Bulletin

AtlantiCare
A member of Geisinger

Checklist for Ambulatory Providers

Trainer or Super-User must indicate and sign this checklist once the employee demonstrates the following skills.

Criteria for successful completion:

    X   = Successful demonstration of all steps

    N/A = Not applicable to Role

Skills Check List:	Education	SME's Initials
Logging In		
Successfully logs in and out of Citrix StoreFront Page (1st Sign On)		
Successfully logs into PowerChart (2nd Sign On)		
Overview/Toolbar Functionality		
Demonstrates at least 2 ways to search for a patient chart		
Verbalize understanding of importance of Refresh button		
Demonstrate how to access hidden components in the toolbars		
Demonstrate how to customize a toolbar		
Ambulatory Organizer Functionality		
Demonstrate and describe the "Resource" box		
Demonstrate Daily Schedule View in the Ambulatory Organizer		
Verbalize what a color change status in Ambulatory Organizer		
Message Center Functionality		
Verbalize the difference between an open message and an unopened message		
Verbalize what a high priority item would be		
Verbalize what each folder represents in the MC toolbar (Orders, Documents, Results etc.)		
Verbalize how to view failed Rx orders		
Demonstrate how to create a general message		
Demonstrate how to create a reminder message		
Demonstrate how to create a consult message		
Demonstrate how to set a notification		

Demonstrate how to Launch Orders		
Demonstrate how to complete a proposed order		
Demonstrate how to create a Patient Letter (via Communicate)		
Demonstrate how to add a message to a patient's chart		
Verbalize the difference between adding a message to a patient's chart and sending a message about a particular patient		
Demonstrate and verbalize setting reminders and due dates within a general message		
Demonstrate and describe the use of the address book and personal address book, show how this is used within a message		
Demonstrate how to create auto-text within a message		
Demonstrate how to send an action with a message		
Verbalize where you can find a message saved to a patient's chart		
Demonstrate how to forward a message		
Demonstrate how to delete a message		
Demonstrate and describe how to add (give) a user proxy		
Demonstrate and/or describe the use of pools and how to send a message to a pool		
Verbalize the difference between receiving messages sent to your inbox vs. sent to your pools		
Patient Lists		
Demonstrate how to access patient lists		
Demonstrate how to create a patient list by location		
Verbalize the difference in patient list types		
Demonstrate how to customize a patient list		
Demonstrate how to filter a patient list		
Demonstrate how to set up a Multi-Patient Task List		
Patient Encounter		
Demonstrate how to open a Patient's Encounter and Assign a Relationship		
Demonstrate how to search for Hx Encounters and Results		
Demonstrate Patient Chart Components		
Demonstrate how to navigate the Ambulatory Workflow		
Demonstrate how to navigate and review the Chief Complaint and Problem List		

Medication Reconciliation and Home Medication		
Demonstrate how to Reconcile Medications		
Demonstrate how to customize the view		
Demonstrate how to Add an External Medication History		
Allergies		
Demonstrate how to only view and add an allergy		
Workflow		
Demonstrate how to navigate workflow sections		
Demonstrate how to split screens		
Demonstrate how to dictate in documentation sections		
Demonstrate how to add free text in documentation sections		
Demonstrate how to select the correct note type		
PowerNote		
Demonstrate using a PowerNote by adding documentation to the patient		
Demonstrate how to split screens		
Demonstrate how to add a PowerNote to Favorites		
Demonstrate how to split screens		
Demonstrate how to select, negate, and clear PowerNote selections		
Demonstrate how to add free-text in a PowerNote		
Demonstrate how to add auto-text to a PowerNote		
Demonstrate how to access a drawing in a PowerNote		
Demonstrate how to save a pre-completed note		
Demonstrate how to merge two templates together		
Demonstrate how to navigate to various areas of the patient's chart from the note		
Demonstrate how to reorganize the structure of a note		
Demonstrate how to switch between views in a note (template vs. contributor)		
Dynamic Documentation		
Begin a note and verbalize the correct note template to use		
Demonstrate how to tag items/adding tag items		
Remove a subsection		

Add free text entries		
Work with auto text entry and smart templates		
Sign and modify a note		
Demonstrate how to send the note to another provider for review		
Mark a note in error		
Problems & Diagnoses		
Demonstrate how to add a Problem		
Demonstrate how to convert present visit/ chronic visit problem to a diagnosis		
Demonstrate how to add a Problem as a Favorite		
Demonstrate how to convert a Problem to a Diagnosis		
Verbalize the difference between a Problem and a Diagnosis		
Demonstrate adding a Diagnosis as a Favorite		
Demonstrate adding a Diagnosis to the Problem List		
Demonstrate how to set a Diagnosis as a Priority		
Orders		
Demonstrate placing an order for prescription related to the Diagnosis		
Demonstrate how to complete a proposed order (see MC)		
Demonstrate how to add an order as a Favorite		
Demonstrate how to add an order sentence as a Favorite		
Demonstrate how to add a Charge and Procedure Code		
Demonstrate knowledge of the difference between Ambulatory, Non-meds, and Prescription Orders in PowerOrders		
Verbalizes understanding of how to see missing information related to orders		
Demonstrate adding an Order using Quick Add in Ambulatory summary		
Verbalize the functionality of the Toolbar in the Add Orders screen		
Demonstrates how to modify an order in the orders list using Edit on the Line functionality		
Demonstrates how to complete order details in an Order		
Verbalize what the blue circle with white X means		
Demonstrates how to order a PowerPlan		
Demonstrate how to add a pharmacy		

Quick Orders MPage		
Demonstrate how to Place an Order and Select Charge		
Demonstrate how to place future orders		
Demonstrate how to Resolve a Medication Clinical Decision Support Alert		
Demonstrate how to Add an Order to Favorites		
Demonstrate how to modify and move sections in Quick Order page		
ePrescribing		
Demonstrate how to place an order for prescription drug		
Demonstrate the various ways to route a medication		
Demonstrate how to find a pharmacy		
Demonstrate how to add a pharmacy		
Demonstrate how to renew a prescription		
Charting Complete		
Demonstrate how to log out.		

Employee: _____

Validator: _____   Date: _____