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Behavioral Health Clinic Workflow Page Enhancement

January 24, 2024

Behavioral Health Clinic Workflow Page Enhancement Overview

Enhancement effective 1/30/24: The Reminders component will be added to the Clinic (Outpatient) Workflow Page for Behavioral Health Provider positions. This component will allow Providers to review existing reminders from within the patient's chart. Providers will also be able to create new reminders and/or resolve existing reminders for the patient via the Reminders component.

Reminders created via the Message Center will also be displayed within the Reminders component. For the steps on creating reminders via the Message Center, please click the link below and refer to scenarios 4-7 (starting on page 7).

[AMB Job Aid Message Center.pdf](#)

For more information on the functionality of the Reminders component, please see the steps below.

Positions Impacted: BEH Psychologist, BEH Psychologist Fellow, BEH Therapist, BEH Therapy/Psychology Student, BEH Social Worker.

Reminders Component Overview

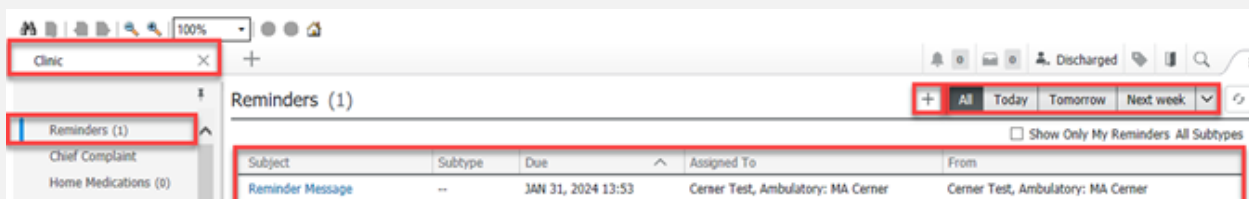
The Reminder feature allows users to compose messages for follow-up later. They are intended as notices to ensure that patient care activities for the specified patient are carried out later. Reminders can either be sent to another user's Inbox or attached to a patient's chart.

- Reminders within a patient's chart are displayed in the Reminders component of the workflow page and are intended as an alert or reference for the clinician reviewing the chart during a visit.
- Notifications can be attached to reminders when notification of receipt or action is needed. When users attach a notification with a reminder, users are alerted when the recipient opens the message or does not open the message by the due date. Notifications work in conjunction with reminders and due dates and can be configured to alert either the sender or another recipient.

Please follow the steps below to view and create reminders from the Reminders component.

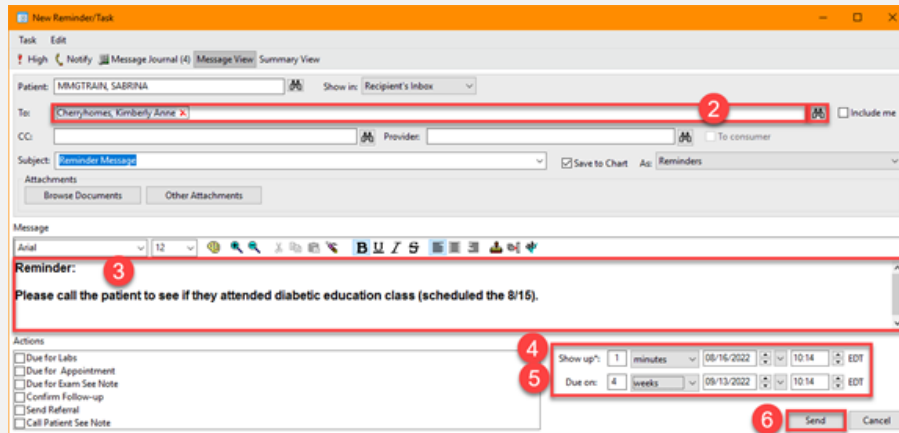
Creating a Reminder

- 1) From the **Clinic** Workflow page, select the **Reminders** component from the Navigation Pane.
 - a. If the patient has existing reminders, they will display in this component.
 - b. If needed, uncheck the **Show Only My Reminders** checkbox to view reminders created by other users.
 - c. Use the filter buttons in the upper right corner of the component to filter the list as desired.
 - d. To create a new reminder, click the **Plus** icon.



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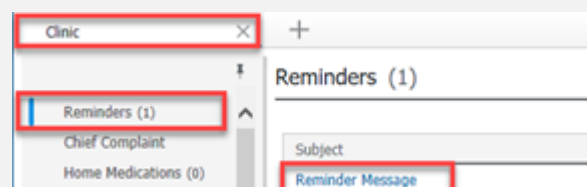
- 2) The **New Reminder/Task** window will display.
 - a. Enter the **Recipient** in the **To** field. Use the **Binocular** icon to search and select one if needed.
 - **Note: It is very important to include a recipient. Not including a recipient will put the reminder in the patient's chart but it will NOT be addressed by anyone. The user creating the reminder can also include themselves as a recipient.**
- 3) Compose the Reminder.
- 4) Enter the **Show Up** date/time.
 - a. This determines when the Reminder will be visible within the recipient's message center and within the patient chart.
- 5) Enter the **Due On** date/time. This determines when the recipient needs to complete the reminder.
- 6) Click **Send** to deliver the **Reminder**.



- 7) The reminder will display within the **Reminders** component on the Workflow Page and in the recipient's inbox under the **Work Items** folder one the Show Up date is reached.
 - a. The Recipient will also see a notification on the Toolbar, notifying them they have a Reminder to review.
 - b. The reminder will appear in **Red Text** on the reminders list when **Overdue**.

Viewing and Completing a Reminder from the Reminders Component

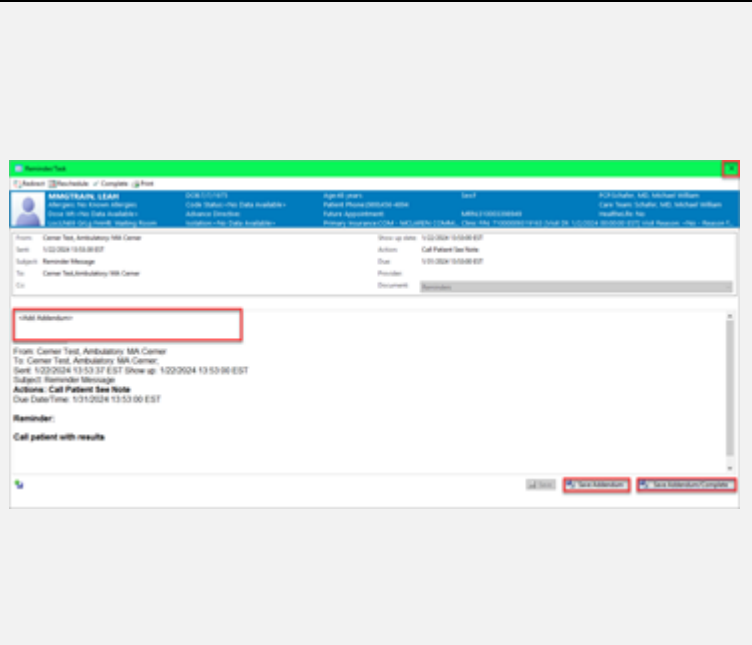
- 1) From the **Reminders** component in the patient's chart, click the subject hyperlink of the reminder you wish to view.



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- 2) View the message in the **Reminder Task** window.
 - a. If documentation is not being added, click the **X** in the upper right-hand corner to close the window.
 - b. Users may add documentation in the **Add Addendum** field if needed.

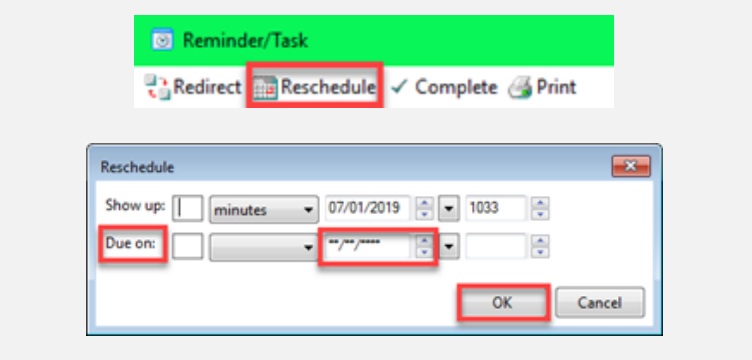
- 3) Once documentation has been added, select one of the following options:
 - a. Click **Save Addendum** to save the added documentation without completing the reminder.
 - b. Select **Save Addendum/Complete** to save the added documentation and complete the reminder.
 - **Note:** The Complete option in the upper right-hand corner may also be used to complete a reminder without adding documentation.



Reschedule or Redirect a Reminder

- 1) From the **Reminders** component in the patient's chart, click the subject hyperlink of the appropriate reminder.

- 2) To reschedule the reminder, select the Reschedule option at the top of the window.
 - a. In the **Reschedule** dialog box, enter the new date information, and click **OK**.



- 3) To redirect a reminder, select the Reminder option at the top of the window.
 - a. In the **To** field, click the **Binocular** icon to search and choose the recipient to redirect the message to.

