CPS v12 Tips, Tricks and Shortcuts

Presented by Arman Virani and Maurice Rosenbaum
HealthSystems
Today’s Topic

With new interface changes and enhancements, we will show you how to get more from your Centricity Practice Solutions version 12 software – to learn how to reduce mouse clicks and work more efficiently.
Objective / Agenda Today

- Use CPS more effectively and efficiently
  - Left Hand Navigation and Ribbon
  - Quick Access Toolbar Use
  - Patient Billing Notes
  - Enhanced Help System
  - Keyboard Shortcuts
  - Dot ID and Wild Card Search
LEFT HAND NAVIGATION AND RIBBON
Open Left Navigation Panel – Click Admin
Left Navigation Panel Opens
Left Navigation Expanded and Collapsed

• Click and drag either up or down to expand or collapse the panel
Click the << to shrink the panel.

Click the >> to open back up.
Chart Left Navigation Access

Click any Left Navigation Button to quickly access that component.
Chart Left Navigation Access

- Once the component has been accessed through Left Navigation, the shortcut will remain in the bottom tray for future use. Tray will clear when Centricity is closed.
Ribbon Feature

- Expandable Ribbon
- Click “v” to expand and “^” to collapse
Administration Displays – Click v to Expand Ribbon
Expand the Ribbon Icon

Show the ribbon so that it is always expanded even after you click a command.
Administration/Edit Access Displays

Administration/Edit Components

Administration Legacy Components
Chart Collapsed Ribbon
Chart Expanded Ribbon
QUICK ACCESS TOOLBAR IN CHART
Minimize Chart Ribbon

- Minimize ribbon to gain larger display of schedule, documents and patient chart
- You may also minimize Left Hand Navigation for maximum screen usage
Show Quick Access Toolbar below the Ribbon

- You may wish to minimize the ribbon “^” to save space, but still want quick access to menu items
- Right-click an icon and choose Show Quick Access Toolbar below the Ribbon
Add to Quick Access Toolbar

- While the ribbon is expanded, right-click icon and choose Add to Quick Access Toolbar
Icon Appears in Toolbar

• Icon appears in toolbar BELOW ribbon
Accessible Icons

• Once ribbon is minimized (\(^\)), icons remain accessible
Minimized Icon Opens Window

- Click minimized icon to open window
Ribbon Feature

- Expanded and Collapsed views
- Click “v” to expand and “^” to collapse
Custom Module Extensibility

• Set Up Links
  (HTML links)

• Set Up Commands
  (execute batch/system commands)
Custom Module Extensibility Security

When these permissions are set in Administration, these icons appear in the left navigation pane and ribbon menu.
Set Up Commands

Set Up Custom Commands

- Add
- Delete

Details:
- Description:
- Ribbon Button Size:
  - Small
  - Large

Command Line:

OK  Cancel
Click Set Up Links Icon and + New Link
Enter Name for New Navigation Link

![Set Up Navigation Links](image)

- **Navigation Links**
  - Group
  - Nav Link
  - Delete

- **Details**
  - Name: ICD-10 Codes
  - Configure URL: [Edit]
Paste URL Link by Right-Clicking
Navigation is Pasted – Click OK to Save
Click Newly-Created Link (bottom left)
International Statistical Classification of Diseases and Health Related Problems (ICD-10) Version for 2010

Chapter XIX
Injury, poisoning and certain other consequences of external causes (S00–T98)

Excl.:
- birth trauma (P10-P15)
- obstetric trauma (Q27-Q71)
- malunion of fracture (M84.0)
- nonunion of fracture [pseudarthrosis] (M84.1)
- pathological fracture (M84.4)
- pathological fracture with osteoporosis (M80.-)
- stress fracture (M84.2)

This chapter contains the following blocks:
- S00-S09: Injuries to the head
- S10-S19: Injuries to the neck
- S20-S29: Injuries to the thorax
- S30-S39: Injuries to the abdomen, lower back, lumbar spine and pelvis
PATIENT BILLING NOTES
Notes Features

• Date/Time Stamp
• Security Enabled
• Audit Capabilities to Track Users & Changes
• Ability to Archive
Notes Security

• All users who have access to Registration and Billing can add notes, but you must give security to:
  – Delete a note
  – Edit a note
  – Inactivate / Reactivate
Notes Security cont...

- Security / Administration / Notes
Access Notes Through Registration

Financial Tab
- OR -
Access Notes Through Billing

Charges Tab
Open Note Subject and Note Text

• Clicking the + sign in Registration or the New button in Billing will display the Note Subject and Note Text.
Billing Note Subjects

• Billing note subjects may be typed in on-the-fly or saved for future use in:
  – Administration
  – Registration
  – Patient Billing Note Subject
  – Description
Saved Patient Billing Note Subject

Type note subject and save
Open Note Subject and Note Text

Billing

Registration

Centricity healthcare user group

HealthSystems
**Full Viewer**

- Click the Full Viewer box to display the note in full view
Message Displays in Full View

Billing Note - Abbey Jeff (48)

Date | Note Subject | Note Text | Created By | Modified Date | Modified By
3/13/2013 7:54 AM | Test Subject | This is a test note for Jeff Abbey | hshwinston | 3/13/2013 8:15 AM | hshwinston

Close
Note Function Icons

New Note ➔ Edit Note ➔ Inactivate Note ➔ Delete Note ➔ Reactivate Note
Display Inactive Billing Notes

• Any note that has been marked as inactive may be shown again by clicking the “Display inactive billing notes” box
Prior Notes

• All prior notes will be upgraded into a one-note line
• These notes will display “Upgrade” under the Created By column
• Users may opt to copy and paste the important information into a new note field and inactivate any notes that are no longer pertinent
ENHANCED HELP
Help Features

• **Related tasks:** Links to related workflows and tasks are listed to the right of each topic.

• **Contents tab:** Use the table of contents to browse subject areas and select a topic to view.

• **Index tab:** Enter keywords on the Index tab to find indexed concepts and topics. For example, for information about canceling appointments, start typing *appointments* or *cancel*, then select an index item from the list to view a linked topic.
Enhanced Help Features cont…

- **Search tab**: Enter keywords on the **Search** tab and press enter to select from a list of all topics containing that word.
- **Highlighted text**: Click highlighted text to jump another topic, view a definition, or display hidden details.
- **Note**: Online help remembers the last navigation pane you used. So if you use the **Index** tab and then close the help, you'll see the **Index** tab the next time you open the help.
Enhanced Help Features cont…

• Not case-sensitive
• Searches any combination of letters (a-z) and numbers (0-9)
• Ignores punctuation marks
Refine Search

• **Search previous results.** Narrows a search resulting in too many topics. Uncheck to search all topics.

• **Match similar words.** Displays results containing words with the same root. For example, searching with pay returns topics with pay, pays, payer, payment.

• **Search titles only.** Searches all help topic titles.
Search for Phrases

• Group words between quotation marks " " to search for phrases
• For example, searching with "insurance carrier" returns topics containing the phrase "insurance carrier" while searching with insurance carrier results in topics containing either or both the separate words insurance and carrier

<table>
<thead>
<tr>
<th>Searching For</th>
<th>Yields</th>
</tr>
</thead>
<tbody>
<tr>
<td>“insurance carrier”</td>
<td>The phrase insurance carrier</td>
</tr>
<tr>
<td>insurance carrier</td>
<td>Either or both separate words insurance and carrier</td>
</tr>
</tbody>
</table>
Search for Phrases

- Use an asterisk (*) for unknown letters or a question mark (?) for unknown numbers
- Do NOT enclose the partial word or number in quotation marks (" ")

<table>
<thead>
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<th>Yields</th>
</tr>
</thead>
<tbody>
<tr>
<td>clin*</td>
<td>clinic, clinical, clinician ...</td>
</tr>
<tr>
<td>dia*s</td>
<td>diagnosis, diagnoses</td>
</tr>
<tr>
<td>*ckt</td>
<td>information about any .ckt file type</td>
</tr>
<tr>
<td>10?2</td>
<td>information about Link Logic errors 1032, 1052, 1062</td>
</tr>
</tbody>
</table>
KEYBOARD SHORTCUTS
## Formatting Keyboard Shortcuts

<table>
<thead>
<tr>
<th>Press this key...</th>
<th>To do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tab</td>
<td>Move cursor to next colon (if tab-to-colon is on), or move cursor to next tab (if tab-to-colon is off)</td>
</tr>
<tr>
<td>Shift + Tab</td>
<td>Move cursor to previous colon (if tab-to-colon is on), or move cursor to previous tab (if tab-to-colon is off)</td>
</tr>
<tr>
<td>Ctrl + B</td>
<td>Toggle bold formatting</td>
</tr>
<tr>
<td>Ctrl + I</td>
<td>Toggle italic formatting</td>
</tr>
<tr>
<td>Ctrl + U</td>
<td>Toggle underlining</td>
</tr>
<tr>
<td>Ctrl + Shift + F5</td>
<td>Insert a document attachment</td>
</tr>
<tr>
<td>Ctrl + Q</td>
<td>Find text in document</td>
</tr>
<tr>
<td>Ctrl + Z + Backspace</td>
<td>Undo the previous action</td>
</tr>
</tbody>
</table>
## Registration Keyboard Shortcuts

You can use the following keyboard shortcuts (hot keys) in Registration:

<table>
<thead>
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</table>
| F2               | - Open a calculator from any currency field. The Paste function on the calculator populates the field with the calculation results.  
- Open a calendar from various date fields. Double-clicking on a date field populates the field with the current date. |
| F3               | - Open a Search window.  
- Move the date forward or backward one day at a time. |
| F12              | Inserts the current date into a date field. |
| Tab              | Move focus to the next field. |
| Shift + Tab      | Move focus to previous field. |
| Alt + P          | Toggle to the Patient tab. |
| Alt + G          | Toggle to the Guarantor tab. |
| Alt + I          | Toggle to the Additional tab. |
| Alt + U          | Toggle to the Insurance tab. |
| Alt + S          | Toggle to the Contacts tab. |
| Alt + T          | Toggle to the Appointments tab. |
| Alt + C          | Toggle to the Financial tab. |
| Alt + L          | Toggle to the Payment Plan tab. |
| Alt + M          | In the Contacts tab, modifies the selected patient contact. |
| Alt + Y          | Toggle to the Registry tab. |
| Alt + D          | In the Contacts tab, deletes the selected patient contact. |
| Alt + F4         | Close. |
| Ctrl + A         | Opens the Default Batch window. This shortcut is only available on systems licensed for Practice Management. |
| Ctrl + S         | Saves the open patient registration record. |
# Chart Keyboard Shortcuts

<table>
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</thead>
<tbody>
<tr>
<td>Tab</td>
<td>Move focus to next field</td>
</tr>
<tr>
<td>Shift + Tab</td>
<td>Move focus to previous field</td>
</tr>
<tr>
<td>F8</td>
<td>Move to next Chart panel</td>
</tr>
<tr>
<td>Shift + F3</td>
<td>Move to previous Chart panel</td>
</tr>
<tr>
<td>F1</td>
<td>Open online help</td>
</tr>
<tr>
<td>F5</td>
<td>Refresh or update a window</td>
</tr>
<tr>
<td>F11</td>
<td>View care alerts/flags</td>
</tr>
<tr>
<td>F12</td>
<td>Create a new care alert/flag</td>
</tr>
<tr>
<td>Ctrl + E</td>
<td>End chart update</td>
</tr>
<tr>
<td>Ctrl + F</td>
<td>Find a patient</td>
</tr>
<tr>
<td>Ctrl + G</td>
<td>Open Graph Observations</td>
</tr>
<tr>
<td>Ctrl + H</td>
<td>Open Print Patient Education Handout</td>
</tr>
<tr>
<td>Ctrl + P</td>
<td>Print</td>
</tr>
<tr>
<td>Ctrl + T</td>
<td>Open Protocol Results</td>
</tr>
<tr>
<td>Ctrl + U</td>
<td>Begin a chart update</td>
</tr>
</tbody>
</table>

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**Note.** If you don’t see the underlined shortcut keys on your menu options, press : `Note. If you don’t see the underlined shortcut keys on your menu options, press :`

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</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + Alt + M</td>
<td>Start/stop MEL tracking</td>
</tr>
<tr>
<td>Ctrl + Alt + S</td>
<td>Start/stop SQL tracking</td>
</tr>
<tr>
<td>Ctrl + Alt + T</td>
<td>Start/stop DB tracking</td>
</tr>
<tr>
<td>Alt + F4</td>
<td>Close Chart module</td>
</tr>
<tr>
<td>Alt + C</td>
<td>Return to Chart summary</td>
</tr>
<tr>
<td>Alt + D</td>
<td>Activate directives</td>
</tr>
<tr>
<td>Alt + F</td>
<td>Activate alerts/flags</td>
</tr>
<tr>
<td>Alt + L</td>
<td>Activate allergies</td>
</tr>
<tr>
<td>Alt + M</td>
<td>Activate medications</td>
</tr>
<tr>
<td>Alt + O</td>
<td>Activate problems</td>
</tr>
</tbody>
</table>

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![Centricity Healthcare User Group logo]
Numerous Keyboard Shortcuts

• **F1** – Context Sensitive Help depending on the screen or window that is displaying at the time you press it.
• **F2** – Opens a calculator from any currency field. Also opens a calendar from various data fields.
• **F3** – Search on any field with binoculars (don’t forget the Alt-Key shortcuts like Alt-S for any search window where you want to click the Search button but do not want to use the mouse. Note: any buttons that have a letter underlined can be used by Alt and that letter in combination.
• **F4** – From any Billing, Accounts Receivable or Collections windows F4 will allow you to bring back up the “Criteria” that you used to get to the window. Many people use this instead of closing a Billing Window and then opening up another billing window.
• **F5** – Refresh very useful in Billing Window, Schedule, Transaction Management or Charge Management to refresh after making changes.
• **F6** – Automatically populates the Actual Allowed amount field in payment posting. While viewing charges, it is used to see other charges already entered.
• **F9** – Insert “ALL” into a multi-select search box. Useful if you have specified some individual criteria, but then you want to see all in a quick way.
• **F10** – Search for or Change Diagnosis (ICD-9) or Go to the next code (same as double-click).
• **F11** – Search for or Change Charges (CPT) or Go to the next code (same as double-click).
• **F12** – Any date file where you have __/__/__ will enter TODAY
• + or – in the same date field will move forward or backward, one day.
• When selecting from a list the HOME and END keys will take you to the top or bottom of a list and then arrow keys will let you move through the list.
F1 Key – Help for any window

• Context Sensitive Help depending on the screen or window that is displaying at the time you press it
F2 Key – Calculator

- Click on any currency field and Press F2 to bring up a calculator. A calculator will appear which will let you paste your value into the original field.
F3 Key – Search

- Opens a Find window for any search window where you want to click the Search button but do not want to use the mouse.
F4 Key – Opens Criteria Window

- From any Billing, Accounts Receivable or Collections windows F4 will allow you to bring back up the “Criteria” that you used to get to the window. Many people use this instead of closing a Billing Window and then opening up another billing window.
F5 Key – Refreshes Window

• Refresh very useful in Billing Window, Schedule, Transaction Management or Charge Management to refresh after making changes
F6 Key – Populates Actual Allowed

- Automatically populates the Actual Allowed amount field in payment posting
F9 Key – [all]

• Pressing F9 Key to indicate [all] data for that field
F10 Key – Search for Diagnosis

• Search for or Change Diagnosis (ICD-9) or Go to the next code (same as double-click)
F11 Key – Search for Procedure

• Search for or Change Charges (CPT) or Go to the next code (same as double-click)
F12 Key – Today’s Date

• Pressing F12 Key in any date field will populate today’s date*

*Does not work within Reports, need to use either date or keywords
Date Field in Reports

- Date fields in reports do not have / / / / formatting in order to allow shortcuts such as month, month -1, today, today +2
Home & End Keys

- When selecting from a list, the Home and End keys on the keyboard take you to the top or bottom of a list. Arrow keys allow you to move through the list.
Find Keyboard Shortcuts Online

• Help / Help with Centricity Practice Solution / Type “Keyboard Shortcuts” / Click List Topics
DOT ID
Dot ID for Quick Lookup

- If you know a patient’s account number, you can type it in the Name field with a preceding period (.) to locate the patient.
- Also useful in Provider and Appointment Type fields.
Wild Card

- The % key is used to indicate a Wild Card search
- Example: You can use %sa to search for a patient who has “sa” anywhere in their last name and ,%sa for anywhere in the first name
Wild Card Search
ADD SHORTCUT BUTTONS
Add Shortcut Buttons

- Add Patient Profile and/or Patient Superbill Buttons to Schedule

1. Click View / Toolbars / Customize
Add Shortcut Buttons cont...

2. Customize Window Opens
Add Shortcut Buttons cont…

3. Click and drag Schedule/File/Profile/Print to a Target Region

4. Click and drag Schedule/File/Superbill/Print to a Target Region

5. Click OK to close box
Add Shortcut Buttons cont...

6. Shortcut Buttons now display on Schedule
Add Shortcut Buttons cont...

7. Left-click on a scheduled patient, then left-click on Print Profile and/or Print Superbill to print a single profile and/or superbill for that patient
Customizing Other Toolbars

• Schedule
• Patient
• Visit
• Payment Entry
• Reports
Questions and Feedback

Thank you for attending!
We value your feedback – Please Complete Surveys

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