

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

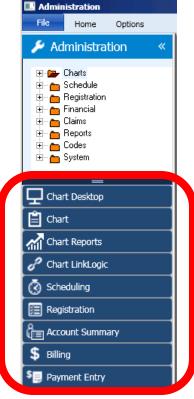








Left Navigation Panel Opens



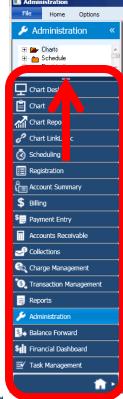


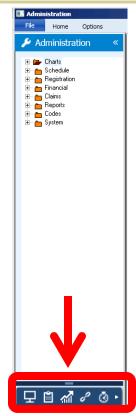




Left Navigation Expanded and Collapsed

 Click and drag either up or down to expand or collapse the panel











Left Navigation Shrunk



Click the << to shrink the panel.



Click the >> to open back up



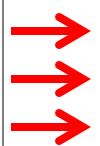






Chart Left Navigation Access

Click any Left Navigation Button to quickly access that component



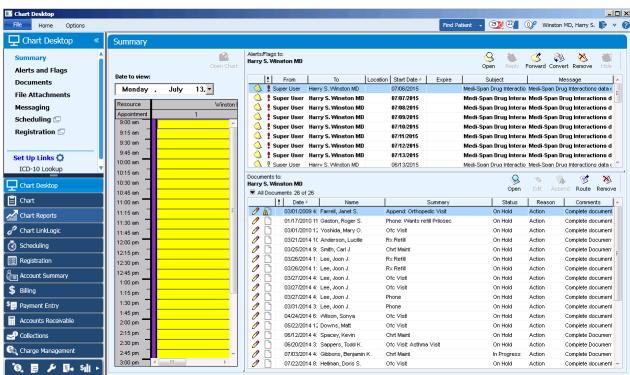








Chart Left Navigation Access

 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.



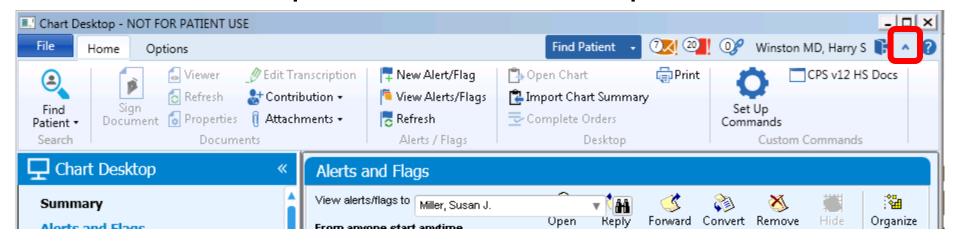






Ribbon Feature

- Expandable Ribbon
- Click "v" to expand and "^" to collapse

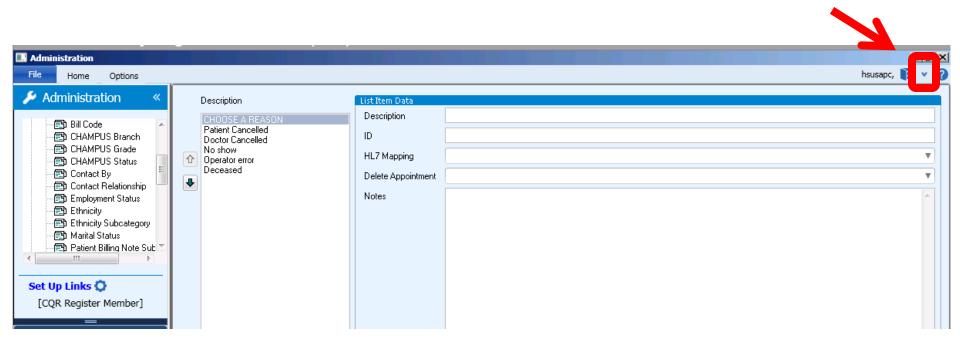








Administration Displays – Click v to Expand Ribbon

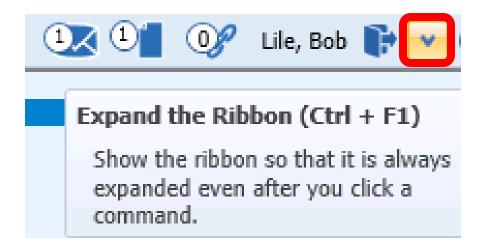








Expand the Ribbon Icon









Administration/Edit Access Displays

Administration/Edit Components









Chart Collapsed Ribbon

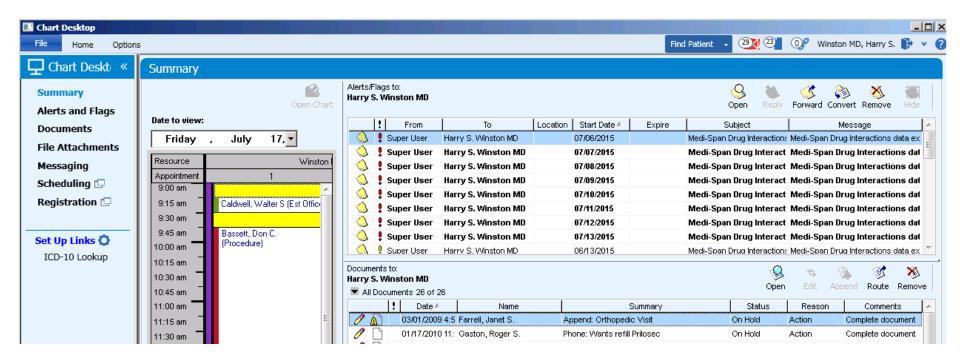
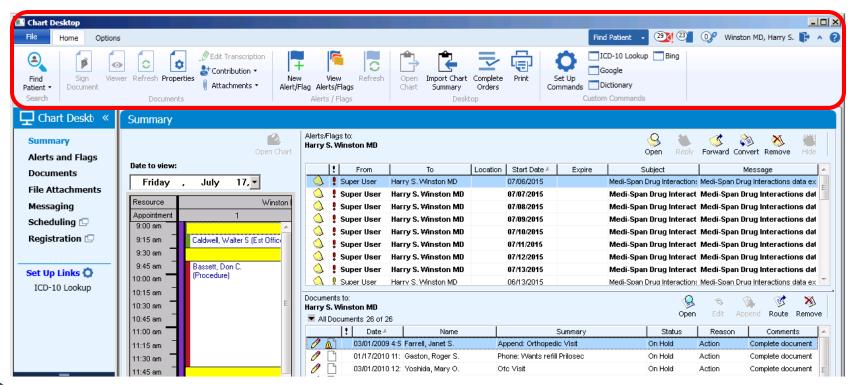








Chart Expanded Ribbon









QUICK ACCESS TOOLBAR IN CHART

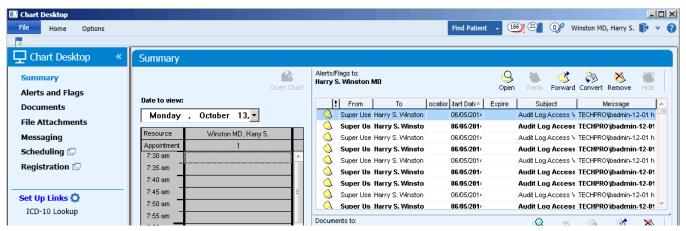






Minimize Chart Ribbon

- Minimize ribbon to gain larger display of schedule, documents and patient chart
- You may also minimize Left Hand Navigation for maximum screen usage



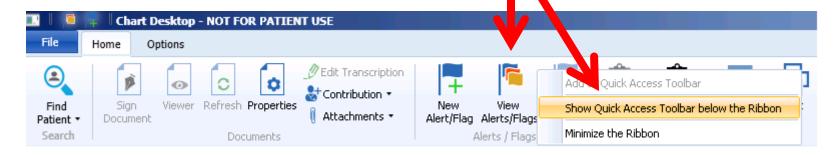






Show Quick Access Toolbar below the Ribbon

- 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



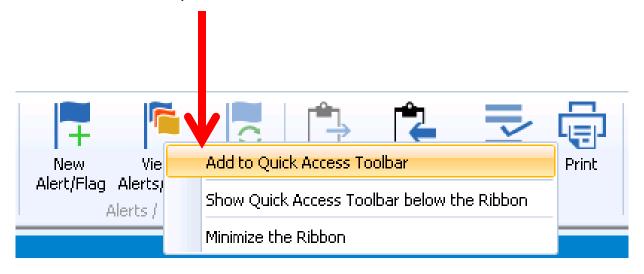






Add to Quick Access Toolbar

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



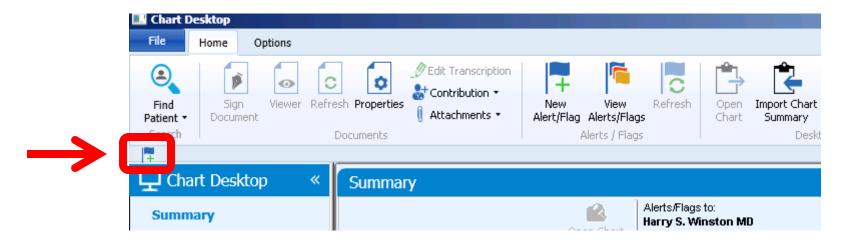






Icon Appears in Toolbar

Icon appears in toolbar BELOW ribbon





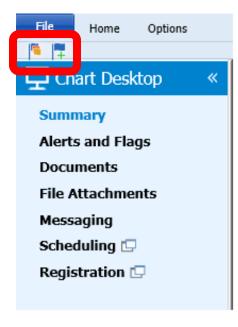




Accessible Icons

Once ribbon is minimized (^), icons remain

accessible



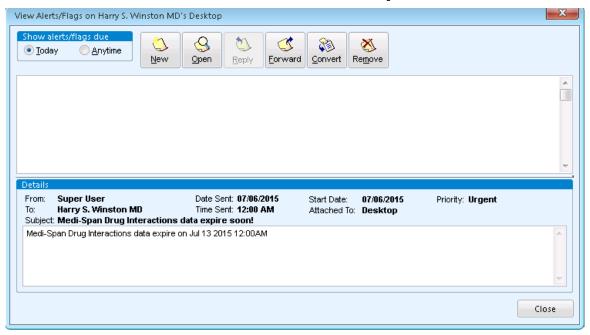






Minimized Icon Opens Window

Click minimized icon
 to open window







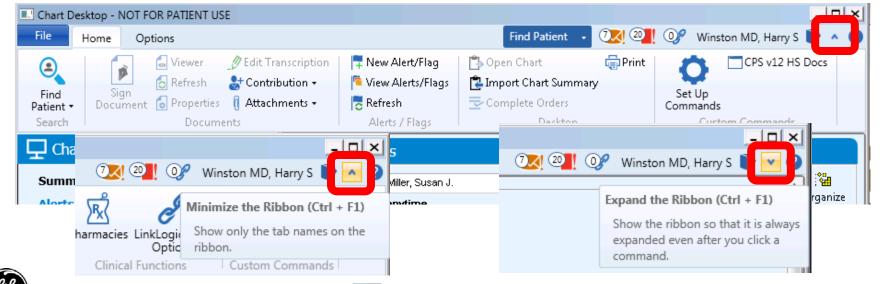


Ribbon Feature

Partner

Healthcare

- Expanded and Collapsed views
- Click "v" to expand and "^" to collapse



Centricity™



Custom Module Extensibility

- Set Up Links (HTML links)
- Set Up Commands (execute batch/system commands)

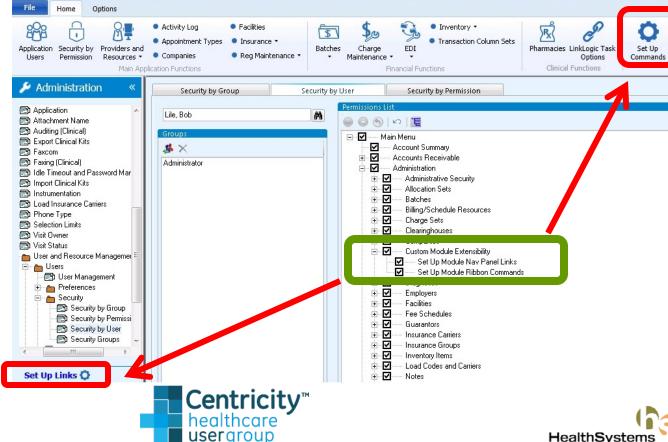






Custom Module Extensibility Security

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

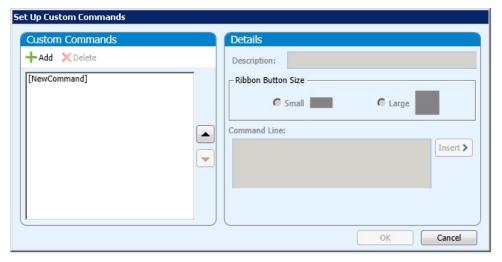






Set Up Commands



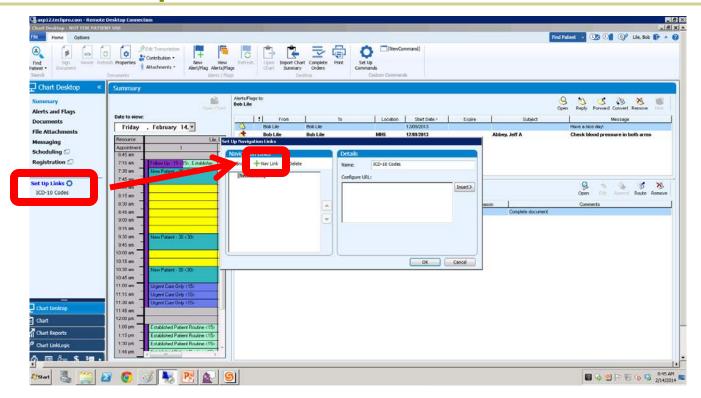








Click Set Up Links Icon and + New Link

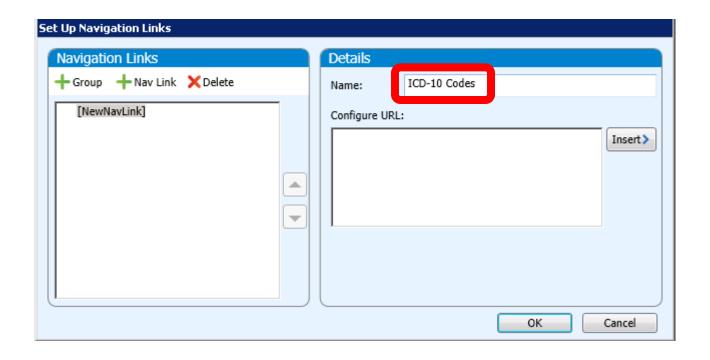








Enter Name for New Navigation Link

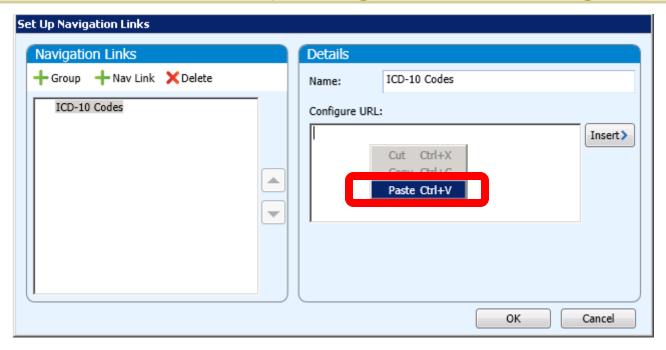








Paste URL Link by Right-Clicking

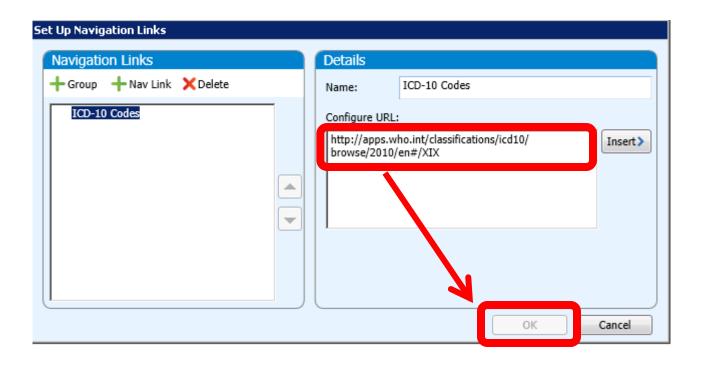








Navigation is Pasted – Click OK to Save









Click Newly-Created Link (bottom left)

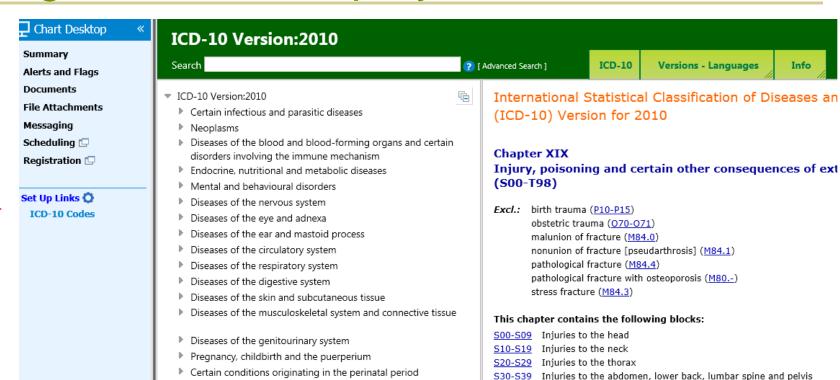








Navigation Link Displays









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

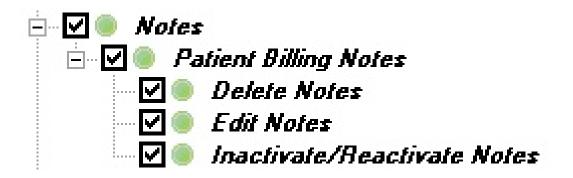






Notes Security cont...

Security / Administration / Notes

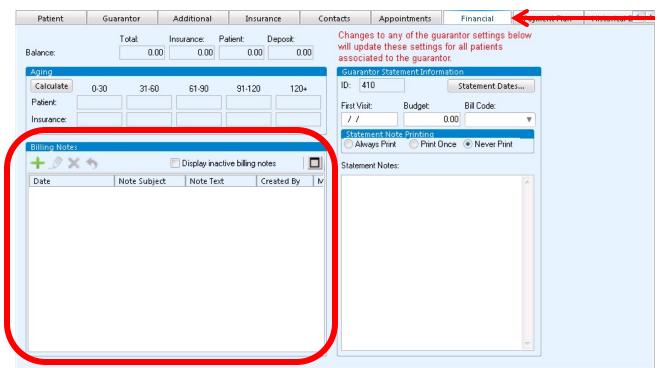








Access Notes Through Registration



Financial Tab







- OR -

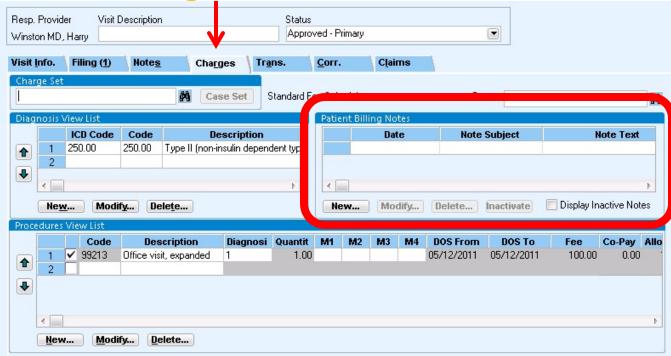






Access Notes Through Billing

Charges Tab





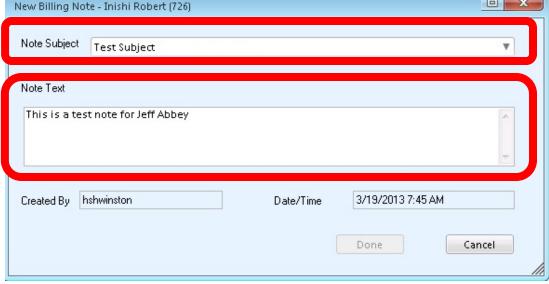




Open Note Subject and Note Text

 Clicking the + sign in Registration or the New button in Billing will display the Note Subject and

Note Text









Billing Note Subjects

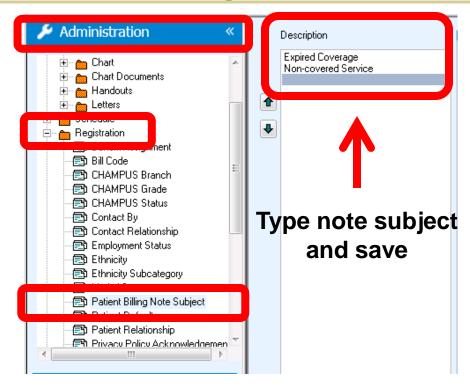
- Billing note subjects may be typed in on-thefly or saved for future use in:
 - Administration
 - Registration
 - Patient Billing Note Subject
 - Description







Saved Patient Billing Note Subject

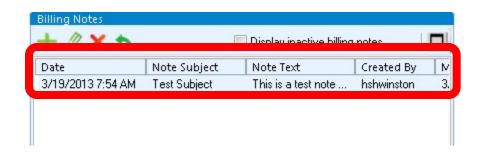








Open Note Subject and Note Text



Billing

Registration



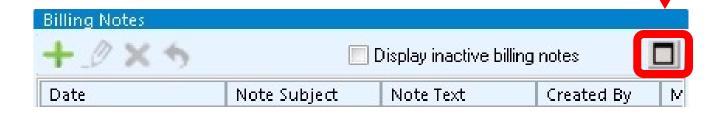






Full Viewer

Click the Full Viewer box to display the note in full view

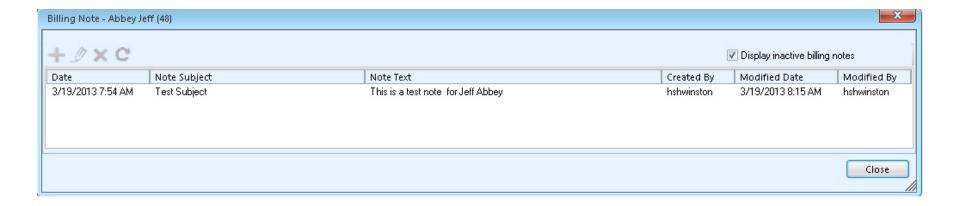








Message Displays in Full View

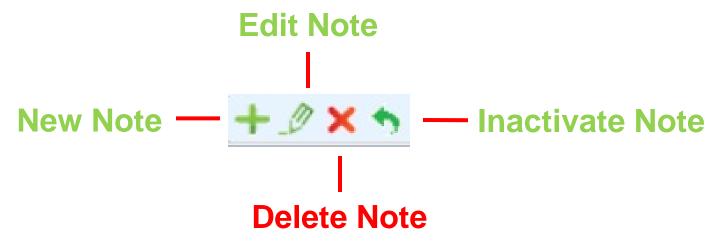








Note Function Icons





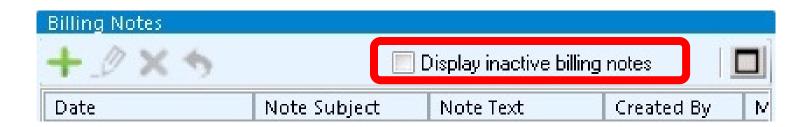






Display Inactive Billing Notes

 Any note that has been marked as inactive may be shown again by clicking the "Display inactive billing notes" box







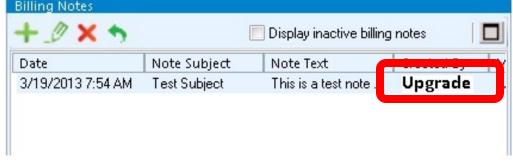


Prior Notes

- 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

Searching For	Yields
"insurance carrier"	The phrase insurance carrier
insurance carrier	Either or both separate words insurance and carrier







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 (" ")

Searching For	Yields
clin*	clinic, clinical, clinician
dia*s	diagnosis, diagnoses
*ckt	information about any .ckt file type
10?2	information about Link Logic errors 1032, 1052, 1062







KEYBOARD SHORTCUTS







Formatting Keyboard Shortcuts

Press this key	To do this
Tab	Move cursor to next colon (if tab-to-colon is on), or move cursor to next tab (if tab-to-colon is off)
Shift + Tab	Move cursor to previous colon (if tab-to-colon is on), or move cursor to previous tab (if tab-to-colon is off)
Ctrl + B	Toggle bold formatting
Ctrl + I	Toggle italic formatting
Ctrl + U	Toggle underlining
Ctrl + Shift + F5	Insert a document attachment
Ctrl + Q	Find text in document
Ctrl + Z + Backspace	Undo the previous action







Registration Keyboard Shortcuts

Registration keyboard shortcuts

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

rou can use the follow	ving keyboard shortcuts (not keys) in keyistration .
Press this key	To do this
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

Chart keyboard shortcuts

Note. If you don't see the underlined shortcut keys on your menu options, press

Press this key	To do this
Tab	Move focus to next field
Shift + Tab	Move focus to previous field
F8	Move to next Chart panel
Shift + F8	Move to previous Chart panel
F1	Open online help
F5	Refresh or update a window
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 + H	Open Print Patient Education Handout
Ctrl + P	Print
Ctrl + T	Open Protocol Results
Ctrl + U	Begin a chart update

Chart keyboard shortcuts

Note. If you don't see the underlined shortcut keys on your menu options, press

Press this key	To do this
Ctrl + Alt + M	Start/stop MEL tracking
Ctrl + Alt + S	Start/stop SQL tracking
Ctrl + Alt + T	Start/stop DB tracking
Alt + F4	Close Chart module
Alt + C	Return to Chart summary
Alt + D	Activate directives
Alt + F	Activate alerts/flags
Alt + L	Activate allergies
Alt + M	Activate medications
Alt + O	Activate problems



Healthcare





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.

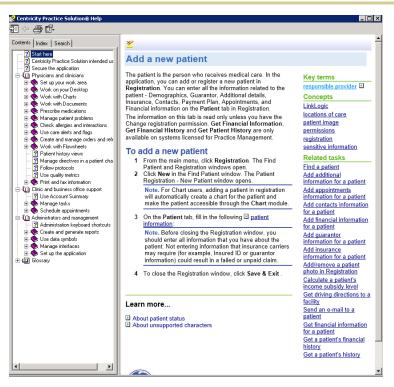






F1 Key – Help for any window

 Context Sensitive Help depending on the screen or window that is displaying at the time you press it



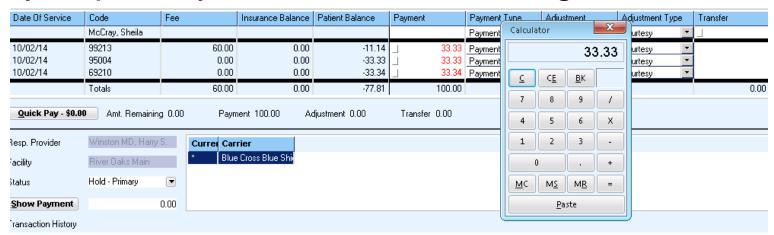






F2 Key – Calculator

 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

条 Find Pati	ent		□ X
ABCDEFGHIJKLMNOPQRSTUVWXYZ			
Name	▼	SSN ··	<u>C</u> lear
Provider	(all)	Medical Rec.	
Facility	(all)	Date of Birth //	
Guarantor	(all) V	Phone [] - []	
Insured ID		Bill Code A	
External ID	No preferred externallDset	Location (any) ▼	
Status	Active ▼		

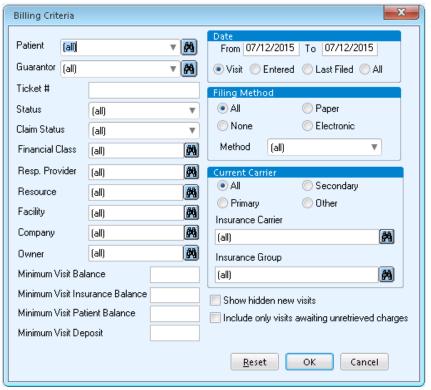






F4 Key – Opens Criteria Window

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

Payment	Adjustment	Adjustment Type	Actual Allowed	Allowed
		Disallowed <u></u>		
25.00	_ 43.00	Disallowed	42.00	85.00
25.00	43.00		42.00	85.00

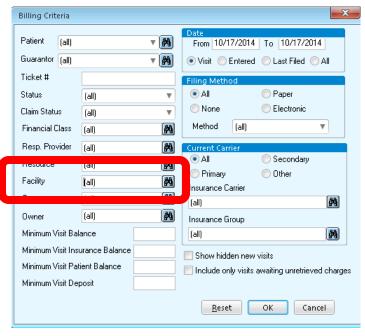






F9 Key – [all]

Pressing F9 Key to indicate [all] data for that field



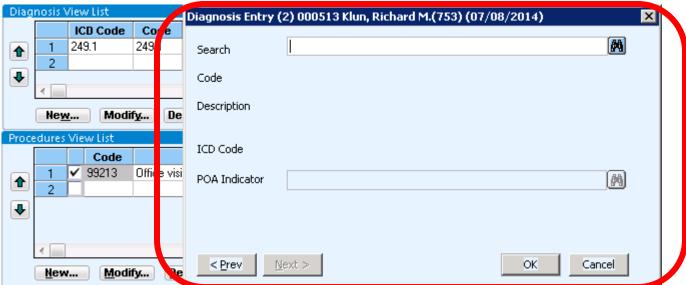






F10 Key – Search for Diagnosis

 Search for or Change Diagnosis (ICD-9) or Go to the next code (same as double-click)



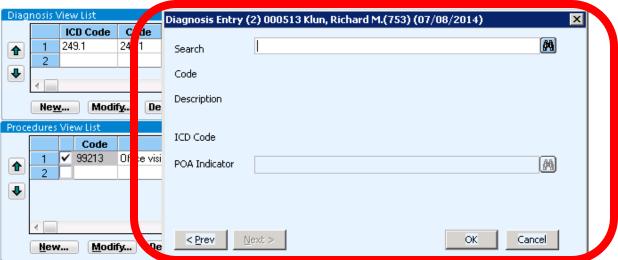






F11 Key – Search for Procedure

 Search for or Change Charges (CPT) or Go to the next code (same as double-click)





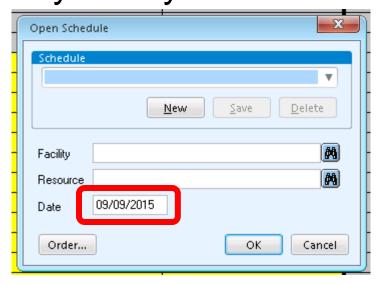




F12 Key – Today's Date

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

Provider			M	
Facility			#	
Company			M	
Financial (Class	(all)	▼	
Departmer	nt	(all)	₩	
Resource		Exclude		Selection
Resource	Selection		M	
Month		month		







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

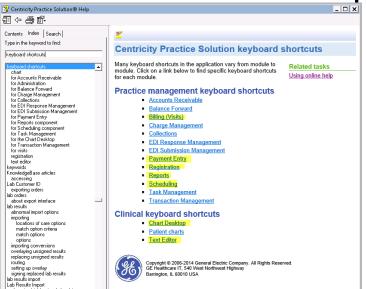






Find Keyboard Shortcuts Online

 Help / Help with Centricity Practice Solution / Type "Keyboard Shortcuts" / Click List Topics









DOT ID

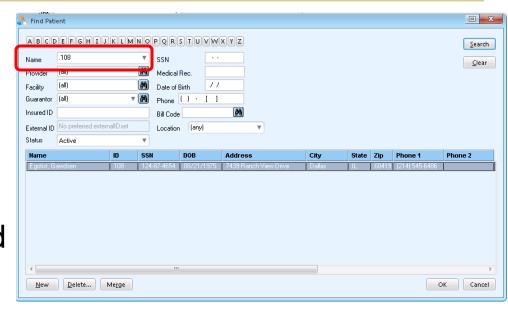






Dot ID for Quick Lookup

- 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

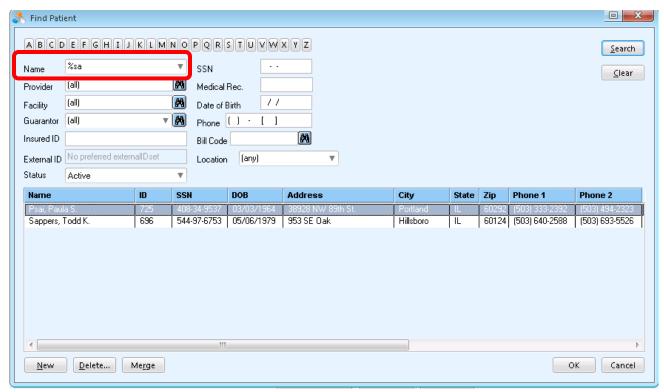
- The % key is used to indicate a Wild Card search
- Example: You can use %sa to search for a patient who has "sa" anywhere in their last name and ,%sa for anywhere in the first name







Wild Card Search









ADD SHORTCUT BUTTONS



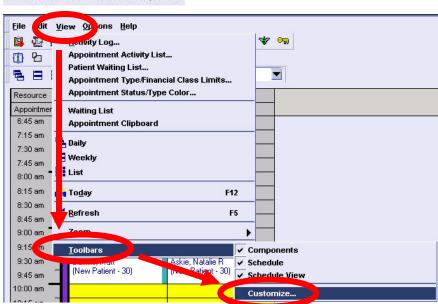




Add Shortcut Buttons

 Add Patient Profile and/or Patient Superbill Buttons to Schedule

1. Click View / Toolbars / Customize

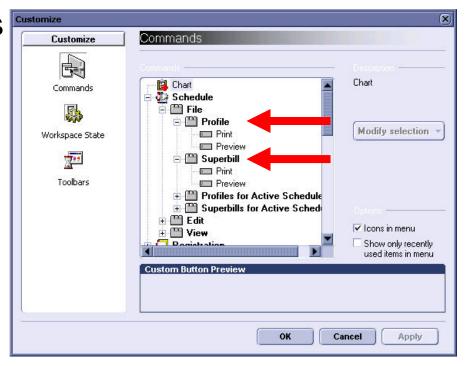








2. Customize Window Opens Customize









- Click and drag Schedule/File/Profile/Print to a Target Region
- Click and drag Schedule/File/Superbill/Print to a Target Region
- 5. Click OK to close box

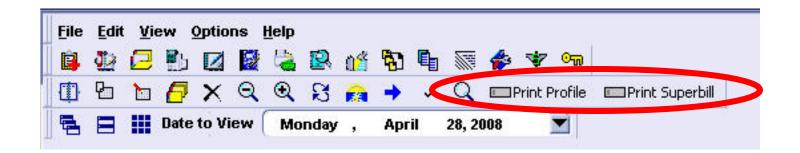








6. Shortcut Buttons now display on Schedule









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

ACCT: 279		3120 Seal	imery Family Medi on Place "PO Box : ilgomery, AL 98124	240202		
PATIENT INFOR	MATION BHEET			TODA	Y'S DATE	41282003
PATIENT				EAL A	NCE .	\$20.00
Recol	Cndy					
43° HIM	HIST HAVE		10 I.S.	_		
2000 Keller Sornoz	261		Luxen			N0295
atovas	•		U1		21414	or or
E (1938 + W(14)18		0.0000000000000000000000000000000000000	4111100 1 121	- A-0.000	41,3,44	
	0.0000000000000000000000000000000000000	822-01-4512		203		33 //3
HOM PHOM HEVEL I.	DIFFERENCE.	30E-3HL HE	10.50	+ C+10/ H		40
M DATE DA	UMared Single D	wased Midex	HAHWMD-HE	16411		PH HANDS.
		7.			50.202	1000-2044
Sleve's Sada Comp	pany .				13.5	100-0044 100-0044
1. Private Pay I Se		PH-54"P		7.0.7 HD.		POETHO.
Primary Guaranio	or (The name on the	primary insurar	nce card)			
Percel		Cody				
	Cno	lv.			,	ieli
	Cent				1	iali Na mole
143* 1414	нач					NI PROPE
ias-web Slave's Sada Comp	нач		522-01-451 300-14-51			
iss Held Sleve's Sads Comp Harland	нач		522-01-4512			0101203
iss new Sleve's Sads Comp Ewitonia 2.	рап ү		52-01-51 300300 H			0101203
Secondary Guara	рап ү	nession nession the secondary t	822-014-513 300-340-96 300-340-96 300-340-96-96-96-96-96-96-96-96-96-96-96-96-96-			0 : 0 : 203 0 : 0 : 203
123- HERE State & Sodia Comp Fresione. 2. SECHENKI HOLENES CO	servy serven servicer (The name on	nession nession the secondary t	822-014-513 300-340-96 300-340-96 300-340-96-96-96-96-96-96-96-96-96-96-96-96-96-	7.00 P HS.		NI - 100# 0 - 0 - 203 NO 0-100 H
Several Seda Compensation Compe	servy serven servicer (The name on	he secondary be secondary by secondary be secondary by se	SECONDARIO SECOND	ooverage at: ur oo paymilliow u sa we y . Bome of	any time . ent la due et to ten !	POLYMENT AND THE STATE OF THE S

	7 mi 1311 2 mil Lame 2010 1 400-1 300			Appl Appl Appl Appl	.D. 36.29 (Ms of 5 wice. 4/23/2003 2 30.004 f type. New Polanti-20 of fms. 1 25.15 pm animari Noles.	UM				
. 000782 d Name. p. . 4417 Allen . Dallas, E. Trans. (200) hore. (200) ans. Notes . Alent Notes .	0 601 Lares 8040 1 408-1380			Aus. App	of Fms. 1.25/5 pm onimed Notes.					
d Name. p. 1. 441 f Allen 1. Dalba, L. Phone. (200) hore. (200) nos. Notes Aleni Notes	0 601 Lares 8040 (408-1380			A00	onimed Roles.					
, 441 f Ajler Dalta, E. Prone (205) hore (200) ane. Notes (200)	0 601 Lares 8040 (408-1380			rim	ii					
. Dalba, L. Prans (205) hore. (938) ans. Notes . Abri Notes .	408-1380			-	ı la Room.					
hone (205) hore (238) ans. Notes (Aleit Notes (400-1300			-	s la Roam.					
hore (290) one. Notes (Abril Notes (-	ı la Roam.					
one. Notes : Alent Notes : C	-34-A-102			-	lo Room.					
Notes . Alent Notes . C	28			-	lo Room.					
Alani Malas. C	že.				firms to Room.					
	88			Relating Dadas, J PENE MD						
				Pimay Cris Physican.						
		-	INSURANCE	EINB	DEMATION					
	CASEMANA O BM ENT				Insurance Aleil Notes .					
hautance Plan.										
ICIMA.				1_						
Casa Name.				hauance Notes .						
Cognision Date.										
Remaning Vota.				_						
VISITS	CONSULT	NEW	ESCABL.	l x	DUIGNOSTIC 16515	CODE	FEE			
Lavel	22241	22201	32211		A) e	32025				
Level 2	99242 99249	99202	99212	+	Blood sugar Glucose	32982 3294 f	_			
	22244	33304	32214	-	FNA yimpageng I nodule					
Lavel4										
Level 5	22245	22205	32215	-	[10022 E 78942)	SNAT				
	22245	22205	32215	H	FNA wimgaging 2 nodule					
	99245	99205	22215		FNX vimgaging 2 nodule [10022, 10022-51, 18942) Lipid Panel	3 N.A.2				
LevelS	99245	22205	32715		FNA vimgaging 2 nodule 10022, 10022-51, (6942) Upd Panel Ulisacund-neck	3 N.A.2 3008 1 78528				
Level 5 on Signalui	99245				FNA vimgaging 2 nodule 10022, 10022-51, 16942) Upd Panel Uhassund-neck Uine Dg	3 N.A.2				
Level S on Signalui ce Colonce .	22245	\$rar a	l rodays		FNA vimgaging 2 nodule (10022, 10022-51, 76942) Ligid Panel Ultrasound-neck Ultrasound-neck Ultrasound-neck	3 N.A.2 3008 1 78528				
Level 5 on Signalui	99245	\$rar a			FNA vimgaging 2 nodule (10022, 10022-51, 76942) Ligid Panel Ultrasound-neck Ultrasound-neck Ultrasound-neck	5 NA2 2005 76528 31002				
Level 5 on Signalui	99245			obiC	FNA vimgaging 2 nodule 10022, 10022-51, 16942) Upd Panel Uhassund-neck Uine Dg	3 N.A.2 3008 1 78528				
		VISITS CONSULT	VISITS CONSULT NEW	Umperiad streen house blod. VISTS CONSULT NEW ESTABL.	O Umper/ed streembroke block VISU'S CONSULUE NEW ESTABL. X	VBI'S CONSULT NEW ESTABL X DUGNOSTETESTS	C Ungge/ad showshooks block. Ungge/ad showshooks block.			

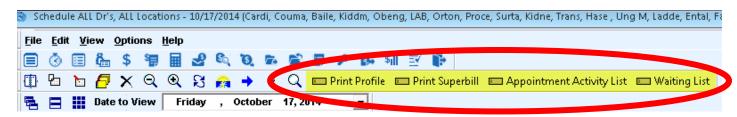


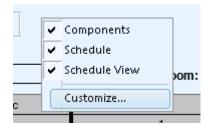




Customizing Other Toolbars

- Schedule
- Patient
- Visit
- Payment Entry
- Reports











Questions and Feedback



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

Arman Virani avirani @healthsystems.net

Maurice Rosenbaum mrosenbaum @healthsystems.net





