

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.

Time	Duration	Patient	Details	Status	Notes	Timeline
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	15 mins		RET	No Show	RFV: 4 mo fu	
9:15 AM	15 mins		RET	Seen By Nurse/Tech	RFV: 6 MONTHS FU	2 am
9:30 AM	15 mins		RET	Checked In	RFV: 6 MO FU	
9:45 AM	15 mins		RET	Confirmed	RFV: 6MO FU	3 am

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:

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.

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

Ambulatory Organizer

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

March 4, 2016

Current time auto-scrolls to top

Time	Duration	Details	Status	Notes	Timeline
4 Clinic - UP-MASCH EYE CL					
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

March 4, 2016
Friday

Timeline view

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:

The screenshot shows the Ambulatory Organizer interface. At the top, there are tabs for 'Day View (15)', 'Calendar', 'Open Items (1)', and 'Upcoming'. A date selector shows 'March 4, 2016' and a patient selector shows 'Patients for: UP-Mason Eye Clinic'. A menu in the upper right corner contains 'Collapsed View', 'Manage Columns', and 'Settings'. A yellow callout box points to this menu with the text: '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.'

Below the menu, the interface shows a list of appointments for 'Clinic - UP-MASON EYE CL'. The appointments are listed in a table with columns for Time, Duration, Patient, Details, Status, Notes, and Timeline. Two rows are circled in red and labeled 'No appointments':

Time	Duration	Patient	Details	Status	Notes	Timeline
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			

A yellow callout box points to the 'No appointments' rows with the text: '“No Appointments” – can be configured to show blocks of open time in the Day View. Click “Settings” in the menu to access.'

Settings

Reminders

These are the tasks that will be shown for

- 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

- Auto Update Schedule
- Display Facility

Minimum Gap Duration

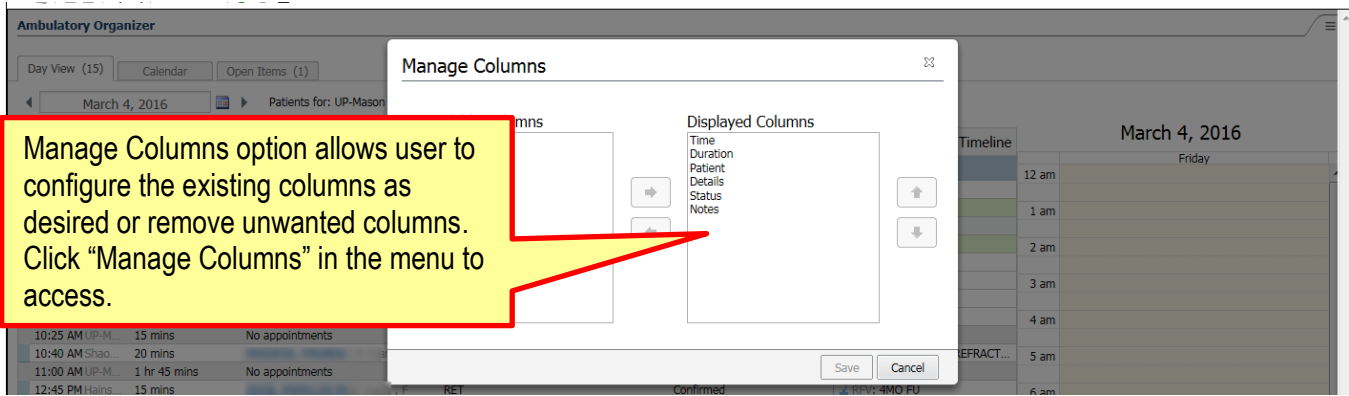
The minimum amount of time before a gap row displays between scheduled appointments on Day View.

- Display Schedule Gap
- 10 Minutes

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

Time	Duration	Patient	Appointment Details	Status (as of 10:51)	Notes
9:00 AM	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

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

SELF, FIVE

MRN: 09-00-72-10-0

FIN: 52020313

DOB: 03/05/1981

Home: 573-111-2345

Business: 573-333-4567

Appointment View

Appointment Information

Appointment Type: RET

Scheduled as: RET

Location: GM FAM MED GRN

Person Name: Eric Type: Eric Status: Active

Current state information

By: Contributo_system

Medical Record Requested: No

Status of Medical Record Request: No

User update: Contributo_system

Check In (1 min)

Seen By Nurse/Tech (4 mins)

Seen By Attending (48+ hrs)

Total Time in Office (48+ hrs)

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:

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

Click here to change location

Click here to change status

Seen By Attending

Seen By Med Student

Seen By APRN/PA

Seen By Nurse/Tech

Seen By Attending

Seen By Resident/Fellow

Seen by Multi-D Provider

CC Arrived in Clinic

Hold

Cancel

No Show

Check Out

Checked In

Waiting Room

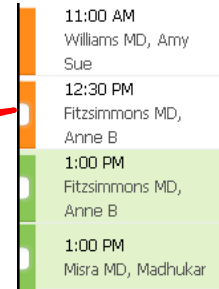
Confirmed

The Open Items Indicator

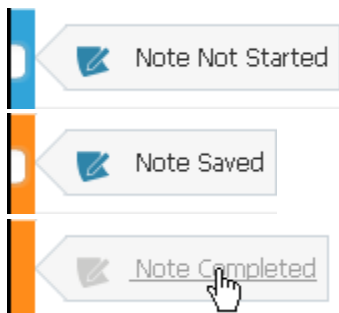
The Open Item indicator will appear in the status color column for any patient that has an outstanding open item for the user viewing the Ambulatory Organizer.

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

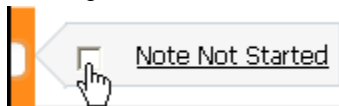
Hovering over the status color column will reveal the status of open items.



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:



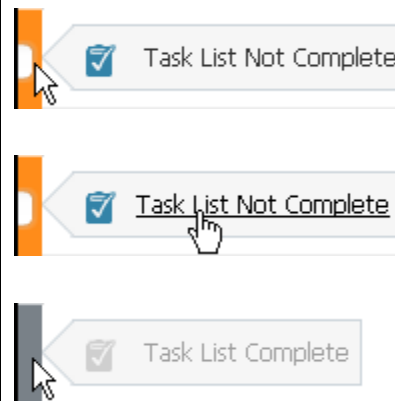
Clicking the checkbox will manually complete the open item:



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:

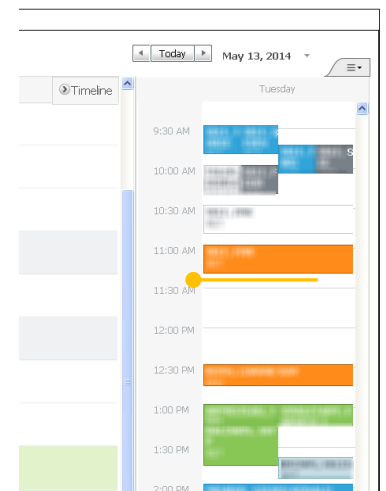


The Timeline

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 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.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

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.

Patient	Appointment Details	Notes	Outstanding Actions
More Than 2 Days Ago (16)			
[Patient]	RET	Reason for Visit: POSS CHICKEN POX Chief Complaint: POSSIBLE CHICKEN POX; RASH O...	Note Saved
[Patient]	IND	Reason for Visit: 2ND HEP A- REG	Note Not Started
[Patient]	VIT	Reason for Visit: wt and ht check Chief Complaint: weight, height check	Note Not Started
[Patient]	VIT	Reason for Visit: WT CHECK Chief Complaint: HEIGHT CHECK AND WEIGHT	Note Not Started
[Patient]	IND	Reason for Visit: HPV #2	Note Not Started
2 Days Ago (8)			
[Patient]	NEW	Reason for Visit: WCC Chief Complaint: wcc	Resident Saved Note
[Patient]	NEW	Reason for Visit: WCC	Resident Saved Note
[Patient]	RE		Resident Saved Note
[Patient]	VI		Note Not Started
[Patient]	RE		Resident Saved Note
Today (5)			
[Patient]	W	Chief Complaint: wcc	Note Saved
[Patient]	RET	Reason for Visit: rattle in chest Chief Complaint: trouble catching breath	Resident Saved Note
[Patient]	WCC	Reason for Visit: WCC-BLOOD IN STOOL--ESKRIDG... Chief Complaint: wcc	Note Not Started
[Patient]	BRE	Reason for Visit: BRE Chief Complaint: BF	Note Not Started
[Patient]	WCC	Reason for Visit: WCC--ESKRIDGE TO SEE Chief Complaint: wcc	Note Not Started