



*Ambulatory Preferences*

MEDITECH  
E X P A N S E

This course will guide you through the different functions of the Ambulatory Preferences to customize your Ambulatory screens.

*Subtle on screen elements of the LIVE system may vary from what is shown within this course; however, the functionality is as shown.*

The screenshot shows the Clinical Home Screen for Anthony F. Cardell, MD. The navigation bar at the top right contains icons for Sign, Compose, More, and Suspend. The 'More' icon is highlighted with a red box, and a green callout bubble points to it with the text "click on the 'More' icon".

**Schedule** (Thu March 7, 2019 9:41a)

Time	Appointment	DOB	Age	Status
10:30	T-TEST, GODZILLA Cyst of skin	01/01/1946	73 F	Booked
10:00	T-TEST, MAGNOLIA 2 MONTH FU	05/04/1952	66 F	Arrived

**Recently Accessed**

Name	Visit Date	Close Chart
Test, CardioAC2		
test, CardioAC4	02/27/19	
Test, CardioAC5		
TEST, CARDIOAC8		
TEST, CARDIOAC7		

**Quick Links**

- [PDMP](#)
- [Meditech](#)
- [Mount Nittany Email](#)

From the Clinical Home Screen, you will notice the 'More' icon on the right side of the navigation bar. Click the 'More' icon.

Anthony F. Cardell, MD

Thu March 7, 2019 9:42a

Schedule

Time	Appointment	DOB	Age	Status
10:30	T-TEST, GODZILLA Cyst of skin	01/01/1946	73 F	Booked
10:00	T-TEST, MAGNOLIA 2 MONTH FU	05/04/1952	66 F	Arrived

Workload

Recently Accessed

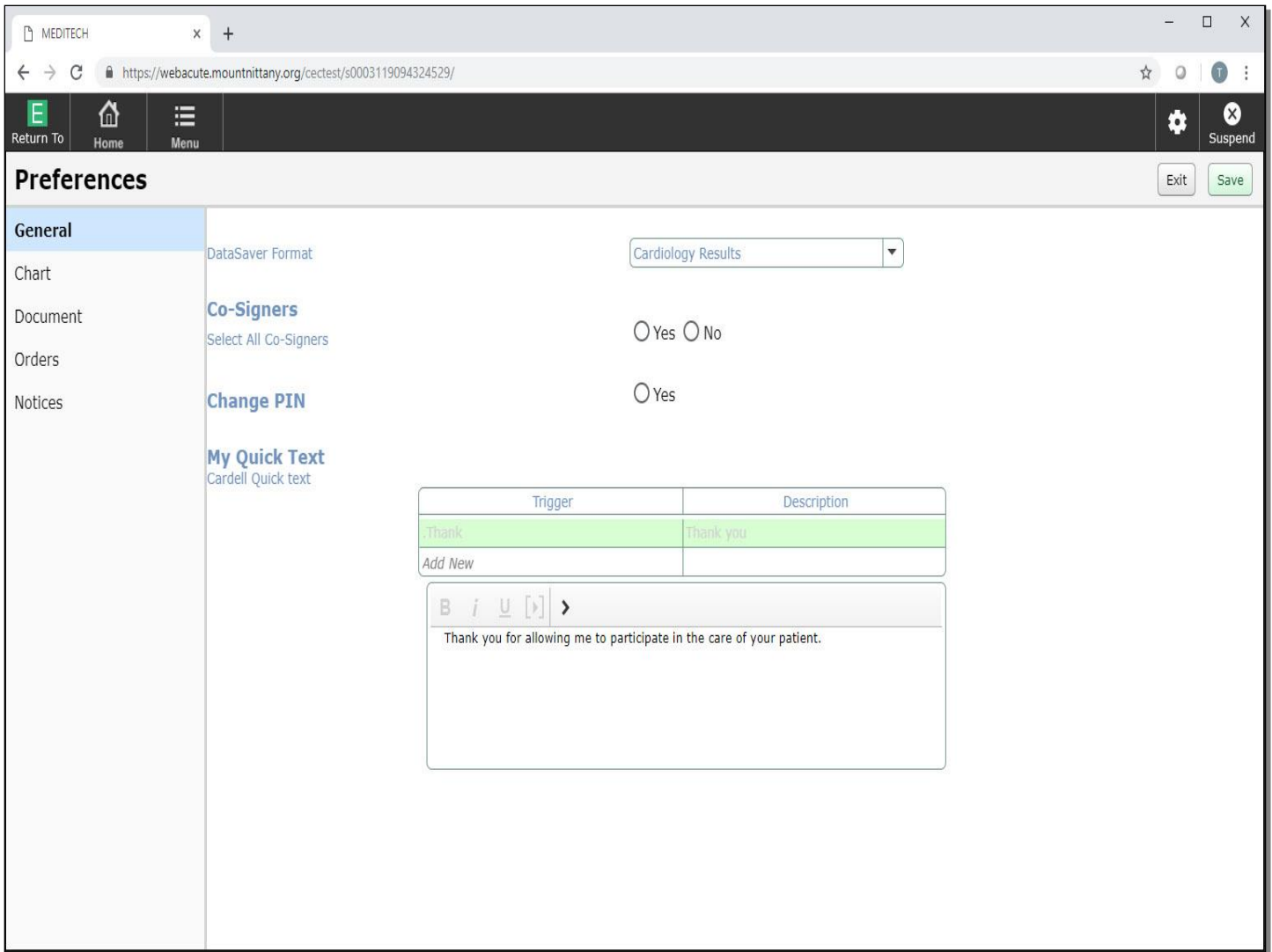
- Test, CardioAC2
- test, CardioAC4
- TEST, CARDIOAC7

click on 'Amb Preferences'

Quick Links

- PDMP
- Meditech
- Mount Nittany Email

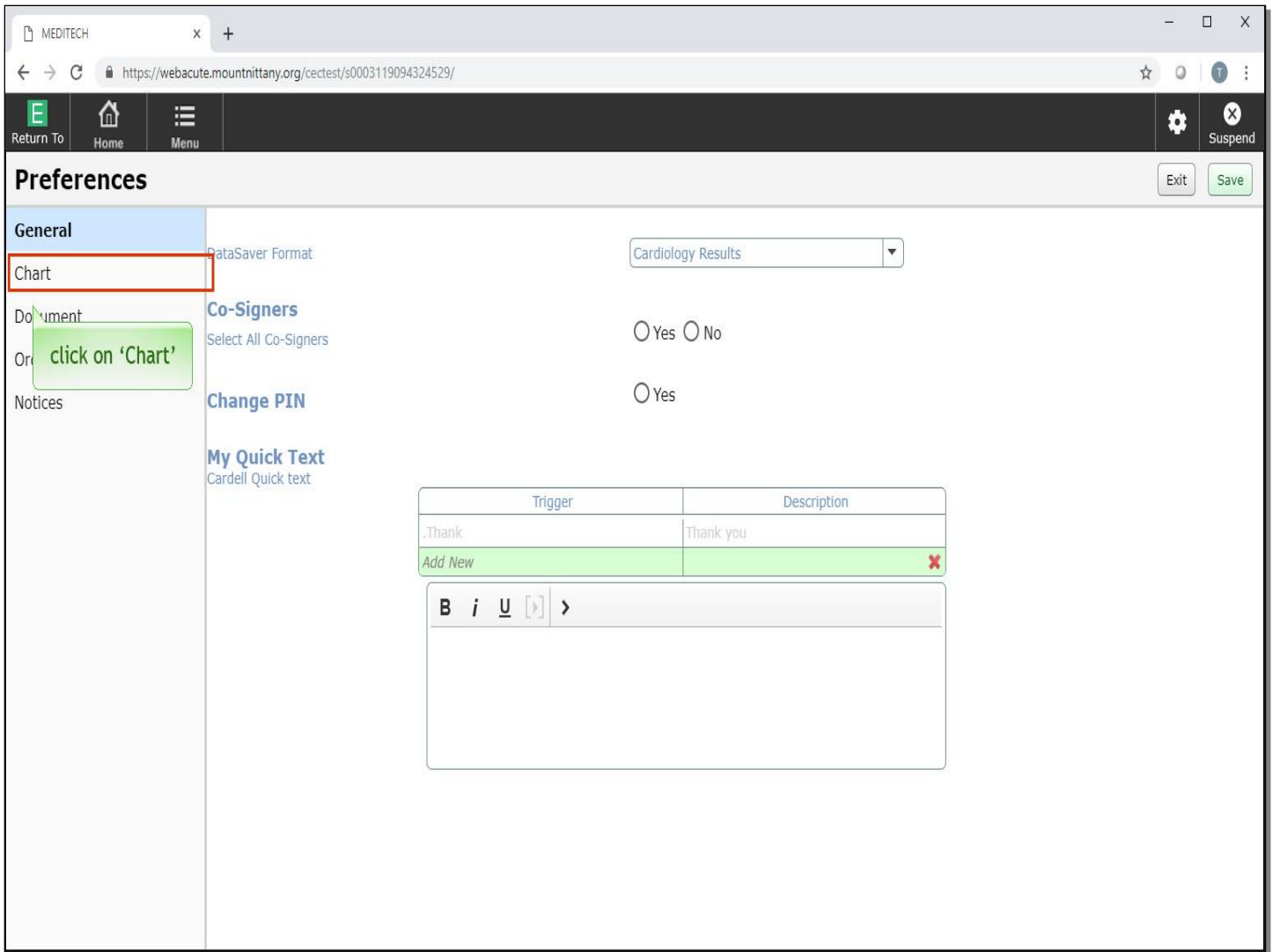
Click on 'Ambulatory Preferences'.



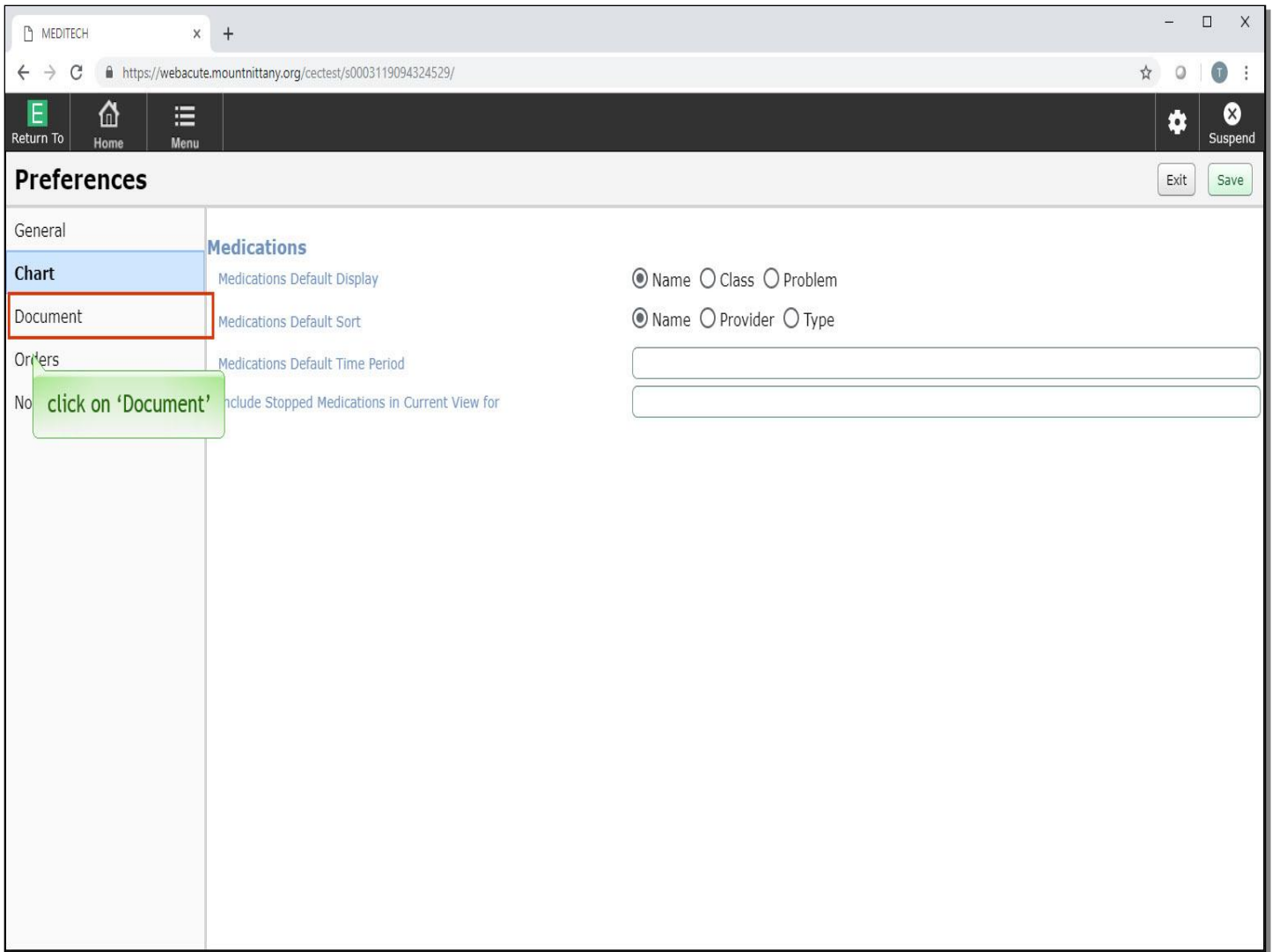
You are launched into the General Preferences. Most notable on this screen is the ability to change your PIN and edit or add new Quick Text. Quick Text is known as 'dot phrases' and 'short phrases' that can be used to insert a large amount of text into a document.

The screenshot shows the 'Preferences' page in the MEDITECH system. The left sidebar contains navigation options: Return To, Home, Menu, Chart, Document, Orders, and Notices. The main content area is titled 'Preferences' and includes sections for 'DataSaver Format' (set to 'Cardiology Results'), 'Co-Signers' (with 'Yes' and 'No' radio buttons), 'Change PIN' (with a 'Yes' radio button), and 'My Quick Text' (Cardell Quick text). A table with columns 'Trigger' and 'Description' is displayed. The first row has 'Thank' in the Trigger column and 'Thank you' in the Description column. The second row has 'Add New' in the Trigger column. A red box highlights the 'Add New' text. A green callout box with a pointer to the 'Add New' text contains the text 'click on "Add New"'. Below the table is a text input field containing the text 'icipate in the care of your patient.'.

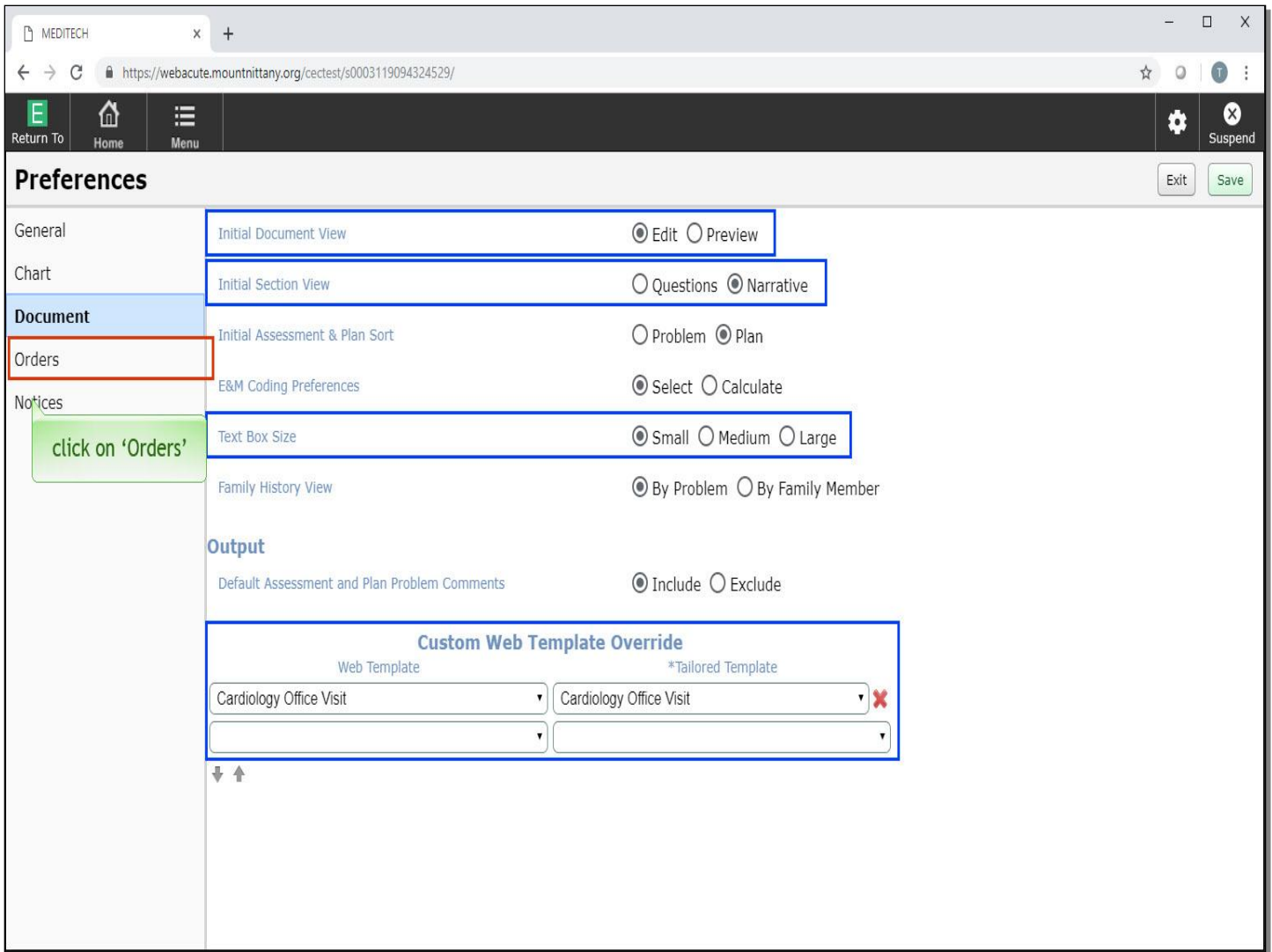
If you were also a provider in ALLSCRIPTS your text macros will be converted into Quick Text for you. If you wish to make any changes to those Quick Text, you can do so by highlighting the Quick Text name you wish to edit, and edit the content in the text box below. To add new Quick Text, click on the words 'Add New' under the trigger column.



This allows you to add your Trigger, Description, and Quick Text content. Clicking the Save button at the top after you've made all your changes will ensure they take effect. Additionally, you will have the ability to change or edit Quick Text within a document; this will be reviewed in another module. To continue reviewing the Ambulatory Preferences, click on 'Chart' on the left side of the screen.



This shows different default displays for medication. You can choose whether to display them by Name, Class, or Problem, as well as how you'd like to sort medications. Right now you can see they both default to by 'Name'. Next, click on 'Document'.



Important Preferences from this screen include the ability to choose to initially view your document in edit mode or preview mode, choose if questions are defined in each section (clickables), or the narrative (text), and choose the size of your text boxes within your document. The Custom Web Template Overrides and Tailored Templates will be set for you. You will not need to make any changes to this section. Click on 'Orders'.



MEDITECH x +  
https://webacute.mountrnity.org/cectest/s0003119094324529/

Return To Home Menu Suspend

### Preferences

Exit Save

- General
- Chart
- Document
- Orders**
- Notices

#### General

New Orders By Display  Favorite Orders  Set

Order Locations

Location	Default
Cardiology MC	<input type="radio"/> X
Cardio Phillip	<input type="radio"/>
Cardiology PV	<input type="radio"/>
Cardiology SC	<input checked="" type="radio"/>
Cardio Tyrone	<input type="radio"/>
	<input type="radio"/>

#### Favorite Orders

Favorite Medication Sort  Name  Dictionary

Favorite Non-Med Sort  Name  Dictionary

Favorite Medication Display  Name  Routed Drug

#### Accordion Defaults

Prescriptions  Collapsed  Expanded

Referrals  Collapsed  Expanded

Diagnostic Imaging  Collapsed  Expanded

Labs  Collapsed  Expanded

#### Order Sets

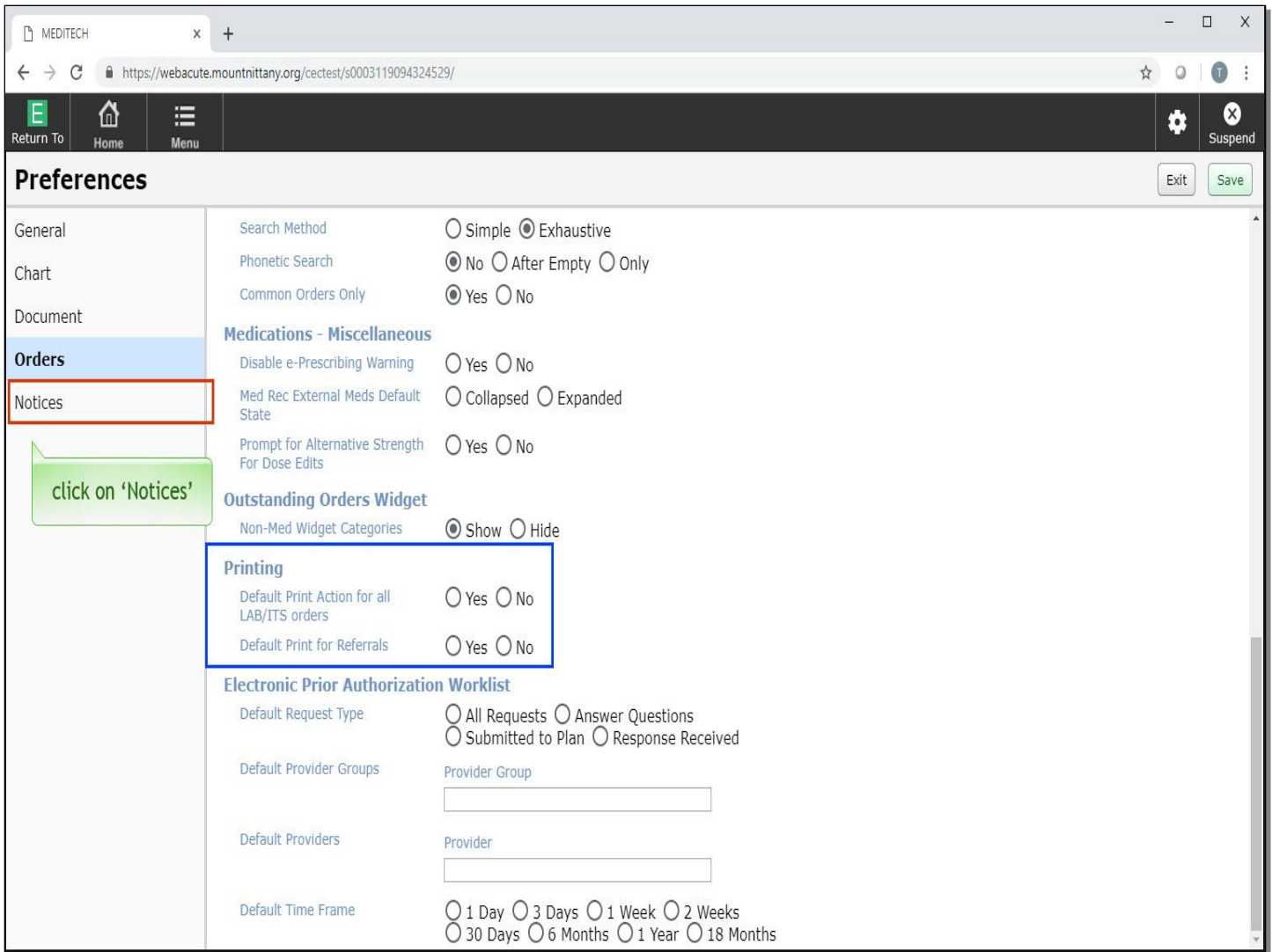
Medication Set Sort  Name  Dictionary

Favorite Set Sort  Set Name  Dictionary

[Medical Necessity / Imaging Appropriateness](#)

we will scroll down

We will scroll down to the 'Printing' section.



Standard Preferences for Orders will be set; however, you can see from this screen that you will have the ability to further customize how your Orders appear within Ambulatory. One area worth mentioning is the Printing section, which contains the two items at the bottom of this screen. For any default printing, order locations will default based on where the patient is checked in.

Click on 'Notices'.

The screenshot shows a web browser window with the URL <https://webacute.mountrnity.org/cectest/s0003119094324529/>. The page title is "Preferences". In the top right corner, there are "Exit" and "Save" buttons. The "Exit" button is highlighted with a red box. A green callout bubble points to the "Exit" button with the text "click the 'Exit' button".

The main content area is divided into two sections:

- Facility**: A list of facilities with "MNH Medical Center Clinics" selected. Other items include "Mount Nittany Medical Center", "MNPG Practices", and "Physician Group Billing".
- Immunizations**: A table with columns "Patient Type" and "Receive Notice". The "Patient Type" column has a dropdown menu with "Enter type...". The "Receive Notice" column has radio buttons for "Yes" and "No".

At the bottom of the Immunizations section, there is a "Receive Consults" label followed by radio buttons for "Yes" and "No".

These settings will be set for you; you will not need to alter these.  
To exit this screen, click the 'Exit' button.

Clinical Home Screen - MEDITEC x +

https://webacute.mountnittany.org/cectest/s0003119094324529/

Return To Home Workload Sign Compose More Suspend

Anthony F. Cardell, MD Find Patient

Schedule Thu March 7, 2019 9:44a

Mar 2019 Sun Mon Tue Wed Thu Fri Sat

3 4 5 6 7 8 9 Today More

Anthony Cardell, M.D. Patient Name

Time	Appointment	DOB	Status
10:30	T-TEST, GODZILLA Cyst of skin	01/01/1946 73 F Shapich, T. PA-C	Booked
10:00	T-TEST, MAGNOLIA 2 MONTH FU	05/04/1952 66 F Shapich, T. PA-C	Arrived

Recently Accessed

Name	Visit Date	Close Chart
Test, CardioAC2		
test, CardioAC4	02/27/19	
Test, CardioAC5		
TEST, CARDIOAC8		
TEST, CARDIOAC7		

Quick Links

- PDMP
- Meditech
- Mount Nittany Email

click on the 'More' icon

Next, you'll take a look at Workload Preferences. Click on the 'More' icon.

Clinical Home Screen - MEDITEC x +

https://webacute.mountrittany.org/cectest/s0003119094324529/

Return To Home Workload Sign Compose More Suspend

Anthony F. Cardell, MD Find Patient

Schedule Thu March 7, 2019 9:44a

Mar 2019	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	3	4	5	6	7	8	9

Anthony Cardell, M.D. Patient Name

Time	Appointment	Date	Status
10:30	T-TEST, GODZILLA Cyst of skin	01/01/1946 73 F Shapich, T. PA-C	Booked
10:00	T-TEST, MAGNOLIA 2 MONTH FU	05/04/1952 66 F Shapich, T. PA-C	Arrived

Workload

Recently Accessed

Name
Test, CardioAC2
test, CardioAC4
Test, CardioAC5
TEST, CARDIOAC9

Result Entry

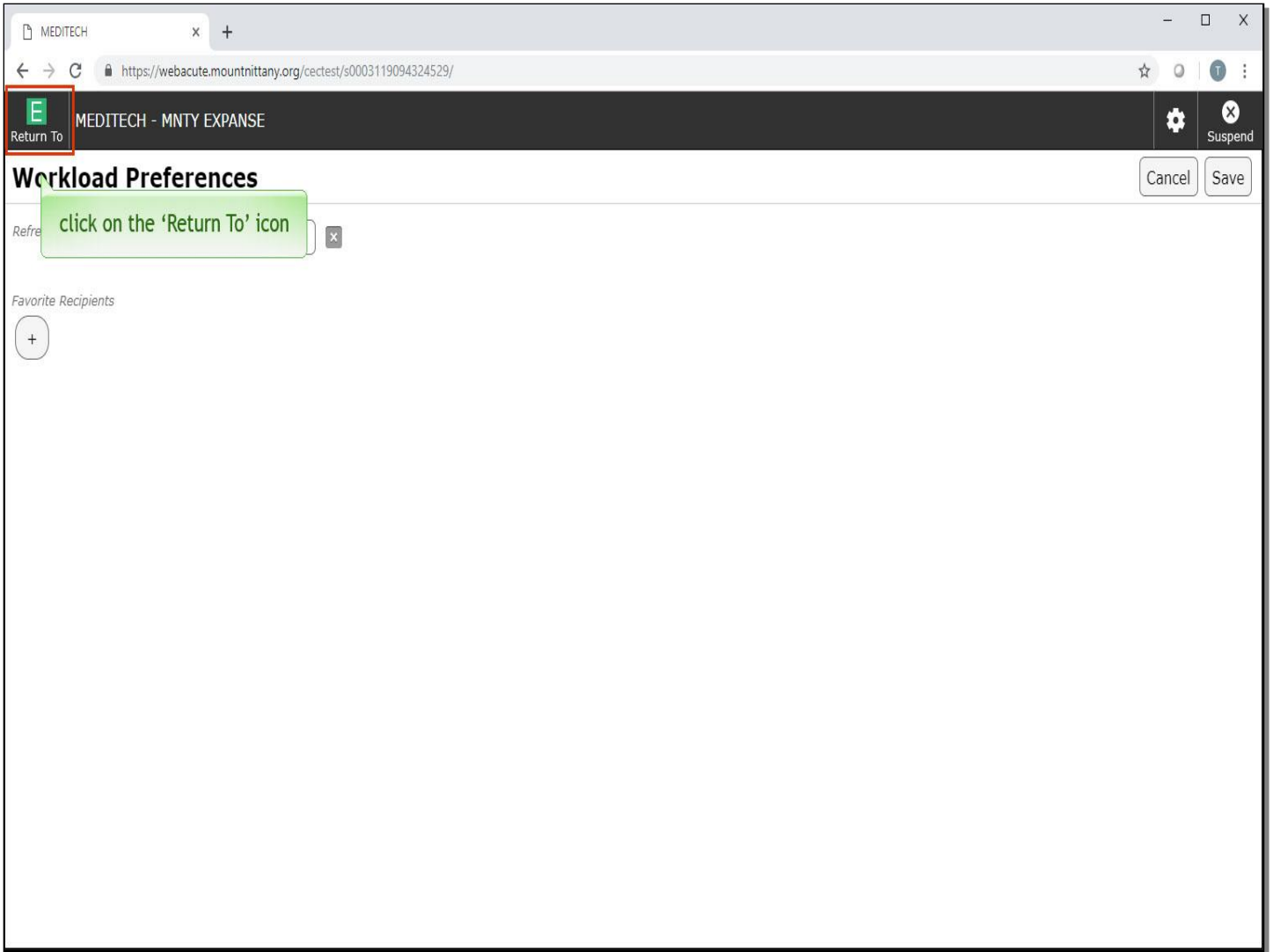
- Letters
- My Prescriber Rx Report
- Patient Registries
- Phone Book
- Manage Typicals
- Amb Preferences
- EMR Preferences
- Workload Preferences**
- Set Print Preferences
- Website

click on 'Workload Preferences'

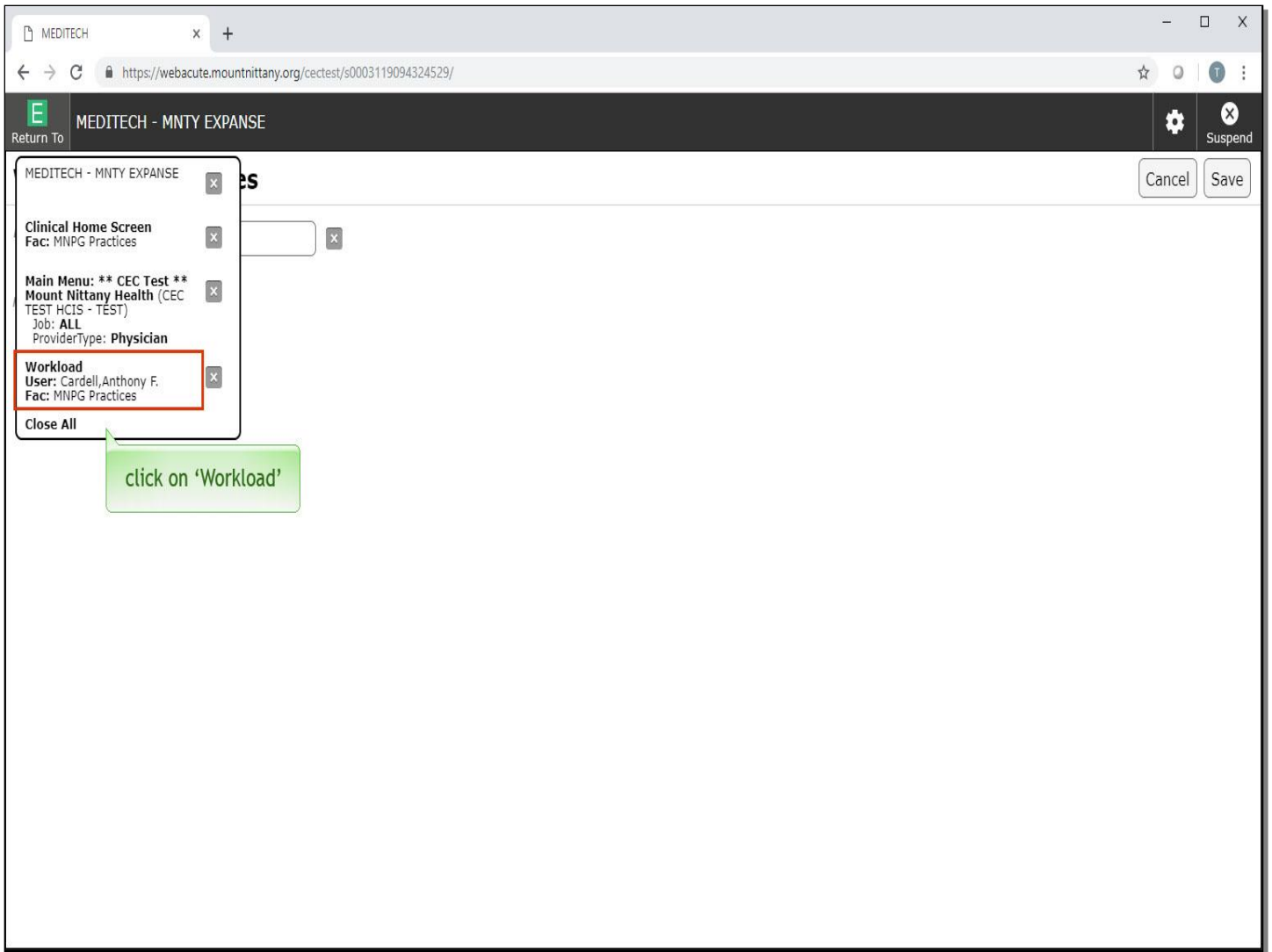
Quick Links

- PDMP
- Meditech
- Mount Nittany Email

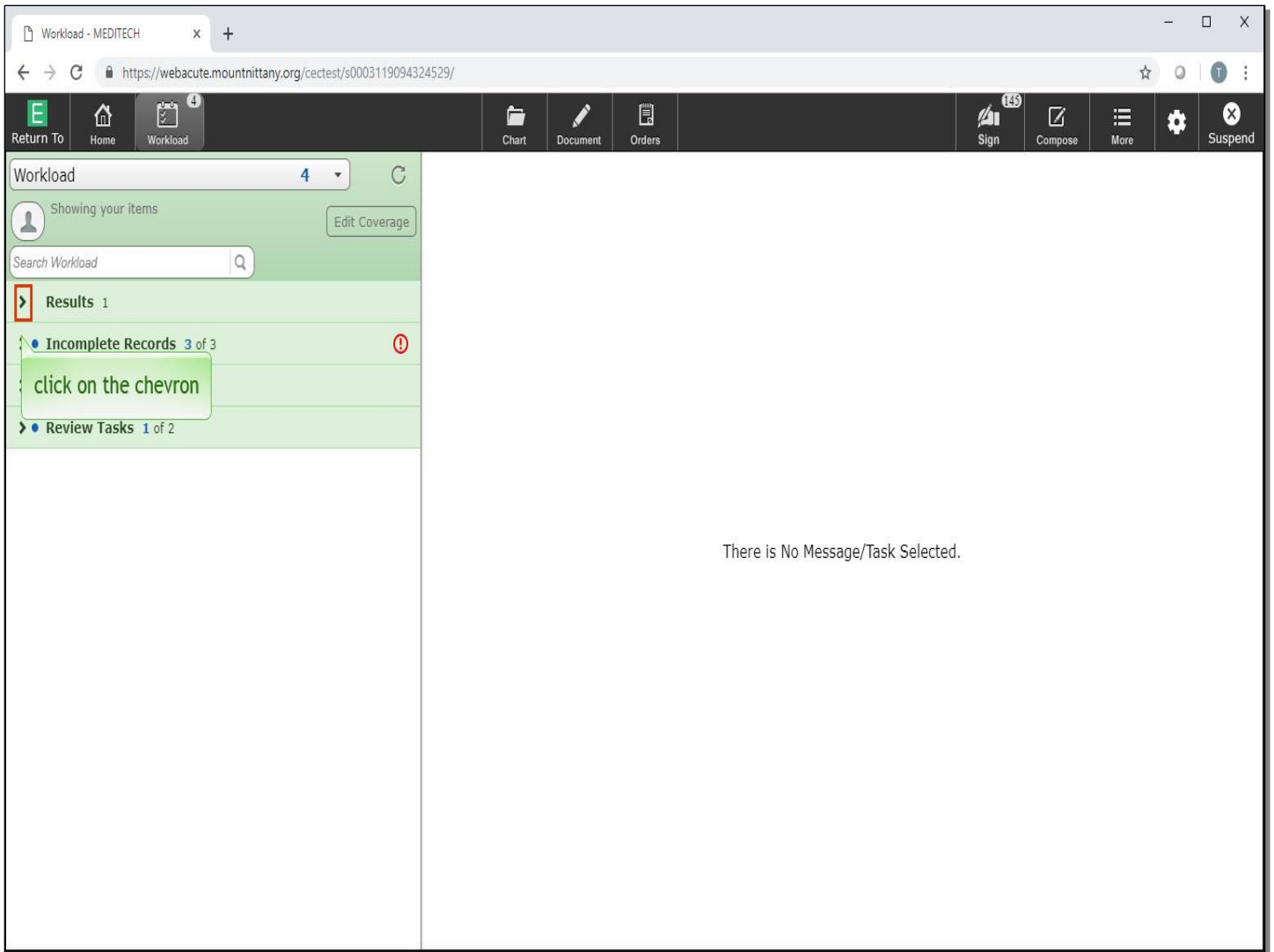
Click on 'Workload Preferences'.



This screen will allow you to customize the recipients who will show up without searching for them when sending a message or task via the Workload Compose button. Click on the 'Return To' icon.

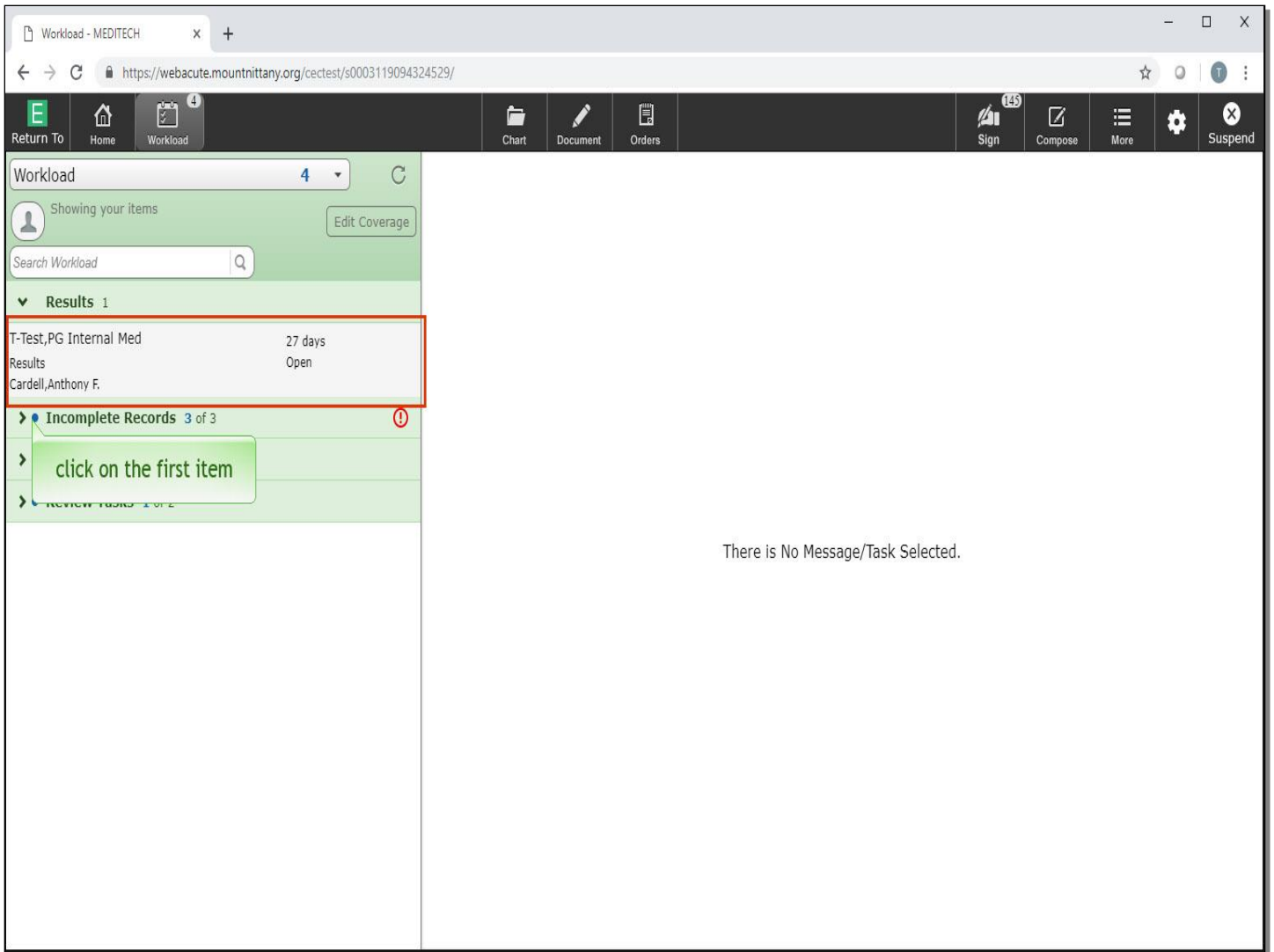


Next, click on 'Clinical Home Screen'.



To expand, click on the chevron to the left of 'Results'.





Click on the first item in 'Workload'.

Workload - MEDITECH

https://webacute.mountrnitty.org/cectest/s0003119094324529/

Return To Home Workload 4

Chart Document Orders Sign Compose More Suspend

Workload 4

Showing your items Edit Coverage

Search Workload

**T-Test, PG Internal Med**  
41 M 04/09/1977

Results Open 27 days

Subject Results From Cardell, Anthony F.  
Provider Shapich, Tara J. To Cardell, Anthony F.

**Laboratory**

Hematology Collected

White Blood Count	5.00	K/uL (4.8-10.8)	Jan 7
Red Blood Count	5.00	M/uL (4.7-6.1)	Jan 7
Hemoglobin	15.0	g/dL (14.0-18.0)	Jan 7
Hematocrit	45.0	% (42-52)	Jan 7
Mean Corpuscular Volume	90.0	fL (80-100)	Jan 7
Mean Corpuscular Hemoglobin	33.0	pg (25-34)	Jan 7
Mean Corpuscular Hemoglobin Concent	34.0	g/dL (32-36)	Jan 7
RDW Standard Deviation	37.0	fL (36.4-46.3)	Jan 7
RDW Coefficient of Variation	12.0	% (11.5-14.5)	Jan 7
Platelet Count	198	K/uL (130-400)	Jan 7
Mean Platelet Volume	8.4	fL (7.4-10.4)	Jan 7

we will scroll down

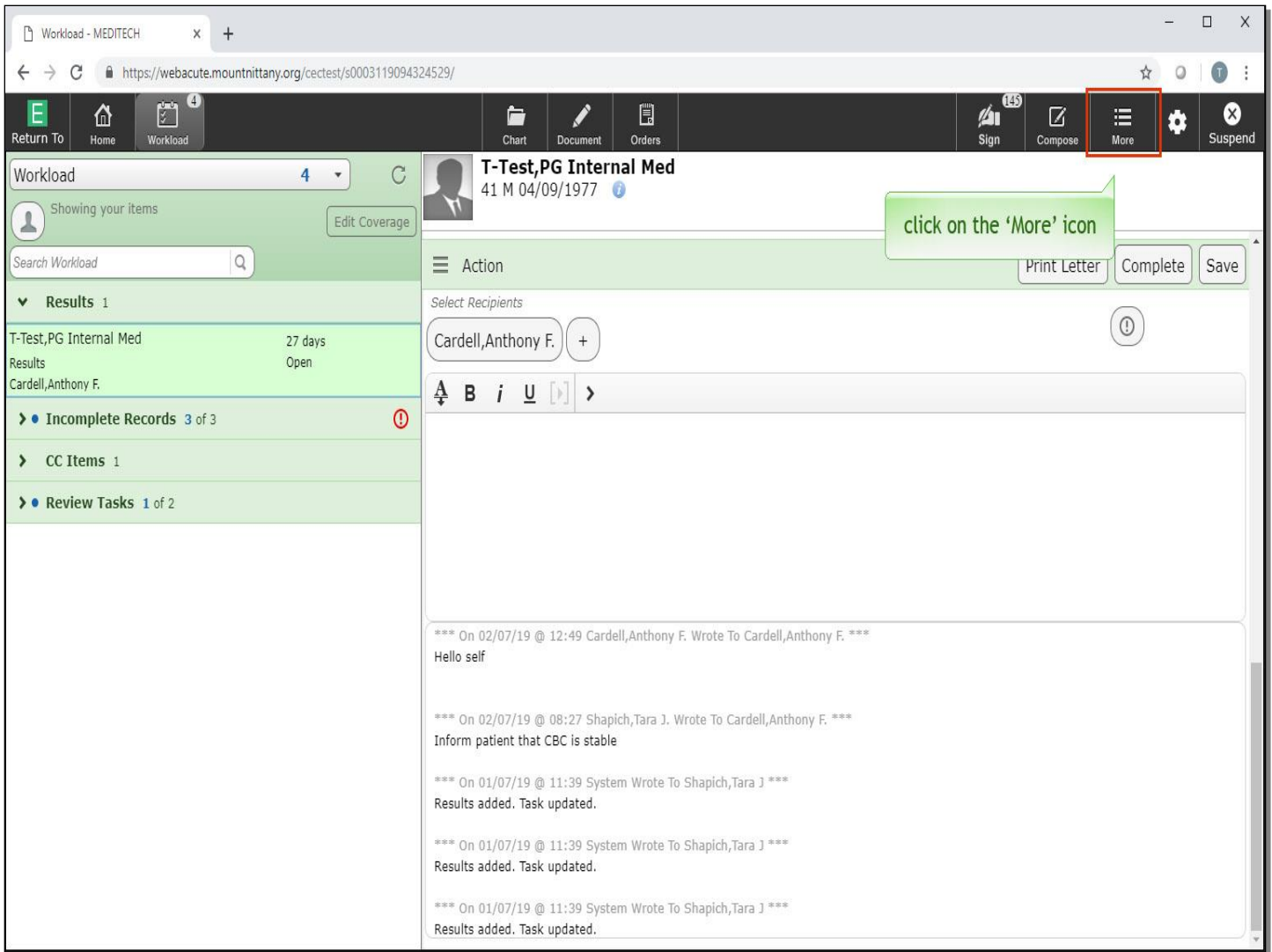
T-Test, PG Internal Med 27 days  
Results Open  
Cardell, Anthony F.

Incomplete Records 3 of 3

CC Items 1

Review Tasks 1 of 2

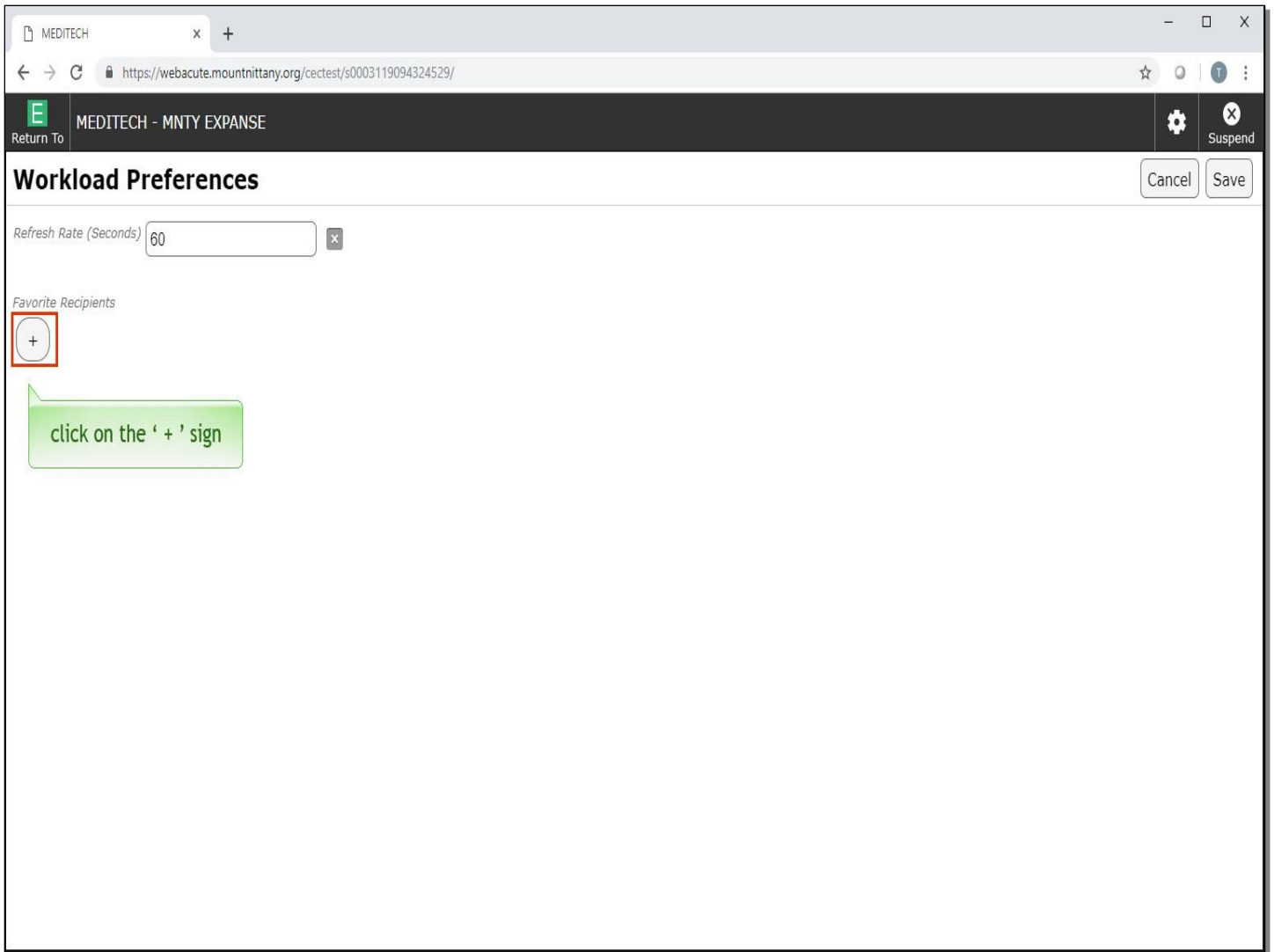
We will scroll down to the bottom.



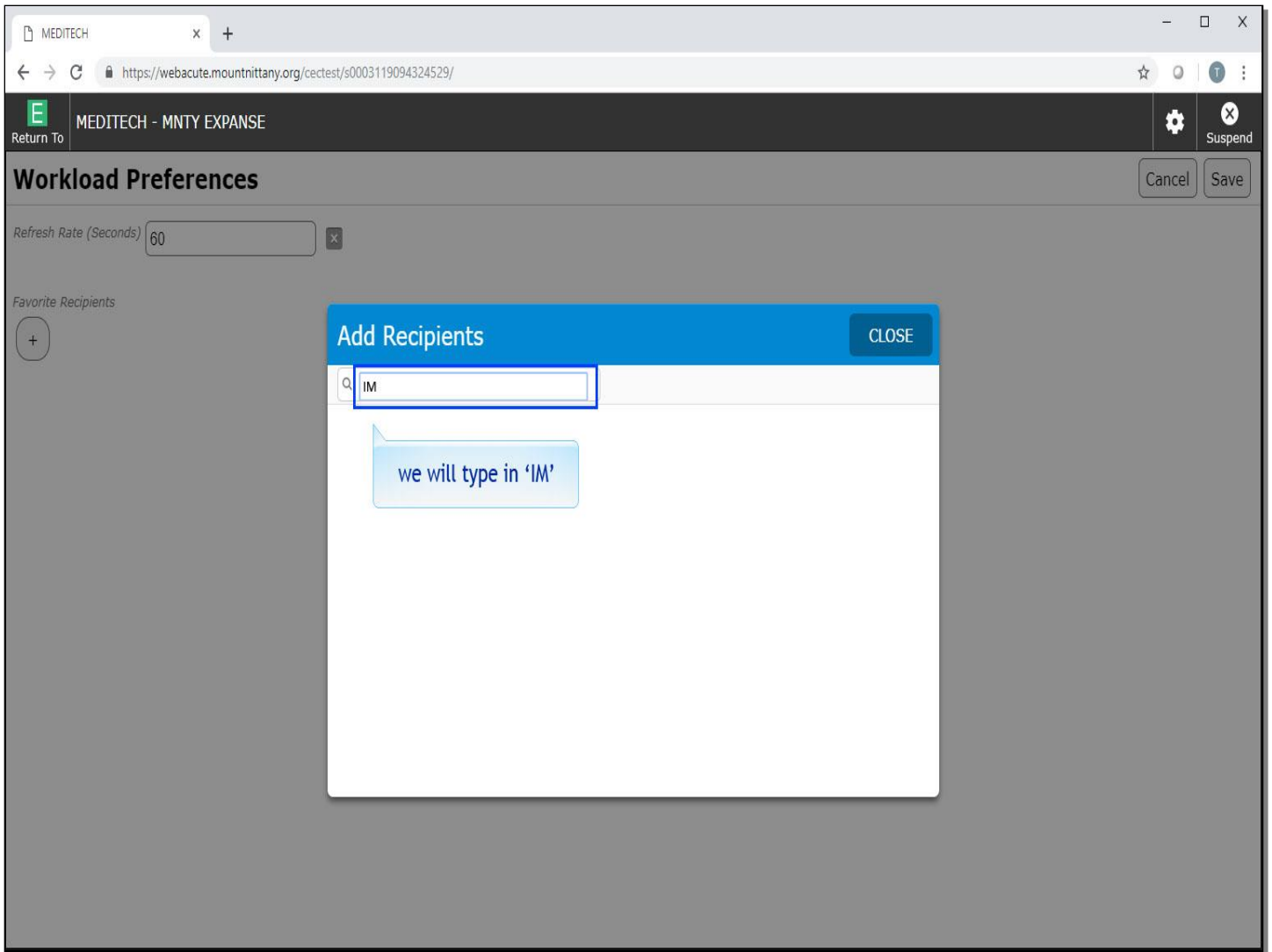
Notice that Dr. Cardell is under select recipients as a button, in addition to the individual who sent the item. Setting up Workload Preferences will allow you to select those providers or groups to whom you most often send things to, so you do not need to search for them when sending a message. Let's go back into Workload Preferences to review the setup. Click on the 'More' icon.

The screenshot shows a web browser window with the URL <https://webacute.mountrnity.org/cectest/s0003119094324529/>. The interface is for a 'Workload' page. At the top, there is a navigation bar with icons for 'Return To', 'Home', 'Workload', 'Chart', 'Document', 'Orders', 'Sign', 'Compose', 'More', and 'Suspend'. Below this, the main header displays 'Workload' with a count of 4 and a refresh icon. The patient information section shows 'T-Test, PG Internal Med' with a birth date of '41 M 04/09/1977'. A dropdown menu is open on the right side, listing various options: 'Result Entry', 'Letters', 'My Prescriber Rx Report', 'Patient Registries', 'Phone Book', 'Manage Typicals', 'Amb Preferences', 'EMR Preferences', 'Workload Preferences' (highlighted with a red box), 'Set Print Preferences', and 'Website'. A green callout box with the text 'click on 'Workload Preferences'' points to the highlighted option. The main content area shows a list of results for 'T-Test, PG Internal Med' and 'Cardell, Anthony F.', including a section for 'Incomplete Records 3 of 3'. Below the results is a rich text editor with a toolbar and a message history section containing several system-generated messages.

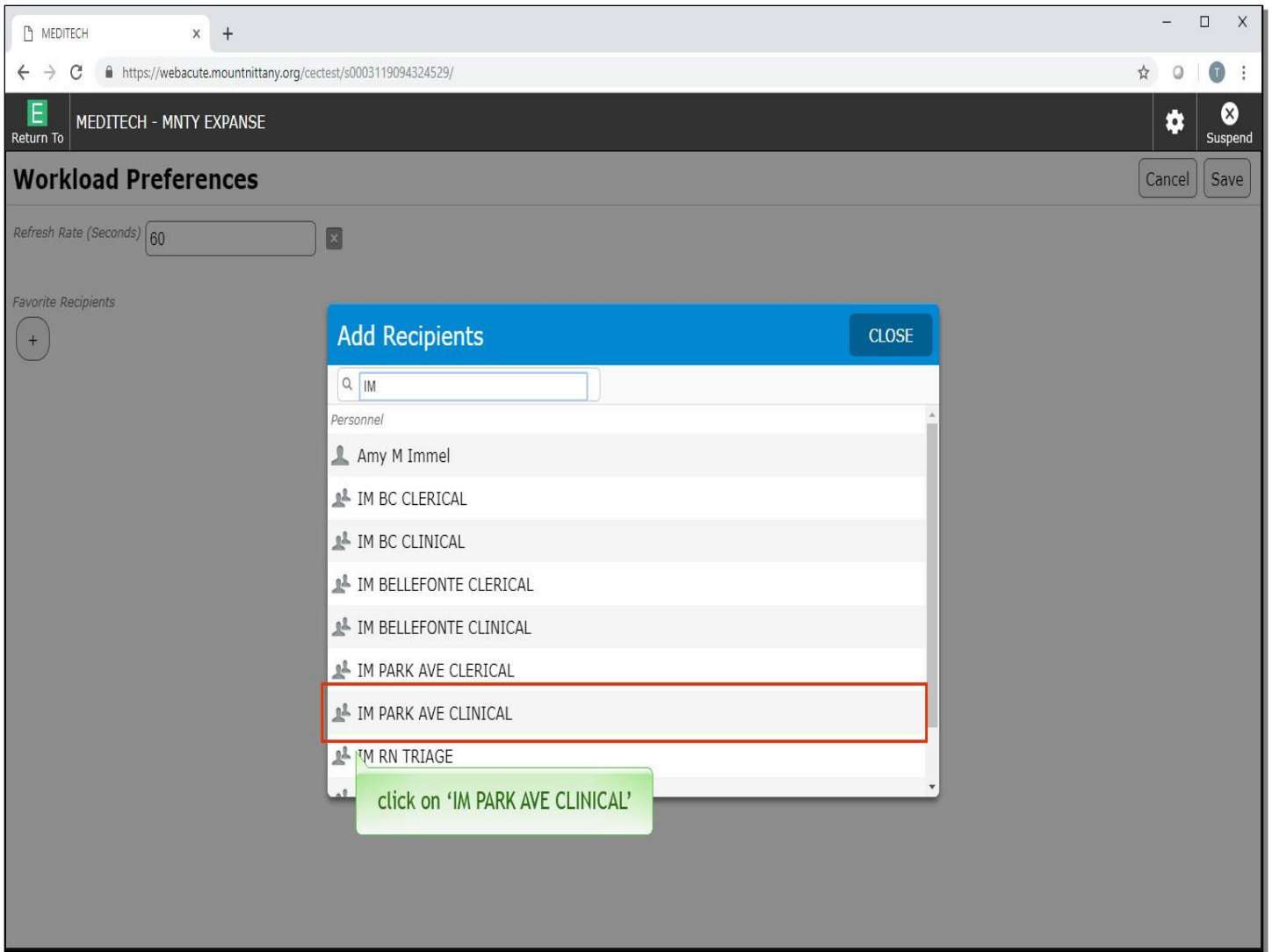
Click on 'Workload Preferences'.



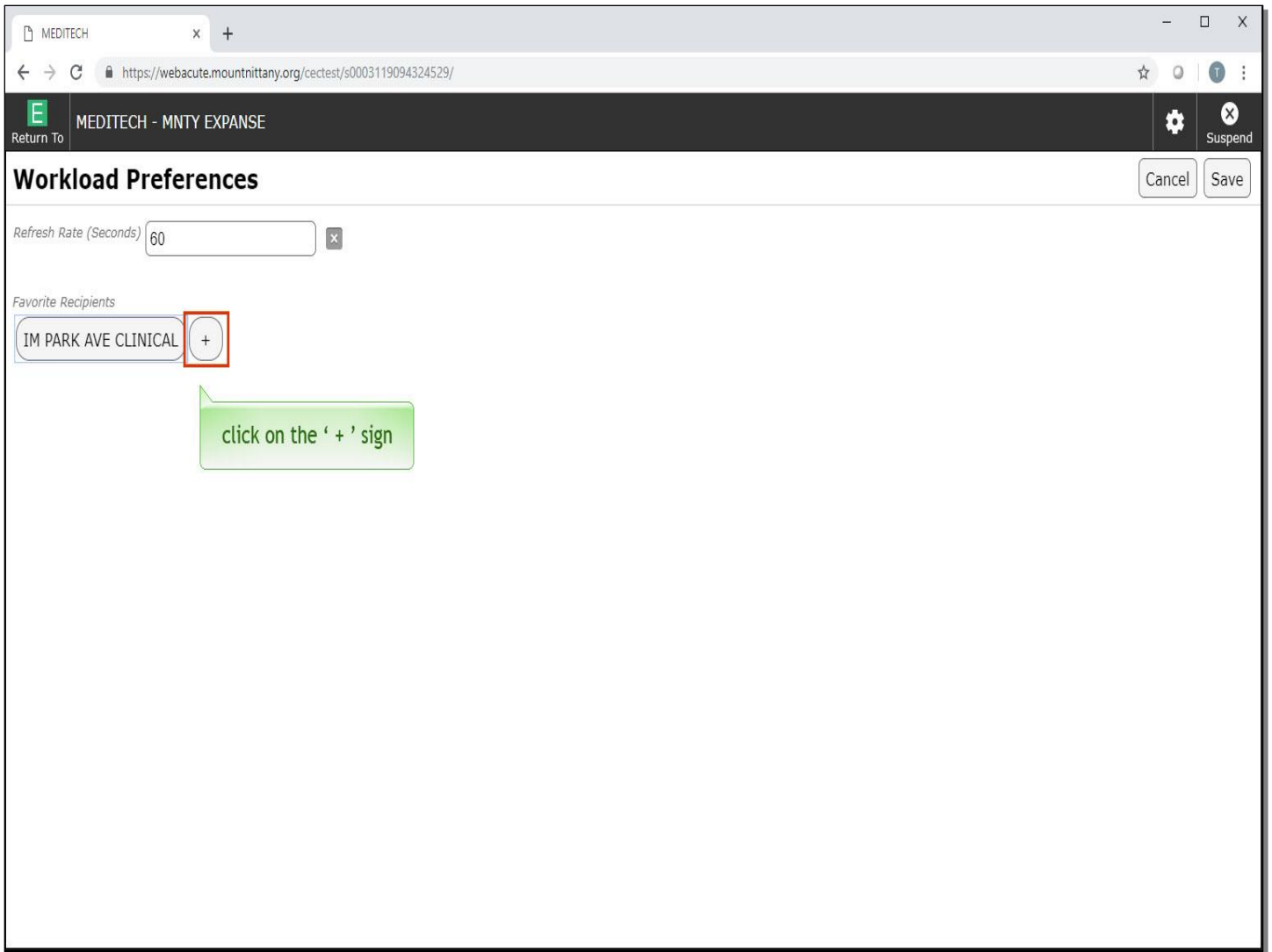
Clicking on the ' + ' sign will allow you to add a new recipient. Click on the ' + ' sign.



You are presented with an overlay where you can search for a provider or group. As the cursor is already in the 'Search Workload' field, we will type in 'IM' for you.

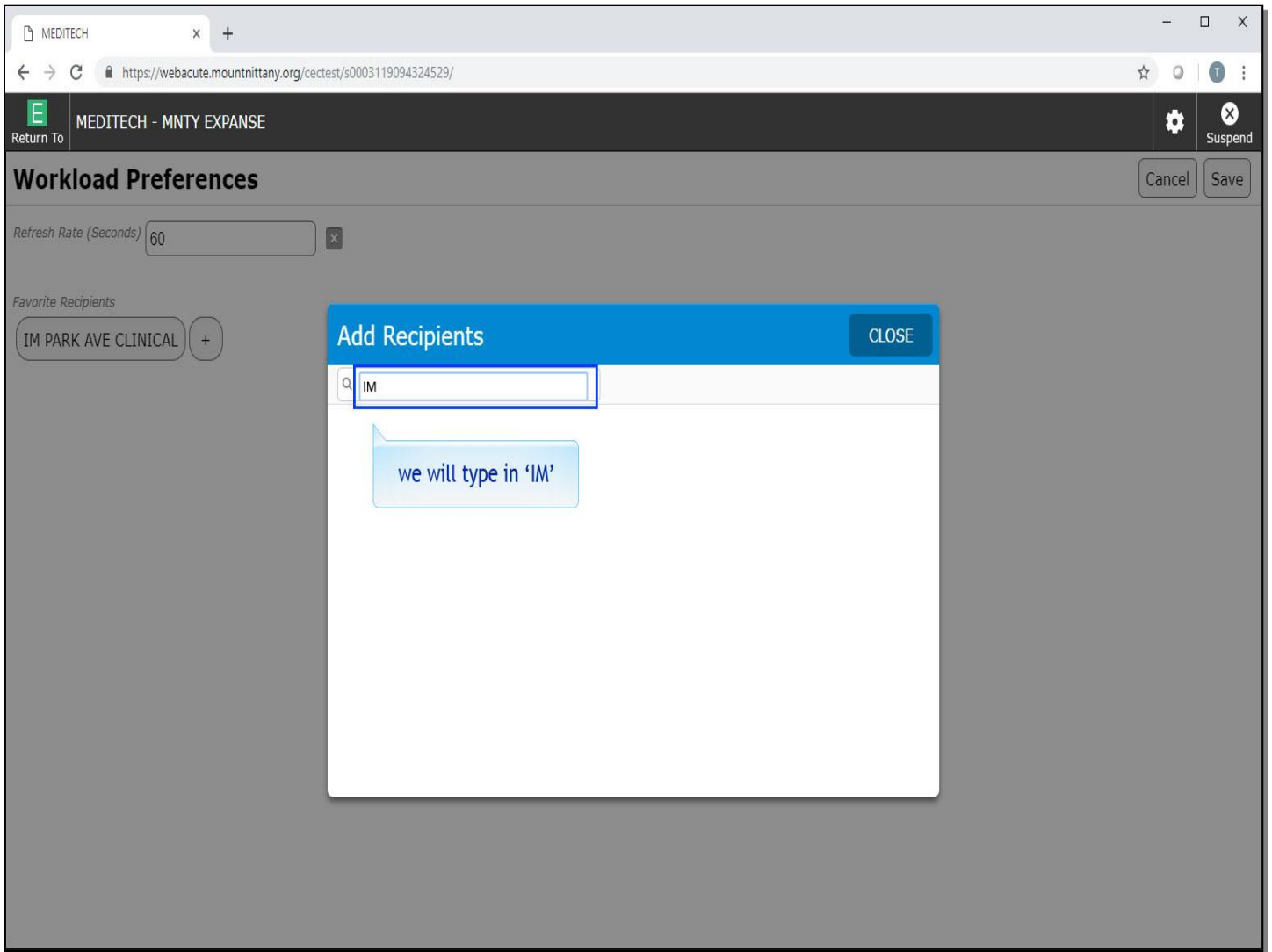


Notice that all the Internal Medicine groups appear. Click on 'IM PARK AVE CLINICAL'.

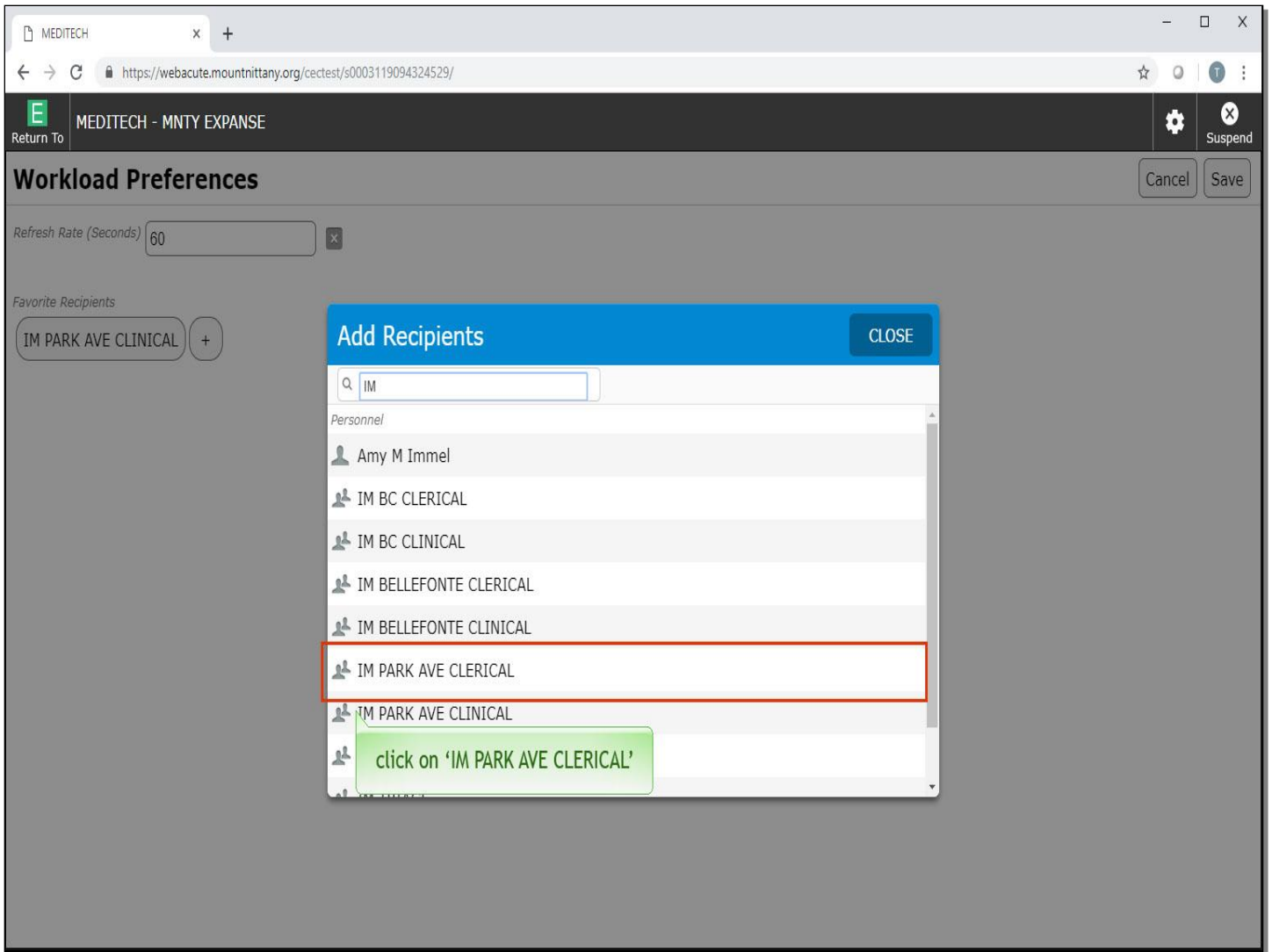


Click on the ' + ' sign again to add another recipient.



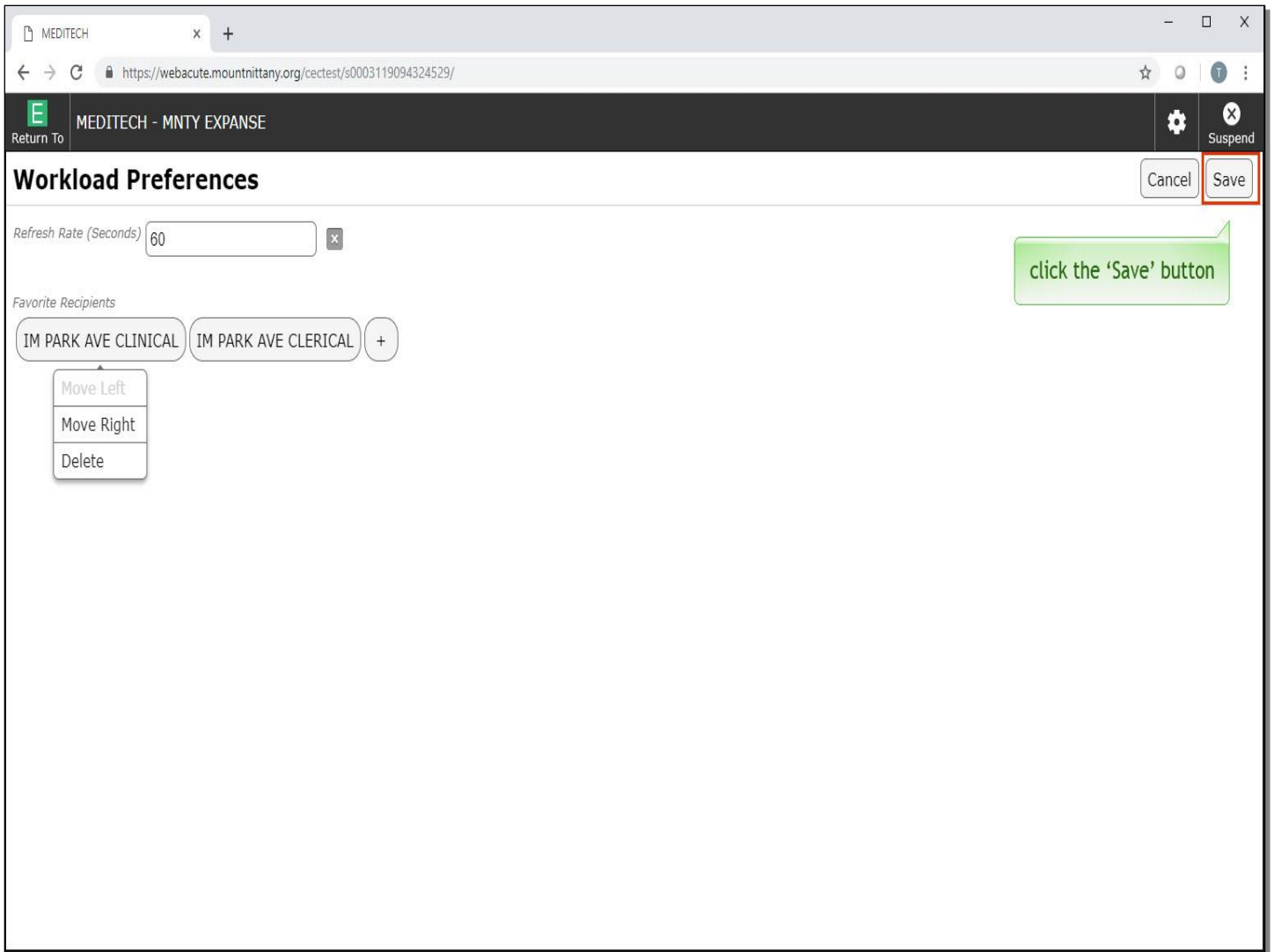


We will type in 'IM' again for you.

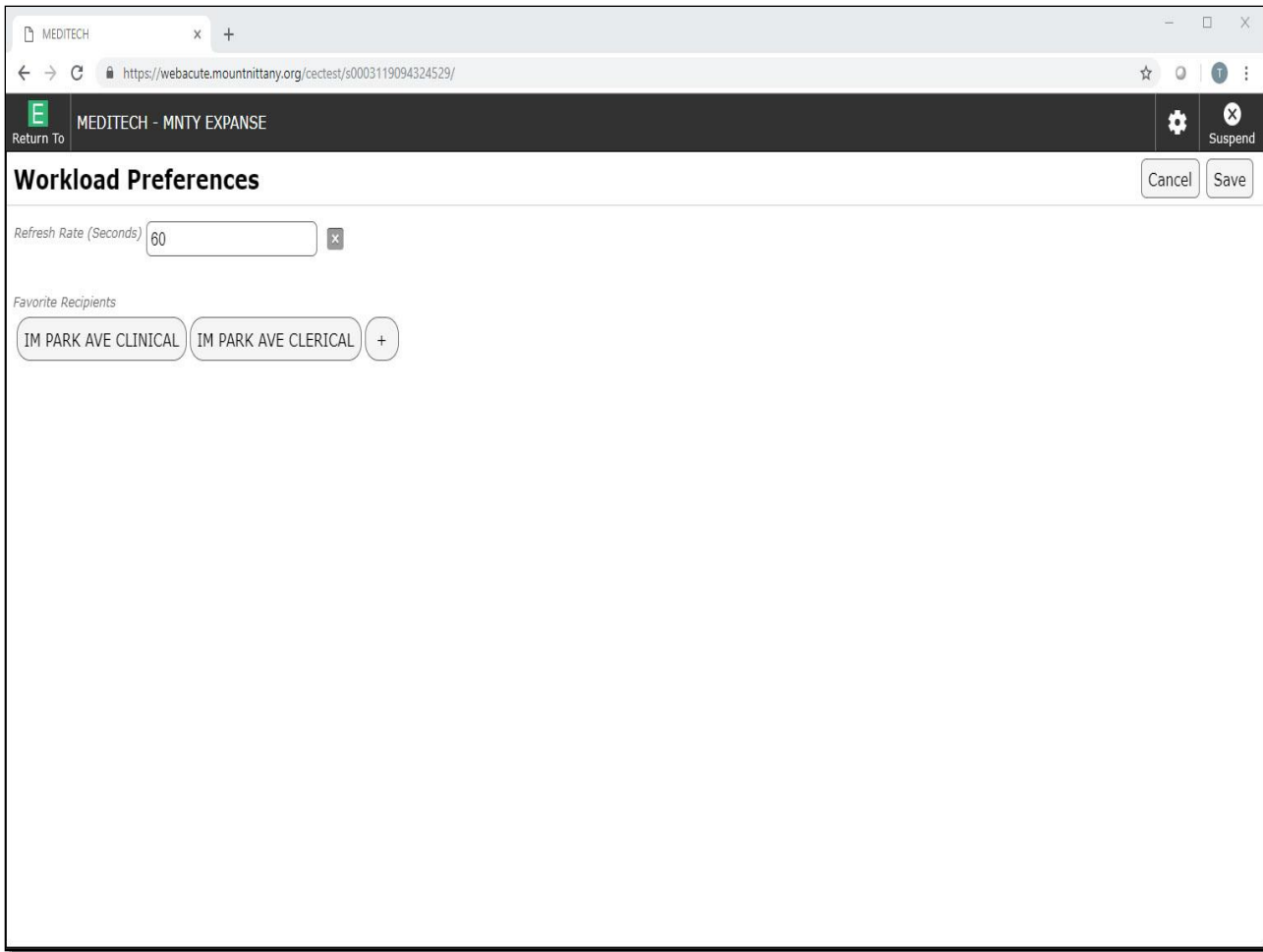


Click on 'IM PARK AVE CLERICAL'.

Click the 'IM PARK AVE CLINICAL' button.



You'll notice you are presented with a menu to move the button to the right or delete. You can do this with any of the buttons so you can prioritize your most used recipients. When you are finished editing your Favorite Recipients, click the 'Save' button.



This concludes the lesson on Ambulatory Preferences.

In this course we learned:

- Where the settings are located to customize the views within Ambulatory
- How to make Quick Text
- How to set Favorite recipients for the Workload.

MEDITECH best practice guidelines have been integrated into this lesson.

Please refer to your facility-specific workflows for process questions not covered in this course