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:

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.
3. When done selecting resources click Apply

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

**Day View Color Legend: Ambulatory**

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

* 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**

<table>
<thead>
<tr>
<th>If the color is:</th>
<th>The patient is:</th>
<th>How the status is set:</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>The patient has not yet checked in.</td>
<td>Automatic</td>
</tr>
<tr>
<td>Blue</td>
<td>The patient has been checked in through IDX.</td>
<td>Automatic via IDX</td>
</tr>
<tr>
<td>Green</td>
<td>Pre-Op</td>
<td>Automatic via Surginet</td>
</tr>
<tr>
<td>Brown</td>
<td>Intra-Op</td>
<td>Automatic via Surginet</td>
</tr>
<tr>
<td>Orange</td>
<td>Post-Op</td>
<td>Automatic via Surginet</td>
</tr>
</tbody>
</table>
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:

1. Click the Menu in the upper right corner of the Day View to access the Day View Display Options.
2. 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.

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 areas in the Day View

- Hover on the patient to view person details
- Click on Appointment type to see Appointment views
- Hover on status to see status and wait times
- Click the Notes icon to add a comment to today’s schedule

Setting the Patient’s Status and Location

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

- Click here to change location
- Click here to change status
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:

- Note Not Started
- Note Saved
- Note Completed

Clicking the checkbox will manually complete the open item:

- Note Not Started

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

- Resident Saved Note
- Resident Signed Note

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:

- Task List Not Complete
- Task List Complete

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 orange box represents current day.
Colors are the same as in the Day View.
The orange line represents current time.

Click the date to display the calendar.

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

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