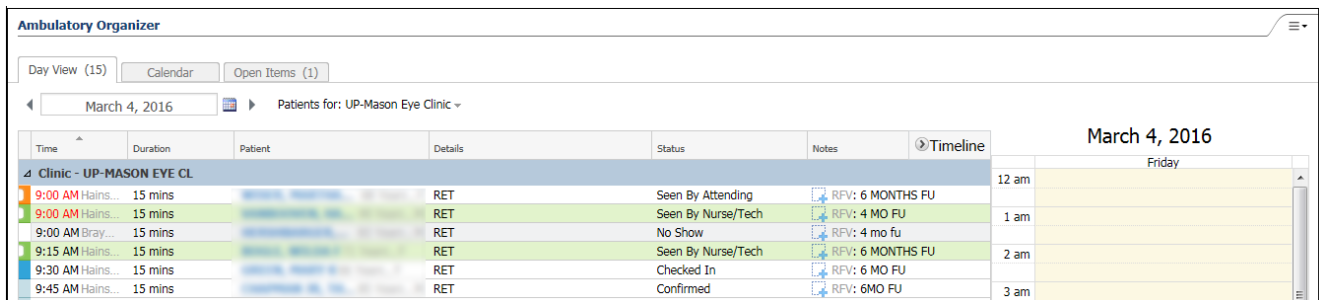


# The Ambulatory Organizer

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## 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 **MU-**). 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

Apply Cancel

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

## Day View

**Ambulatory Organizer**

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

March 4, 2016

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

March 4, 2016  
Friday

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.	Automatic	
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.	Automatic	
Blue (entire line)	Checked in (visible to Nursing/techs only).	Automatic	
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.	Automatic	
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	12 am
9:00 AM Hains...	15 mins		RET	Seen By Nurse/Tech	RFV: 4 MO FU	1 am
9:00 AM Bray...	15 mins		RET	No Show	RFV: 4 mo fu	2 am
9:15 AM Hains...	15 mins		RET	Seen By Nurse/Tech	RFV: 6 MONTHS FU	3 am
9:30 AM Hains...	15 mins		RET	Checked In	RFV: 6 MO FU	4 am
9:45 AM Hains...	15 mins		RET			5 am
10:00 AM Hains...	15 mins		RET			6 am
10:15 AM Liu M...	10 mins		RET			
10:25 AM UP-A...	15 mins	No appointments				
10:40 AM Shao...	20 mins		RET			
11:00 AM UP-A...	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

## 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

## Ambulatory Organizer Status Changes:

The ability to check in and check out will no longer be available from the Ambulatory Organizer.

AO 2.5

Inbox Proxies Pools

Display: Last 90 Days

List (6) Day Week Today 07/13/2020 Patients for: UP-SPMB Family Medicine Blue

Pre-Visit	Time	Duration	Patient	Details	Status (as of 11:03)	Notes
	7:30 AM	15 mins	SPBLUE, TRAIN1 (MAG...)	PHY	Confirmed	Reason for Visit: phy
✓	7:45 AM	15 mins	Fitzsimmons M...		Confirmed	Reason for Visit: PE, Hep A inj
	8:00 AM	15 mins	Fitzsimmons M...		Confirmed	Reason for Visit: annual
	8:00 AM	20 mins	Wilson DO, Chri...		Confirmed	Reason for Visit: WWE
	8:20 AM	40 mins			Confirmed	
	9:00 AM	40 mins	SPBLUE, TRAIN5 56 Years, Female	NW1	Confirmed	Reason for Visit: annual/est care
	9:30 AM	15 mins	SPBLUE, TRAIN6 46 Years, Female	PHY	Confirmed	Reason for Visit: PE

Clicking on **Confirmed** will not allow you to change the appointment status

Once the patient is arrived by the frontline staff, and as the patient moves through the clinic, the option to select *Hold*, *Cancel*, *No Show*, and *Check Out* are no longer available

- Checked In Location Not Defined
- Ready
  - Finished
  - In Room
  - Seen By APRN/PA
  - Seen By Attending
  - In Radiology/Imaging
  - CC Arrived in Clinic
  - Seen by Multi-D Provider
  - Seen By Med Student
  - Seen By Nurse/Tech
  - Seen By Resident/Fellow

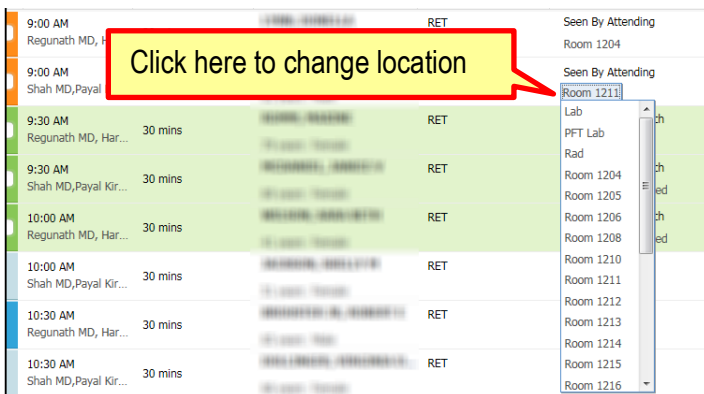
- In Room Location Not Defined
- Finished
  - Seen By APRN/PA
  - Seen By Attending
  - In Radiology/Imaging
  - CC Arrived in Clinic
  - Seen by Multi-D Provider
  - Seen By Med Student
  - Seen By Nurse/Tech
  - Seen By Resident/Fellow

- Seen By Nurse/Tech Location Not Defined
- In Room
  - Finished
  - Seen By APRN/PA
  - Seen By Attending
  - In Radiology/Imaging
  - CC Arrived in Clinic
  - Seen by Multi-D Provider
  - Seen By Med Student
  - Seen By Nurse/Tech
  - Seen By Resident/Fellow

- Seen By Attending Location Not Defined
- In Room
  - Finished
  - Seen By APRN/PA
  - Seen By Attending
  - In Radiology/Imaging
  - CC Arrived in Clinic
  - Seen by Multi-D Provider
  - Seen By Med Student
  - Seen By Nurse/Tech
  - Seen By Resident/Fellow

## Setting the Patient's Location

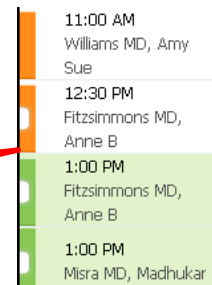
The Location is clickable and can be set after the patient has checked in. The Status will updated automatically based on actions completed in the EMR. The Location drop down is used to communicate the exam room the patient is located within the clinic.



## Open Items Indicator

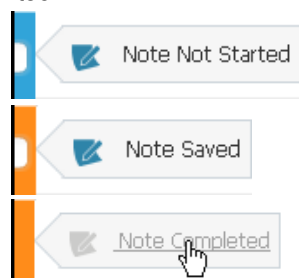
The Open Item indicator will appear in the status color column for any patient that has an outstanding open item for the user viewing the Ambulatory Organizer.

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

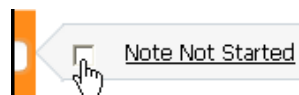


Hovering over the status color column will reveal the status of open items.

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:



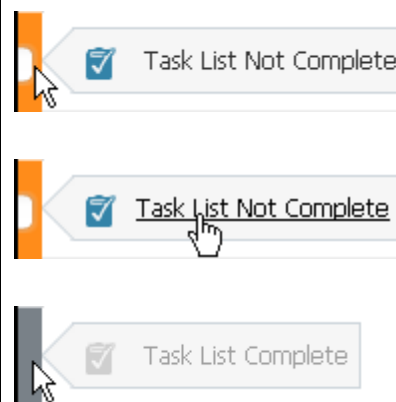
Clicking the checkbox will manually complete the open item:



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:



## Open Items View

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

### Ambulatory Organizer

Day View Calendar Open Items (33)

Patients for: EF-Medical Oncology ; UP-WCH Urologic Specialties

EF-Medical O... (6) UP-WCH Urol... (27)

From: August 31, 2018 View 7 More Days

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

Use the link to the open item in the Outstanding Actions column to launch directly to that item.

## 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

Day View Calendar Open Items (14) Patients for: Eskridge MD, Bernard R ; Selva MD, Thomas J

Day Week Eskridge MD, T... Selva MD, T... May 19, 2014 - May 25, 2014

Wednesday, 21st Thursday, 22nd Friday, 23rd Saturday, 24th Sunday, 25th

2:00 PM

Toggle between multiple resources.

The orange box represents current day.

Colors are the same as in the Day View.

3:30 PM

The orange line represents current time.

4:00 PM

4:30 PM

5:00 PM

# Calendar Tab / Day View

From the Day view under the Calendar tab, if multiple resources are selected, each resource will display in a separate column

## Ambulatory Organizer

Day View | Calendar | Open Items (1)

Day | Week | March 23, 2021 | Eskridge MD, Bernard R ; Selva MD, Thomas J

March 23, 2021

	Eskridge MD, Bernard R	Selva MD, Thomas J
10 am		
11 am		
12 pm		
1 pm		
2 pm		
3 pm		
4 pm		