# CENTRICITY TIPS AND TRICKS THAT ANY USER WILL LOVE





#### Presented By: North Country HealthCare







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# **ABOUT NORTH COUNTRY HEALTHCARE**

- In 1991 NCHC was founded in Flagstaff by a group of local healthcare providers and administrators as a "Free Clinic Services"
- In 1996 became a Federally Qualified Health Center (FQHC).
- Services 14 communities across Northern Arizona, with 24 access points.
- Services include Mobile Unit (school base and other organization employee health), Behavioral health integration, Behavioral Health Services, Prenatal Care, Ultrasounds, Pediatric Care, Family Medicine, Urgent Care, Radiology, Dental, Physical Therapy, Acupuncture, OMM, Telemedicine, and Pharmacy.
- Outreach Services: PWW, RESEP, HIV, NACASA, FIT, Ryan White, Hepatitis C, PT INR, Diabetic Nutrition, SBIRT, Care Management, Hermosa Vida, and many more.





# **Review of Topics**

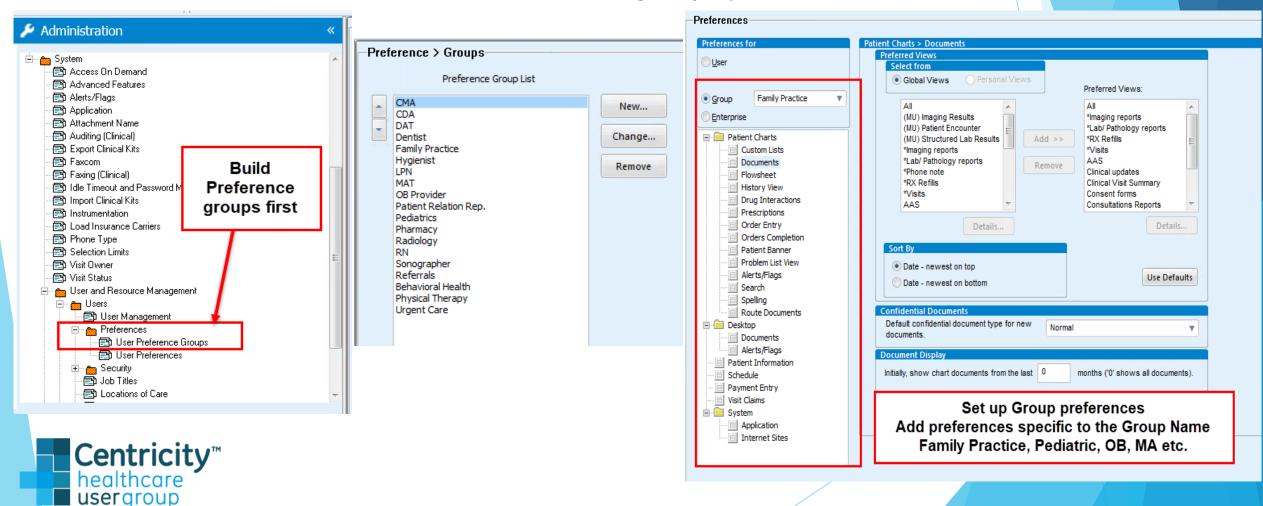
- ✗ User Preferences
- ℜ Quick Text transferring
- 💥 Set Up Links
- **%** Quick Scheduling 1 or more appointments
- ℜ Other Schedule tips
- ℜ Shortcuts through out Centricity
- ℜ Answer any Questions



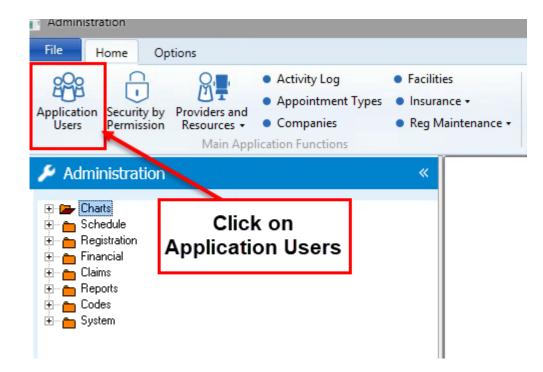


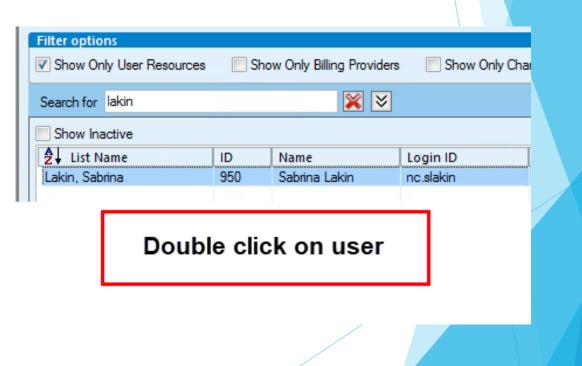
## User Preference Set up

First create "User Preference Groups". Whoever creates the new employee accounts can attach the correct group to the new employee. This can be attached to existing employee's as well.



Once you have set up the groups and added the correct preferences to each group you now can start attaching them to users. In the administration tab under Application Users, Choose the user







Use the drop down to select correct group according to Job title/position, Click ok. If you are adding this to an existing user they may need to logout then back in to see the changes.

Basic Info Security Chart Access				CQR Registration			
Attributes					Identification		
Inactive	Sched	dule Templat	es		NPI		
Billable Pr	rovider 🔽 Chart	Access			DEA #		
	*First	Middle	*Last	Suffix	Anesthesiologist License		
	Sabrina		Lakin		Additional License		
List Name	Lakin, Sabrina				Specialty	(none)	•
D	950				Specialty License		
Organization	North Country Health	Care			State License		
Address 1	2920 N 4th St.				UPIN #		
Address 2				-	User Settings		
City/State/Zip	Flagstaff	AZ	86004	<b>64</b>	*Login ID nc.sl	akin	
Country			Subdivision		Select a user	ly Practice	<b>v</b>
Phone 1	(928) 310-6118 [ ]	Work	<b>v</b>		preference group		
Phone 2	() - []						
Email			•				
Notes							
I							
			F	Prev Resource	Next Resource	ОК	Cancel

Centricity<sup>™</sup> healthcare user aroup

#### **Quick Text**

To quickly transfer a users quick text to another user go to administration, expand charts, chart, click on "Quick Text" Choose the user you are grabbing the QT from, find which one you want to add to other user and double click on it to load it into editing box.

🏓 Administration 🛛 «	-Chart > Quick	Text 0		
Charts	View Quick Tex Lakin, Sabrina	on OT it w		-
🖃 Internet Sites	Replace:	With:		
👘 MQIC			_	
🖻 👝 Chart	.a1c	A1C 6.5 or great = overt diabetes A1C 5.7-6.4 = prediabetes		Insert Symbol
📕 🕄 Administered Medic		ATC 5.7-6.4 = prediabeles		
📇 Allergy Custom List:	3			
🔁 Coding Requiremen	.a1c	A1C 6.5 or great = overt diabetes +		Replace
Document Views	.origni	Engni Futures Parent Handout (attached)		
Drug Interaction 0	.ca	Sources of calcium, calcium need recommendations, and calcium		
Et ag modelion of	.cho	Alcohol and carbohydrate effect on triglyceride management.		Delete
	.cmeal	Options for changing meal planning to create meals that are lo		
Fiowsneet Mews     Formulary Manager	.cold	testing this for you +		
	.dash	The DASH diet and improving blood pressure management.	=	
History Views	.fiber	Types of dietary fat/fiber with reference to current meal plan,	8	
Immunization Custc	.FWA	Five Wishes Advance Directive given to patient		
	.gdma2gui	<ul> <li>[] antenatal testing at 32wks or when meds initiated, NST 2x/4</li> </ul>		
🔤 🔁 Medication Custom	.gdmgui	GDM		
🖃 Patient Banner	.hcues	Recognition of hunger and fullness, tasting food, and modifyin	<u> </u>	
🖃 Prescription Requir	.ir	Internal Referral		
🛛 👝 🖃 Problem Custom Lis	.label	Label reading for portions, carbohydrates, fiber and fat conten	_	
Problem List Views	.log	Using a food log , spreedsheet program, orr app for tracking f	:	
Protocols	.LP	With in normal limits		
🖹 Quick Text	.lty	Fully discussed the risks of smoking. I advised patient to quit s		
+ m Chart Documents	.menu	Menu planning and how to put menu plans into practice.		
🛨 👝 Handouts 🗸 🗸	.mplan	Using patient's current meal plan compared to recommendation	_	
	.nw	National weight control registry recommendations for weight k	-	
P III	Lander	(OBDEDC NEW/))		

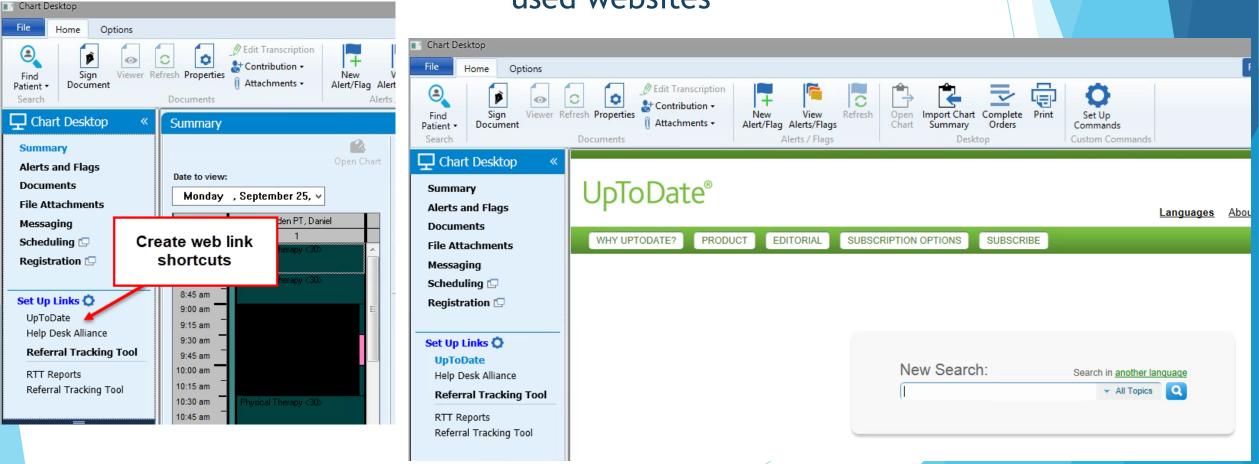
Centricity™ healthcare usergroup Choose the user you want to transfer the quick text to, once you Have the user listed click "Add". This will add the quick text to the user, you can go back to add more if needed using the same steps.

Chart > Quick Text View Quick Text for: Ortiz, Sylvia Replace: With:	Chart > Quick Text View Quick Text for: Ortiz, Sylvia Ortiz, Sylvia Lakin, Sabrina
A1C 6.5 or great = overt diabetes A1C 5.7-6.4 = prediabetes Add Add Delete	Aaron, Lauralee       Insert Symbol         Reyka FNP, Ladonna       Insert Symbol         Lochner FNP, Mary Beth <global list="">       rt diabetes         Aaron, Lauralee          Abbott DO, Brandon          Accomando PA-C, Elaine M          Aderanoi MD. Faeoh</global>



#### Web Link Set up

With this function you can add web links as shortcuts for your users to have quick access to the web. You can add things like UpToDate and other commonly used websites



## Schedule Tips

Finding the "next available" appointment can be time consuming searching day by day. Limit your time when scheduling by using these easy steps

🕙 Schedule Flagstaff EAST - 0	9/25/2017 (East	, Crane, Es	kuc, Raja , M	larin, D	avis, Polst,	Alvar, Diabe, Bert
File Edit View Options	Help	i 10. 🖬	<b>*</b>	۶	<b>Ş</b> → \$	2
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Date to View	Monday ,	Septembe	r 25, 2017			
	. + .	September	2017	•		
🖃 🔍 Waiting Lists 🔺 📑	Sun Mon	Tue Wed	Thu Fri	Sat		
± ASH/SEL	R 27 28	29 30	31 <b>1</b>	- 1	Pod MA Vis	it
BUL-Ap	A 3 4	5 6	7 8	9		2
🕀 🦰 BUL - Ne	10 11 17 18	12 13 19 20	14 15 21 22	22		
🕀 🧰 Cathy To	24 25	26 27	28 29	30		
🗄 👮 Cherry, C	1 2	3 4	5 6	7		
🕀 💆 FLAG - D		Today:	9/25/2017			
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FLAG_C	8:30 am	East Pod N	IA Visit <10>			
⊕ 🛱 FLAG_C	8:40 am	East Pod M	IA Visit <10>			



## Easy Scheduling

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<ul> <li>Schedule Flagstaff EAST - 09/25/2017 (East , Crane, Eskuc, Raja , Marin, Dave and the second s</li></ul>	
Appointment Search - Test, Slakin (179538)         Criteria         Find at most 30         Find dates:         Starting         09/25/2017         Out         60         Days         SM         Include unallocated time slots in search         Amm         Maximum Time Span         minutes         Appointments         # Incl         Resources         Appointment Types	Find Patient     A B C D E F G H I J K L M N O P Q R S T U V W X Y Z   Name Test, Slakin   Provider (all)   Provider (all)   Guarantor (all)   Guarantor (all)   Insured ID Bill Code   External ID No preferred externalD set   Location (any)
Fill in your patients criteria         How many results, How many         New<       Delay         Results         Case         Date       Day         Time       Duratior Resource         Appointment Typ Facility       Co	Name       ID       SSN       DOB       Address       City       State       Zip       Phone 1         Test, Slakin       179538       277-77-7777       01/27/1979       420 Little house       Winslow       AZ       86047       (928) 111-1111

## Criteria Search

ľ	Appointment Search - Test, Slakin (179538)	Weidinder ouden	
	Criteria	🕅 Find at most 30 📑 results	Search
1	Find dates: Starting 09/25/2017 Out 60 🚔 Day	ys SMTWThFS	Clear
l	Include unallocated time slots in search	A.M V V V .	Defaults
	Maximum Time Span 🔝 🚔 minutes		S <u>a</u> ve
	Appointments		

Find Appointment Search Criteria								
ABCDEFGHIJKLMNOPQRSTUVWXYZ Search								
Created by	•							
Show Inactive Appointment Search Criter	ia							
Name	Status							
Accomando EST 20 Seligman	Active	~						
Blasko FNP, Lisa	Active							
Capozzi Adult Well Visit 30 min	Active							
Capozzi Hospital F/U 30 min	Active	=						
Capozzi WWE 30 min	Active							
Capozzie Est. 15 min	Active							
Cappozi New Pt. 30 min	Active							
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Centricity™ healthcare usergroup

Appointment Search - Test, Slakin (179538) 🕅 Find at most 🔢 🚔 results Criteria Capozzie Est. 15 min Search SMTWThFS Clear 60 🚔 Diays Find dates: Starting 09/25/2017 Out  $\checkmark$  $\checkmark$ Include unallocated time slots in search. A.M. Defaults P.M.  $\checkmark$ Maximum Time Span minutes Save Appointments Resources # Incl Appointment Types Facilities Established 15 Capozzi FNP, Carol A **V** Lake Havasu Cl 1 Click Search Delay.. Modify. R<u>u</u>les New... Results Case **Duration Resource** Appointment Typ Facility Co Day Date Time - X Search Limits Exceeded The maximum number of resources, appointment types, and facilities (combined) on all appointment rows I The maximum number of resources, appointment types, and facilities (combined) per appointment row has Choose 111 Yes Do you want to continue? Yes No

Ap	ро	intment S	Search - Te	st, Slakin (179538)							
Crit	eria	a Capo	ozzie Elst. 15	5 min		💏 Find at m	ost 30 🚔 res	ults	Search		
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		12/01/2	(Fri	08:00am-08:15am	15	Capozzi FNP,	Established 15	Lake Hav	asu I Ca		
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	1	12/15/2	u Fn	08:00am-08:15am	15	Lapozzi FNP,	Established 15	Lake Hav	asul La		
L	1										
	В	egin C <u>h</u> a	iin					ОК	Cancel		

Choose which appointment(s) works for the patient by checking the box, Double click on appointment(s) to add any appointment notes then click ok

Resource	Capozz	i FNP, Carol A		M	Ticket #				
Facility	Lake Havasu Clinic 🏼 🧖				Date	11/10/2017	7		
Resp. Provider	Capozz	i FNP, Carol A		<b>#</b>	Time	08:00 AM	to	08:15 AM	
Company	North C	ountry HealthC	are, Inc.	<b>#</b>	Room No.				
Referral Source				<b>#</b>	Set				M
Referral Patient				M	Chain				M
Туре	Establis	hed 15		M	Case				M
Recall				#	Waiting List				M
Status					Service Location				
Overbook		Hide new vi	sit 📃						
Patient Phone				_	Primary Ins.	NCHC-WWHP (Navajo)			
	3) 111-11		Cell Phone	Y Y	Financial Class	Commercial			
Phone 2 ()	- [	Allocation Set	0 Copay						
Notes									
Type Notes									
Appointment									
Patient Appoint	ment	- English]^							
Case									

#### Another Helpful Schedule Tip

"List View" located on your schedule allows you to view patient appointments from the very first day your provider began seeing patients.

	Date to View Thu	ırsday, September 21	, 2017 🗐 🔻 Re	source to View	Blasko FNP, Lis	a	T			
Alias Trackin	g Wait Status				r					
Start	Stop	Туре	Name	Phone 1	Phone 2	Status	Facility	Insurance Carrier	Effective Date	
08:00AM	09:00AM	Meeting (60)	<doctor <="" resource="" td=""><td></td><td></td><td>Scheduled</td><td>Winslow Clinic</td><td></td><td></td><td></td></doctor>			Scheduled	Winslow Clinic			
09:00AM	09:30AM	New Patient 30	- · · · · · · · · · · · · · · · · · · ·			Checked Out	Winslow Clinic	CMDP DES 942C	12/01/2015	Т
10:00AM	10:30AM	Established 30				Checked Out	Winslow Clinic	Summit Administrativ	09/01/2016	Т
10:30AM	11:00AM	New Patient 30			C	Cancel/Patient	Winslow Clinic	Summit Administrativ	06/27/2016	Т
10:30AM	11:00AM	Established 30			C	Checked Out	Winslow Clinic	Health Choice Arizo	10/01/2011	
11:00AM	11:15AM	Same Day Appt 15				Checked Out	Winslow Clinic	APIPA UHC CRS	10/01/2017	
11:15AM	11:30AM	Same Day Appt 15				Checked Out	Winslow Clinic	CMDP DES 942C	09/06/2017	
11:30AM	12:00PM	Established 30				Checked Out	Winslow Clinic	Blue Cross Blue Shi	09/01/2017	
01:00PM	01:30PM	Established 30				Checked Out	Winslow Clinic	APIPA UHC Medica	10/01/2017	
01:30PM	02:00PM	Established 30				Checked Out	Winslow Clinic	Health Choice Arizo	10/21/2016	
02:00PM	02:15PM	Same Day Appt 15				Checked Out	Winslow Clinic	SFS 134 to 166	09/21/2017	
02:30PM	03:00PM	Established 30				Checked Out	Winslow Clinic	APIPA UHC Medica	10/01/2017	
03:00PM	03:30PM	Established 30				Checked Out	Winslow Clinic	Cigna HealthCare	01/01/2017	1
04:00PM	04:30PM	Established 30			C	Checked Out	Winslow Clinic	Aetna	01/01/2017	
04:30PM	05:00PM	Established 30				Checked Out	Winslow Clinic	APIPA UHC Medica	10/01/2017	

Notes



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## **Registration Shortcuts**

Hot keys	Function
F2	Patient tickets: Bring up calculator and populates your calculation results.
F3	Search any field with binoculars
F4	Allows you to bring back up the "Search Criteria"
F5	Refresh screen
F6	Automatically populates "Actual Allowed" amount field in payment posting
F9	Inserts "ALL" into a multi-selected search box
F12	Inserts current date into the date field
Crtl + A	Opens Default Batch
Crtl + S	Saves patient registration record
Alt + M	Contact Tab: modifies the selected contact
Alt + D	Contacts Tab: deletes the selected contact



#### **Document Shortcuts**

Hot keys	Function
Tab	Move focus to next field
Shift + Tab	Move focus to previous field
F1	Open online help
F5	Refresh or update a window
F8	Move from Forms view to Text view
F11	View care alerts/flags
F12	Create new care alert/flag
Ctrl + E	End Chart update
Ctrl + F	Find a patient
Ctrl + G	Open Graph Observations
Ctrl + P	Opens Print Window (Print Letters, consents, etc.)
Shift + Ctrl + D	Add/Change/Remove a Directive
Shift + Ctrl + R	Prescription Refill



#### Patient Chart Shortcuts

Hot keys	Function
Alt + C	Return to Chart summary
Alt + D	Activate directive
Alt + F	Activate alerts/flags
Alt + L	Activate allergies
Alt + M	Activate medications
Alt + O	Activate problems
Ctrl + T	Open Protocol Results
Ctrl + U	Begin a chart update



