfoAmes	NLPN01 30-Oct-2024 15:28 EDT
	Correct Instantion	

8. The ambulatory folders will show, navigate to your clinics appropriate folder.

Ad Hoc Charting - ZZONC, STRAWBERRYMILKMOB				×
Ambulatory/Durpatent     Cath Lab     Cath Lab     Cath Lab     Cath Lab     Cath Lab     Generation     G				
	Char	t	Clos	se

9. Now you can pick your clinic form or the generic telephone visit form.

niagarahealth





P Ad Hoc Charting - ZZONC, STRAWBE	SERRYMILKMOB			×
Ambulatory/Dutpatient     Carl Lab     Carl Lab     Carl Lab     Carl Lab     Carl Lab     Generation     Generation	Cancer Care Navigation   Drotate Diagnostic Assessment Program Intake			
		Chart	Clo	se

Within the forms the buttons on the top are for the following:

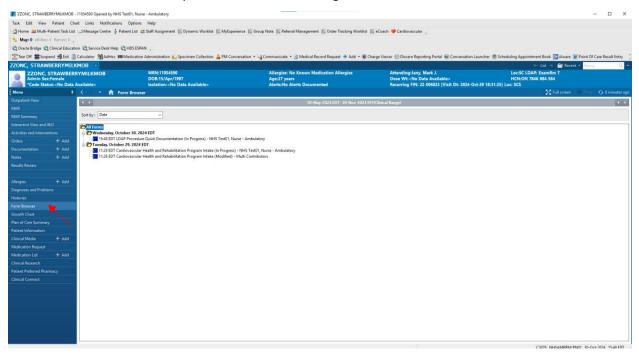
Prostate Diagn	ostic Assessment Program Intake - ZZONC, STRAWBERRYN	11LKMOB			
<ul> <li>Image: Image: Ima</li></ul>	7 全 🕈 💷 🛅 🗎				
*Performed on:	1/Oct/2024 12:51 EDT				
	I/Oct/2024     Izs1     EDT       Patient Summary       Chief Complaint       I       History of Present Illness       Vitals       SBP / DBP     Resp. Rate 02 :       mmHg     br/min       Heart Rate     MAP       Dpm     Cast Restin       Dpm     Exertion       Pain     Present	%     U/min     Deg C       g/Exertion     Temperature Tympanic       Image: State Sta	mit Measuremen Weight kg Height / Length Cm Waist Circ. Cm Ht/Wt Refused? ✓	NtS BMI BMI Exclusion BSA	
	Copyright® Cerner Corporation. All rights reserved.				







- Submit
- Save but NOT Submit, when you use this you can reopen your forms in Form Browser. Double click the forms to reopen and continue charting.



#### Vital Sign Drop Down Carrot:

1. When in your patient chart, select **Outpatient View** if not already open.





ZZTEST, AMB - 11000218 Opened by	NHS Test01, Nurse - Ambula	itory			- 5 ×
Task Edit View Patient Char	rt Links Notifications	Navigation Help			
Home 🔐 Multi-Patient Task List	🖂 Message Centre 👍 Patie	ent List 🗯 Staff Assignment 🌃 Dynamic Worklist 🎬 MyExp	rrience 🌃 Group Note 🌇 Referral Management 🌃 Order Tracking Wo	vrklist 👫 eCoach 🤎 Cardiovascular	
S Msg= 0 eR:Ren: 0 Remin:: 0					
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			nametica - 1 Communicate - 12 Medical Record Result - Add -	🔹 🕼 Charge Viewer 💿 Discern Reporting Portal 📾 Conversation Launcher 🛗 Scheduling Appointment Book 💽 iAware	Paint Of Care Basels Entry
ZZTEST, AMB	Calculator Adrise million	redication Administration 1 specimen Collection as PM Co	westation • 📲 Communicate • 🔄 Medical Record Request 🗣 Add •	← List → 😭 Recer	
ZZTEST, AMB		MRN:11000218	Allergies: Allergies Not Recorded	Attending:Cerner Test, Laboratory - AP Pathologist CernerLoc:SC PLAS: ExamRm 3	Name Q
Admin Sex:Male *Code Status: <no a<="" data="" th=""><th>han Haddan</th><th>DOB:04/Apr/1999 Isolation:<no available="" data=""></no></th><th>Age:25 years Age:25 Not letts Documented</th><th>Dose Wt:121.000 kg (30-Jul-2024) HCN:ON 6542-198-755 Outpatient FIN: 22-003269 [Visit Dt: 2024-Jul-10 08:35:00] Visit Reason: test for issue</th><th></th></no>	han Haddan	DOB:04/Apr/1999 Isolation: <no available="" data=""></no>	Age:25 years Age:25 Not letts Documented	Dose Wt:121.000 kg (30-Jul-2024) HCN:ON 6542-198-755 Outpatient FIN: 22-003269 [Visit Dt: 2024-Jul-10 08:35:00] Visit Reason: test for issue	
Menu ¥		patient View	Alerts:No Alerts Documented	Outpatient Fin: 22-003269 [Visit DT: 2024-Jul-10 06:35:00] Visit Reason: test for issue	📄 Print 💪 0 minutes ago
Outpatient View				25 rui scieen	
MAR	*	75% • • 🔿			
<b>`</b>	Outpatient Workflow X	+			🗍 🗍 No Severity 🗣 🔍 🔳 ==
MAR Summary	1	Chief Complaint			Selected Visit O
Interactive View and I&O	Chief Complaint	Enter Chief Complaint			
Activities and Interventions	Histories				
Orders + Add	Vital Signs Labs	Histories			All Visits G
Documentation + Add	Home Medications (1)	Problems II Procedure II Family	I Social II		
Notes + Add	Allergies (0)	Protonis :: Procedule :: Pariny	: 3000 E		
Results Review	Scales and Assessments			Search within SNOMED CT V Add problem	Q
	Care Team Microbiology	Name		∧ Censification	
Allergies + Add	Hyperbilingbinemia	- Chronic Problems (2)			
Diagnoses and Problems	Diagnostics	Alcohol abuse		Nescal	
Histories	Clinical Media	Bipolar affective * Resolved Problems (0)		Medical	
Form Browser	Order Profile Documents	- umanum concernanta (a)		Recorded to Date of Party	plete Complete Reconciliation
Growth Chart	Pathology				
Plan of Care Summary	Visits	Vital Signs		+ V All Visits Last 18 months Last 7 days Last 1 months	Last 6 months 🗸 🔳 🖸 📀
Patient Information	Reminders	23 OCT 2024	30 XJL 2024	30 APR 2024	
Clinical Media + Add	Goals and Interventions Component	16:02	15:16	13/38	
	Health Concerns	BP averty -	-	118/60	
Medication Request	Lines/Tubes/Drains Patient Instructions	HR tpm 60 Tamp Dru C 37	-	-	
Medication List + Add	Problem List	Respiratory Rate Intinin 15		-	
Clinical Research	Immunizations	5p02 % 98	-	-	
Patient Preferred Pharmacy	Create Note	Weight Dosing kg 121.000 Weight Measured kg 121	121.000		
Clinical Connect	Visit Instructions	magin masterial of			
	Nursing Narrative Note	Labs		All Visits Latent* Last 18 months Last 3 days Last	
	Select Other Note	Laus		All Visits Course Case 1 days Case	
					Display: Facility defined view *
		31 3.1. 2024 54:37			
		AST units 24			
		Calcium Lal mmo(rt. 2.30			
		Chloride Level mmul/L 99			~
		Phosphorus minuit. 1.30			

# 2. Now navigate to the **Vital Signs** section, here you will locate the "carrot" icon +

OPERATION

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ZZTEST, AMB - 11000218 Opened by	NHS Test01, Nurse - Ambula	tory			- a ×
Task Edit View Patient Char	rt Links Notifications	Navigation Help			
🔄 Home 🚨 Multi-Patient Task List	🖃 Message Centre 👍 Patie	nt List 🚑 Staff Assignment 🌇 Dynamic Worklist 🌇 MyExp	erience 🌃 Group Note 🌇 Referral Management 🌇 Order Tracking Worl	klist 👫 eCoach 🤎 Cardiovascular _	
🔸 Msg= 0 eRxRen: 0 Remin:: 0 🖕					
Oracle Bridge 🐧 Clinical Educatio	in 🔞 Service Desk Help 🔞 I	HDS ESPAN			
			onversation • 🔄 Communicate • 📄 Medical Record Request 🔸 Add •	🕲 Charge Viewer 💿 Discern Reporting Portal 📾 Conversation Launcher 🗂 Scheduling Appointment Book 🔂 JAwa	are 👿 Point Of Care Result Entry 📱
ZZTEST, AMB				$\leftarrow List \rightarrow \overset{res}{\rightarrow} R$	
ZZTEST, AMB Admin Sex:Male *Code Status: <no a<="" data="" th=""><th>wailable&gt;</th><th>MRN:11000218 DOB:04/Apr/1999 Isolation:<no available="" data=""></no></th><th>Allergies: Allergies Not Recorded Age:25 years Alerts:No Alerts Documented</th><th>Attending:Cerner Test, Laboratory - AP Pathologist CernerLoc:SC PLAS; ExamRm 3 Dose Wt:121.000 kg (30 Jul-2024) HCN:ON (6542-198-755 Outpatient Filt: 22:092369 (Visit D1: 2024-Jul-10 08:35:00) (Visit Reason: test for issue</th><th></th></no>	wailable>	MRN:11000218 DOB:04/Apr/1999 Isolation: <no available="" data=""></no>	Allergies: Allergies Not Recorded Age:25 years Alerts:No Alerts Documented	Attending:Cerner Test, Laboratory - AP Pathologist CernerLoc:SC PLAS; ExamRm 3 Dose Wt:121.000 kg (30 Jul-2024) HCN:ON (6542-198-755 Outpatient Filt: 22:092369 (Visit D1: 2024-Jul-10 08:35:00) (Visit Reason: test for issue	
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Interactive View and I&O	Chief Complaint	Chief Complaint			Selected Visit O
Activities and Interventions	Histories	Entar Chief Complaint			
Orders + Add	Vital Signs	Histories			Al Visits 📀
Documentation + Add	Labs Home Medications (1)				ALVES V
Notes + Add	Allergies (0)	Problems    Procedure    Family	II Social II		
Results Review	Scales and Assessments			Search within SNOMED CT	9
	Care Team Microbiology	Name		∧ Cassification	
Allergies + Add	Hyperbilirubinemia	- Chronic Problems (2)			
Diagnoses and Problems	Diagnostics	Alcohol abuse Bipolar affective		Medical Medical	
Histories	Clinical Media Order Profile	Resolved Problems (0)		Medical	
Form Browser	Documents			Reconcilation Status: In	complete Complete Reconcilation
Growth Chart	Pathology				
Plan of Care Summary	Veits Reminders	Vital Signs		+ V All Visits Last 18 months Last 7 days Last 1 month	ns Last 6 months 🖌 🗐 🔲 📀
Patient Information	Goals and Interventions	23 OCT 2024 26/02	30 X.8. 2024 16 16	10 APR 2024	
Clinical Media + Add	Component Health Concerns	BP mmtg		13:38	
Medication Request	Lines/Tubes/Drains	HR tpm 60			
Medication List + Add	Patient Instructions	Temp Drg C 37 Respiratory Rate brinin 16	-		
Clinical Research	Problem List Immunizations	5p02 % 98	-	-	
Patient Preferred Pharmacy	Create Note	Weight Dosing to 121.000 Weight Messured to 121	121.000		
Clinical Connect	Volt Instructions	Weight Measured kg 121	121		
	Nursing Narrative Note	Labs		All Visits Latest* Latt 18 months Last 3 days	last 2 days _ W _ D _ Q _ =
	Select Other Note			Fill Filling Concerning States of Property States o	
		70 80 9004			Display: Facility defined view *
		31.33, 2024 14:37 # Primary Labs			
		AST unit/L 24			
		Calcium Lal menolit. 2.30 Obloride Level menolit. 99			
		Phosphorus minolit. 1.30			~
				C3076 NHSAI	MBRNLPN01 30-Oct-2024 22:18 EDT





3. From the drop-down list, select **Telephone Visit.** 

Handower X Ambulatory Community W_ X +	
Vital Signs +	All Visits Last 18 months L
No Results Found	Infectious Disease Amb
Labs	PDAP Procedure Quick Documentation
No results found	Fracture Clinic Comprehensive Documentation
	Telephone Visit

4. Document your patient encounter. On the telephone visit form you can add the caller name and

number by searching with the And finding the clinicians name. Once you complete the

Telephone Visit	ephone visit click the green checkmark	to complete the documentation
	18/Oct/2024 21:43 EDT	
Telephone Visit	Telephone Visit	
	Caller: Leduc, Lezlie	Caller Telephone #:
	Telephone Visit Note:	
	Segoe UI - 9 - 🧐 🐰 🗎 🛍	<b>B</b> <u>U</u> <i>I</i> <del>S</del> ≣ <u>≡</u> <u>≡</u>

5. This will document the power form in the chart and register a telephone visit as an encounter.

Outpatient View	🖶 Add 👻 🖩 Submit	Forward	Provider Letter	/lodify	🖿   🕊 🎔   📰 🖬 In Error   🛄	Preview
MAR	List					
MAR Summary						
Interactive View and I&O	Display : All	∼ Advan	ced Filters			
Activities and Interventions			_			
	Service Date/Ti 🗸	Subject	Туре	Facility	Author; Contributor(s)	Status
Orders + Add	2024-Oct-18 21:43:00	Telephone Visit	Telephone Visit - Text	SCS	NHS Test01, Nurse - Ambulatory	Auth (Verified)
Documentation + Add						,,







Allergies: Allergies Not Recorded Age:44 years Alerts:No Alerts Documented			Attending: Dose Wt: <no available="" data=""> Telephone Visit FIN: 22-006014 [Visit Dt: 202</no>			LOC:SC LDAP HCN:ON 1234-444-888 24-Oct-18 21:31:26] Visit Reason: <no -="" for="" reason="" th="" visit<=""></no>		
Custom Information	: TESTNUTRITION,	LEZLIE						
Visit Type	Location	Admit Date	Discharge Date	FIN	Service	Visit Reason		
Telephone Visit	NF GAC	18/Oct/2024 08:13:27		22-005931	Ambulatory			
Outpatient	SC CLINU	17/Oct/2024 16:01:49		22-005920	Ambulatory	consult		
PreReg	SC CLINU			22-005950				
Telephone Visit	SCIDAP	18/Oct/2024 21:31:26		22-006014	Respirology			

6. Decision support and clinical managers will be able to pull reports on the number of registered telephone visit encounter for a Clinic area from this data.



