


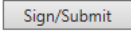
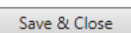


This Quick Reference Guide (QRG) reviews the medication management follow-up appointment.

### Common Buttons & Icons

	<b>Sign icon</b>
 Document Medication by Hx	<b>Document Medication by Hx</b>
	<b>Orders for Signature Tray</b>
	<b>Sign/Submit button</b>
	<b>Save &amp; Close button</b>
Add as <input type="text" value="Chronic"/>	<b>Add as drop-down</b>

### Complete the BH Ambulatory Comprehensive Intake Form

➤ **From the Ambulatory Organizer:**

**STEP 1:** Click the patient's name to navigate to the chart.

**STEP 2:** Establish your relationship to the patient.

**STEP 3:** Review the blue banner bar to confirm you have the right patient, date/time, and location of the appointment.

**STEP 4:** Navigate to the Ambulatory Workflow MPage.

**NOTE:** The intake form can also be accessed through the Forms component of the Clinic Workflow MPage.

**STEP 5:** Navigate to the Vital Signs component.

**STEP 6:** Click the **Vital Signs** component drop-down arrow.

**STEP 7:** Click the **BH Ambulatory Comprehensive Intake** form.

**STEP 8:** Complete the sections necessary for your clinic by clicking the needed sections down the left-side pane.

- Sections with an asterisk have required documentation.
- Information not captured elsewhere can be documented within the Nursing HPI section using freetext.
- Click a header to note all items in a grid at one time.

**STEP 9:** Enter or update the dates and times as needed.

**NOTE:** The current date and time auto-populate when opening the form.

**STEP 10:** Click the **Sign** icon once documentation is complete.

### Document Medication History

➤ From within the BH Ambulatory Comprehensive Intake form:

**STEP 1:** Click **Document Medication by Hx** within the Current Medication List section of the form.

**STEP 2:** Right-click the medication.

**STEP 3:** Click **Add/Modify Compliance** in the menu.

**STEP 4:** Use the respective fields to update compliance and document last dose date/time.

**NOTE:** Follow steps 2-4 for all medications.

**STEP 5:** Click **Document History** at the bottom of the Document Medication by Hx window when all medications are reviewed and documented.

### Document Allergies Component

➤ From within the patient's chart:

**STEP 1:** Navigate to the Inpatient Workflow if you are not already there.

**STEP 2:** Click the **Allergies** component.

**STEP 3:** Use the Add Allergy icon to add allergies or click the No Known Allergies button as appropriate.

**STEP 4:** Click Complete Reconciliation once complete.

### Review and Document the Problem List

➤ From within the patient's chart:

**STEP 1:** Navigate to the Ambulatory Workflow.

**STEP 2:** Click **Problem List** to bring up the component for documentation.

**STEP 3:** Review and update the patient's chronic problems as needed.

**STEP 4:** Use the Add Problem field as needed to add either This Visit or Chronic problems. A list of options will populate as you begin to type.

**NOTE:** Before starting your search use the Add As drop-down to have a problem added as Chronic or This Visit problems to the patient's chart.

**STEP 5:** Click the appropriate problem to be added from the populated list.

**STEP 6:** Click the appropriate button to note as a This Visit Problem, Chronic or both as needed.

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**NOTE:** When clicking the Resolve hyperlink, it will bring up a window that allows you to document a problem as resolved.

### Document the Provider Workflow

➤ **From the Ambulatory Organizer:**

**STEP 1:** Click the patient's name that you need.

**STEP 2:** Click the **Clinic Workflow** MPage within the patient chart.

- When completing the components, the information flows over to the prenote.
- Components are not shared between multiple users and the information entered is only on the person's screen who is documenting.

**STEP 3:** Click the **Chief Complaint** component from the Component list.

**STEP 4:** Click the freetext field and enter the Chief Complaint information.

**STEP 5:** Click **Sign** when complete.

**STEP 6:** Navigate to the Problem List.

**STEP 7:** Utilize the search box to populate the necessary diagnosis as needed.

**NOTE:** Entering more specifiers will assist in selecting the most applicable diagnosis.

**STEP 8:** Click the appropriate diagnosis.

**STEP 9:** Designate the problem as This Visit or Chronic, or both using the respective buttons.

**STEP 10:** Navigate to the Subjective/History of Present Illness (HPI) component.

**STEP 11:** Enter a comment as needed.

**NOTE:** There are available hpi autotext available.

**STEP 12:** Review and update the comment for accuracy.

**STEP 13:** Click **Save** once complete.

**STEP 14:** Navigate to the Mental Health component.

**STEP 15:** Document as appropriate.

**NOTE:** There are available autotext.

**STEP 16:** Review and update for accuracy.

**STEP 17:** Click Save.

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**STEP 18:** Chart any other relevant information to the respective components being sure to save and/or sign the individual component as needed.

### Document Behavioral Health Quick Orders

➤ **From the Patient chart using the Behavioral Health Provider View**

**STEP 1:** Navigate to the Behavioral Health Quick Orders MPage.

**STEP 2:** Click the appropriate order(s) needed.

**STEP 3:** Click the **Orders for Signature Tray**.

**STEP 4:** Review and Modify orders as appropriate.

**STEP 5:** Click **Sign**.

### Chart an Outpatient Medication Reconciliation

➤ **From the Patient chart using the Behavioral Health Provider View:**

**STEP 1:** Navigate to the Home Medications component within the Clinic Workflow MPage.

**STEP 2:** Click **Outpatient** within the Home Medications Component.

**STEP 3:** Reconcile the listed medications.

**STEP 4:** Click **Sign**.

### Add Patient Education

➤ **From the Patient chart:**

**STEP 1:** Navigate to the Patient Education component within the Clinic Workflow MPage.

**STEP 2:** Click the education you wish to add if it is listed.

**STEP 3:** Search for additional education using the More Options button.

**STEP 4:** Scroll down the component to verify that the education you want is added.

**NOTE:** You have the ability to choose a language outside of English. Click the Education Language drop-down arrow at the bottom of the component. Select the language preferred.

### Create the BH Office Note

➤ **From the Clinic Workflow MPage within the patient's chart:**

**STEP 1:** Scroll down the Component list on the left-side.

**STEP 2:** Click **BH Office Note** hyperlink.

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**NOTE:** Information pulls in based on prior documentation.

**STEP 3:** Document the **Date of Service** field.

**STEP 4:** Review the information that was pulled in, making edits as needed.

**NOTE:** Remember, any component that does not have documentation will not flow over to the note.

**STEP 5:** Click **Save and Close** if you are the scribe.

**NOTE:** If you are the scribe:

- Forward the note to the appropriate individual.

**STEP 6:** Click **Sign/Submit** if you are the provider.

**STEP 7:** Alter Type and Title of the note only if it is applicable to your clinic. They should not need to be changed.

**STEP 8:** Review and update the date and time as needed.

**STEP 9:** Click Sign.