

Ambulatory Follow Up Board

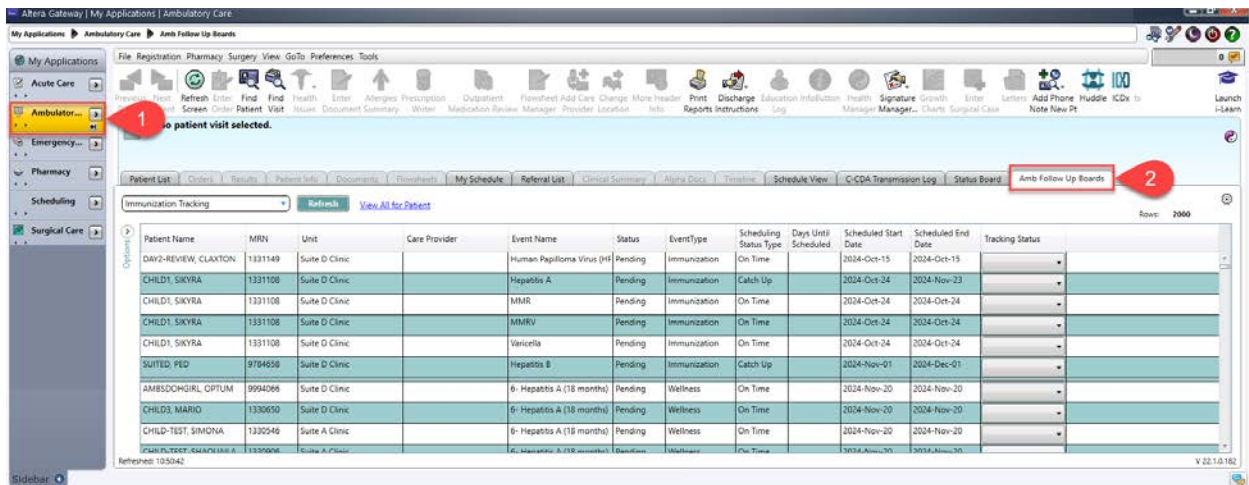
The Ambulatory Follow-up Board serves as tool to help Ambulatory Clinicians navigate their daily tasks. The board displays the following tasks while allowing the user to update the status of each as needed:

Ambulatory Board Follow-up Options:

- **Immunization Tracking:** Shows either all immunizations scheduled from 90 days ago to 45 days in the future
- **Immunization Tracking: Removed:** Displays immunizations removed from the Immunization Tracking board in the last 30 days and any Immunization that was removed Indefinitely
- **Incomplete Orders:** The board pulls all orders with an incomplete status on to the board where the visit was seen in the last 60 days.
- **Missing Encounter Form Orders:** Pulls a list of visits that are missing the location-specific encounter forms.
- **Missing Note:** Pulls a list of visits that are missing the clinics required documents.

Accessing the Ambulatory Follow Up Board

1. Open the **Ambulatory Care** application
2. Then click the **Amb Follow Up Boards** tab



The screenshot shows the 'Amb Follow Up Boards' interface. The table below represents the data displayed in the 'Immunization Tracking' section.

| Patient Name | MRN | Unit | Care Provider | Event Name | Status | Event Type | Scheduling Status Type | Days Until Scheduled | Scheduled Start Date | Scheduled End Date | Tracking Status |
|----------------------|----------|----------------|---------------|-----------------------------|---------|--------------|------------------------|----------------------|----------------------|--------------------|-----------------|
| DAV2-REVIEW, CLAXTON | 11331149 | Suite D Clinic | | Human Papilloma Virus (HPV) | Pending | Immunization | On Time | | 2024-Oct-15 | 2024-Oct-15 | |
| CHILD1, SIKYRA | 1331108 | Suite D Clinic | | Hepatitis A | Pending | Immunization | Catch Up | | 2024-Oct-24 | 2024-Nov-23 | |
| CHILD1, SIKYRA | 1331108 | Suite D Clinic | | MMR | Pending | Immunization | On Time | | 2024-Oct-24 | 2024-Oct-24 | |
| CHILD1, SIKYRA | 1331108 | Suite D Clinic | | MMRV | Pending | Immunization | On Time | | 2024-Oct-24 | 2024-Oct-24 | |
| CHILD1, SIKYRA | 1331108 | Suite D Clinic | | Varicella | Pending | Immunization | On Time | | 2024-Oct-24 | 2024-Oct-24 | |
| SUITED, PED | 9794658 | Suite D Clinic | | Hepatitis B | Pending | Immunization | Catch Up | | 2024-Nov-01 | 2024-Dec-01 | |
| AMBSDOHGIRL, OPTUM | 9994066 | Suite D Clinic | | 6- Hepatitis A (18 months) | Pending | Wellness | On Time | | 2024-Nov-20 | 2024-Nov-20 | |
| CHILD3, MARIO | 1330650 | Suite D Clinic | | 6- Hepatitis A (18 months) | Pending | Wellness | On Time | | 2024-Nov-20 | 2024-Nov-20 | |
| CHILD-TEST, SIMONA | 1330546 | Suite A Clinic | | 6- Hepatitis A (18 months) | Pending | Wellness | On Time | | 2024-Nov-20 | 2024-Nov-20 | |
| CHILD-TEST, SIMONA | 1330906 | Suite A Clinic | | 6- Hepatitis A (18 months) | Pending | Wellness | On Time | | 2024-Nov-20 | 2024-Nov-20 | |



Options Panel: Applying Filters

Applying and saving filters will allow the user to create their personal default view. The available filters are shown below

1. Click the **Options** button
2. Select the preferred parameters
3. Select “Set Current View as My Default View” once the preferred parameters are selected
Note: Grids are also available for selection
4. Then click **Apply**

The screenshot shows a software interface with a top navigation bar containing tabs for Patient List, Orders, Results, Patient Info, Documents, and Flow. Below this is a search bar with the text 'Missing Note' and a 'Refresh' button. A modal window titled 'My Default View' is open, containing several sections: 'User Grid Settings' with checkboxes for Retain User Filter, Retain User Sort, Retain User Column Order, and Retain User Column Widths; 'Suppress Columns' with a sub-section 'Open/Close' containing checkboxes for Care Level, Discharge Location, Patient Name, Remove, Visit Close Date, Visit Date, Visit ID, Visit Location, and Visit Type; and 'Filters' with a sub-section 'Patient Name' containing a list of patient names with checkboxes. At the bottom of the modal are 'Clear Filter' and 'Apply' buttons. Red callouts are placed over the interface: '1' points to the 'Options' button on the left; '2' points to the 'Patient Name' filter list; '3' points to the 'Set Current View as My Default View' checkbox; and '4' points to the 'Apply' button. The background table shows patient records with columns for Clinic and Outpatient status.



5. User Grid Settings- the following may also be applied to default the view to preferred columns and sequence(s)

Options

My Default View

Set Current View As My Default View

User Grid Settings

Retain User Filter

Retain User Sort

Retain User Column Order

Retain User Column Widths

Suppress Columns

Open/Close

Filters

Patient Name

Patient Name

AMBYBOARD, ONE

AMBYBOARD, TWO

AMBYBOARDFEMALE, ONE

AMBYBOARDMALE, ONE

AMBYBOARDPED, ONE

Visit ID

Visit ID

1113420

1113421

9142364

9142365

9142366

Visit Location

Clear Filter Apply

Refreshed: 11:00:46

6. Care provider filter can only be selected from the **Immunization Tracking, Immunization Tracking: Removed, and Missing Encounter Form Orders**

Patient List Orders Results Patient Info Documents Flowsheets

Immunization Tracking Refresh View All for Patient

Options

Unit

Unit

Empire Boulevard Clinic

Suite B Clinic

Suite D Clinic

Suite R Clinic

CareProvider

Care Provider

Kim, Howard E

Marra, Kimberly

Sabado, Mario

EventName

Event Name

6- DTaP (15mons - 4yrs)

6- DTaP (2months, 4months and 6 months)

6- Hep A - 1 at 1year

6- Hep A -2 at 18mos

6- Hepatitis A (12 months)

6- Hepatitis A (18 months)

6- Hepatitis B (0 at birth, 1month, 2 months and 6months)

6 Hepatitis B vaccine 1 series (check antibody f

6- Hib (15 months)

Clear Filter Apply



Ambulatory Tracking Board Views

1. Select from the dropdown on the left to toggle the available views.

No patient visit selected.

Patient List Orders Results Patient Info Documents Flowsheets My Schedule C-CDA Transmission Log Status Board Amb Follow Up Boards

Immunization Tracking Refresh View All for Patient Rows: 2000

| Unit | Care Provider | Scheduled Start Date | Scheduled End Date | Tracking Status |
|----------------|---------------|----------------------|--------------------|-----------------|
| Suite D Clinic | | 2024-Oct-15 | 2024-Oct-15 | |
| Suite D Clinic | | 2024-Oct-24 | 2024-Nov-23 | |
| Suite D Clinic | | 2024-Oct-24 | 2024-Oct-24 | |

Immunization Tracking

No patient visit selected.

Patient List Orders Results Patient Info Documents Flowsheets My Schedule Referral List Clinical Summary Alpha Docs Timeline Schedule View C-CDA Transmission Log Status Board Amb Follow Up Boards

Immunization Tracking Refresh View All for Patient Rows: 2000

| Patient Name | MRN | Unit | Care Provider | Event Name | Status | EventType | Scheduling Status type | Days Until Scheduled | Scheduled Start Date | Scheduled End Date | Tracking Status |
|----------------------|---------|----------------|---------------|-----------------------------|---------|--------------|------------------------|----------------------|----------------------|--------------------|-----------------|
| DAV2-REVIEW, CLAXTON | 1331149 | Suite D Clinic | | Human Papilloma Virus (HPV) | Pending | Immunization | On Time | | 2024-Oct-15 | 2024-Oct-15 | |
| CHILD1, SIKYRA | 1331108 | Suite D Clinic | | Hepatitis A | Pending | Immunization | Catch Up | | 2024-Oct-24 | 2024-Nov-23 | |
| CHILD1, SIKYRA | 1331108 | Suite D Clinic | | MMR | Pending | Immunization | On Time | | 2024-Oct-24 | 2024-Oct-24 | |

Available Actions:

- **Tracking Status** - The Tracking Status Column is a user selected value. The available values are *Blank, Remove, Contacted Patient, and Never Show Patient Again*.
 - **Remove** - Removes the patient from this board and then the patient will appear on the Immunization Tracking - Removed board.
 - **Contacted Patient**- patient was notified of their upcoming/overdue immunization(s)
 - **Never Show Patient Again**- Removes the patient from this board and then the patient will appear on the Immunization Tracking – Removed board. *This option removes all Immunization items for the Patient and never pull in any future Immunizations for that patient. The use case for this is if the patient is no longer your patient. That is if they changed practices or moved out of area. These would be patients you no longer wish to follow up on for Immunizations. This record will go to the Removed board, but stay there indefinitely, so you can add them back if the patient become relevant in the future.*



Immunization Tracking – Removed

CHILD1_SIKYRA
Suite D Clinic
Language Spoken: English
Preferred Pronouns:
Allergies:
Admit Date: 12-19-2024 Visit Reason: PCP: null Pt. Portal: Sequestered Record: Severe IV Fluid Shortage, follo
Ht: cm Wt: kg BSA: m. s

Unreviewed Allergies
Dinkevich, Eugene
1331108 / 9142253
ty2m (18)

Patient List Orders Results Patient Info Documents Flowcharts My Schedule Referral List Clinical Summary Alpha Docs Timeline Schedule View C-CDA Transmission Log Status Board Amb Follow Up Boards

Immunization Tracking - Removed Refresh

| Patient Name | MRN | Unit | Care Provider | Event Name | Status | EventType | Scheduling Status Type | Days Until Scheduled | Scheduled Start Date | Scheduled End Date | Tracking Status | Return |
|--------------|---------|----------------|---------------|--------------------------|---------|-----------|------------------------|----------------------|----------------------|--------------------|--------------------------|--------|
| TEST, PLPPUL | 1304606 | Suite D Clinic | | 6- Meningococcal Vaccine | Pending | Wellness | On Time | | 2024-Nov-20 | 2024-Nov-20 | Remove | Return |
| TEST, CLPINF | 9994102 | Suite D Clinic | | 6- Tdap | Pending | Wellness | On Time | | 2024-Nov-20 | 2024-Nov-20 | Never Show Patient Again | Return |

Refreshed: 15:51:39

- Tracking Status - Status of the review of this item on the board.
 - Remove - This signifies that they patient was removed from the Immunization Tracking Board.
- Return - This button will return the patient to the Immunization Tracking Board.

Board Amb Follow Up Boards

| Tracking Status | Return |
|--------------------------|--------|
| Remove | Return |
| Never Show Patient Again | Return |



Incomplete Orders

No patient visit selected.

Patient List Orders Results Patient Info Documents Flowsheets My Schedule Referral List Clinical Summary Alpha Docs Timeline Schedule View C-CDA Transmission Log Status Board Amb Follow Up Boards

Incomplete Orders Refresh Selection Criteria

| Patient Name | Visit ID | Visit Location | Visit Date | Visit Close Date | Order Status | Order Name | Order Date | Who Entered | Who Requested | Remove |
|--------------|-----------|-------------------------------|-------------------|-------------------|--|---------------------------------|-------------------|-------------------|---------------|--------|
| TEST, STEVE | 000541876 | ACATH cardiac Catheterization | Jul 07 2021 15:46 | Jul 07 2021 23:59 | Specimen Received by Performing Department | BioFire Filmarray RP2 Panel | Jul 14 2021 10:40 | NPSCMServices, NP | Test, MD | Remove |
| TEST, STEVE | 000541876 | ACATH cardiac Catheterization | Jul 07 2021 15:46 | Jul 07 2021 23:59 | Specimen Received by Performing Department | SARS Coronavirus RT PCR (Lenco) | Jul 14 2021 10:44 | NPSCMServices, NP | Test, MD | Remove |

Available Actions:

- Remove - Two options exist.
 - Remove - Removes the order from the board.
 - Remove all for Visit - Removed all orders for the visit from the board.
- If the order is completed the order will automatically be removed from the board when it is refreshed.

Missing Encounter Form Orders

No patient visit selected.

Patient List Orders Results Patient Info Documents Flowsheets My Schedule Referral List Clinical Summary Alpha Docs Timeline Schedule View C-CDA Transmission Log Status Board Amb Follow Up Boards

Missing Encounter Form Orders Refresh

| Patient Name | Visit Number | MRN | DOB | Visit Type | Current Location | Admit Date/Time | Close Date/Time | Attending Provider |
|---------------|--------------|---------|------------|------------|------------------|-------------------|-----------------|--------------------|
| TEST, OEMFMP | 9142204 | 9994109 | 6-3-1983 | Outpatient | Empire Boulevard | Nov 19 2024 14:35 | | Liverpool, Steven |
| SMITH, JANE | 9142206 | 1331045 | 9-10-1999 | Outpatient | Suite D Clinic | Nov 22 2024 16:47 | | Tena, Meseret |
| SIMMONS, MARY | 9142211 | 1331048 | 11-12-1948 | Outpatient | Suite C Clinic | Nov 25 2024 12:24 | | Ginzler, Ellen |
| JUDY, JONES | 9142213 | 1331050 | 1-14-1960 | Outpatient | Suite I Clinic | Nov 25 2024 14:52 | | Banerji, Maryann |
| PEREZ, JOSHUA | 9142216 | 1331052 | 1-18-2023 | Outpatient | Suite D Clinic | Nov 27 2024 12:25 | | Velcek, Francisca |
| THOMAS, BETTY | 9142218 | 1331054 | 6-18-2023 | Outpatient | Suite D Clinic | Nov 29 2024 13:17 | | Tena, Meseret |

Refreshed: 16:38:49

Available Actions:

When the Encounter Form is created, the patient automatically falls off the board.



Missing Note

No patient visit selected.

Missing Note Refresh Rows 0 Export

| Patient Name | Visit ID | Visit Location | Attending | Visit Type | Visit Date | Visit Close Date | Care Level | Discharge Location | Remove |
|--------------------|------------|-------------------------------|------------------------------|------------|-------------------|-------------------|------------|---------------------------|--------|
| SFMTST, MEDICAIDRA | 1001019916 | Sunflower Rural Health Clinic | James, Kathryn | Ambulatory | Jan 01 2024 13:04 | Jan 01 2024 15:04 | Clinic | Routine Home or Self Care | Remove |
| HESTER, KASSANDRA | 1001019857 | Sunflower Rural Health Clinic | Myers, Shannon | Ambulatory | Nov 30 2023 14:11 | Nov 30 2023 23:59 | Clinic | Routine Home or Self Care | Remove |
| TEST, FMH | 1001019869 | Sunflower Rural Health Clinic | aaTemplate, NonStaffProvider | Ambulatory | Dec 13 2023 10:09 | Dec 13 2023 10:31 | Clinic | Another Hospital | Remove |
| SFMTST, MEDICAREPA | 1001019917 | Sunflower Rural Health Clinic | Chandler, Kijuanria | Ambulatory | Jan 01 2024 14:33 | Jan 01 2024 15:33 | Clinic | Routine Home or Self Care | Remove |
| SFMTST, SHAHBAZ | 1001019882 | Sunflower Rural Health Clinic | Marlow, Lauren | Ambulatory | Jan 02 2024 10:33 | Jan 02 2024 11:33 | Clinic | Routine Home or Self Care | Remove |
| HESTER, KASSANDRA | 1001019861 | Sunflower Rural Health Clinic | Myers, Shannon | Ambulatory | Dec 01 2023 17:21 | Dec 01 2023 23:59 | Clinic | Routine Home or Self Care | Remove |
| SFMTST, SHAHBAZ | 1001019842 | Pulmonary Clinic | Sabatino, Bruce | Outpatient | Nov 01 2023 07:42 | Nov 01 2023 08:42 | Outpatient | Routine Home or Self Care | Remove |
| NEW, NEW | 1001019910 | Sunflower Rural Health Clinic | Rizzo, Brooks | Ambulatory | Jan 12 2024 13:48 | Jan 12 2024 23:59 | Clinic | Routine Home or Self Care | Remove |
| SFMTST, SHAHBAZ | 1001019890 | Sunflower Rural Health Clinic | Summers, Katherine | Ambulatory | Jan 05 2024 07:47 | Jan 05 2024 23:59 | Clinic | Routine Home or Self Care | Remove |
| SFMTST, SHAHBAZ | 1001019881 | Sunflower Rural Health Clinic | Summers, Katherine | Ambulatory | Jan 01 2024 10:19 | Jan 01 2024 12:19 | Clinic | Routine Home or Self Care | Remove |
| TEST, KS | 1001019902 | Sunflower Rural Health Clinic | Warrington Jr, James | Ambulatory | Jan 09 2024 09:56 | Jan 09 2024 09:57 | Clinic | Routine Home or Self Care | Remove |
| TEST, AUTOCOMBINE | 1001019923 | Sunflower Rural Health Clinic | Pandya Lipmah, Rashmi | Ambulatory | Nov 20 2023 13:29 | Nov 20 2023 16:29 | Clinic | Routine Home or Self Care | Remove |
| MICOTWE CHADEACH R | 1001019856 | Sunflower Rural Health Clinic | AATEMPLATE, NONAFFILIATED | Ambulatory | Nov 30 2023 10:55 | Nov 30 2023 23:59 | Clinic | Routine Home or Self Care | Remove |
| TEST, KS | 1001019876 | Sunflower Rural Health Clinic | Rizzo, Brooks | Ambulatory | Dec 22 2023 11:57 | Dec 22 2023 23:59 | Clinic | Routine Home or Self Care | Remove |
| TEST, VAL | 1001019875 | Sunflower Rural Health Clinic | Rizzo, Brooks | Ambulatory | Dec 15 2023 12:46 | Dec 15 2023 23:59 | Clinic | Routine Home or Self Care | Remove |
| ZTEST, JACOB | 1001019839 | Sunflower Rural Health Clinic | Warrington Jr, James | Ambulatory | Dec 07 2023 10:41 | Dec 07 2023 23:59 | Clinic | Routine Home or Self Care | Remove |

Available Actions:

- Remove - Removes the patient from the board.
- When a document is added to the visit, the visit will automatically be removed when the board is refreshed.

If the patient is in 'Suite B Clinic', 'Empire Boulevard Clinic or Suite R Clinic' they **must** have one of the following notes or the patient will appear on the board: '

- General Adult Ambulatory (OPD)
- Adolescent Clinic Note (OPD)
- Annual Wellness Visit Note (OPD)
- Progress Note, Adult

If the patient is in 'Suite D Clinic' then they must have one of the following notes or they will appear on the board:

- Pediatric Encounter Note (OPD)
- Pediatric Well Visit Note (OPD)
- Event Note (OPD)

***The board does not look at the status of the documents. Instead, it pulls the patient if any of the listed documents is/are missing.**