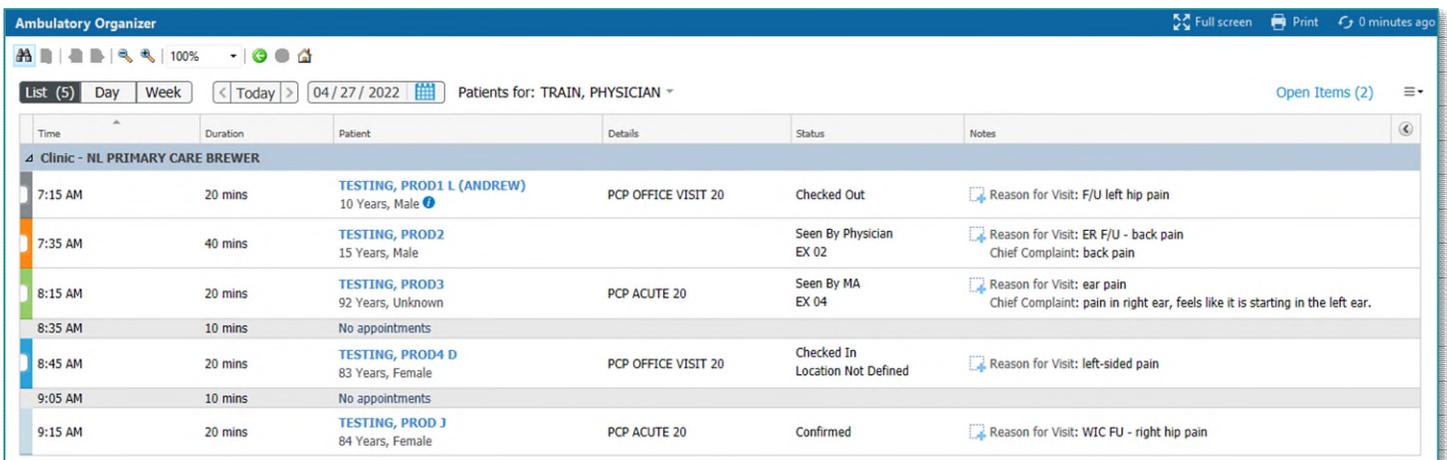


The Ambulatory Organizer will be upgraded with new features, functionality, and an enhanced look.

## Ambulatory Organizer Overview

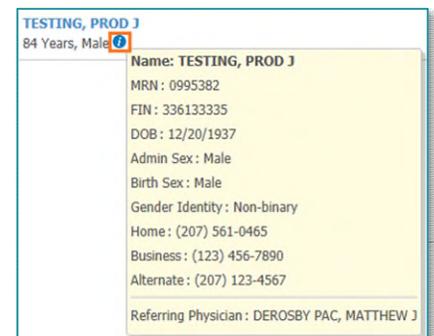
The Ambulatory Organizer provides a snapshot of a single day's appointments, as well as any appointment gaps and appointment times and details, patient information and status, and outstanding tasks for each visit.



Time	Duration	Patient	Details	Status	Notes
Clinic - NL PRIMARY CARE BREWER					
7:15 AM	20 mins	TESTING, PROD1 L (ANDREW) 10 Years, Male	PCP OFFICE VISIT 20	Checked Out	Reason for Visit: F/U left hip pain
7:35 AM	40 mins	TESTING, PROD2 15 Years, Male		Seen By Physician EX 02	Reason for Visit: ER F/U - back pain Chief Complaint: back pain
8:15 AM	20 mins	TESTING, PROD3 92 Years, Unknown	PCP ACUTE 20	Seen By MA EX 04	Reason for Visit: ear pain Chief Complaint: pain in right ear, feels like it is starting in the left ear.
8:35 AM	10 mins	No appointments			
8:45 AM	20 mins	TESTING, PROD4 D 83 Years, Female	PCP OFFICE VISIT 20	Checked In Location Not Defined	Reason for Visit: left-sided pain
9:05 AM	10 mins	No appointments			
9:15 AM	20 mins	TESTING, PROD J 84 Years, Female	PCP ACUTE 20	Confirmed	Reason for Visit: WIC FU - right hip pain

### ➤ List View

- This is the default view and is a snapshot of a single day's appointments for the applicable resource book(s) selected. Once a resource is selected, additional information displays:
  - Time:** Displays the time of the scheduled appointment. If more than one resource book is selected, the provider scheduled to see the patient displays under the time indicated.
  - Duration:** Displays the length of the appointment that was scheduled for the patient.
  - Patient:** Displays the patient's name, including their preferred name, age and gender, and gender identity. Single-click the patient's name to open the record for the FIN associated.
    - An italic *i* displays when a patient identifies as something different than their birth sex.
    - Hovering provides more information such as MRN, FIN, DOB, Contact numbers, Admin Sex, Birth Sex, Gender Identity, and the referring provider.
  - Details:** Displays the appointment type the patient is scheduled for.



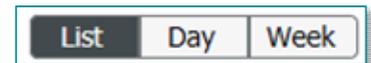
TESTING, PROD J	
84 Years, Male	
Name: TESTING, PROD J	
MRN : 0995382	
FIN : 336133335	
DOB : 12/20/1937	
Admin Sex : Male	
Birth Sex : Male	
Gender Identity : Non-binary	
Home : (207) 561-0465	
Business : (123) 456-7890	
Alternate : (207) 123-4567	
Referring Physician : DEROSBY PAC, MATTHEW J	

- **Status:** Displays where the patient is in their visit. Hovering provides additional details regarding how long checked-in, seen by clinical staff, seen by provider, and total time in the office.

	Light blue indicates a confirmed appointment.
	Medium blue indicates a checked in appointment.
	Green indicates seen by nurse, medical student, or custom status has taken place.
	Orange indicates a Seen by physician, advance practice partner, resident, or custom status has taken place.
	Dark gray indicates the appointment has been checked out.
	White indicates a No Show, Hold, or Canceled appointment.

- **Notes:** Displays the reason for the visit and populates the chief complaint once documented.
- **Timeline:** Displays the selected resource in a view that mimics the **Day** view. Timeline can be collapsed and expanded by selecting the arrow within **List** view. 

#### ➤ Day and Week View



- The Day and Week view display multiple providers schedules.
  - When viewing multiple provider's schedules on the **Day** view, each provider displays side by side, the provider is indicated under the time of the appointment.
  - When viewing multiple providers schedules on the **Week** view, each provider's schedule is displayed on their own tab.

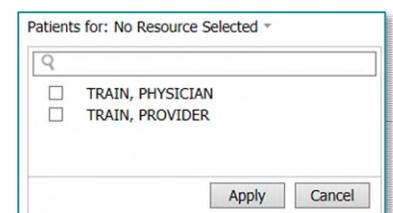
#### ➤ Date

- This defaults to the current date. Select an arrow or the calendar icon to change the date.



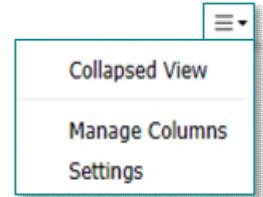
#### ➤ Patients for:

- This is the resource book that is selected to view a provider's schedule. Multiple resources can be selected to view.
  - Select the down arrow to search and select the applicable providers. A checkmark indicates the provider's schedule is viewable.



➤ **Settings**

- This allows users to customize their Ambulatory Organizer by updating **Settings, Managing Columns** or selecting a **Collapsed View**.



**Open Items**

Open Items displays unfinished tasks still for a patient’s visit for the resource books(s) selected. If more than one resource is selected, each provider’s open items displays on a separate tab. Open Item tasks displays the appointments in sections of Today, Yesterday, 2 days ago, and More than 2 Days Ago.

Appointment	Patient	Details	Notes	Outstanding Actions
<b>More Than 2 Days Ago (1)</b>				
April 12, 2022 7:15 AM	TESTING, PROD1 L (ANDREW) 10 Years, Male	PCP ACUTE 20	Reason for Visit: ED Discharge Follow-up	✓ Charge Completed Note Not Started
<b>Today (1)</b>				
April 27, 2022 7:35 AM	TESTING, PROD2 15 Years, Male	PCP OFFICE VISIT 40	Reason for Visit: ER F/U - back pain Chief Complaint: back pain	Charge Not Started ✓ Note Completed

➤ **Outstanding Actions**

- Displays the unfinished tasks for a patient’s visit.
- The column displays **Charge Not Started** or **Charge Completed** for the charge for the visit and **Note Not Started**, **Note Saved**, or **Note Completed** for the documentation for the visit. Once all tasks are complete, the appointment is removed from view.
  - In addition to completing the task through selecting the reminder link(s), task(s) are completed automatically by placing a charge or completing a note.

**NOTE:** Sometimes a minor charge marks the FIN as *Charge Completed* when the full Office Visit has not been charged out.

