Invitations is an organizer component that allows for the tracking of patients who are due or overdue for designated Health Maintenance items at a location.

In its most basic form, it can be used to initiate the printing of letters or the sending of messages for health maintenance items. Invitations is certified to meet the Meaningful Use measure for patient reminders.

How to Use Invitations

The invitations button will be available to users in the PowerChart tool bar and will display. Once selected the window will display for the user.

➢ **Accessing Invitations**

- From PowerChart, click the **Invitations** button in the toolbar.
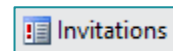
NOTE: The Invitations button may be hidden in your view. In that case click the carrot dropdown to locate it. This can also be rearranged in your toolbar.

- The invitations screen will display in PowerChart. Upon initial load of Invitations, no programs will be displayed in the Program list. Each user must select the appropriate location or locations to track under the Customize View option.

- Click **Customize View** button on the toolbar.
    - In the Select the Program Group section at the bottom of the window, click **Add**.
    - Select the appropriate location or locations to track. Click **OK**.
    - You may decide how many patients appear face-up on the list. Click the **Invitation Limit** drop-down arrow to select how many invitations to display. The default display is 20 invitations.
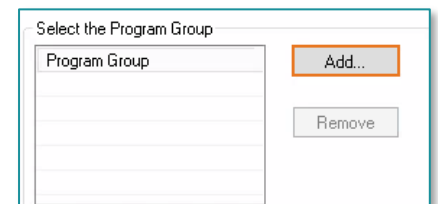
➢ **Selecting a Program**

The Programs field allows users to select tracking items for specific locations which are built based on Health Maintenance expectations. Only one program can be selected at a time.

STEP 1: Click the drop-down arrow in the **Program** field to select the desired program.

STEP 2: The **Patients** and **Patient Without History** tabs will display with patients qualified for the selected program.
   - Addition filters can be used to organize the list: Display filter the Before and After radio buttons with date field.

➢ **Generating Communications**

- The Generate Communication button displays when letters are ready to be printed.
- If the patient is signed up for the Patient Portal, the following icon will display in the Consumer column. Follow the steps below to generate a letter to a patient.

STEP 1: Select the patient(s) to send a letter to.

NOTE: Select the box in the top row next to Consumer to select all the patients listed. After clicking the box, you will need to select the first patient listed as it is not selected. This is a known issue that Cerner is aware of.
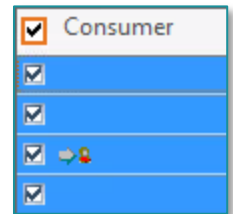
STEP 2: Click the **Generate Communication** button.
   - The Output Destination window displays.

STEP 3: Select the appropriate printer from the list displayed.

STEP 4: Click the **OK** button to print.
   - If the patient has a Patient Portal account, the letter routes automatically to their Patient Portal Inbox instead of printing.

STEP 5: A status bar in the lower right-hand corner will indicate the number of messages sent and letters printed.

➢ **View Documents and View History Buttons**

- **View History**
  - The **View Documents** button allows users to view all the documents generated for a selected patient.
  - Click in the checkbox next to the patient's name and click **View Documents**.
  - Letters can also be reprinted from this viewing screen.

- **View History**
  - The **View History** button allows users to view an invitation's history for a specified patient.
  - Click the checkbox next to the patient's name and click the **View History** button.
  - The History pane displays below, and the history of the patient's invitations display in the Description column. This can also be done when using the Find Patient option and a specific patient is displayed.