Northern Light Health | Optum

From the Office of Health Informatics

Quick Reference Guide (QRG) Introduction to Ambulatory PowerChart

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This Quick Reference Guide (QRG) gives a brief introduction to ambulatory PowerChart.

Common Buttons & Icons

	Quick Links Add icon
	PowerChart icon
Message	Message Center button
	Toolbar dropdown arrow to view hidden toolbar items
	Add Comment This Visit icon
	Note icon
	Timeline expansion icon
	Toolbar Ellipsis icon
Change	Change Roles button

Suspend	Suspend PowerChart session button
Exit	Exit PowerChart button
PM Conversation	Patient Management Conversation button
Communicate	Communicate button
	Pushpin icon to collapse left-side menu
Menu	Menu expansion button for left-side menu
	MPages Add icon

Add Quick Links (All locations except EMMC)

The first time logging in, Oracle Health (Cerner) Millennium will need to be added to **My Quick Links** for easy access moving forward. This same process can be used to add other Quick Links at log in, as needed.

- **From the intranet homepage:**

STEP 1: Click **Select Category** under Quick Links on the far right of the page.

STEP 2: Click the **All Employees** dropdown arrow.

STEP 3: Click the appropriate selection needed.

NOTE: **To add Oracle Health (Cerner) Millennium for the first time logging in, click Clinical Systems.**

STEP 4: Scroll down to see the available Quick Links that can be added; click the **Quick Links Add** icon to add the Quick Link.

NOTE: **To add Oracle Health (Cerner) Millennium, scroll down, and then click the Cerner Millennium Add icon.**

STEP 5: Check that it has been added by scrolling back up and clicking the **My Quick Links** button.

Add Quick Links (for EMMC location only)

The first time logging in, Oracle Health (Cerner) Millennium will need to be added to My Quick Links for easy access moving forward. This same process can be used to add other Quick Links at log in, as needed.

➢ **From the EMMC Hub:**

STEP 1: Click the Quick Links Header on the right side of the page.

STEP 2: Click the Quick Links, as needed.

NOTE: **To add Oracle Health (Cerner) Millennium to Quick Links, click Millennium.**

Log on to Oracle Health (Cerner) Millennium (All locations)

➢ **From the list of Quick Links screen:**

STEP 1: Click the **PowerChart** icon.

STEP 2: Click the **Username** field; then type the personal username.

STEP 3: Click the **Password** field; then type the personal password.

STEP 4: Click **OK**.

NOTE: **The first time logging in, the following will need to be reviewed:**

- **Millennium Change Notification – Click Acknowledge once reviewed. If the Read Later option is selected, it will reappear again at the next log in. To print it, simply select print; however, it must still be acknowledged.**
- **Millennium message pop-up message – Select the Information Update check box at the bottom of the window to only see messages when there is an update. Then click Close.**

Add Resources to the Ambulatory Organizer

➢ **From the Ambulatory Organizer screen:**

STEP 1: Click the **No Resource Selected** dropdown arrow on the **List View** tab in the Ambulatory Organizer.

NOTE: **This process needs to be followed for each tab in the Ambulatory Organizer the first time logging in.**

STEP 2: Click the **Search field**; then type the resource to add.

STEP 3: Select the correct resource check box.

STEP 4: Click **Add Other** to add additional resources.

STEP 5: Click **Apply**.

Navigate to a Different Day in The Ambulatory Organizer

➢ **From the Ambulatory Organizer Home view, default List View tab:**

STEP 1: Use the **Right** and **Left** arrow icons to the right and left of the current date in view.

NOTE: **The Calendar can also be used to select a specific date. When using the calendar, click the Right and Left arrow icons to the right and left of the current month in view to find the needed month. Then, click the appropriate date.**

STEP 2: Review the schedule information.

Check Patients In

- **From the Ambulatory Organizer Home View:**

STEP 1: Confirm the correct date is selected, adjust if needed.

NOTE: **Click the Right arrow icon to the left of the timeline view, if needed, to give more room on screen. Click it again to open it.**

STEP 2: Click **Confirmed** by the patient's name under Status.

NOTE: **Some locations will use the Schedule Appointment book and not the Ambulatory Organizer.**

STEP 3: Click **Check In**.

NOTE: **There is the option to note the patient as Arrived, Cancel, No Show, and Hold from this same dropdown list.**

STEP 4: Add information to the Check In window, as appropriate.

STEP 5: Click **OK**.

STEP 6: Hover over **Checked In** to see how long the patient has been checked in.

STEP 7: Click **Location** below the Checked In status; then click the appropriate location of the patient.

Access Patient Information from the Ambulatory Organizer

- **From the Ambulatory Organizer List View tab:**

STEP 1: Review to make sure the correct day is selected. Set the date, if needed.

NOTE: **Hover over the patient's name to access additional details.**

STEP 2: Hover over **Reason for Visit** to access the information.

STEP 3: Click the **Add Comment** icon to add additional details for This Visit.

STEP 4: Click the **Add New Comment** field; then free text the comment and click **Save**.

Access the Message Center

- **From the Ambulatory Organizer Home view:**

STEP 1: Review a summary of message with the left side pane.

STEP 2: Click the **Message Center** icon in the toolbar.

Expand the Toolbar View

- **From any view with a toolbar at the top of the window:**

STEP 1: Click the **Toolbar Options** dropdown arrow.

STEP 2: Review the new viewable options.

STEP 3: Click the needed item.

NOTE: **The Ambulatory Organizer can be accessed from this list. When selected from the toolbar it will only show the organizer and not the Message Center summary.**

Assign a Relationship

- **From the Ambulatory Organizer Day View:**

STEP 1: Click the **patient's name**.

STEP 2: Click the appropriate relationship.

STEP 3: Add free text comments in the Comment field, if needed.

STEP 4: Click **OK**.

Rearrange the Toolbar

- **From the any screen with a toolbar:**

STEP 1: Click and hold the **Ellipsis** icon.

STEP 2: Drag the toolbar to a new location, based on preference.

Navigate Patient Management Conversation Options

- **From the Ambulatory View toolbar within a patient chart:**

STEP 1: Click the **PM Conversation** button within the toolbar.

STEP 2: Click the appropriate option.

- Patient Portal – Used to sign patients up for online access to their medical records.
- Modify Encounter – For nurses only to document isolation and/or disease precautions.
- Discharge Encounter – Used by unit secretaries, nursing, and nursing support staff to signal registration when a patient has been discharged.

Use the Communicate Toolbar Button

- **From the Ambulatory View within the patient chart:**

STEP 1: Click the **Communicate** button in the toolbar.

STEP 2: Click the appropriate action to include:

- Message
- Reminder
- Patient Letter
- Provider Letter

STEP 3: Create the needed communication.

Navigate the Banner Bar

- **From the Ambulatory View within a patient chart:**

STEP 1: Hover over items to gain more detail.

STEP 2: Click hyperlinks to quickly access patient information.

Navigate Summary MPages

- **From the Ambulatory View within a patient chart:**

STEP 1: Click the **Summary MPage X** icon to close.

STEP 2: Click the **MPage Add** icon to the right of the MPages bar.

STEP 3: Click the appropriate view.

STEP 4: Click the MPage needed to display information and interact with the information on-screen.

NOTE: **Click the Amb 2018 view for a summary view. Click the appropriate component to quickly navigate to that section.**

Search for a Patient Chart

- **From the Ambulatory View within a patient chart:**

STEP 1: Click the **Search** field located in the top right of a patient chart.

NOTE: **The default is to search by MRN.**

STEP 2: Type the **MRN** for the patient; then press **Enter**.

STEP 3: Click the correct patient's name from the top pane.

STEP 4: Click the correct encounter from the bottom pane.

STEP 5: Click **OK**.

STEP 6: Assign a relationship as needed; then click **OK**.

Search by Patient Name

- **From the Ambulatory View within a patient chart:**

STEP 1: Click the **Search** field dropdown arrow to search by patient name.

STEP 2: Click **Name**.

STEP 3: Click the **Search** field; then type the patient's name.

STEP 4: Press **Enter**.

STEP 5: Verify it is the correct patient in the top pane.

STEP 6: Click the correct encounter in the bottom pane.

STEP 7: Click **OK**.

STEP 8: Assign a relationship as needed; then click **OK**.

Search by FIN

- **From the Ambulatory View within a patient chart.**

STEP 1: Click the **Search** field dropdown arrow to search by FIN.

- Click **FIN**.
- Click the **Search** field; then type the patient's FIN.
- Press **Enter**.
- Verify it is the correct encounter in the bottom pane.
- Click the correct patient in the top pane.
- Click **OK**.
- Establish a relationship as needed; then click **OK**.

Search for a Recent Patient

- **From the Ambulatory View within a Patient chart:**

STEP 1: Click the **Recent** dropdown arrow to find recent patients; then click the needed patient.

NOTE: **The Recent dropdown arrow will list the most recent five patients that have been viewed.**