Checklist – Ambulatory Clinical Intake

Document and forward any additional questions that you are unable to answer to the appropriate member of the team. Do not leave concerns open-ended; YOU are responsible for following up.

Please note the following are priorities during your time with the staff:

- Workflow Mpage
- Complete Office Visits

Date:_____

CI/Support Name:_____

Staff Member Name:_____

Staff Position:_____

Task	Yes	No	N/A
1. Workflow Mpage			
Arrange your components: Recommendations, Chief Complaint, Allergies, medications, histories, vitals and then all others as appropriate for staff			
Review how to update Allergies from the Workflow Mpage			
Review how to update medications from the Workflow Mpage			
Review how to update histories from the Workflow Mpage			
Review how to reconcile quality measure components: Allergies, medications and histories			
2. Complete Intake Form			
From the Vitals component choose the appropriate Intake Form: • Adult Ambulatory Intake • Pediatric Ambulatory Intake			
Review how to access the Ambulatory Assessment iView band from the Vitals Component drop down			
3. Ambulatory Assessment iView Band			
Review iView functionality: • Dynamic Group • Tabbing • Double Clicking • Marking in Error			
Weird Gotchas			

Review where to find more materials			
CI Educational Library: ci.northernlighthealth.org/home			
Comments/Concerns			

Checklist