Northern Light Health

From the Office of Clinical Informatics

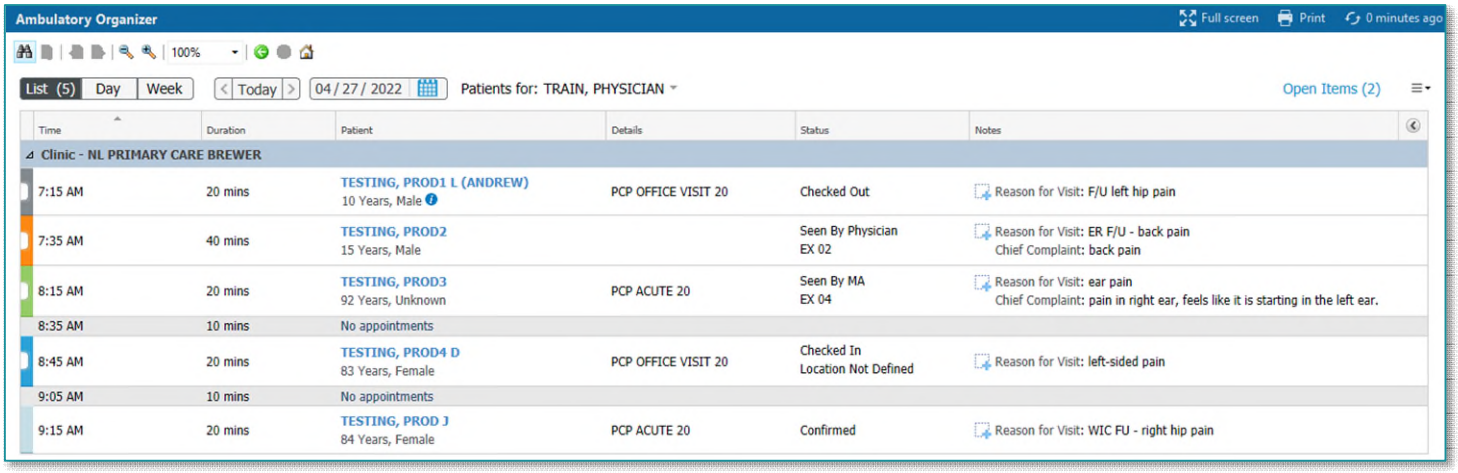
Community Works
Ambulatory Organizer 2.5

October 4, 2022

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

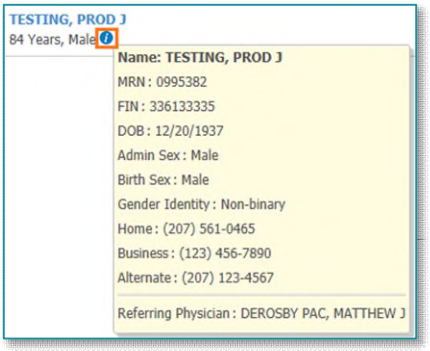
Ambulatory Organizer Overview

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.



➢ 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.



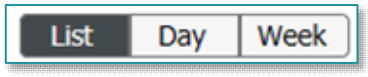
  - **Details**: Displays the appointment type the patient is scheduled for.

- **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**



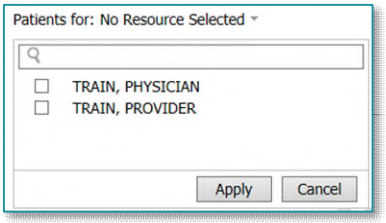
- The Day and Week view display multiple providers schedules.
  - When viewing multiple provider's schedules on the **Day** view, each provider displays side by side, the provider is indicated under the time of the appointment.
  - When viewing multiple providers schedules on the **Week** view, each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

➢ **Date**

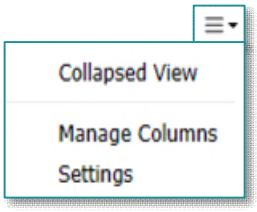
- This defaults to the current date. Select an arrow or the calendar icon to change the date.

➢ **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.



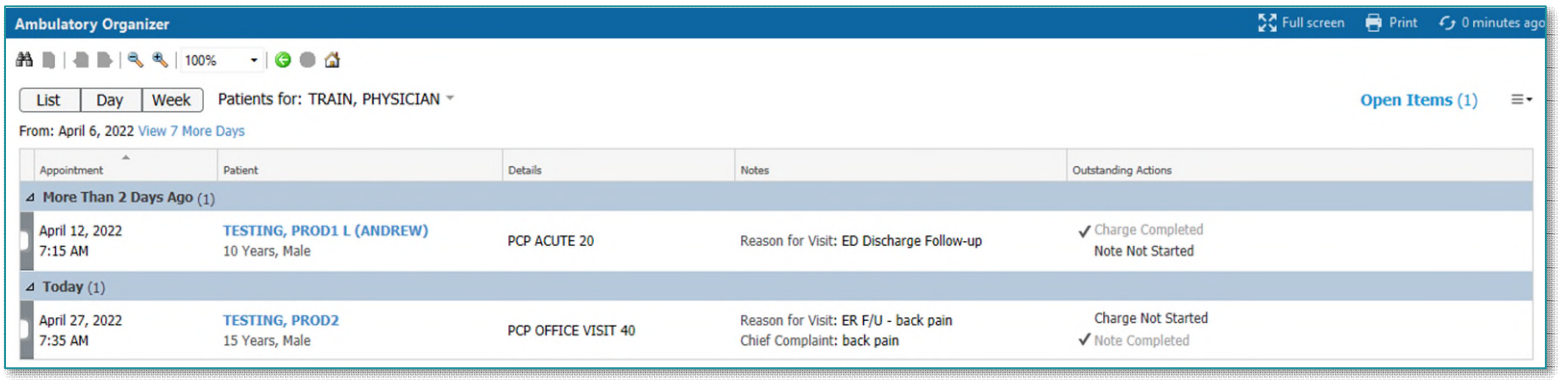
➢ **Settings**



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

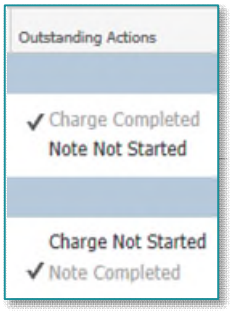
Open Items

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.



➢ **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.**