

Checklist – BH Ambulatory 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
1. Workflow Mpage			
Arrange your components: Chief Complaint, Allergies, medications, histories, vitals and then all others as appropriate for staff			
Review how to update the following from the Workflow Mpage: <ul style="list-style-type: none"> • Allergies • Home Medications • Histories 			
Review how to reconcile quality measure components from the Workflow Mpage: <ul style="list-style-type: none"> • Allergies • Home Medications • Histories 			
2. Complete Intake Form			
Review how to access the BH Ambulatory Intake Form from the applicable workflow Mpage component: <ul style="list-style-type: none"> • Clinic Workflow <ul style="list-style-type: none"> ○ Forms component • Ambulatory Workflow <ul style="list-style-type: none"> ○ Vital Signs component 			
Review how to access the Ambulatory Assessment iView band from the following components: <ul style="list-style-type: none"> • Clinic Workflow <ul style="list-style-type: none"> ○ Forms component • Ambulatory Workflow <ul style="list-style-type: none"> ○ Vital Signs component 			
3. Ambulatory Assessment iView Band			
Review iView functionality: <ul style="list-style-type: none"> • Dynamic Group 			

