

# Checklist – Ambulatory WH Clinical Intake

Document and forward any additional questions that you are unable to answer to the appropriate member of the team. Do not leave concerns open-ended; YOU are responsible for following up.

Please note the following are priorities during your time with the staff:

- Workflow Mpage
- Complete Office Visits

Date: \_\_\_\_\_

CI/Support Name: \_\_\_\_\_

Staff Member Name: \_\_\_\_\_

Staff Position: \_\_\_\_\_

Task	Yes	No	N/A
<b>1. Workflow Mpage</b>			
Arrange your components: Pregnancy Overview, EDD Maintenance, Chief Complaint, Pregnancy Visit Information, Allergies, Home Medications, Histories, and then all others as appropriate for staff			
Review how to update Allergies from the Workflow Mpage			
Review how to update medications from the Workflow Mpage			
Review how to update histories from the Workflow Mpage			
Review how to reconcile quality measure components: Allergies, medications and histories			
<b>2. Complete Intake Form</b>			
From the Pregnancy Visit Information component choose the appropriate Intake Form:			
<ul style="list-style-type: none"> <li>• Antepartum Intake Form</li> </ul>			
Review how to access the OB Office Visit iView band from the Pregnancy Visit Information Component drop down			
From the GYN Clinic MPage – From the Vital Signs component, choose the appropriate Intake Form:			
<ul style="list-style-type: none"> <li>• GYN Intake Form</li> </ul>			
<b>3. OB Office iView Band</b>			
Review iView functionality:			
<ul style="list-style-type: none"> <li>• Dynamic Group</li> </ul>			
<ul style="list-style-type: none"> <li>• Tabbing</li> </ul>			
<ul style="list-style-type: none"> <li>• Double Clicking</li> </ul>			
<ul style="list-style-type: none"> <li>• Marking in Error</li> </ul>			
<b>Weird Gotchas</b>			



Checklist
