



Be the Difference.

New User Configuration

Douglas Moore Resident Clinic

This job aid describes the process for setting up new users from the Douglas Moore Resident Clinic in UHCare Ambulatory.

Signature Capture

Signatures need to be captured for all Residents and Attendings. Rita is able to capture signatures. Please refer to the appropriate job aid for questions regarding the process.

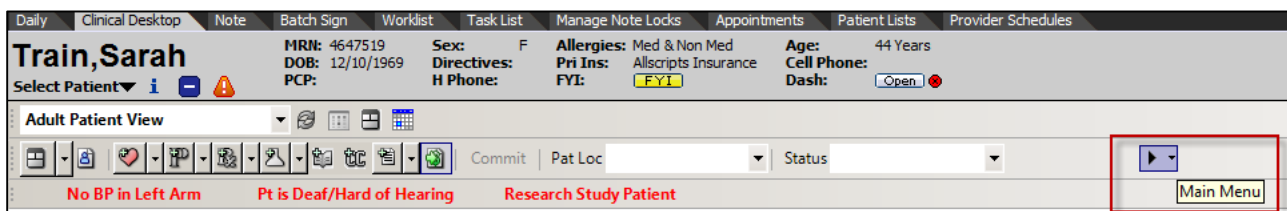
Personalization Options

There are a few personalization items that should be changed.

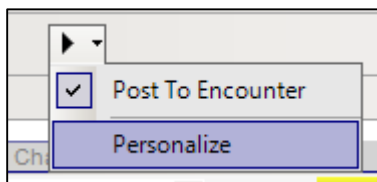
Note ▶ This only will need to be completed once and should be done when a new Resident or Attending begins at the clinic.

Accessing the Personalization Menu

1. Open the **Clinical Desktop** and select the **arrows** on the far right of the Clinical Toolbar.



2. Click on the arrow and select **Personalize** from the menu.

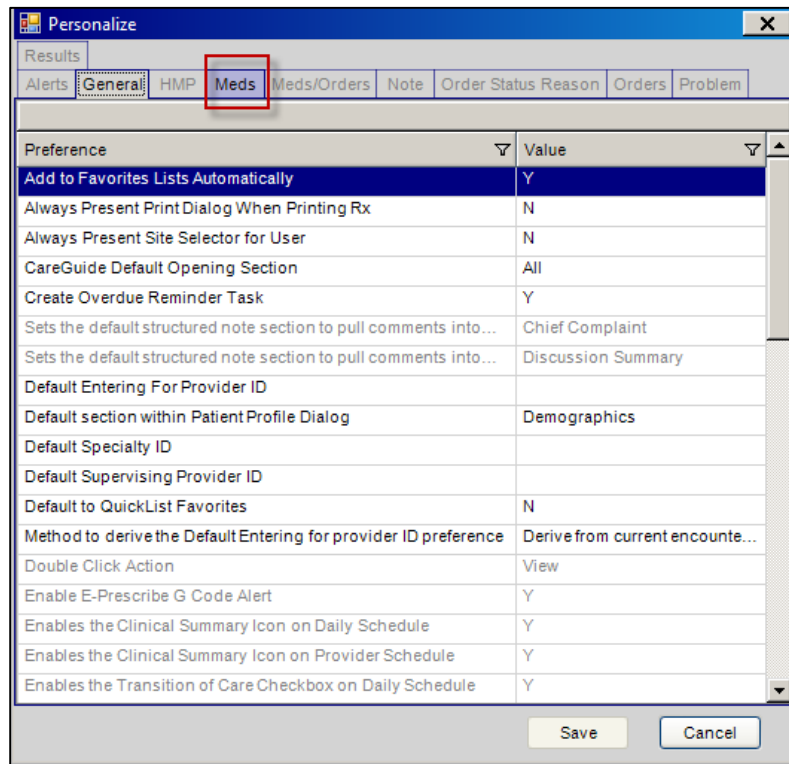


3. The Personalization menu displays.

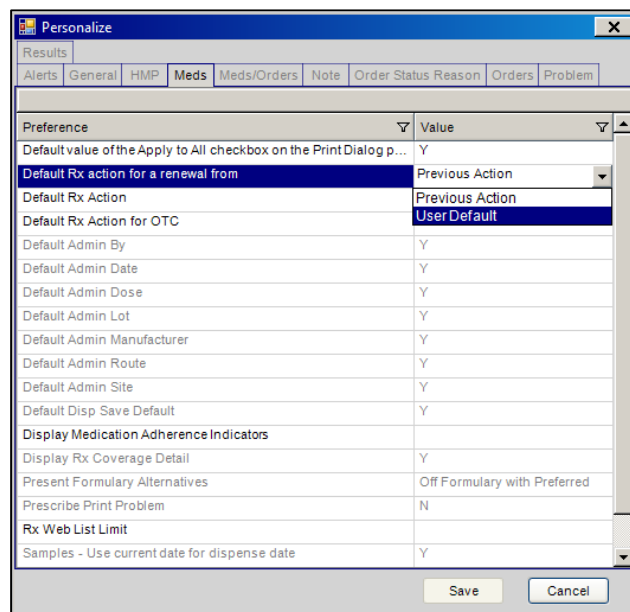
Medication Ordering Setting

Follow these steps to change your Medication Ordering preferences.


1. Now that you are in the Personalize Menu, select the **Meds Tab**.

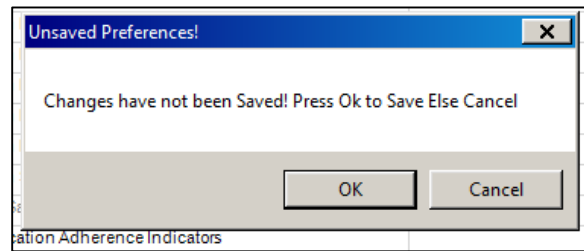


2. From the Meds Tab, select the **Default Rx Action for a renewal from** option.
3. Change the value to **User Default**.



4. Proceed to the next configuration setting by clicking on the **Results** tab.

 The Unsaved Preference window displays.

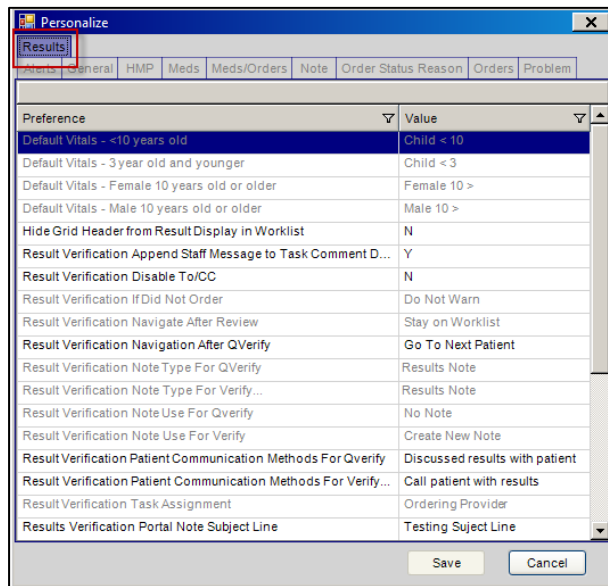


5. Click **OK** to save your preference.

QVerify Output Setting

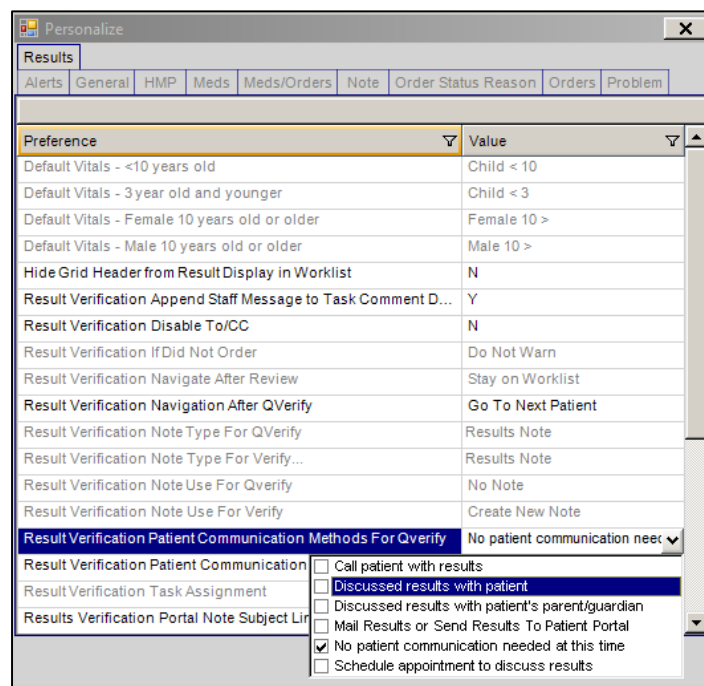
The QVerify Output Setting allows you to change your QVerify preference.

1. From the **Personalize** window, select the **Results** tab.



2. Select the line **Results Verificatin Patient Communication Methods for Qverify** option.
3. Change the value to **No Patient Communication Needed at this time**.

Tip ► Make sure to uncheck **Discussed Results with Patient**.



4. Click **Save** to to close the menu and apply your changes.

Schedule Personalization

There are a few items you can configure on the Daily Schedule tab.

Schedule Refresh

This will make your schedule refresh faster than what is defaulted so you are more likely to see arrived patients appear on the system sooner.

1. Navigate to the Daily tab to see your schedule.
2. Select **Personalize** from the top right corner.

Select Patient *i*

Daily Schedule Arrived, Pending and Rescheduled

Provider: Abbass,Hassan *All* AM: 32 PM: 8 Total: 40 Last Updated: 09/25/2014 10:55 AM *Personalize*

Date: 25 Sep 2014 Sun Mon Tue Wed **Thu** Fri Sat

\$	N	TC	SOC	CS	A	PT Loc	PT Status	Time	Patient	Type	Dur	Tasks	Comments
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	08:00 AM	Train,Loretta	ASC13	15	34	Sore Throat and Cough,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	08:00 AM	Train,Laric	ASC13	15	11	,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	08:15 AM	Train,Baker	ASC13	15	10	Sore Throat and Cough,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	08:15 AM	Train,Bailey	ASC13	15	10	,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	08:30 AM	Train,Darin	ASC13	15	7	Sore Throat and Cough,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	08:30 AM	Train,Caleb	ASC13	15	8	,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	08:45 AM	Train,Gabby	ASC13	15	7	Sore Throat and Cough,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	08:45 AM	Train,Edge	ASC13	15	19	,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	09:00 AM	Train,Jack	ASC13	15	7	Sore Throat and Cough,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	09:00 AM	Train,Hawk	ASC13	15	9	,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	09:15 AM	Train,Filberta	ASC13	15	7	Sore Throat and Cough,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	09:15 AM	Train,Ford	ASC13	15	9	,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	09:30 AM	Train,Fantasia	ASC13	15	7	Sore Throat and Cough,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	09:30 AM	Train,Fatima	ASC13	15	8	,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	09:45 AM	Train,Flip	ASC13	15	11	Sore Throat and Cough,
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Arr	09:45 AM	Train,Filomena	ASC13	15	8	,

The personalization menu displays.

Personalize -- Webpage Dialog

Personalize

Daily

Default Provider: Provider007,Train *All*

Automatic Refresh 1 minutes

Double-Click Action: Chart

Schedule Contents: Arrived,Pending and Rescheduled

All Provider View:

New Remove

Provider Schedules

Default Provider1: *All*

Default Provider2: *All*

Default Provider3: *All*

Default Provider4: *All*

Automatic Refresh 5 minutes

Double-Click Action: Chart

Schedule Contents: Arrived,Pending and Rescheduled

OK Cancel

3. Change the **Automatic Refresh** section from 5 minutes to **1 minute**.

Personalize -- Webpage Dialog

Personalize

Daily

Default Provider: Provider007,Train

Automatic Refresh: 1 minutes

Double-Click Action: Chart

Schedule Contents: Arrived,Pending and Rescheduled

All Provider View:

Provider Schedules

Default Provider1:

Default Provider2:

Default Provider3:

Default Provider4:

Automatic Refresh: 5 minutes

Double-Click Action: Chart

Schedule Contents: Arrived,Pending and Rescheduled

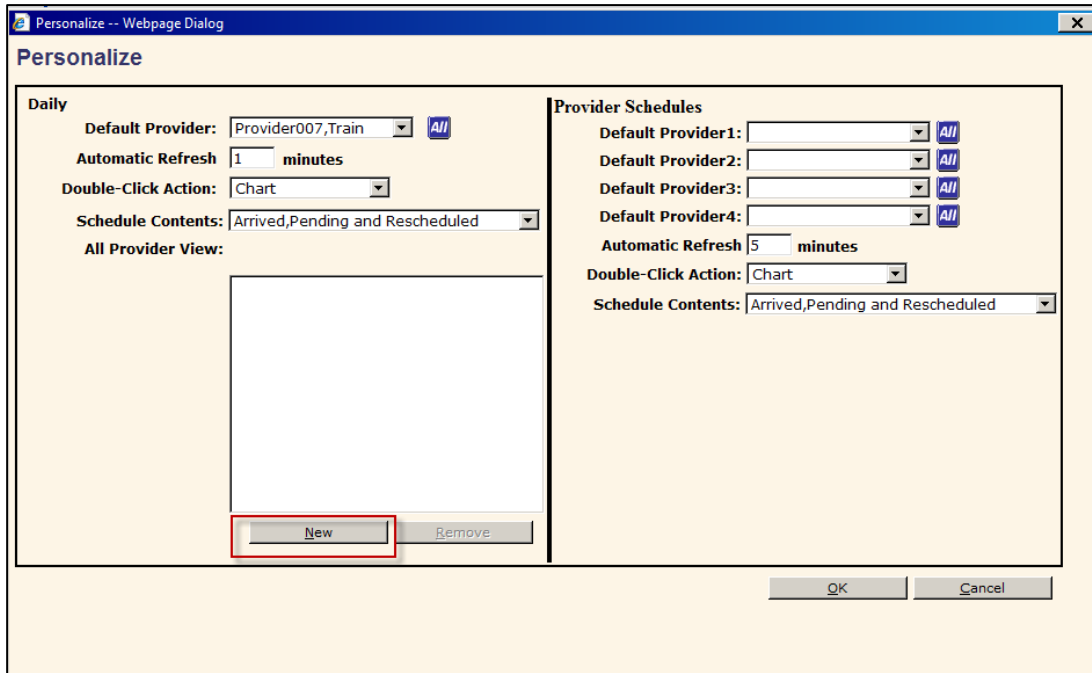
4. Click **OK** to save.

All Providers Schedule

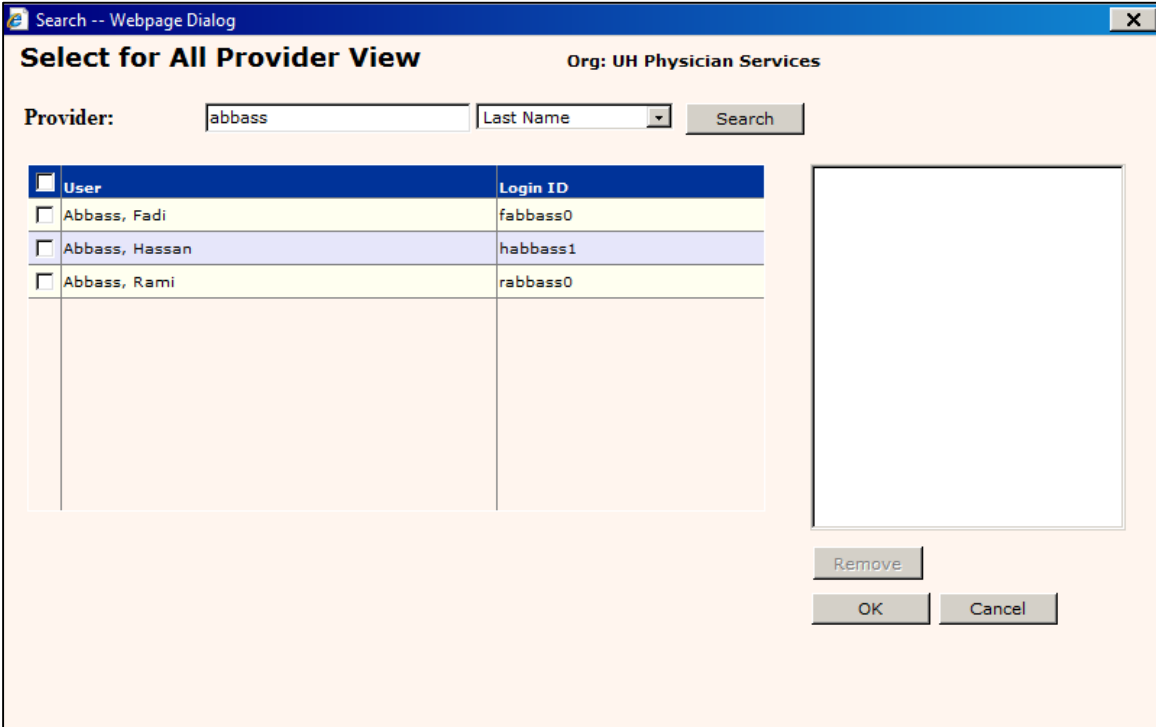
If you would like to utilize the **All Providers** option on the Daily list to be able to see multiple resident schedules in a given list, follow these steps.

Note ► This is not required only a matter of preference.

1. From the **Personalize** menu, click **New** under the all provider view.



 The **New Window** displays.



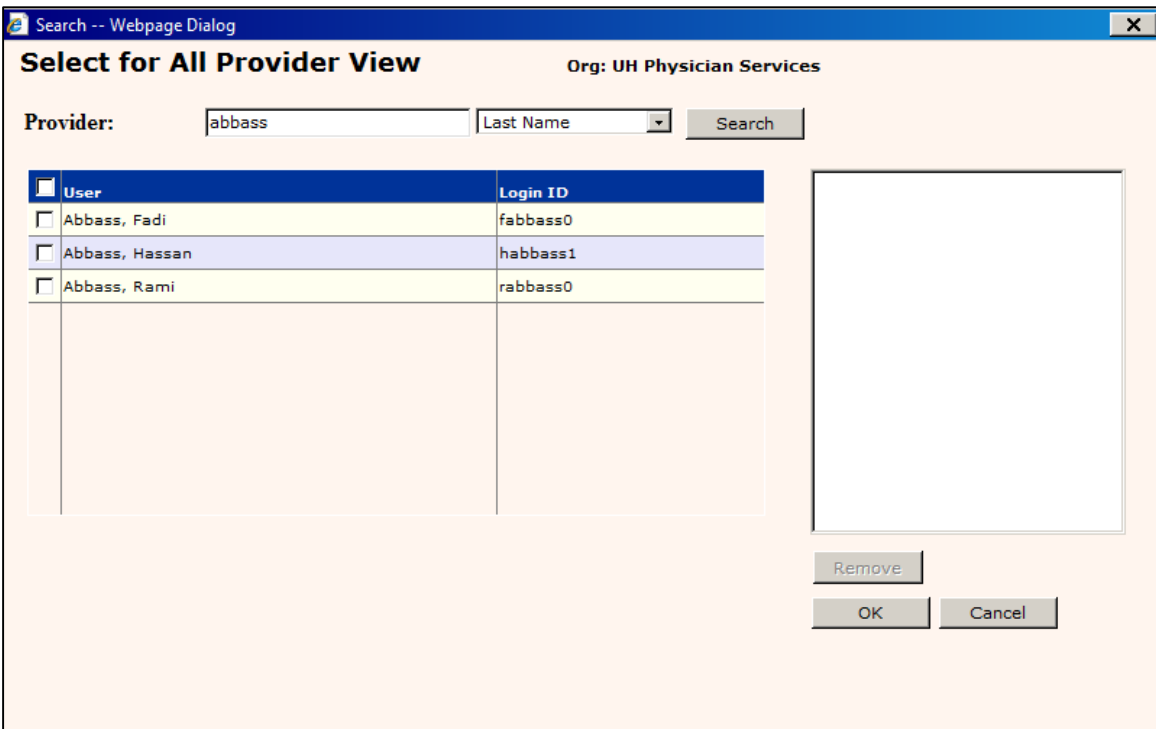
Select for All Provider View Org: UH Physician Services

Provider: Last Name

<input type="checkbox"/>	User	Login ID
<input type="checkbox"/>	Abbass, Fadi	fabbass0
<input type="checkbox"/>	Abbass, Hassan	habbass1
<input type="checkbox"/>	Abbass, Rami	rabbass0

2. In the **Provider** field, type in the residents you would like to see added to your schedule list.

Tip ▶ Only type in the **last name**.



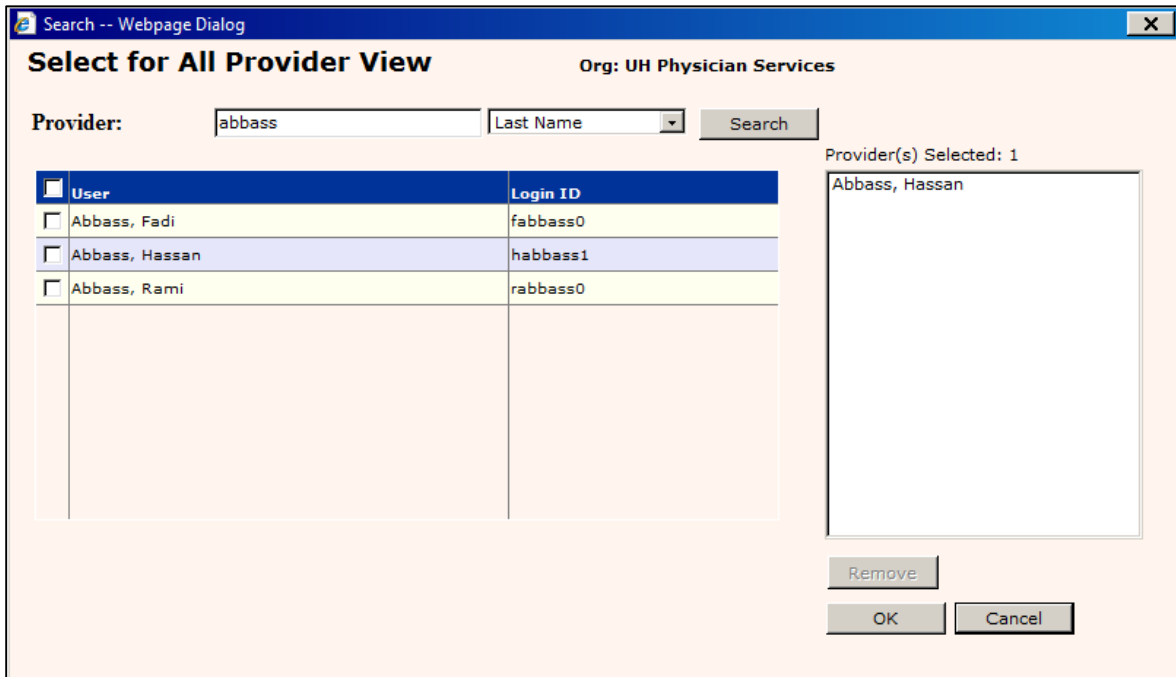
Select for All Provider View Org: UH Physician Services

Provider: Last Name

<input type="checkbox"/>	User	Login ID
<input type="checkbox"/>	Abbass, Fadi	fabbass0
<input type="checkbox"/>	Abbass, Hassan	habbass1
<input type="checkbox"/>	Abbass, Rami	rabbass0

3. Click **Search**.

- From the search results, select the physician you would like to add by **checking the box** next to their name. Their name displays in the **right column**.

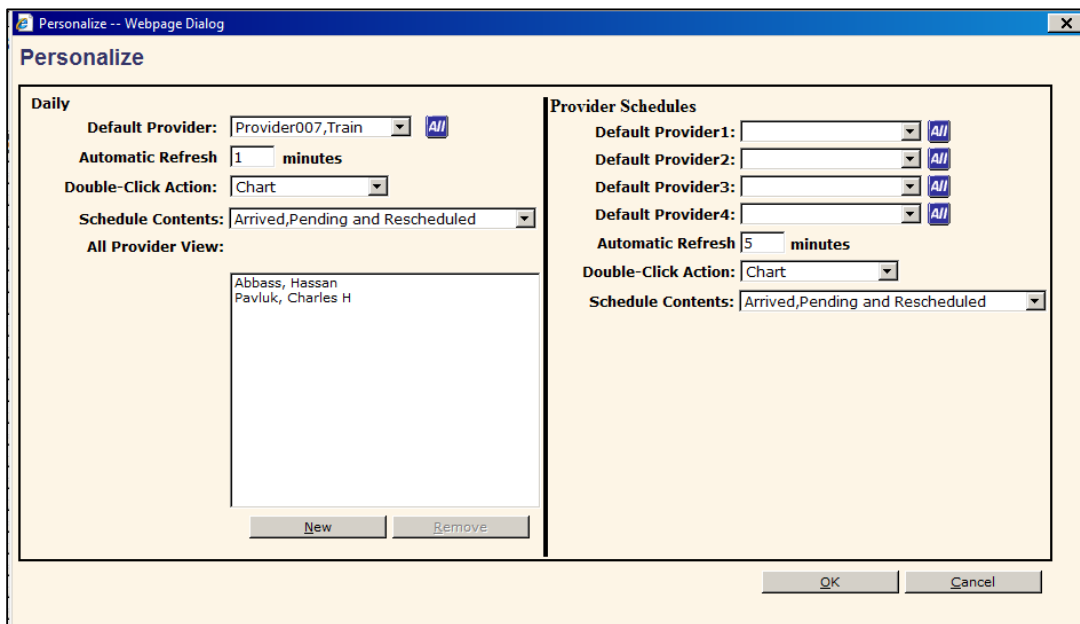


- Repeat steps 3 and 4 until all providers are added to your list.

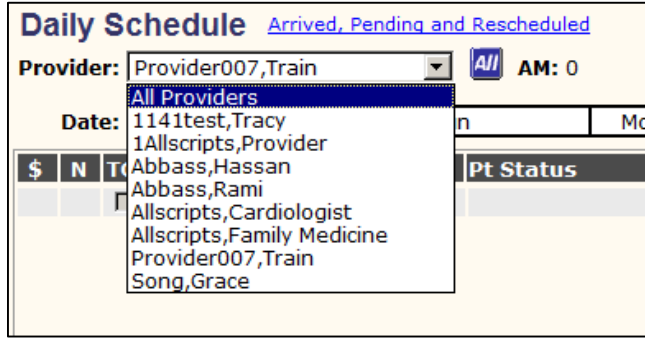
Note ► There is a maximum of 20 names that can be added at a time.

- Once complete, click **OK**.

Your list displays in the Personalize Menu as well.



The **All Providers** list is available from the Provider drop down menu.



All patients for both providers display together in a single list. In addition, a new column displays called **Provider** to indicate which provider the patient will be seeing.

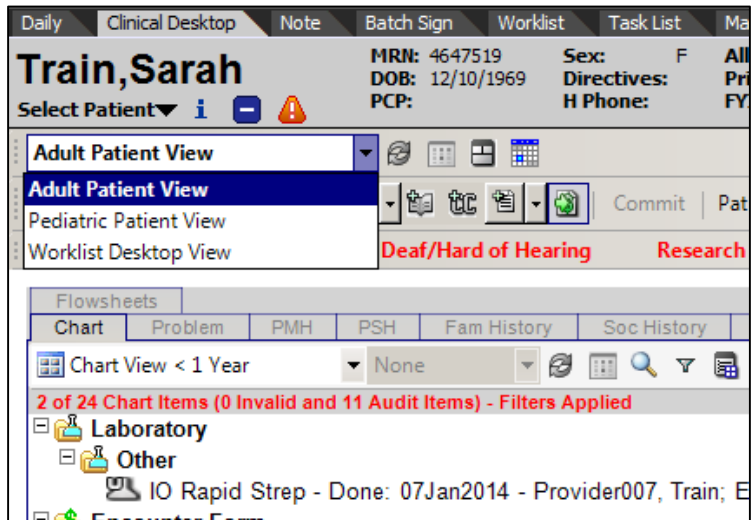
Daily Schedule Arrived, Pending and Rescheduled													
Provider: All Providers All AM: 64 PM: 16 Total: 80 Last Updated: 09/25/2014 11:09 AM Personalize													
Date: 25 Sep 2014													
Sun Mon Tue Wed Thu Fri Sat													
\$	N	TC	SOC	CS	A	Pt Loc	Pt Status	Time	Patient	Type	Dur	Provider	Comments
					Arr			08:00 AM	Train,Loretta	ASC13	15	Abbass,Hassan	Sore Throat and Cough,
					Arr			08:00 AM	Train,Laric	ASC13	15	Abbass,Hassan	,
					Arr	Exam Room 2	Provider Ready	08:00 AM	Train,Brianah	ASC13	15	Pavluk,Charles	Sore Throat and Cough,
					Arr	Exam Room 2	Provider Ready	08:00 AM	Train,Briggston	ASC13	15	Pavluk,Charles	,
					Arr			08:15 AM	Train,Baker	ASC13	15	Abbass,Hassan	Sore Throat and Cough,
					Arr			08:15 AM	Train,Bailey	ASC13	15	Abbass,Hassan	,
					Arr			08:15 AM	Train,Brindley	ASC13	15	Pavluk,Charles	Sore Throat and Cough,

Chart View Access

All Residents should have access to the **Adult Patient View** and **Worklist Desktop View** on the Clinical Desktop tab.

If either of these views are not available, a call to the command center can resolve.

Note ▶ **Adult Patient View** should be the default.

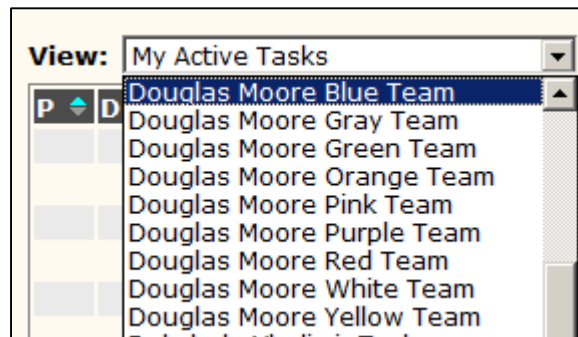


Note ▶ Med/Peds Residents should also have **Pediatric Patient View** on their drop down as well. The Command Center can add this as well.

Tasklist Access

All residents should have access to the tasklist for their team only.

1. From the **Tasklist tab**, select the View drop down menu.
 - ▶ Douglas Moore (Color) Team should be available in the pull down.



Note: This screenshot shows all the available names. The resident will only have 1 list available.

Tip ▶ Additional tasklists are also available in their view. These should also remain in the view.

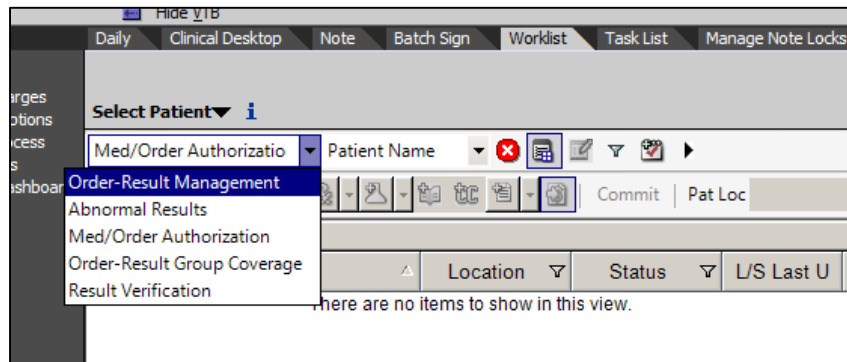
Worklist View Access

All Residents and Attendings should have access to the following Worklists:

- Douglas Moore Res Orders/Results Mgmt
- Order-Result Management
- Abnormal Results
- Med/Order Authorization
- Results Verification

Note ► If any of these items are missing, please call the command center to request that the security be updated to allow access.

To check if these views are available, click on the pull down menu in the Worklist tab.



Note: This screenshot is from the practice environment so is not showing the Douglas Moore list.

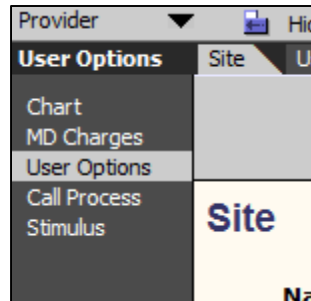
Worklist Filters

Worklist filters need to be set on the Douglas Moore list so that each resident only sees the items for their team. Please see the appropriate job aid regarding how to set these filters.

Setting Printer Defaults

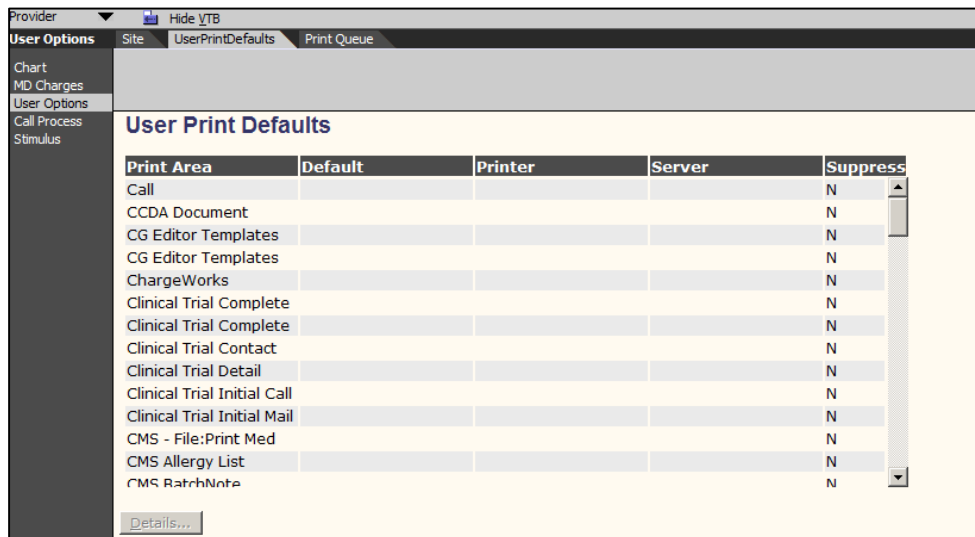
The following are instructions for setting all printer defaults for the Douglas Moore Resident Clinic.

1. From the Vertical Toolbar, select **User Options**.



Note ▶ Make sure that your *site is Douglas Moore Clinic* on the **Site tab** that will open. If it is not, click select site to change this to DMC.

2. Select the **UserPrintDefaults** tab.



3. Select any of the items in the list and select the **Details** button.

Print Area	Default	Printer	Server	Suppress
Call				N
CCDA Document				N
CG Editor Templates				N
CG Editor Templates				N
ChargeWorks				N
Clinical Trial Complete				N
Clinical Trial Complete				N
Clinical Trial Contact				N
Clinical Trial Detail				N
Clinical Trial Initial Call				N
Clinical Trial Initial Mail				N
CMS - File:Print Med				N
CMS Allergy List				N
CMS BatchNote				N

Details...

- The **User Print Defaults** window displays.

User Print Defaults -- Webpage Dialog

User Print Defaults

Print Area: CCDA Document

Document:

Server:

Printer:

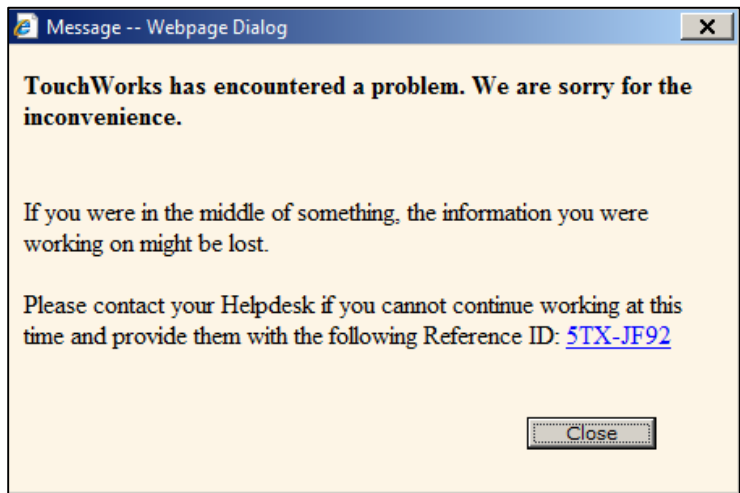
Suppress print dialog

Apply to all

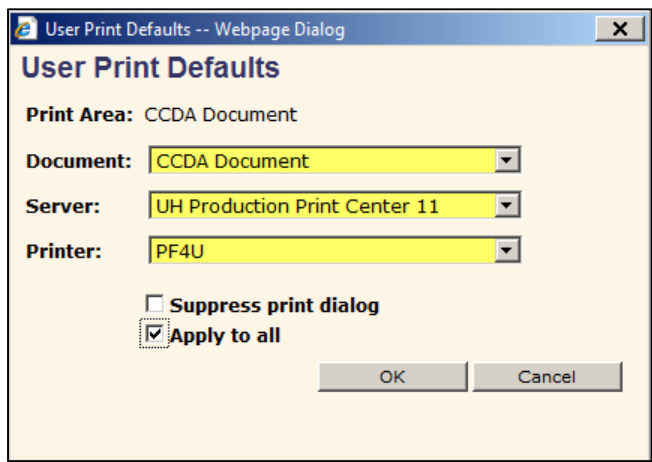
OK Cancel

4. In the **Server** field, select **Server 11 or 12**.
5. In the **Printer** field, elect printer **PF4U**.
6. Check the **Apply to All** box.
7. Click **OK**.

- ☞ An Allscripts error may display.



- ☞ The **User Print Defaults** window displays.



8. Click **OK**.

 The **User Print Defaults** main window displays.

User Print Defaults				
Print Area	Default	Printer	Server	Suppress
Call	Call	PF4U	UH Production Print	N
CCDA Document	CCDA Document	PF4U	UH Production Print	N
CG Editor Templates	CG Editor Templates	PF4U	UH Production Print	N
CG Editor Templates	CG Editor Templates	PF4U	UH Production Print	N
ChargeWorks	V4EncounterForm	PF4U	UH Production Print	N
Clinical Trial Complete	Clinical Trial Complete	PF4U	UH Production Print	N
Clinical Trial Complete	Clinical Trial Complete	PF4U	UH Production Print	N
Clinical Trial Contact	Clinical Trial Contact	PF4U	UH Production Print	N
Clinical Trial Detail	Clinical Trial Detail	PF4U	UH Production Print	N
Clinical Trial Initial Call	Clinical Trial Initial Call	PF4U	UH Production Print	N
Clinical Trial Initial Mail	Clinical Trial Initial Mail	PF4U	UH Production Print	N
CMS - File:Print Med	Medical Record	PF4U	UH Production Print	N
CMS Allergy List	List of Allergies	PF4U	UH Production Print	N
CMS BatchNote	Note BatchNotes	PF4U	UH Production Print	N

9. From the Vertical Toolbar, click **Chart** to return to the schedule screen.