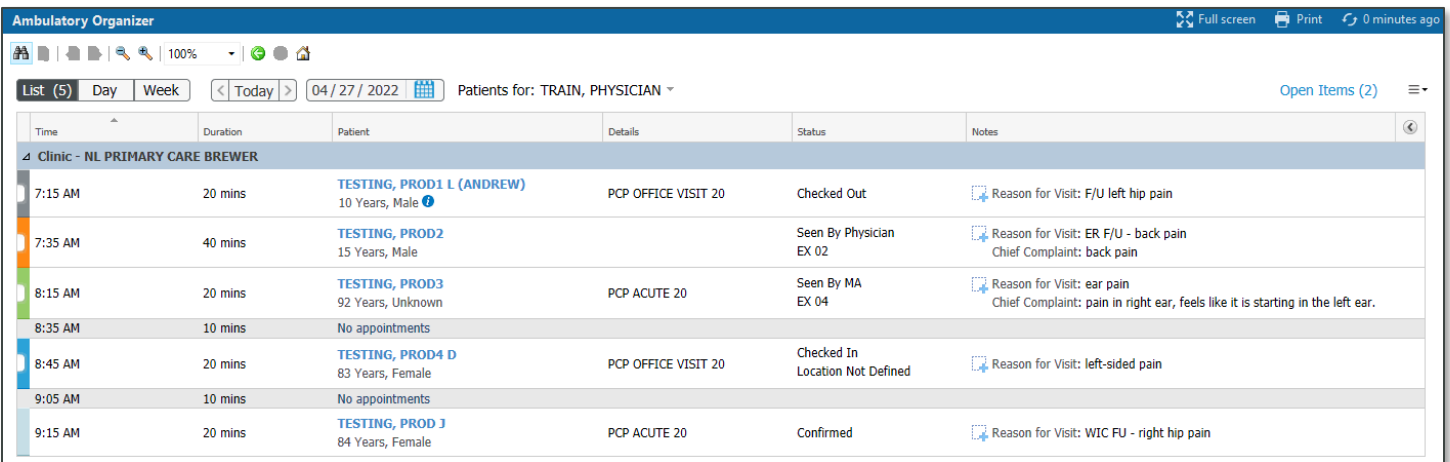**The Ambulatory Organizer provides a simple, comprehensive view for Ambulatory staff to efficiently access and manage their patient schedule, documentation, and charges.**
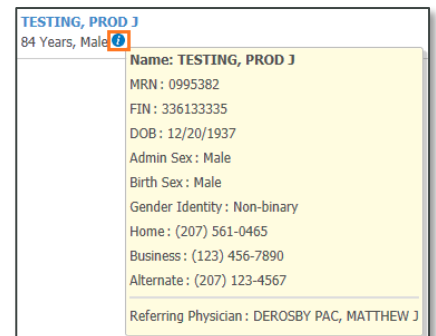
Ambulatory Organizer Overview

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

➢ **List View**

- This is the default view and is a snapshot of a single day's appointments for the 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 will display 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* will display when a patient identifies as a different gender than their birth sex.
    - Hovering will provide 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.

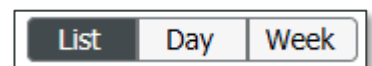- **Status**: Displays the status of where the patient is in their visit using different colors for different statuses (see below chart); hovering on a cell in this column will provide additional details in regards to if the note has not been started or if it has been completed, if the charges have been placed or not, and if the patient has outside records available.

	Light blue indicates a confirmed appointment.
	Medium blue indicates a checked in appointment.
	Green indicates seen by nurse, medical assistant, 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 views provide other ways to view the scheduled patients for the selected resource(s) and timeframe. These views are recommended when viewing multiple resources at once.
  - When viewing multiple provider schedules on the **Day** view, each provider will display side by side, the provider is indicated under the time of the appointment.
  - When viewing multiple provider schedules on the **Week** view, each provider's schedule is displayed on their own tab.
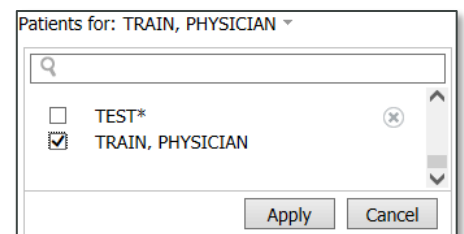
➢ **Date**

- This defaults to the current date. Select an arrow or the calendar icon to change the date.
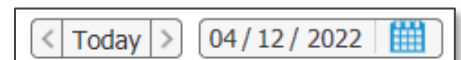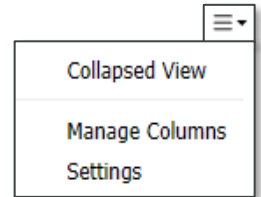
➢ **Patients for:**

- This drop-down allows for selection of a resource. Multiple resources can be selected to view at one time.
  - Select the down arrow to search and select the desired resource(s). A checkmark indicates the schedule(s) selected for viewing.

- To remove a resource from the drop-down list, hover over the resource and click the X that appears to the right of the resource.

➢ **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 task for a patient's visit for the resource(s) selected. If more than one resource is selected, each open items list will display on a separate tab. Open Item tasks will display the appointments in sections of Today, Yesterday, 2 days ago and More than 2 Days Ago.

➢ **Outstanding Actions Column**

- Displays what task(s) is unfinished for the patient's appointment.
- The column will display **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 will no longer display in the Open Items view.
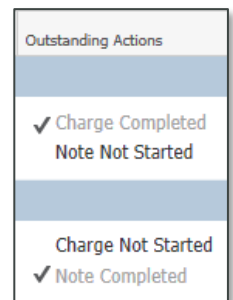
NOTE: Sometimes a minor charge will mark the FIN as *Charge Completed* when the full Office Visit has not been charged out.