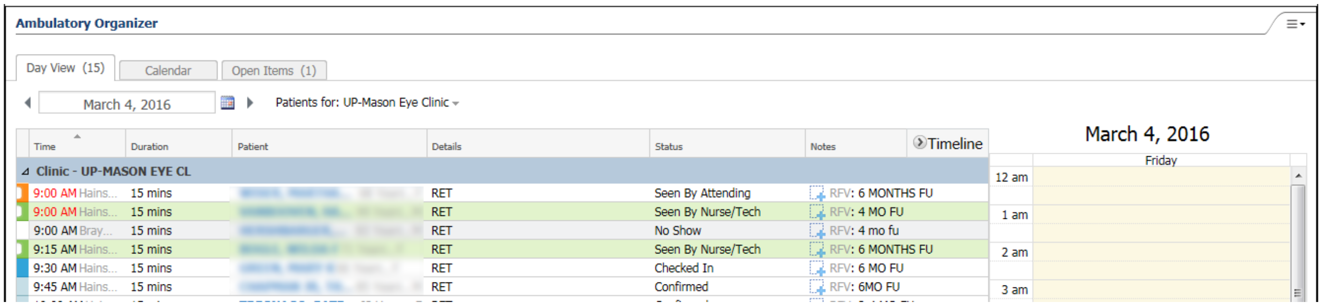
The Ambulatory Organizer

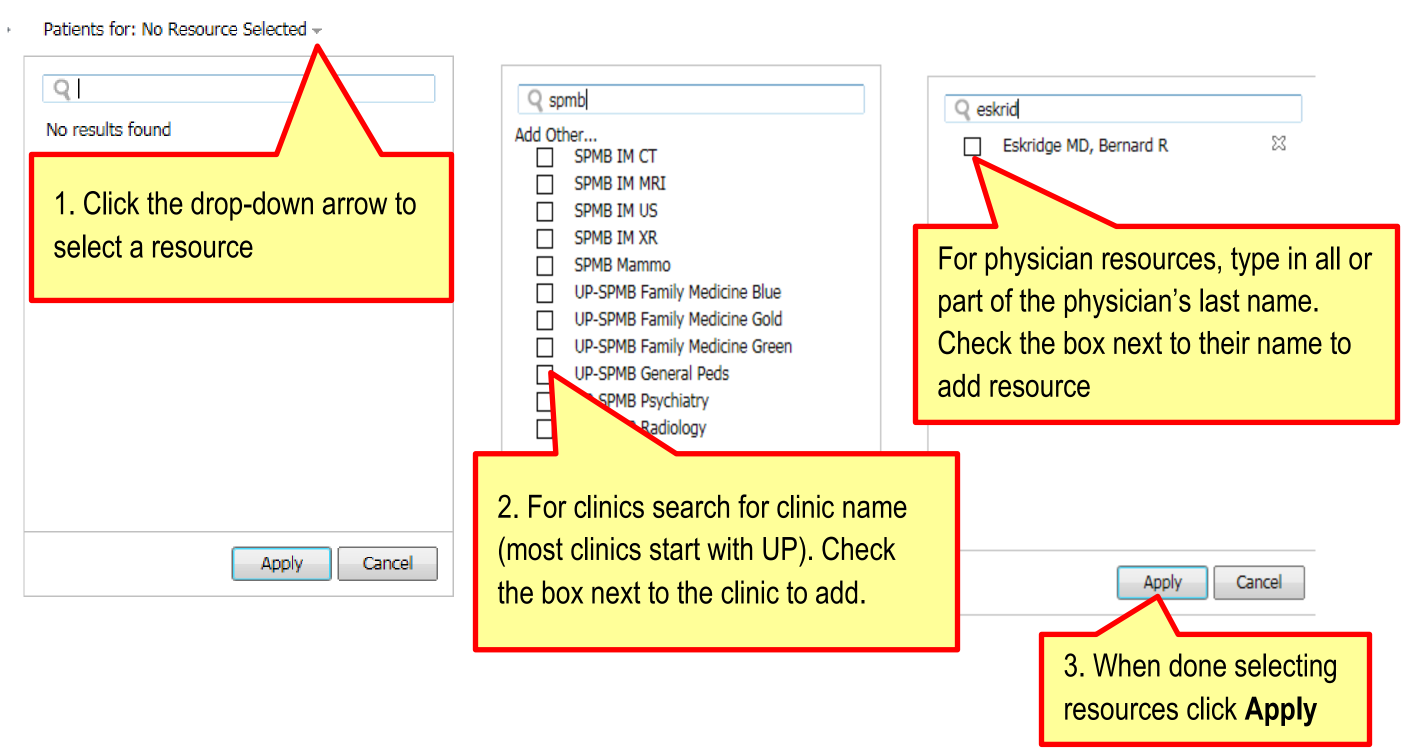
Overview

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.

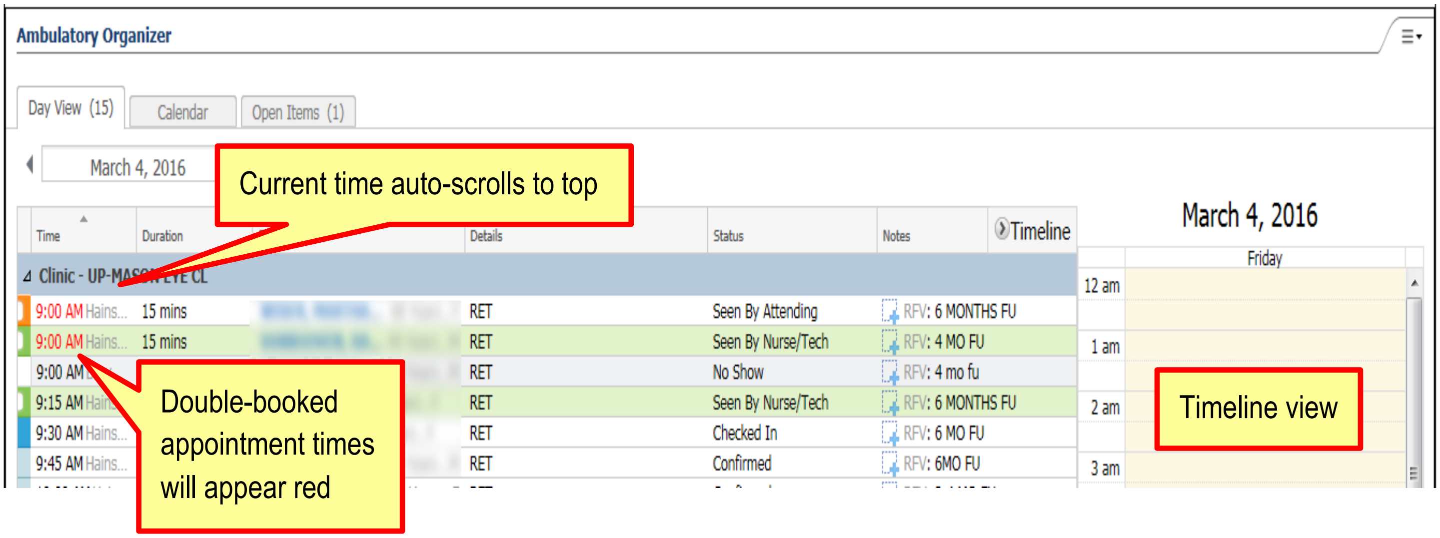


Creating your Resource List

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*; however only one resource can be selected in the 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:



The Day View



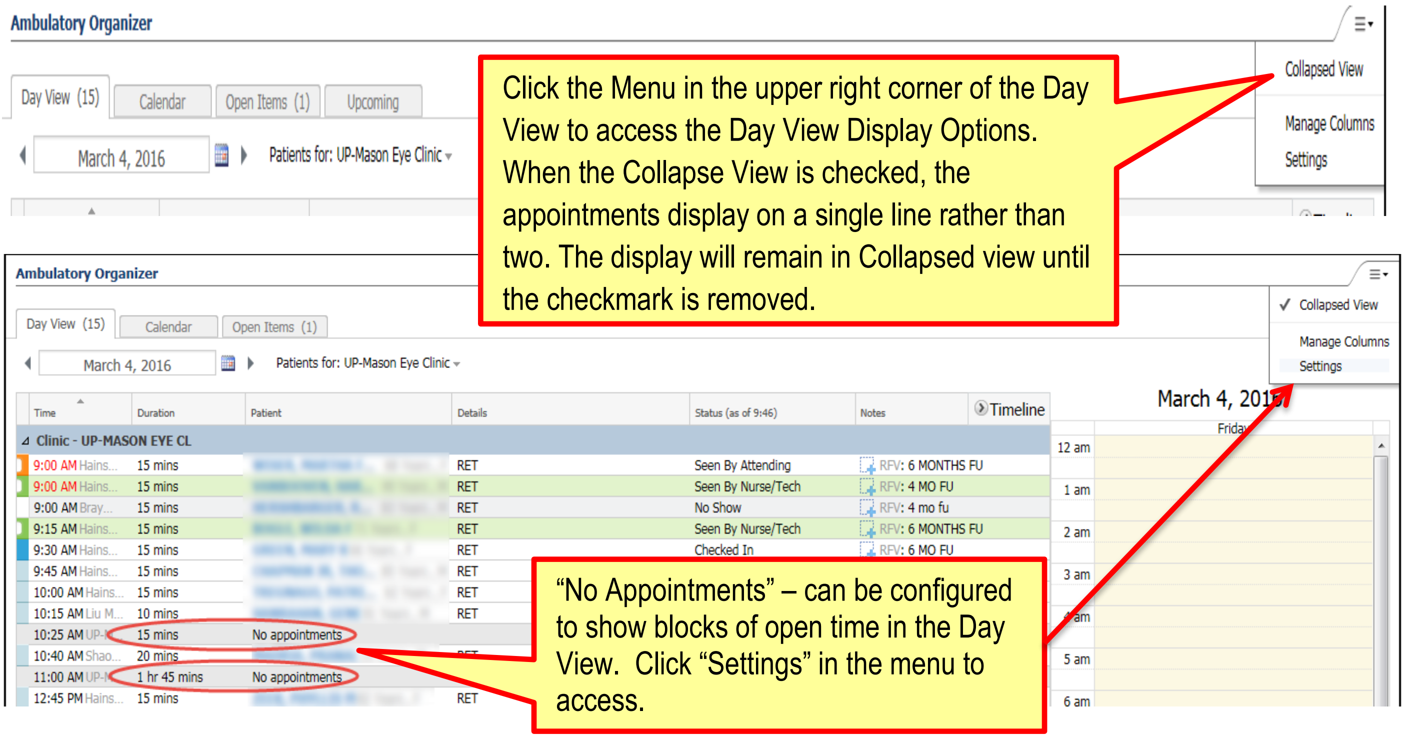
Day View Color Legend: Ambulatory			
	If the color is:	**The patient's appointment is:**	**How the status is set:**
	Dark Gray	Checked out	Manual within the Ambulatory Organizer
	Light Gray (entire line)	Cancelled through IDX.	Automatic via IDX
	Orange	In a "seen by" physician, mid-level, resident, med 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

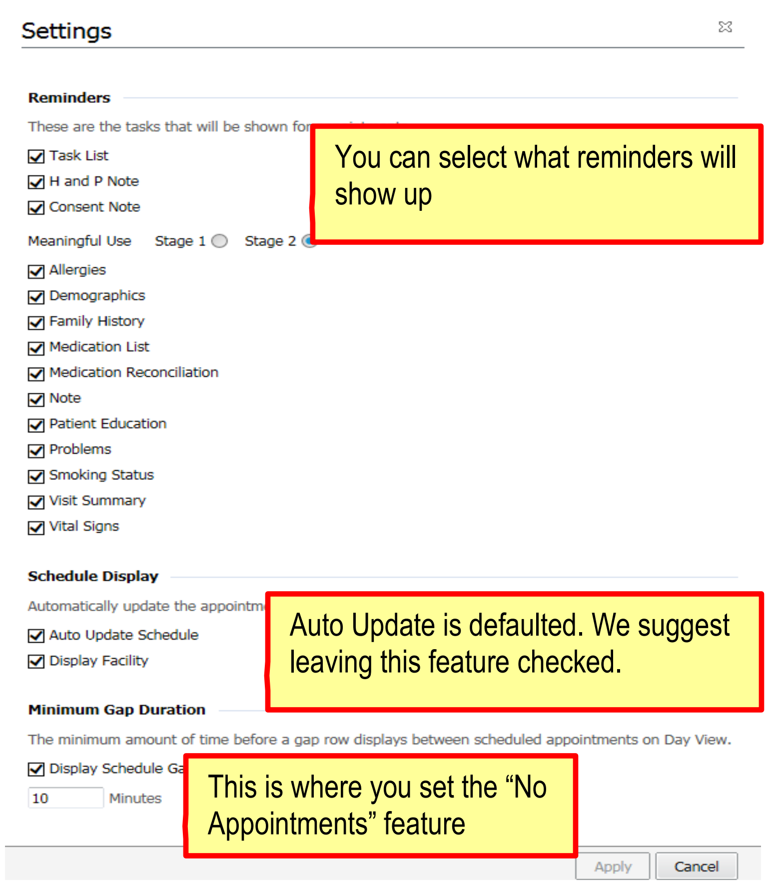
* Automatic triggering of a "Seen By" status occurs when a user signs or saves something in the EMR after the patient has arrived. This includes Ad Hoc Forms, Notes and Orders.

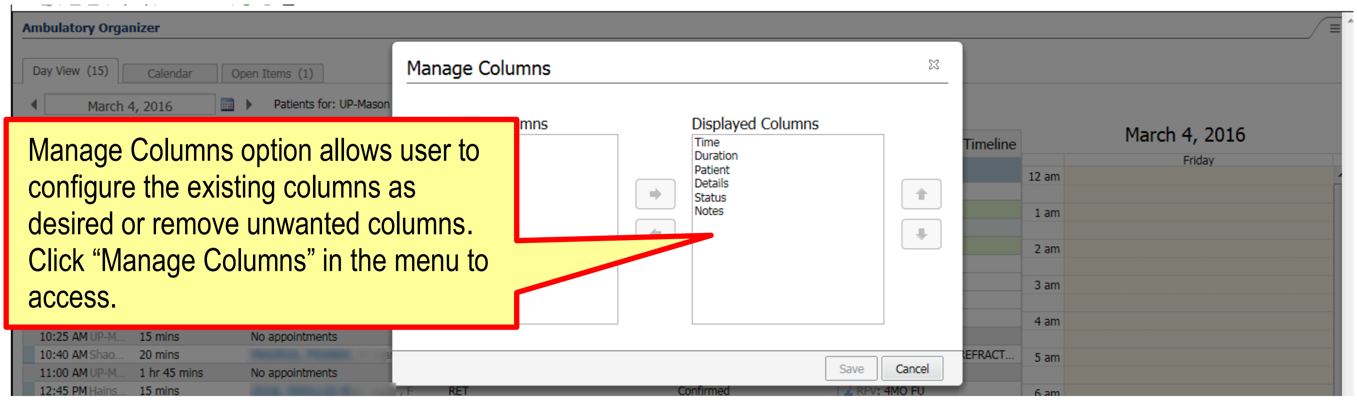
Day View Color Legend: Surgical			
	If the color is:	**The patient is:**	**How the status is set:**
	White	The patient has not yet checked in.	Automatic
	Blue	The patient has been checked in through IDX.	Automatic via IDX
	Green	Pre-Op	Automatic via Surginet
	Brown	Intra-Op	Automatic via Surginet
	Orange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

Configuring the Day View

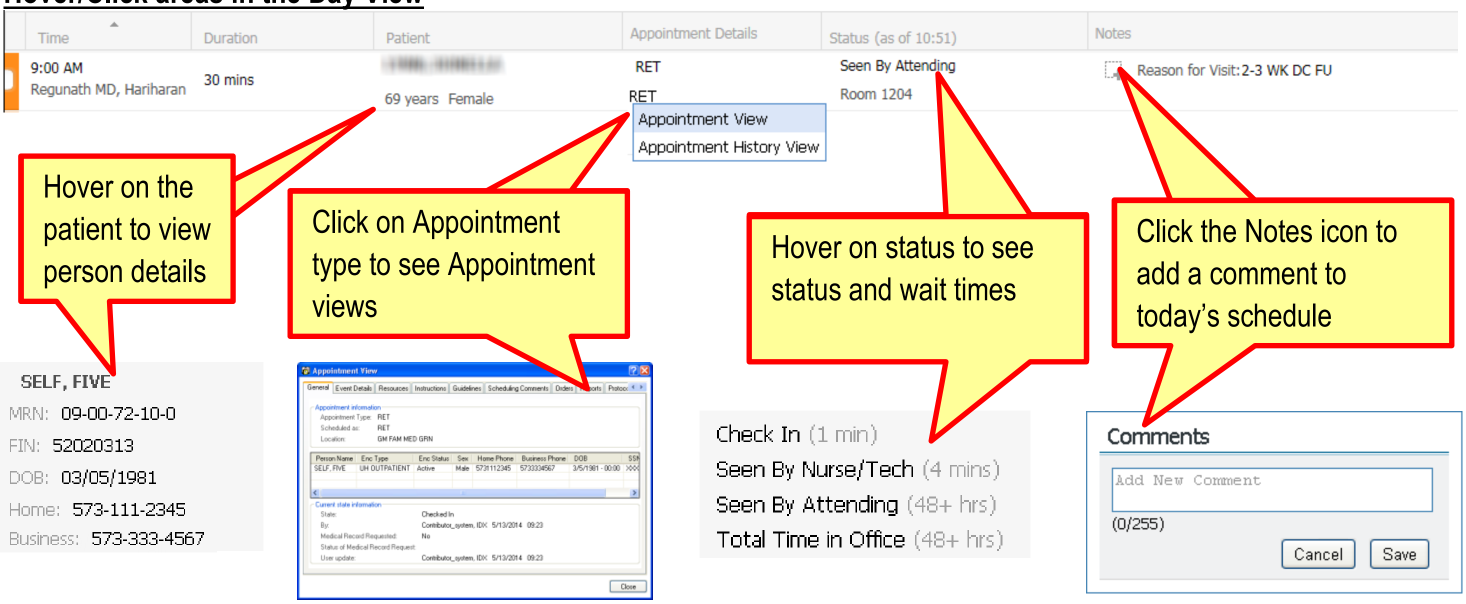
The Day View can be configured in a collapsed view which allows more patients to be viewable on the Organizer and decreases the need for scrolling. This option is turned OFF by default and must be turned on by the user:





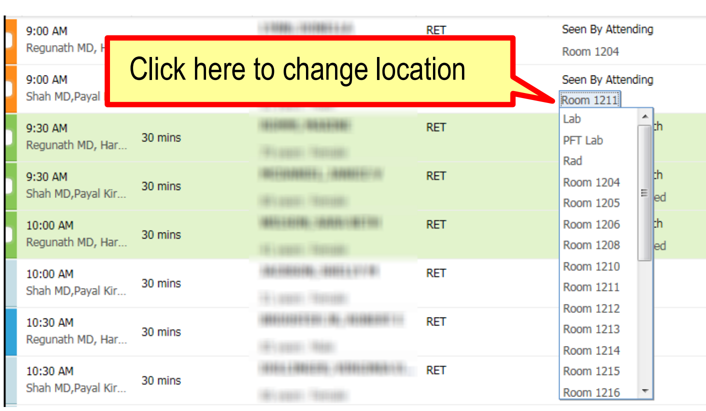


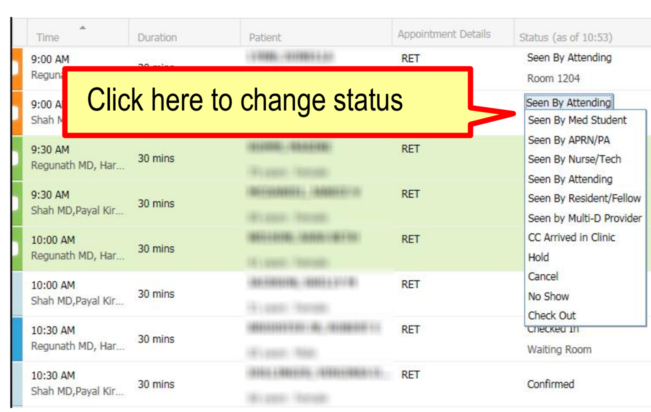
Hover/Click areas in the Day View



Setting the Patient's Status and Location

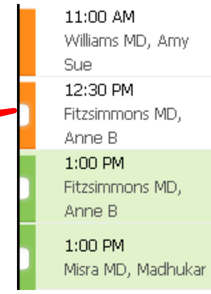
Both the Location and Status are clickable and can be set after the patient has checked in:





The Open Items Indicator

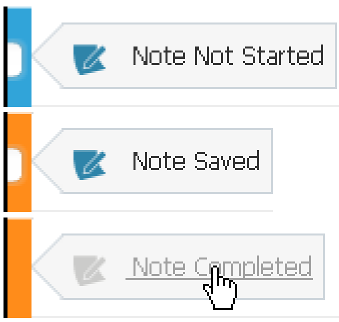
The Open Item indicator will appear in the status color column for any patient that has an outstanding open item for the user viewing the Ambulatory Organizer.



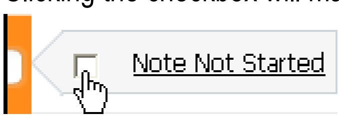
The indicator appears as a white "light" in the status color column

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

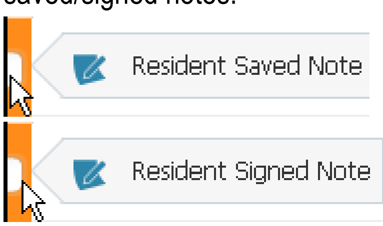
Attending, Resident, APRN and PA users will see indicators depending on the status of the Clinic Note. The status text is clickable and will launch either to Document Viewing (if the note has not been started) or to the note itself:



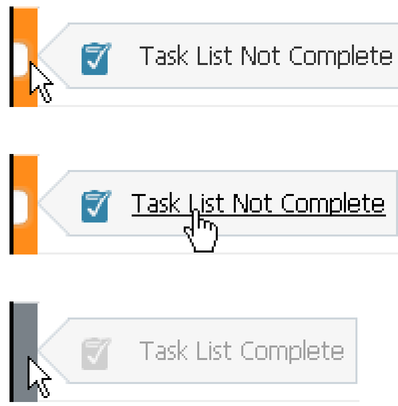
Clicking the checkbox will manually complete the open item:



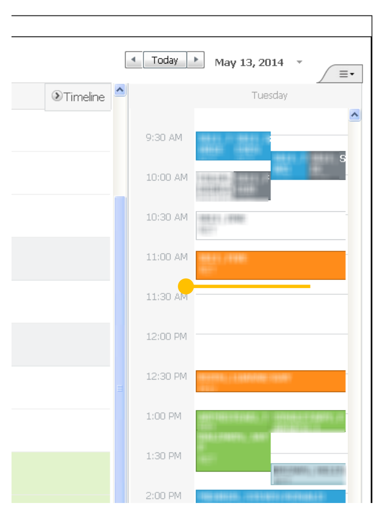
Attending physicians will see indicators for Resident saved/signed notes:



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:



The Timeline



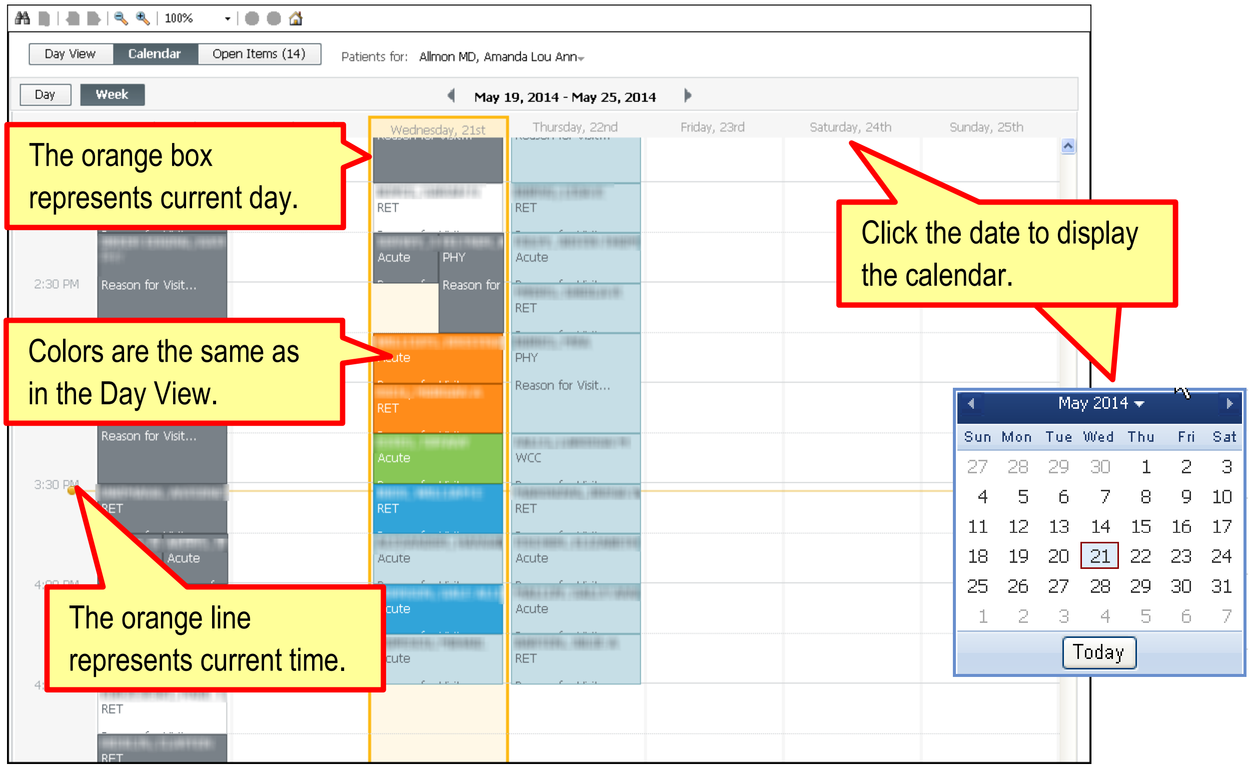
A timeline is displayed on the right side of the Day View (either automatically if the screen resolution is permitting, or through a **collapse** and **expand** button) when only one provider is displayed on the Day View.

The timeline keeps the present time in focus with an orange line as a marker so the physician can quickly see where they are at in relation to the current time.

The timeline is not displayed when more than one resource is selected to display.

The Calendar View

The Calendar View will display all scheduled appointments in either a week view or a day view. Only one resource can be shown at a time.



The Open Items View

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