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This Quick Reference Guide (QRG) reviews the typical daily workflow of a Medical Specialist in the Ambulatory setting.

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### Review the Provider View for Medical Specialty

Here is an overview of the main screens you will use in the patient chart.

- **Amb <Specialty> Workflow 2018** – Where documentation and chart review should occur. This page can be rearranged/customized to reflect your daily workflow.
- **<Specialty> Quick Orders** – Where orders for office charges, follow-up appointments, and most frequently ordered lab, imaging, and medication orders are placed. You can also add to the Problem List from here.
- **Demographics** – Used for quick access to patient demographic, insurance, and consent information. You can reorder and customize components as needed.
- **Future Orders** – Where you can see orders that have not been completed, in order to avoid duplication. Use the filters to locate specific orders.
- **Refill MPage** – Where previous PMP information can be accessed and medication refills ordered.
- **MPages View** – Calculator tool that can help with using different scales and assessments.

### Complete the Patient Visit Workflow

Here is a high-level overview of your typical workflow during an ambulatory patient visit.

#### ➤ **From the Provider View Ambulatory Organizer:**

**STEP 1:** Establish relationship to patient.

- Find the patient schedule on the Ambulatory Organizer.
- Click the patient's name to access their chart.
- Establish your relationship as the Consulting Physician.

**STEP 2:** Review chart.

- In the Patient Banner, verify that the encounter is specific to your location and date of service, and the encounter is Ambulatory.
- Review the chart.
- Add yourself to the patient's Care Team as their Cardiologist.

**STEP 3:** Provide direct patient care.

**STEP 4:** Indicate This Visit diagnosis(es).

**STEP 5:** Place POC testing/medication orders as needed from the cardiology quick orders.

**STEP 6:** Perform Medication Reconciliation at each visit.

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- Have your cell phone/token fob available for any controlled substance prescribing.
- Review PMP prior to prescribing any controlled substances.

**STEP 7:** Document patient instructions.

- Instructions will print to the Patient Visit Summary for the patient to take home.

**STEP 8:** Place charge order and follow-up orders as needed from the cardiology quick orders.

- If working with a scribe, be sure to sign off on any orders proposed to you during the visit.

**STEP 9:** Document HPI, Review of Systems, Physical Exam, and Assessment & Plan components on the Amb Cardiology 2018 tab.

- Use tagging, free text, auto text, and/or M\*Modal.

**STEP 10:** Create and sign your Office Visit Note. Typical Cardiology note types include:

- Cardiology Office Note - for both Consults and Follow-up Office Visits
- Cardiology Office Procedure
- Cardiology Electrophys Office Note - for both Consults and Follow-up Office Visits
- Cardiology Electrophys Office Procedure

### **Complete the Between Visit Workflow**

Between patient visits, take this time to review your Message Center and Ambulatory Organizer to complete communication and address incomplete items.

**STEP 1:** Review Message Center.

- Review/sign documents.
- Review/cosign orders/proposed orders.
- Review/reply to messages, and place orders as needed.
- Review/manage/endorse results.
- View reminders.
- If covering for a colleague, view your Proxy Message Center Items as assigned.

**STEP 2:** Review Ambulatory Organizer.

- View the Open Items tab for any outstanding charges/documentation needing to be completed.