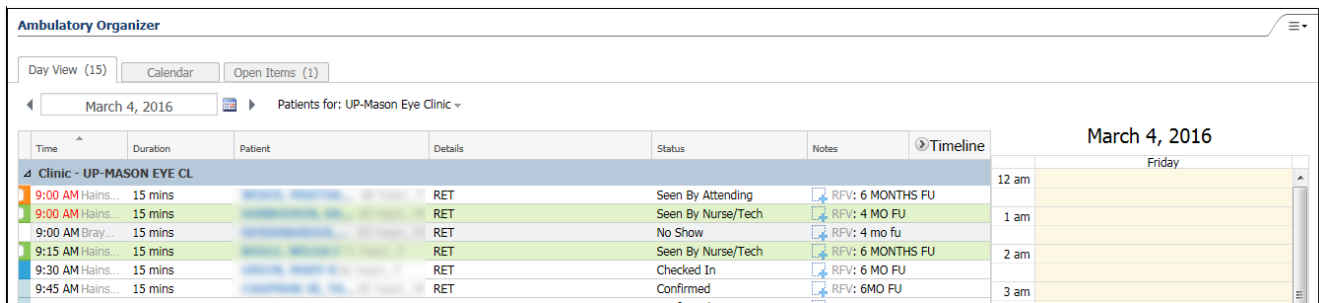


# The Ambulatory Organizer

Creating your Resource List – page 1	Setting the Patient’s Status and Location – page 4
Day View – page 2	Open Items Indicator – page 5
Configuring your Day View – page 3	Calendar View – page 6
Click/Hover Information in the Day View – page 4	Open Items View – page 6

## Overview

The purpose of the Ambulatory Organizer is to provide a simple, comprehensive view for ambulatory users to efficiently access and manage patient schedules, documentation and tasks. The Ambulatory Organizer can display current day, past and future clinic appointments as well as reminders for outstanding documents and tasks. Surgical providers can also use the Ambulatory Organizer to view surgical case schedules.



## Creating your Resource List

A drop-down arrow is displayed next to the **Patients for:** field and provides the opportunity to add as many physicians resources or locations into the drop down menu as desired. Multiple resources can be selected in the *Day View*, *Calendar*, and *Open Items* views. Physicians will see their name listed as the selected resources automatically. Other users must add the resources to the list manually for each view:

Patients for: No Resource Selected ▾

1. Click the drop-down arrow to select a resource

2. For clinics search for clinic name (most clinics start with UP). Check the box next to the clinic to add.

For physician resources, type in all or part of the physician’s last name. Check the box next to their name to add resource

3. When done selecting resources click **Apply**

## Day View

**Ambulatory Organizer**

Day View (15) | Calendar | Open Items (1)

March 4, 2016

Current time auto-scrolls to top

Time	Duration	Details	Status	Notes	Timeline
<b>Clinic - UP-MASSON EYE CL</b>					
9:00 AM	15 mins	RET	Seen By Attending	RFV: 6 MONTHS FU	12 am
9:00 AM	15 mins	RET	Seen By Nurse/Tech	RFV: 4 MO FU	1 am
9:00 AM		RET	No Show	RFV: 4 mo fu	
9:15 AM		RET	Seen By Nurse/Tech	RFV: 6 MONTHS FU	2 am
9:30 AM		RET	Checked In	RFV: 6 MO FU	
9:45 AM		RET	Confirmed	RFV: 6MO FU	3 am

Timeline view- click > to hind Timeline

Double-booked appointment times will appear red

Day View Color Legend: Ambulatory			
If the color is:	The patient's appointment is:	How the status is set:	
Dark Gray	Checked out	Manual within the Ambulatory Organizer	
Light Gray (entire line)	Cancelled through IDX.	Automatic via IDX	
Orange	In a "seen by" physician, mid-level, resident, med student or multi-d provider status.	* Automatic OR manual	
Green (entire line)	In a "seen by" nurse/technician status.	* Automatic OR manual	
Green	In a "CC Arrived in Clinic" status.	Manual within the Ambulatory Organizer	
Blue	Checked in through IDX.	Automatic via IDX	
Blue (entire line)	Checked in through IDX (visible to Nursing/techs only).	Automatic via IDX	
Light Blue	Confirmed – the patient has not yet arrived or checked-in.	Automatic	

\* Automatic triggering of a "Seen By" status occurs when a user signs or saves something in the EMR after the patient has arrived. This includes Ad Hoc Forms, Notes and Orders.

Day View Color Legend: Surgical			
If the color is:	The patient is:	How the status is set:	
White	The patient has not yet checked in.	Automatic	
Blue	The patient has been checked in through IDX.	Automatic via IDX	
Green	Pre-Op	Automatic via Surginet	
Brown	Intra-Op	Automatic via Surginet	
Orange	Post-Op	Automatic via Surginet	

## Configuring the Day View

The Day View can be configured in a collapsed view which allows more patients to be viewable on the Organizer and decreases the need for scrolling. This option is turned OFF by default and must be turned on by the user:

Click the Menu in the upper right corner of the Day View to access the Day View Display Options. When the Collapse View is checked, the appointments display on a single line rather than two. The display will remain in Collapsed view until the checkmark is removed.

“No Appointments” – can be configured to show blocks of open time in the Day View. Click “Settings” in the menu to access.

Time	Duration	Patient	Details	Status (as of 9:46)	Notes	Timeline
<b>Clinic - UP-MASON EYE CL</b>						
9:00 AM	Hains...	15 mins		RET	Seen By Attending	RFV: 6 MONTHS FU
9:00 AM	Hains...	15 mins		RET	Seen By Nurse/Tech	RFV: 4 MO FU
9:00 AM	Bray...	15 mins		RET	No Show	RFV: 4 mo fu
9:15 AM	Hains...	15 mins		RET	Seen By Nurse/Tech	RFV: 6 MONTHS FU
9:30 AM	Hains...	15 mins		RET	Checked In	RFV: 6 MO FU
9:45 AM	Hains...	15 mins		RET		
10:00 AM	Hains...	15 mins		RET		
10:15 AM	Liu M...	10 mins		RET		
10:25 AM	UP-I...	15 mins	No appointments			
10:40 AM	Shao...	20 mins		RET		
11:00 AM	UP-I...	1 hr 45 mins	No appointments			
12:45 PM	Hains...	15 mins		RET		

**Settings**

**Reminders**

These are the tasks that will be shown for this patient.

- Task List
- H and P Note
- Consent Note

Meaningful Use Stage 1  Stage 2

- Allergies
- Demographics
- Family History
- Medication List
- Medication Reconciliation
- Note
- Patient Education
- Problems
- Smoking Status
- Visit Summary
- Vital Signs

**Schedule Display**

Automatically update the appointment schedule.

- Auto Update Schedule
- Display Facility

**Minimum Gap Duration**

The minimum amount of time before a gap row displays between scheduled appointments on Day View.

- Display Schedule Gaps

10 Minutes

Apply Cancel

You can select what reminders will show up

Auto Update is defaulted. We suggest leaving this feature checked.

This is where you set the “No Appointments” feature

## Hover/Click Information in the Day View

Time	Duration	Patient	Appointment Details	Status (as of 10:51)	Notes
9:00 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Seen By Attending Room 1204	Reason for Visit: 2-3 WK DC FU

Hover on the patient to view person details

Status column: gives appointment status and patient location/exam room

Click the Notes icon to add a comment to today's schedule

**SELF, FIVE**  
 MRN: 09-00-72-10-0  
 FIN: 52020313  
 DOB: 03/05/1981  
 Home: 573-111-2345  
 Business: 573-333-4567

**Comments**

Add New Comment

(0/255)

Cancel Save

### Setting the Patient's Status and Location

Both the Location and Status are clickable and can be set after the patient has checked in. The Status will updated automatically based on actions completed in the EMR. The Location drop down is used to communicate the exam room the patient is located within the clinic.

Time	Duration	Patient	Appointment Details	Status (as of 10:53)	Notes
9:00 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Seen By Attending Room 1204	
9:00 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Seen By Attending Room 1211	
9:30 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Lab	
9:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	PFT Lab	
9:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Rad	
10:00 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Room 1204	
10:00 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Room 1205	
10:00 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Room 1206	
10:00 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Room 1208	
10:00 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Room 1210	
10:30 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Room 1212	
10:30 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Room 1213	
10:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Room 1214	
10:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Room 1215	
10:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Room 1216	

Click here to change location

Time	Duration	Patient	Appointment Details	Status (as of 10:53)	Notes
9:00 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Seen By Attending Room 1204	
9:00 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Seen By Attending Room 1204	
9:30 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Seen By Attending	
9:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Seen By Med Student	
9:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Seen By APRN/PA	
9:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Seen By Nurse/Tech	
9:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Seen By Attending	
9:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Seen By Resident/Fellow	
9:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Seen by Multi-D Provider	
10:00 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	CC Arrived in Clinic	
10:00 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Hold	
10:00 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Cancel	
10:00 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	No Show	
10:30 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Check Out	
10:30 AM Regunath MD, Hariharan	30 mins	69 years Female	RET	Waiting Room	
10:30 AM Shah MD, Payal Kir...	30 mins	69 years Female	RET	Confirmed	

Click here to change status

## Open Items Indicator

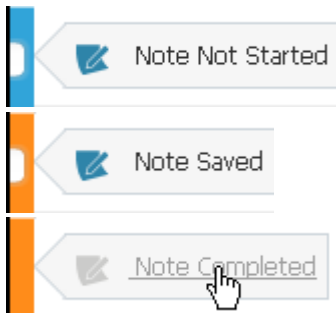
The Open Item indicator will appear in the status color column for any patient that has an outstanding open item for the user viewing the Ambulatory Organizer.

The indicator appears as a white "light" in the status color column

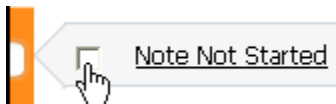
Hovering over the status color column will reveal the status of open items.

11:00 AM	Williams MD, Amy Sue
12:30 PM	Fitzsimmons MD, Anne B
1:00 PM	Fitzsimmons MD, Anne B
1:00 PM	Misra MD, Madhukar

Attending, Resident, APRN and PA users will see indicators depending on the status of the Clinic Note. The status text is clickable and will launch either to Document Viewing (if the note has not been started) or to the note itself:



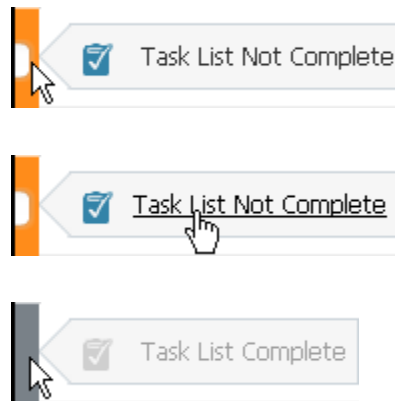
Clicking the checkbox will manually complete the open item:



Attending physicians will see indicators for Resident saved/signed notes:



Nursing, PSR and office support staff will see indicators depending upon the status of tasks. The status text is clickable and will launch to the Task List in the patient's chart:



## Calendar View

The Calendar View will display all scheduled appointments in either a week view or a day view. Multiple resources may be toggled between on the Calendar View

The screenshot shows a calendar interface for the week of May 19, 2014, to May 25, 2014. The interface includes tabs for 'Day View', 'Calendar', and 'Open Items (14)'. The 'Calendar' tab is active, showing a grid of appointments for two resources: 'Eskridge MD, Bernard R' and 'Selva MD, Thomas J'. The current day, Wednesday, May 21st, is highlighted in orange. A vertical orange line indicates the current time, which is approximately 3:30 PM. Callouts explain that the orange box represents the current day, the colors of the appointment blocks are the same as in the Day View, and the orange line represents the current time.

## Open Items View

All open items within the past 7 days for the selected resource can be seen in the Open Items view:

The screenshot shows the 'Ambulatory Organizer' interface with the 'Open Items (33)' tab selected. The interface displays a list of appointments for two resources: 'EF-Medical O...' (6 items) and 'UP-WCH Urol...' (27 items). The list is filtered to show items from August 31, 2018, onwards. The table has columns for Appointment, Patient, Details, Notes, and Outstanding Actions. A callout points to a link in the 'Outstanding Actions' column, explaining that it can be used to launch directly to that item.

Appointment	Patient	Details	Notes	Outstanding Actions
<b>More Than 2 Days Ago (1)</b>				
September 04, 2018 12:00 PM	55 Years, Female	CMO	Reason for Visit : F/U;LABS;AIU	Note Not Started
<b>2 Days Ago (4)</b>				
September 05, 2018 9:20 AM	65 Years, Male	CMO	Reason for Visit : F/U;LABS;AIU Chief Complaint: follow up/AIU	Note Not Started
September 05, 2018 9:40 AM	65 Years, Male	CMO	Reason for Visit : F/U;LABS;AIU Chief Complaint: Continuity of care	Note Not Started
September 05, 2018 10:20 AM	59 Years, Female	RT1	Reason for Visit : 6 month FU Chief Complaint: follow up	Note Not Started
September 05, 2018 11:00 AM	70 Years, Female	RT1	Reason for Visit : PER MICHELLE Chief Complaint: follow up	Note Saved
<b>Yesterday (1)</b>				
September 06, 2018 10:40 AM	88 Years, Female	RT2		Note Not Started