Intern Orientation – Cerner EHR

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**How to login**

1. Open Internet Explorer and into the following URL: [https://vchaca.cernerworks.com](https://vchaca.cernerworks.com)
   
   **Don’t use the ‘Cerner Logon’ link today – we’re going to use a training ‘domain’.

2. Enter your CernerWorks or “Citrix” username and password, click logon.

3. Click on the “PowerChart” icon:

   ![PowerChart icon](image-url)
What you see when you first login

**Communicate**
Send messages to staff/providers or create a letter to patients.

**Home**
Back to this page

**Ambulatory Organizer**
aKA clinic schedule

**Patient List**
Inpatient & custom lists

**Physician Handoff**
Signout documentation

**Tracking Shell**
Patient ‘boards’ for ER and L&D

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**Message Center**
- Communications (like an email inbox)
- Prescription refill requests
- Lab results to review
- Notes to finish (or start)

**Schedule**
(AKA “Ambulatory Organizer”)
Your (or other providers’) schedule will show up here.
Accessible from the home page

Communicate
- Select “Message” to send an electronic message to other staff for providers.
- Select “Patient Letter” to draft a letter to patient.
- “Save to chart” option. Check box if you want your communication included in the patient’s chart. Be sure the box is unchecked if it is not relevant to patient care.

Ambulatory organizer

Schedule View options
- "Day review" box gives a single day’s patient list.
- "Calendar" box displays an entire week
- "Open items" box displays a list of outpatient encounters that still need a note or a bill completed.

Adding provider schedules:
- Click the drop down menu next to "Patients for:"
- Clinic "Add Other…"
- Type the provider’s name in the "Search For:" box
- Choose the correct provider and click "OK"
Patient Charts

There are several ways to access a chart.

- Search for name or MRN
- Message Center messages
- Ambulatory Organizer schedules
- Patient Lists

**Dashboard**
- Custom content for different settings: Inpatient, ambulatory, prenatal care, etc. Click and drag to rearrange tabs.

**New Order Entry**
- Search for orders here. Access favorites.

**Shopping Cart**
- For orders - click here to sign when finished.

**Banner Bar**
- Basic patient information. Click their name for phone #.

**Vitals, Labs, etc.**
- Recent results are visible. Filters adjustable using down arrows.

**Documents**

**Home Meds.**
- Reconcile meds (click the blue text). Refill, 'complete', or discontinue by clicking on the med to highlight it.

**Health Maintenance**
- Requires a lot of upkeep, but good for tracking screening tests, IZs, etc.

**Consolidated Problems**
- "This Visit" section (i.e. 'Diagnoses') is for issues addressed at today's visit; "Active" issues are the ongoing problem list.

Jun-17
Acute Workflow

Flowsheet to help organize and streamline an encounter. Most of your patient care time should be spent in this screen. These exist for many different settings including inpatient admissions (“Admit”), daily rounding (“Manage”), clinic visits (“Ambulatory”), prenatal care (“OB Prenatal”), and Labor/Delivery (“OB Inpatient” & “Partogram”). Ideally, you can have the Acute Workflow open throughout your encounter to review information and input subjective/objective data and orders, then covert it all to a note at the conclusion of the visit.

Start by choosing the appropriate tab for the visit. You can click-and-drag to change the order.

You can also click-and-drag the menu items to the left to re-order them to match your workflow (i.e., I like to see health maintenance recommendations first so I don’t forget them; you may want to start with chief complaint, etc.):

Input information into text boxes such as ‘Subjective/History of Present Illness’ or ‘Objective/Physical Exam’. Save them, and they’ll pull into your note automatically.

Order from the workflow pages just like from the dashboard:

At the conclusion of your visit, hit ‘Create Note’ to pull all this information into a document. You may add a few comments to elaborate on your plan, then sign the note and you’re finished.
Creating an Order/Prescription/Bill

Cerner’s order entry field fills many purposes. It also contains lots of detail.

How to: order a CBC

1. Under New Order Entry, type CBC. As you type, a list of options will appear.

2. Click ‘CBC’ in the list. You’ll see the Shopping Cart turn green:

3. Click on the shopping cart icon. Associate the order with a diagnosis by clicking an empty box.

4. Click ‘Modify’ to verify that the details of the order are correct.

5. On the screen that pops up, you’ll see that there is a blue X next to the order. This tells you that more detail is required before the order can be signed.

6. Clicking on the order will bring up a screen to enter the detail. Required fields are bolded and yellow boxes signify required fields that haven’t been filled. You can also click on the “4 Missing Required Details” box at the bottom to take you to the empty fields.
7. When finished, click ‘Sign’.
How to: order Lisinopril, in the hospital

1. In the New Order Entry box on the dashboard, be sure that ‘Inpatient’ is selected.

2. Type Lisinopril. You’ll notice several options with different doses/frequencies listed in grey. These are pre-filled order details. Choose the one that’s closest to what you want to order.

3. Notice that the shopping cart icon turned green. Click it to sign your order.

4. Be sure that the order is associated with the proper diagnosis (this will help with your note-writing later) and click ‘Sign’.
How to: order Lisinopril, as a prescription

1. In the New Order Entry field, be sure that ‘Prescriptions’ or ‘Meds as Rx’ is selected.

2. Type Lisinopril. You’ll notice several options with different doses/frequencies/quantities listed in grey. These are pre-filled order details. Choose the one that’s closest to what you want to order.

3. Notice that the shopping cart icon turned green. Click it to sign your order.

4. Click ‘Modify’ to ensure that the prescription is routed properly.

5. The pharmacy on file is listed next to the prescription name. To change it, double click on the medication line to bring up the order details.

6. Click on the “Send To:” box to change the destination of the prescription.

7. Options will include any other pharmacies listed, any printers available to you, and several reasons not to send the prescription (if you’ve written it on paper, for example). “Other…” will allow you to search for other pharmacies not listed.
How to: bill a 99213-GC

Freetext Ordering

1. In the New Order Entry field, type 99213

2. Notice that the shopping cart icon turned green. Click it to sign your order.

3. Be sure to associate the order with the diagnoses addressed during the visit, in order of importance. These are the diagnoses that will be sent to the payor to justify the bill. Then, click ‘Modify’ to adjust the details. As a resident, you’ll always need to add a ‘GC’ or ‘GE’ modifier to your billing codes.

4. A list of pending orders will come up. Double click on the 99213 order to edit the details.

5. Under ‘CPT Modifier’, select the appropriate modifier (-GC). Also be sure the ‘Date of Service’ is correct – it has to match the date that the patient was seen (you’ll get a pop-up warning if it doesn’t). Then click sign.
1. In the New Order Entry field, open the ‘AFMC’ favorites folder.
2. Open the ‘billing’ folder, then ‘E&M Resident Modifier’
3. Choose the appropriate billing code from the list of options:
4. Notice that the shopping cart icon turned green. Click it to sign your order.
5. Be sure to associate the order with the diagnoses addressed during the visit, in order of importance. These are the diagnoses that will be sent to the payor to justify the bill. Then click ‘Sign’

*** NB: This can be done in fewer steps if you create your own personal favorites for frequently used orders.
Quick Orders

1. If it isn’t already there, add a Quick Orders tab to the Acute Workflow page by clicking the + to the right of the active tabs. Select “Orders Primary Care”.

![Image of Acute Workflow page with Quick Orders tab selected]

2. Under the ‘Primary Care’ page, find the ‘Family Medicine E and M Codes’ box.

![Image of ‘Primary Care’ page with ‘Family Medicine E and M Codes’ box highlighted]

3. Open the E&M Resident Modifier folder and find the code you need:

![Image of E&M Resident Modifier folder with codes listed]

1. Notice that the shopping cart icon turned green. 🛒 Click it to sign your order.

2. Be sure to associate the order with the diagnoses addressed during the visit, in order of importance. These are the diagnoses that will be sent to the payor to justify the bill. Then click ‘Sign’

![Image of signed order with diagnoses listed]
How to: Enter Admit Orders

1. Order “Med General Admit Multi-Phase”

2. In the ‘View’ menu to the left, you’ll notice that the order set has two parts. One to “initiate in ED” and one to “Leave Planned Until Floor”. You’ll have to fill in each separately.

Initiate in ED.

1. Your first set of orders get activated immediately when your orderset is signed. This includes the basics (admit to:, activity level, diet, etc.) and any medications or labs you want to start immediately. Check the box to the left of the order to select it. Orders with a blue circle/white X ( ARISING ) require additional information – right-click and choose ‘Modify’ or select an option from the drop-down menu to the right.

2. If you need to order something that isn’t offered as an option, select ‘Add to Phase’ from the menu above the orderset and search for the order there.

Leave Planned Until Floor

1. Once finished with the ‘Initiate in ED’ orders, select ‘Leave Planned Until Floor’ and choose from the options in those ordersets.

Sign & Initiate

1. When finished ordering, choose ‘Orders for Signature’

2. You’ll be presented with a collection of all the orders you’ve requested. After you’ve reviewed once more, hit ‘Sign’ .
3. Refresh and confirm that the orders were entered correctly. The ‘Initiate in ED’ section should be bold and say ‘(Initiated)’, and the ‘Leave Planned Until Floor’ section should not be bold but say “(Planned)”
Documenting

Cerner has two programs for documenting: PowerNote and Dynamic Documentation. PowerNote is the traditional algorithmic, box-clicking EHR format and is used primarily in the ER and on OB-GYN. Dynamic Documentation works more like a word processor. YouTube Demo: https://youtu.be/t-8dMTqbda0

Creating a new Dynamic Document

1. From the Acute Workflow page, you can either find the Documents tab and click the blue plus +.

2. By default, a Dynamic Document will be created. There are a few details to adjust:
   a. **Type:** This is the note type that will be registered in the system. Outpatient notes should be set as ‘Office/Clinic Note’ or ‘AFMC Clinic Note’. Inpatient notes are generally ‘Progress Note’.
   b. **Title:** Think of this as the subject line in an email.
   c. **Date:** If you need to back-date a note, this can be changed.
   d. **Note Template:** This dictates the content of the note. For example, ‘Admission H&P’ will generate fields for an entire H&P, while ‘Office Visit Note’ is a simple SOAP note format and ‘Free Text Note’ is simply a blank document.

You can skip all these steps by choosing one of the presets in Acute Workflow. Instead of clicking the blue + icon next to Documents, scroll to the bottom of the Acute Workflow menu and choose one the preset options under ‘Create Note’
3. Within the note, each field is filled in separately. Next to the title of each field are three little icons.

- (refreshes any content that is automatically populated (i.e. vital signs);
- (adds space for free text;
- (deletes the field completely.

4. At the bottom of the screen, you can save or sign the note.

5. Once you hit Sign/Submit, you’ll see a screen with the option to forward the note. To forward to an attending for cosignature, (1) search for their name in the ‘Provider Name’ box, (2) choose the ‘Sign’ radio box next to their name, (3) then click the ‘Sign’ button to finish signing your note.
Patient list
Create a list of your primary care patients

1. In the “patient list” screen, click on the wrench icon.

2. Click "New"

3. Under patient list type, click “relationship” and then click “next”.

4. The box on the right, under lifetime relationships, check the box for “primary care physician”, then “finish”.

5. Your new list will be listed on the left-hand column under “unavailable lists”. Click on that list (it will turn blue) and then click the right arrow to move it into your “Active Lists”. Then click OK.
6. Now select the tab “Primary Care Physician”. To print the list, use the print button at the top of the screen.

View inpatient service lists
1. In the “patient list” screen, click on the wrench icon.
2. Find the list today looking for in the “Available lists:” menu on the left.
3. Click the blue right arrow to move that list into the “Active lists:”
4. Click OK.
Physician Handoff

The lists that are active under the Patient List page will also be available in the Physician Handoff page here. If you are unable to find a list, go back to the patient list page and ensure that it is listed under the “active lists”.

*Note: You may see a series of “Care Team Lists”. These lists are currently not functional, will take a long time to load, and should be avoided.*

Updating information in Physician Handoff

1. Click the arrow next to the patient’s name to open their handoff information.

2. Edit each component daily to maintain accuracy:
### Making Yourself the Primary Contact

Nurses and other providers will call the “primary contact” to discuss patient issues, so it’s important that this remains updated. It is initially set from the “admitting physician” field in admission orders.

<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Open the drop down menu on the physician handoff page</td>
</tr>
<tr>
<td>2.</td>
<td>Select “Manage Care Team Providers”</td>
</tr>
<tr>
<td>3.</td>
<td>Select your Medical Service, then select a Team from the list, then search for a provider to assign.</td>
</tr>
</tbody>
</table>

### Printing the Physician Handoff page

<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Open the drop down menu on the physician handoff page</td>
</tr>
<tr>
<td>2.</td>
<td>Click the print button</td>
</tr>
<tr>
<td>3.</td>
<td>Choose “simplified” or “detailed”</td>
</tr>
</tbody>
</table>
Powerchart Touch

What is Powerchart Touch?
Powerchart Touch is Cerner’s mobile app for provider functions in the EHR. It allows you to do most (but not all) of your chart review, ordering, documentation and messaging tasks within a mobile app.

What do I need to use Touch?
You will need an iphone, ipod or ipad with iOS 8.1 or greater (limited android applications are expected late 2016). IOS 9.1 will be required starting in May. We are not providing devices for use with Touch.

Should I use an ipad, or an iphone?
The ipad version of the app has fewer clicks for several functions, and allows graphing for labs, vitals and growth chart. There is generally a slight preference for the ipad in the outpatient setting, and for the iphone in the inpatient setting, but both work well and people clearly have individual preferences. You are welcome to try, and use both.

How do I get started?
First, download at least one of the Cerner apps from the app store. The apps that are enabled for us are Ambulatory, Inpatient, Surgery, Urology, Orthopedics, Cardiology, Neurology, Camera Capture, Message Center and Instanote. You can download and use as many as you want. Then, follow this link and log in here using your Cerner username and password (the one you use for the second/small blue log in box on the desktop).
https://cernercentral.com/device--access/tenants/8cf1bb66--7b18--4eaa--b641--538f19feb923/user/

Click the "Request Access" button on the right side of the blue banner bar and an access code will be sent to you. Keep an eye on your Clutter mailbox for an email from Millennium+ (or check back on the site after a day or two). When you get your access code, enter it in one of the apps and get started. Access codes expire in a week, so use them right away, or you will have to request one again. Each code is good for one device. If you have an additional device that you would like to use, go to the website and request a second code.

How do I learn how to use Touch?
The app is quite intuitive, and some people have started without any training. We do recommend some training in order to get the most from the apps. There is a video available on UCern
https://connect.ucern.com/videos/39985. You will need to register on the site to access. There are reference documents available in the Files section of the Powerchart Touch Outlook group and also here for non Outlook users https://www.dropbox.com/sh/wpcmlgsabljmuu1/AACHgZ2vow0CPaMua4Pt5MDna?dl=0

You can use also use training resources from other systems as there is almost no customization in Touch. This site has some good videos and training guides.
http://iemr.informatics.stonybrook.edu/products

There will be periodic in person and webinar training sessions. If you are interested in a training session, contact aimee.brecht--doscher@ventura.org

Can I dictate into my device using Touch?
The dictation is one of the major strengths of the apps. There is no voice training or additional setup required for dictation within Powerchart Touch. Use the microphone button that is above the keyboard for your dictation.

Can I use my Dragon voice templates in Touch?
Dragon voice templates can be imported from our desktop version but cannot be created, or updated within Touch. These are voice commands that you would use for commonly dictations (things like normal physical exam, ROS, procedure notes). Dr. Patterson has created several standard templates that have been uploaded to
your Touch profile. You can review what is available on your profile in Touch by holding down the microphone button in the app.

If you have custom templates you have created within the desktop version, these can be imported in to Touch. After the initial upload of custom templates, there will a limited amount of resources available for re-updating and there will be a delay, or wait list before your changes can be imported. If you have custom templates and have changes or additions you have been thinking of making, it would be best to spend some time making those changes before you export them into Touch.

To add your custom commands to Touch, first activate the Touch app(s) with your access code, then send an email to HCA.Helpdesk@ventura.org requesting that your Dragon voice commands are imported into Powerchart Touch (you can expect that it will take about a week for this to occur).

**Can I use my dot phrases in Touch?**
You can not use .phrases in Touch. If you save your note (instead of signing it), you can add them to the note on the desktop (this is very useful for things like lab templates). If you would like to create voice commands from your text .phrases on the desktop, you can create them in the Dragon desktop using copy and paste by following the instructions here [https://www.youtube.com/watch?v=R2jn9Oy--vn0](https://www.youtube.com/watch?v=R2jn9Oy--vn0) and then requesting that your commands are imported to Touch as described above.

**What kind of notes can I create?**
You can create your note purely within Touch, or use the dictation in Touch to create either Powernotes or Dynamic Documentation notes on the desktop. The notes created within Touch are neither Powernotes nor Dynamic Documentation. If you use the HPI, ROS, and PE fields in Touch they will pull in to those sections on the desktop (Workflow pages and in Dyn Doc), and vice versa (if you type in those fields on the Workflow pages, those sections will pull in to Touch.) We are planning to create .phrases that can bring in the Touch HPI, ROS, PE fields to wherever you might want to put them in a Dyn Doc note so you can use the fields like a dictation box.

Currently, Powernote users can add the text in these fields in Touch in any free text field by clicking on the Insert Template icon . The templates are called *History of Present Illness (Doc Comp), *Physical Exam (Doc Comp), *Review of Systems (Doc Comp).

**Where can I view the images I took with the Camera Capture app?**
At this point, the only way to view the image in the chart after it is taken is by adding to a Powernote. There is a detailed video that shows how to add a photo taken with Camera Capture to a note [https://youtu.be/QiSG3oV8DMw](https://youtu.be/QiSG3oV8DMw)

**What should I do about upgrades?**
As new Powerchart Touch features are developed by Cerner, these are available via updates to the apps. You can take upgrades to the app as soon as they are available, and will be required to update after 60 days. When a new iOS operating system is released, it is recommended that you do not upgrade your iOS until Cerner announces that it is safe to do so. We will let you know when that occurs.

**If I have questions about using Touch what should I do?**
Please ask your questions on the Outlook Powerchart Touch group (or browse to see if it was already asked and answered). If you do not have an Outlook account, you can email aimee.brecht-doscher@ventura.org. We will be sending out announcements about Touch to the Outlook group, or to your email address.
Helpful How-To Videos
There is a series of YouTube videos on the venturafamilymed.org Cerner page.

Documenting Pediatric Health Maintenance Exams
Pediatric health maintenance visits have a long list of required elements. The nurses use ‘Form Browser’ to fill in a lot of this information. We’ve used a series of Precompleted PowerNotes to get around this issue. Dr. Brecht-Doscher explains how to do so in her Documenting Pediatric Health Maintenance Visits video (https://youtu.be/oG9olqlZsK0). We’re in the process of creating our own notes for the residency, which will be accessed in the same way. Stay tuned!

Documenting OB Clinic Visits
OB clinic visits are documented using I-View to meet reporting requirements. However, I-View does not create a legible progress note. You can use a custom Precompleted PowerNote to pull in the information into a progress note to avoid having to document twice. Dr. Brecht-Doscher explains how to do this in her Documenting OB Clinic Visits video (https://youtu.be/nfhLQsx5bhE), which is on the Cerner page of venturafamilymed.org.

Dashboard: Consolidated Problems
A good refresher on how to keep track of Problems and Diagnoses on the Dashboard. This is available on Dr. Brecht-Doscher’s YouTube video (https://youtu.be/ti7vSs9SUFU) on the Cerner page of venturafamilymed.org.