Revenue Cycle Education & Training

Patient Access
Cerner Preferences
Quick Reference Guide - QRG
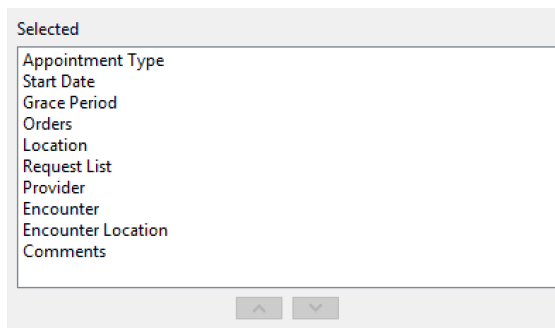
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HEALTH CARE

RevCycle

Basic Recommendations:

- General
  - Quick search default: Encounter
  - Facility: Staff Location
  - Non-Patient Perspectives:
    - Patient Tracking
    - Resource View
    - Queues
    - My Workflow
    - Patient Locator
  - Patient Perspectives:
    - Appointments
    - Registration
    - Encounters
    - Patient Account
- Patient Tracking
  - Filters
    - Location Group: Staff Location
    - Resources: Staff Resources
  - Future Requests: Staff Requests
- Scheduling
  - Appointment Requests

Selected
Appointment Type
Start Date
Grace Period
Orders
Location
Request List
Provider
Encounter
Encounter Location
Comments
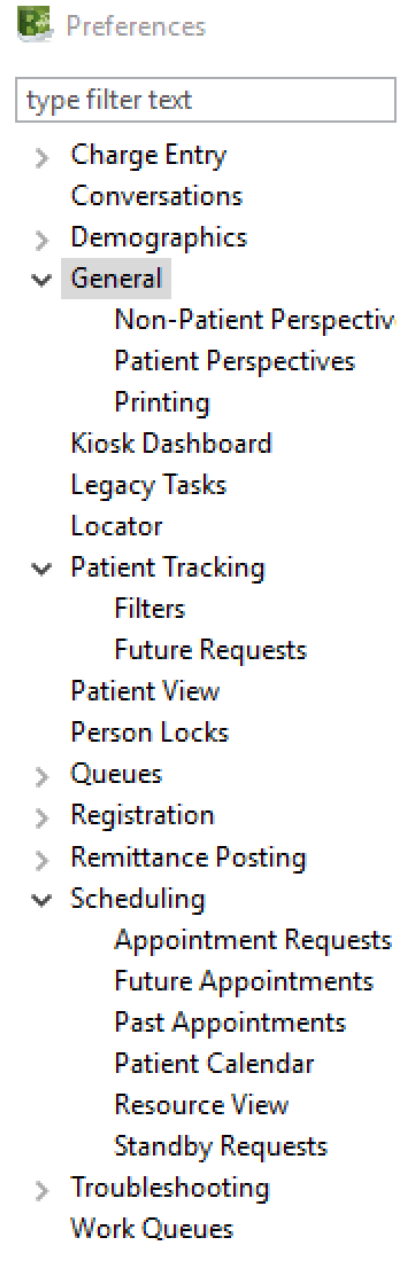
  - Past Appointments

Selected
Pending
Scheduled
Confirmed
Checked In
Checked Out
Canceled
Hold
No Show
Requested

  - Standby Requests: Staff Requests for Location

Preferences

type filter text

- Charge Entry
- Conversations
- Demographics
- General
  - Non-Patient Perspectiv
  - Patient Perspectives
  - Printing
  - Kiosk Dashboard
  - Legacy Tasks
  - Locator
- Patient Tracking
  - Filters
  - Future Requests
  - Patient View
  - Person Locks
- Queues
- Registration
- Remittance Posting
- Scheduling
  - Appointment Requests
  - Future Appointments
  - Past Appointments
  - Patient Calendar
  - Resource View
  - Standby Requests
- Troubleshooting
  - Work Queues

## AppBar Customization
Basic Recommendations:

- Access Management Office
- Charge Viewer – not all staff, just leadership
- Conversation Launcher
- Documents
- Powerchart
- Scheduling Appointment Book

Schapptbooks
Basic Recommendations:

- View → Options:
  - o Central Scheduling → Select all Toolbars except Availability, Cancels, No Shows, On Holds
  - o Ambulatory Scheduling → Select all Toolbars except Availability, Cancels, No Shows, On Holds
  - o User Defaults:
    - Default Location: if scheduling for one location
    - Appointment Detail Fields:
      - Appointment Type
      - Appointment Location
      - Person Name
    - Appointment Scheduling Range
      - Days in Past → 1
      - Day in Future → 0
  - o Appointment Tab:
    - Check the following:
      - Display Future Requests/Appointments
      - Display extended conflict details
      - Maintain focus on pending appointment during reschedule
      - Display person search encounter window
      - Allow add encounter
  - o Navigation Tab:
    - Add default bookshelf (if scheduling for one location)
    - Add default book
  - o Confirm Tab:
    - Check the following:
      - Always display confirm dialogue when confirming appointments
      - Return to previous book appointment display

- Demographic Bar → Right click & select Properties. Add Ins Carrier, Ins Plan, Home Phone & Custom Field 18 (Mobile Phone).
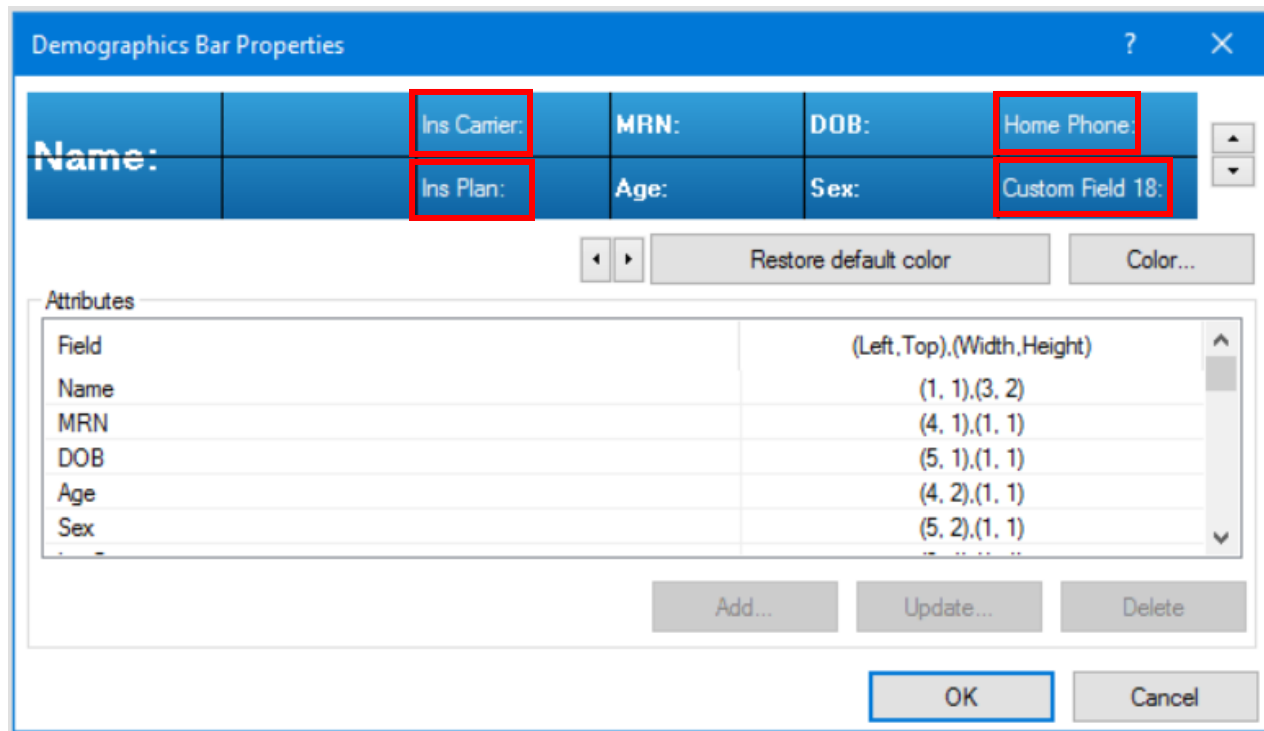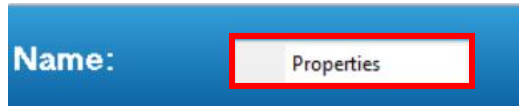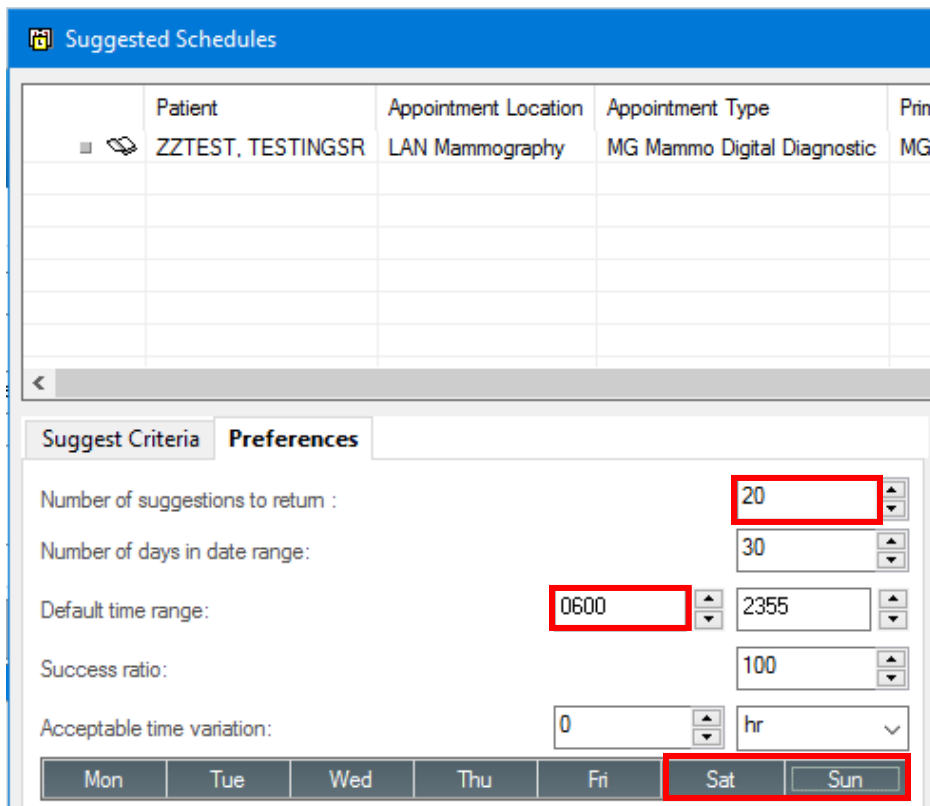

- Book Settings:
  - View – Select → Porportional Single Day
  - Properties –
    - General Tab: begin time **0700** and end time **1900** - match office hours
    - Display fields – check the following:
      - Person
      - Appointment type scheduled as
      - Appointment location
      - Requesting provider
      - Reason for appointment
      - Appointment state
      - Appointment duration
      - Encounter type
      - Start/End Time
    - Icons Tab → Slot Icons – check the following:
      - Comments
      - Locks

- Appointment Icons, check the following:
  - Appointment Linking
  - Comments
  - Information
  - Locks
  - Medical Necessity State Checked
  - Medical Necessity State Printed
  - Medical Necessity State Refused to Sign
  - Medical Necessity State Signed
  - Warnings
- View - Porportional Single Day
  - Display binder
  - Time Interval: 15 minutes
  - Column Width: Size to fit all, with minimum width at 150px
  - Start Display: at 0700 or normal clinic hours

Begin Scheduling an Appointment

- Ordering Physician → Uncheck Limit By Organization filter
- Unavailable Physician → If physician is not found, Unavailable can be used, populate Unavailable physician fields completely.
- Suggest Preferences → From the WIP Pane → Select Suggest → Preferences → Update settings → Cancel

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- Encounter Selection:
  - Column Preferences (right click column heading) → Customize the columns to match the screenshot

FIN NBR	Enc Type	Est Arrive Date	Reg Date	Disch Date	Facility	Nurse Unit	Med Service	Provider Name
70000000927974	Prereg	12/19/2019 - 12:00 PM			LN04 Rad GL	LN04 Mammo	Imaging Services	Izzo, DO, Timoth
70000000928269	Outpatient Message		10/9/2019 - 12:56 PM	10/9/2019 - 11:59 PM	LN20 Anticoag	LN20 Anticoag	Medicine - General	
70000000342170	Outpatient Message		11/13/2018 - 12:37 PM	11/13/2018 - 11:59 PM	LN45 Holt FM	LN45 Holt FM		
70000000136594	Outpatient Message		7/24/2018 - 12:12 PM	7/24/2018 - 11:59 PM	LN46 Holt FP	LN46 Holt FP	Medicine - General	

- Appointment View:
  - Schapptbook – double click on an appointment
    - Column Preferences (right click column heading) → Add FIN NBR, move next to Person Name

Person Name	FIN NBR	Enc Type	Enc Status	Sex	Home Phone	Business Phone	DOB	SSN
ZZTEST, MARGARET MARY	730000001199969	Prereg	Preadmit	Female	(231)444-4444		11/3/1970	

PMOffice/Access Management Office
Basic Recommendations:

- Worklists → Filter by site/modality
- Request Lists → Request by Queue → Filter by site/modality

Filters: Incomplete PreRegistrations □ ✕

Nurse Unit
Available:

- GIFT OF LIFE MICHIGAN LANSING
- LAN Family Medicine of Michigan
- LAN Lab Burcham Facility
- LAN Lab Sparrow Hospital

Copy >

Select All

* Selected:

Skip □

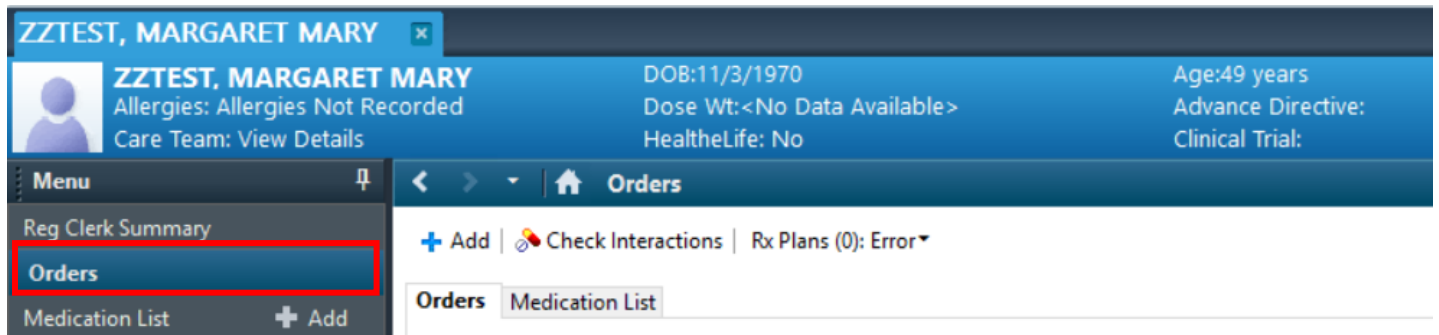## FirstNet
Basic Recommendations:

- Ensure staff have access to the tracking boards for their locations (WH, ALL BEDS, ED REG)

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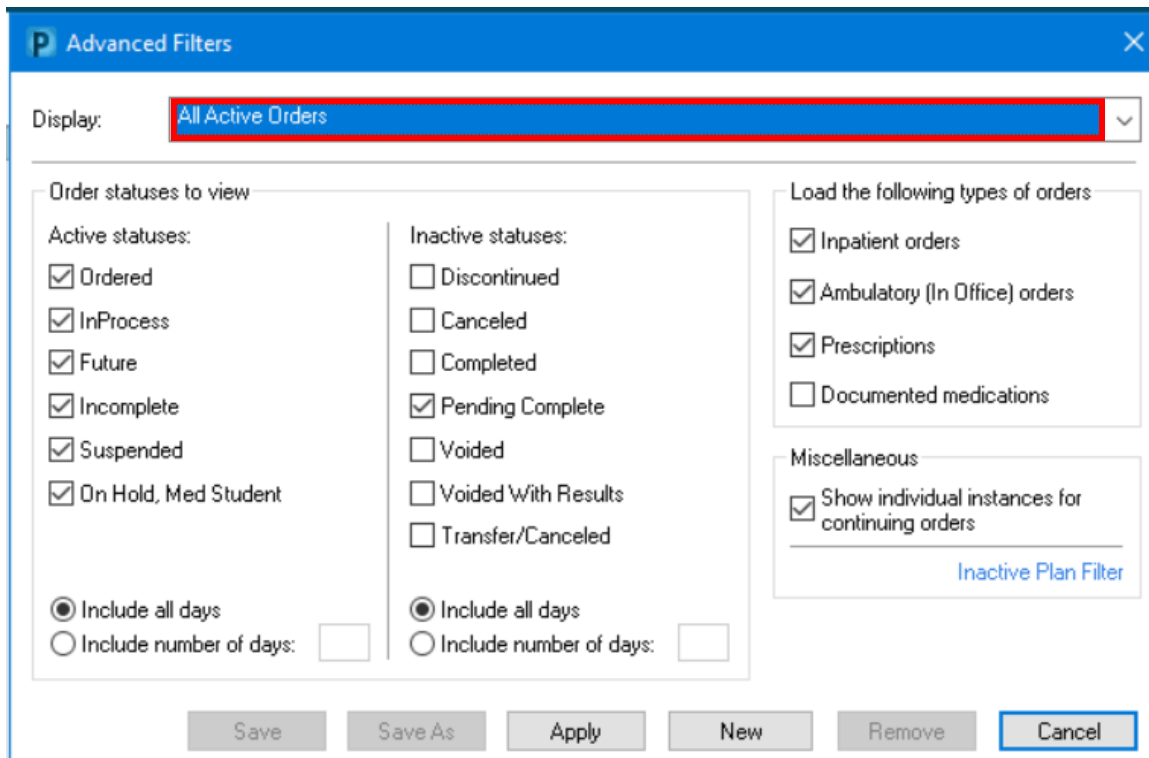HEALTH CARE

PowerChart

Basic Recommendations:

- Set/verify that All Active Orders are displayed.
  - Click on Orders → Displayed: All Active Orders → set filter to: All Active Orders

Exit properly to save changes. Task → Exit