CLINICAL + SYSTEMS TRANSFORMATION
Our path to smarter, seamless care

Please use this checklist to personalize your CST Cerner Account in preparation for using CST Cerner in outpatient clinics

Ambulatory Organizer

- ☐ Set Up Ambulatory Organizer

Referral Management Triage List

- ☐ Create, Save and Run Lists in Referral Management

Patients who are referred and ready to be triaged:	Patients who have been triaged and accepted:
Location: Clinic Referral Status: Ready for Triage +/- Redirected Attending Provider: blank if for whole clinic	Location: Clinic (if applicable) Referral Status: Accepted Attending Provider: blank if for whole clinic

Provider View

- ☐ Customize Workflow Tabs (in Provider View)
  - Add Tabs: Outpatient Chart, Outpatient Quick Orders, Referral Triage
  - Customize Components

Orders

- ☐ Customize Order Profile
- ☐ Add additional orders and powerplans to your favourites:
  - Create Favourite Folder for Orders
  - Add Orders Favourites Folder
  - Add PowerPlan to Favourites Folder
  - Search for other providers' favourited orders
  - Remove favourited Powerplans
  - Add your Favourites Folder to the Quick Orders Tab

Message Centre

- ☐ Manage Inbox
  - Proxy into Clinical/Institutional Entities Inbox – not all clinics have a Clinic Inbox, typically for clinics with rotating providers who need to view/flag lab and diagnostic results the day they are on shift.
  - Opt In and Out of Message Centre Pools – Pools function similarly to Clinic/Institutional Entity Inboxes, however when results are reviewed/actioned in a pool's inbox, they drop off both the pool's and ordering physician's inboxes. Results actioned in a Clinic Inbox remain available in the ordering physician's individual inbox until reviewed from the individual inbox.
- ☐ Manage Results FYI in Message Centre: subscribe to a patient for result notification
- ☐ Opting Out of Results: Clinic Cycle 1 providers are automatically opted in to recevive results in message centre. Providers with a private EMR will have results duplicated, sent to private EMR **and** CST Cerner message centre.

Auto Text

- ☐ Create and Insert Auto Text
- ☐ Copy Autotext from your colleagues

Patient List

- ☐ Create Patient Lists:
  - Create a Location Patient List
  - Create a Custom Patient List
  - Create a Relationship List

Documentation

- ☐ Add Favourite Documentation Recipients
  - Stop Automatic Distribution via Excelleris
    - Provider, Do Not Auto Distribute PCP
    - Provider, Do Not Auto Distribute Referring
    - Provider, Do Not Auto Distribute Author
  - Copy Patient via Health Gateway
    - Provider, Copy Patient Report
- ☐ Forward Note to Favourite and Defaulted Recipients - You can create a list of regularly cc'd recipients, rather than searching for them each time while creating/signing documentation.
- ☐ Documentation Filters:
  - Documentation Filter (Blue Table of Contents)
- ☐ Changing Document Filter through Documents Component on Workflow Tab (e.g. filtering for allied/nursing-specific documentation). Note, selected filters remain unchanged at user level until the user revises selection.

☐ Adding Templates to Personal Note Type Filter List
Set position and workflow for users rotating to different areas or positions
☐ Position Picker: For users with multiple positions
☐ My Experience: for users rotating to multiple specialties (ex. residents)
Printer Preferences
☐ Set default printer
CST Cerner Provider Personalization Videos
Review this Short Video Series for Optimizing your Account