



Ambulatory MA/Tech, Ambulatory Nurse, Allied Health, Scheduler/Ward Clerk

Future State: Ambulatory - Clerical/Administrative Communications/Messages/Phone Calls

Cerner Workflow ID: 246 (v. 21.0) Client Workflow ID: 219

Last updated by Lezlie Leduc, Feb 23, 2024 1:44pm (UTC -5 hours)

Workflow Details:

Workflow Name: Ambulatory - Clerical/Administrative Communications/Messages/Phone Calls

Workflow State: Future State

Workstream: Ongoing Assessment and Treatment

Venue: Ambulatory

Client Owner:

Cerner Owner:

Standard: Yes

Related Workflow(s):

Tags:

Workflow Summary:

Service Line:

Related Solution(s): Cerner Millennium EMR - Ambulatory
Cerner Oncology

Project Name: Niagara Health System:OPT-0297674:NIAG_CD Niagara HIS RFP

TestBuilder Script(s):

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Workflow Notes: Messaging Protocols: Messages that are managed by department/
organization protocol should be documented in template and saved to
the chart.

Standard Build

-Message Center

(Model Experience>Model Experience Foundation>

Physician> Foundation>Organizer Level Items>Message Center)

-HealthLife Portal

(Model Experience>Model Experience Foundation>Depts &
Capabilities>HealthLife Portal)

Local Build

-Pools

Introduced By: WS 4

Validated By: WS 5

Swim Lane:

Role(s): Ambulatory MA/Tech

Ambulatory Nurse

Allied Health [Custom]

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Scheduler/Ward Clerk [Custom]

Department(s):
Security Position(s):**Start/Stop** [7859]

Description: Patient phone call needs to be documented.

Comments: Communication can be received at the clinic in various manners including phone calls and a message from the patient or an community provider via portal or secure messaging.

Communication can be related,
but not limited, to requests for appointments, medications, medical advice, intervention requests.

Portal messages route to a pool for management.

CPC+ Considerations:

Access and Continuity: Non-visit-based care activities

ACO Consideration:

ACO #2 How Well Your Doctors Communicate

Decision [17502]

Description: Is phone call greater than 5min or requires a powerform to be documented?

Off Page Reference [17505]

Workflow Link: Ambulatory - Clinical Phone Calls and Messaging (>5min PM Conversation Patient Care)

Work Step [17380]

Description: Within Message Centre, select Message Journal and search for and select patient and review messages

Comments: Depending on timeframe, applicable messages will show

Work Step [17478]

Description: Navigate to the message and take appropriate action

Comments: From within the message you can either Reply, Reply All, Forward or Add Addendum within message.

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Decision [17472]

Description: Is this message or phone call regarding a previous request or communication?

Work Step [17487]

Description: Close message journal

Work Step [17492]

Description: Create new message, fill out Patient and To fields in message window as necessary

Decision [17381]

Description: Is the message regarding a Medication Refill?

Work Step [17398]

Description: Select Launch Orders within Message Window and locate medication(s) to be refilled

Comments: Since this is not regarding a previous message, you will need to select location to create the new between visit encounter

Work Step [17386]

Description: Select appropriate Message Center Subject and Template, if applicable

Decision [17400]

Description: Is there a protocol in the office to refill this medication?

Value Impact: Patient Safety

Comments: Follow organization Policy and Protocol for chart researching prior to renewing medication.

Work Step [17401]

Description: Select Proposal, Provider, and appropriate Communication Type then complete refill details, if user has security

Comments: If the staff who is fielding the initial communication does not have the security to propose orders use the renewal messaging template to send request to appropriate clinical staff for review and order proposal.

Work Step [8112]

Description: Document details within Message

Comments: If this is an appointment request follow appropriate clinic

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protocols regarding scheduling of appointments.

If requesting for immunization
record execute Ambulatory - Immunization Record Release.

If requesting work or school release execute Ambulatory - Work/School
Release.

Work Step [17405]

Description: Select Order, Provider, appropriate Communication type then complete refill
details

Comments: Submit message to save to patient chart

Work Step [17389]

Description: Send to appropriate Provider, Clinical Staff, or Pool

Comments: Message will populate under Messages > Renewal Request folder.

Decision [17391]

Description: Is further intervention required (e.g. Provider or Clinical Staff to review or return
call)?

System [17406]

Description: Refill will be sent to Provider's inbox for cosignature

Comments: Cosignature will appear in Orders > Cosign Orders

Work Step [8113]

Description: Provider/Clinical Staff will respond and/or act on message and document in
message sent

Start/Stop [8222]

Description: Messaging completed, saved to chart

Comments: Messages can be auto saved (the recommendation is to save every
message to the chart by default) to chart or manually saved during
messaging process. If additional administrative requests are
received handle via clinic protocol (vaccine log requests, medical

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record requests, etc).

Once the communication has been saved and completed the end-user can delete the message to remove it from their inbox.

Upon sending a staff message and selecting a location a Between Visit Encounter is created.

Start/Stop [17409]

Description: Medication Refill completed (Prescription printed and faxed to pharmacy)

Comments: Once the communication has been saved and completed the end-user can delete the message to remove it from their inbox.

Decision [17439]

Description: Are Orders needed?

Work Step [17441]

Description: Select Launch Orders from within message, select order,