

September 09, 2011

Dear Client,

Patient Chart Manager Update 5.5.900 is now available

This information includes some the most recent changes with PCM version 5.5.900. Full documentation to cover all of the recent changes from versions 5.5.644 to 5.5.900 is also available; a separate e-mail with a link to that information will soon follow.

The main functionality of PCM remains the same with this update. This update has the latest changes necessary to meet the "Meaningful Use" criteria along with many more features and updates. Please review the attached changes.

This version of PCM has been continuously updated and changed in order to keep up with the advanced e-Rx and Meaningful Use requirements; it has been installed at a very busy, high patient volume beta site for a several months during these changes. Please be advised that as with any other system update errors may still occur and if they do, subsequent updates may be necessary.

If your server is on PCM version 5.5 or higher, the update process is simple and the update requirements remain unchanged; the server will be updated by PCS Support, at initial PCM log in each work station will get an update prompt, and each user must accept the update prompt and proceed with the update until it is finished. All work stations must be updated.

The Operating System, Display, and Optional Third Party Component Requirements remain unchanged since PCM Version 5.5.600 release

If your PCM server version is 5.4 or lower, there will be special instructions for this update, please make sure that you review the information which will be provided by PCS Support Department.

Please be advised that your server will be updated as time permits. If you would like to schedule a specific date or time, please contact support@primeclinical.com

Important Information:

If you are using Olympus Dictation, all of the existing text transcription documents will need to be filed prior to this update. Please contact support@primeclinical.com to schedule this update.

For PCM TS Client users; PCM TS Client 5.5.900 or higher is required to use with this update, after this update you should be notified as usual of the TS Client update upon PCM login, proceed as usual with that.

Prime Clinical Systems, Inc PCM Support and Training Department

Summary of New Changes (See pages 4-20 for complete details)

Preventative Services/ Patient Reminders

- Chart Reviewer user can now edit the Guideline Setup Screen, and can set guidelines for all the providers
- For Education Reminders , the Meaningful Use credit will apply to the provider for whom the guideline is set up for, is recommended that the Chart Reviewer user edit each guidelines and set them all to be for all providers
- Completing Education reminders and printing Education Materials, this can be done by mapping an education type document, a web link to a document, or network path to a document
- Specify the Type of Alert-you can set the type to be anything other than PREVSVC, choose from the existing list of reminder categories, or you can add new categories to choose as the type.
- Reminder Duration there is a new Duration filed, this was requested by an office that does a lot of post operative care, and wants to set up reminders for specific durations.
- Due Next Month option; this new option will show all reminders due next month.
 For example, if the current date is 8/15/2011 using this option will show all reminders due for the month of September: 9/1/2011 to 9/30/2011
- Education Type Reminders that are due or over due will be automatically processed on patient Check out, if the reminder is setup with a web link, the link will open at check out for printing, if a mapped document, the document will be printed on check out, etc...The Meaningful Use table will be updated with the Event Code 6 "Educational Materials Provided".
- Process reminders By User Preference; Email, Mail, Home, Cell, Patient Portal For example, you can process all of the E-mail type reminders first, and this way, you won't get prompted to choose a printer in between, or if only choosing the Mail type, it will not check to see if a user has their e-mail set up, etc...
- Meaningful Use table now stores the Document ID for reminders processed using the Patient Reminder Log
- Inactive Patients, if the patient's status is marked as Inactive or if a date died is entered in the patient data editor screen, new reminders will not get added to the list, nor will preventive service type items get added to the reminder log.

Filing/Exporting Chart Documents

- Filing from Filing Inboxes, the workflow has slightly changed; it is no longer necessary to right-click to indicate "File Page" or "File Pages". All you do now is select the document you want to file, then type the patient's name under the "Patient Search", the message "File with REQ Log Interface" will come up, and when you click on "NO" you will then get the "Pages to File" dialog at which point you can choose the specific page ranges to be filed.
- o The Faxed Docs chart tab stores a copy of faxed and e-mailed documents
- New web filing options, the selected web image can now be saved as a .BMP format to the Filing Inboxes (Image Tab) or as a .JPG directly to the patient's chart. This was done because some web pages which display pure diagnostic images are encrypted and do not allow capture as TIF/PDF etc..., but using this new "Image Only" option and having the Filing Inboxes open gives users the option to save

the images to the Image inbox as .BMP and having the chart open gives users the option to file the images directly into the chart as .JPG

• Olympus Dictation- the logic for naming and auto-filing text documents has changed; all existing documents must be filed prior to this update

Patient Data Tables

• The new Task view in Patient Data Tables allows users more flexibility, and the ability to sort and to view all of the outstanding tasks for all users.

User Privileges

• Chart Reviewer login now has access to all users' "MyDocs"

Miscellaneous Changes

• Quick clinic switch option, there is a new option for switching clinics which is located on the main toolbar, If a user is logged on to another clinic, they can click on the drop down and choose from the available clinics.

Preventative Services / Patient Reminders

These additions to the Guideline Setup and Alert designer complete the Meaningful Use changes.

The following system reminder types are system types and cannot be deleted; DECISION, EDUCATION, PRESVC, and APPOINTMENT.

Chart Reviewer user can edit the Guideline Setup Screen- the desired provider is chosen from the combo box which is sorted in alphabetical order. In order to edit for 'All" providers, first select a provider from the drop-down menu, then select the "All" option for the provider.

Education Reminders and Meaningful Use-when completing an EDUCATION type reminders from the patient reminder screen, the Meaningful Use credit will apply to the provider for whom the guideline is set up for.

It is recommended that the Chart Reviewer user edit any Education type reminders that need to be shared by all, as that way, all providers will have the same Education guideline in their own list for possible use in the treatment plans, etc...

When completing these EDUCATION reminders on patient check-out, the credit goes to the responsible provider for today's appointment.

If the Provider for this Education reminder is blank, the set provider from the Preventive Services User preference option will be used.

Options
Word Processor Spell Check Options Misc. TS Client Mode Tasks/Reminders Signing Preferences Tablet PC Prev Services Prescription Documents
Age at which Popup asks Pregnancy Status 12 Age at which Popup asks if Sexually Active 12
Use the Guidelines set for this Provider
Never create a duplicate reminder even if the date due of the previous reminder has past.

Completing Education reminders and printing Education Materials - When completing these reminders, using Complete, Complete with Data Table Action, or Complete with Treatment Plan, this will automatically update the Meaningful Use table with 'Educational Materials Provided' event code 6

Re	eminder Log									
P	Patient Reminders									
	Seq	Short Desc	Comment		Start Date	Int. Months	Date Due	End Date	Days OverDue	Date 📤
	1	EDUCATION	Test Educatio				2011/09/01	2011/09/01	-5	
	1	PRESVC	Varicella Vac	Complete Item Complete Item with Data Table Action Complete Item with Treatment Plan Override / Remove			2011/06/12	2012/11/27	61	
	1	PRESVC	Aspirin for the Prevention of Events Ove				2011/12/09	2042/11/23	-104	
	1	PRESVC	Aspirin for the Prevention of Events Cre	Edit Reminder Create Task			2011/12/10	2042/11/21	-105	
	1	PRESVC	Depression Screening	g	2010/12/10					
			High Blood Pressure							

Family Cond	litions Growt	h Param HL7 R	esults Imm Log Meaningful Use Medi	cation Medication History	Misc. Orders and /	\dvice	
DATE	PROVINIT	EVENT CODE	EVENT DESC	DATE COMPLETE	LAB SPEC	LAB REPORT DTE	NEXTBIZE
08/26/2011	RMD	6	Educational Materials Provided	08/26/2011			08/31/
03/12/2011	RMD	6	Educational Materials Provided	03/12/2011			03/16/
03/12/2011	GZH179	4	Received Patient Transfer Meds Reconciled	03/12/2011			03/16/
03/12/2011	GZH179	4	Received Patient Transfer Meds Reconciled				03/16/
03/12/2011	GZH179	6	Educational Materials Provided				03/16/
03/12/2011	JDS103	6	Educational Materials Provided	03/12/2011			03/16/
10,000,0010	- ·	-	Drup the r	10,0010010		1	3084

This type of trigger is used when you want to print educational information from the web, or stored link.

If you are using a document path instead of a web link, make sure that the path has the complete path <u>\\computername\sharename\document</u> path; otherwise the document source will not be found.

When you use either a web link or a local file system link, the link will be launched on reminder completion and the material has to be manually printed.

When using a document from the list of forms to attach, will automatically print to the document printer at the time the reminder is completed.

When the document is printed, a copy is also inserted into the chart for the patient, the signor defaults to NOSIG. If document is a Pen Doc, then Author-Signor will be Scan-NOSIG, if text, then Text-NOSIG.

Note: an Education type document cannot be a REQ type document.

The Guideline URL has a combo box for the previous link text, and also holds the list of all the documents in the forms to attach list which are flagged as education type documents, and thus these same documents can be used when completing an education reminder, and count for Meaningful Use.

0	Guideli	ne Set	up				
	Provide	er:	RMD	Show Prev	Svcs Table		⊻iew Guideline
	Title:		Abdominal Aortic Aneurysm Scr	eening			N.G.C.H.
	Sex:		M			A	ctive: No 💌
	Risks:	?	Include: 📃 💌 Excl	ude:	💌 Medi	cation	
	Lab Re	esults:		-	•		1ed Include Alert
	Age fro	om:	65 🔹 Year(s) 💌 to: 7	75 📮 🛛 Year(s	s) 💌 Interva	al: Every	1 ♣ Year(s) ▼
	Pregna	incy	Weeks from:	to:	T D	uration	0 🛖 Year(s) ▼
	Туре о	f Alert	PRESVC 🔽				
	Guideli	ne URL:	ScreeningAbdominalAorticAneu	irysm.mht		Brow	se Load Default
	Notes:		Name Color Pen Doc All User Office Note Colon Operative Report Blue Shield Authorization Form Echo	Code 00000 ADT BARRY BILLING CARD	Id Auth 8402 AllUs 8382 AllUs 5615 AllUs 563 Univ 5552 Doct	io Signor iers RMD iers iers ors	• n (AAA) •
	Sex		pdf 1 Coumadin Education	CINDY EDUCATION	8225 Univ 8962 Univ		gnant?
	M	Abdomi	Breast Exam	GYN	554 AllUs	ers	▼
	М	Alcohol	Misuse Screening and Behavio	ral 18	1	Year(s)	F
	F	Alcohol	Misuse Screening and Behavio	ral 18	1	Year(s)	F
	F	Alcohol	Misuse Screening and Behavior	ral (0 Mnts			Yes F

Specify Type of Alert- the Guideline Setup screen now allows you to specify type of alert (this is the same as the reminder short description categories), it is no longer required that the type be "PRESVC", any existing category can be used. New types can be added by adding a new reminder to a patient, and entering s new short description, once that is added, that category type will be available in this screen as well.

Guideline Se	tup
Provider:	NEW157 Show Prev Show Pediatric View Guideline
Title:	N.G.C.H.
Sex:	Active:
Risks: 🧖	Include: PS_PRG Exclude: Medication
Lab Results:	▼ ■ Med Include Alert
Age from:	0
Pregnancy	Weeks from: to: Duration 0 + Year(s) -
Type of Alert	PRESVC
Guideline UR	APPOINTMENT L'ARM SURGERY ASPIRIN THERAPY
Notes:	CALL PT COPAY
	FU

Reminder Duration- there is a new Duration filed, this was requested by an office that does a lot of post operative care, and wants to set up reminders for specific durations.

Note the following when using durations:

- a. if a duration is used, it will blank out any age to values
- b. if an age to field is used, the duration will be cleared
- c. if patient is not pregnant(ps_prg), the reminder applied will calculate an End Date to apply to the reminder

Guideline S	etup	
Provider:	RMD Show Prev Svcs Table	e ⊻iew Guideline
Title:	Alcohol Misuse Screening and Behavioral Counseling In	terventions N.G.C.H.
Sex:	F	Active: Yes 💌
Risks: 🧖	Include: PS_ALC 🔽 Exclude: 💽 Me	edication
Lab Results:	_	Med Include Alert
Age from:	18 Year(s) 🔻 to: 0 Year(s) 💌 Inte	erval: Every 1 📮 Year(s) 🔻
Pregnancy	Weeks from: 💌 to:	
Type of Alert	PRESVC	Year(s) % Month(s) Week(s)
Guideline UR	L:ScreeningAlcoholMisuse.mht	Browse Load Default

Patient Reminders Due Next Month Option- this new option will show all reminders due next month. For example, if the current date is 8/15/2011 using this option will show all reminders due for the month of September: 9/1/2011 to 9/30/2011

P	atient Reminders		
	Sort Options: Patient Name PCM User for Tasks Short Desc: Comment:	Days Until Due: Due Next Mo Due or Over Over Due	inth P Due
	Choose Document for Reminder Use to Map to Short Desc (Reminder Type)	Signor: ▼ Signor: Signor: Signor: Save Due in 14 Da Due in 14 Da Due in 14 Da Due in 20 Da Due in 14 Da Due in 14 Da Due in 14 Da Due in 14 Da Due in 20 Da Due in 14 Da	s iys iys inth
	Seq Name Home Phone Short Desc	Due > 30 Da Comment No Date Spe	ys cified

Education Type Reminders will be automatically processed on Check out- Education type reminders that are due or over due will now be automatically completed on patient check-out.

The date due will be reset to today's date plus the reminder interval if any, but never past the end date if any.

If the reminder has a mapped document or a document path, that will be printed on check out.

If the reminder has a valid link associated with it, the link will open on check out, the user who is doing the check-out can then print the materials at that time.

The Meaningful Use table will be updated with the Event Code 6 "Educational Materials Provided"

"Education" type reminders can be setup to be generated on patient check out; the Meaningful Use table will be updated with the Event Code 6 "Educational Materials Provided"

Setup "Education" type documents by going to Doc Set up, just select the document, then right click on it and choose the option "Doc is Educ Material"

	Lomplaints I able	AllUsers	Adria	na
🗖 🗐 SOLIMAN	Consent for a Proce	dura Allilaara	Cons	ents
🗖 🗐 CONSULT	Consult	Share		Notes
🗖 🕖 Z1376	Coumadin Clinic	Map to ICD9		BATOR
EDUCATI	Coumadin Educatic	Attach Last Evoludo EVD		tion
COPY	DAVID ATTACH LA			
🗖 🗐 DAVID	DAVID ATTACH L	Doc is Educ Material		
🗖 🗐 CINDY	Diabetic Meal Plan	Set IPlanOption		э
🗖 🗐 Z461	Discharge Instruction	Enable Sharing with Patie	nt on Patient Portal	irge
🗖 🗐 DON	DON DON DON	Enable Sharing with Refe	rring on Patient Portal	
	Dr Doc	Dectors	Mise	ويتمقطواله

On the list of forms to attach, if you scroll to the right, there is a column "Doc is Educ Material" if it has a "Y" entry, this means the document is flagged to be "Education" material.

Sharing PP with Patient	Sharing PP with Referring	Reg Loinc	Reg Is Lab	Doc is Educ M	~
				Y	
				Y	
				Y	
				Y	
				Y	
Y	Y			Y	
Y					
1					

To Map the document, Click on the "Map" button to open the Document Mapping Screen, choose the document you want to map, choose the rest of the criteria, including the appropriate Appt Type.

For example a Diabetic Consult Appt Type, should have Diabetes Educational Material document mapped, etc...

Then route the document, set the <u>routing action to print</u>, <u>choose the printer for the Document Destination</u> and finally <u>choose the routing condition to be "On Check Out"</u>

Note: when processing Patient reminders, if the patient's preferred method for receiving confidential communication is not set, the preference will default to Mail printed delivery, in order to meet Meaningful Use, the patient communication preference must be set.

Process reminders by communication type- when generating reminders, the logged on user can now specify the communication type preference; E-mail, Mail, Phone, Cell, Patient Portal, etc...

	*
4	Þ
Print Open Chart Process By User Preference	E-Mail Glose
	(All Types)
	E-Mail
	Phone-Cell
•	Phone-Home
	Patient Portal

For example, you can process all of the E-mail type reminders first, and this way, you won't get prompted to choose a printer in between, or if only choosing the Mail type, it will not check to see if a user has their e-mail set up, etc....

Note: we recommend that you use text documents for reminders, because pen type documents cannot be sent to Patient portal, these can only be printed for mailing or converted to PDF for mailing.

Also, you cannot send reminders when the type is Education, nor when it is Decision (for decision support items), these two are reserved.

Meaningful Use Table stores Document ID- when processing patient reminders using the Patient Reminder Log, the document ID (From the Chart Docs table) will now be stored in this field, this way we can tell if a document was actually generated.

Note: if user manually updates the Meaningful Use table for the reminder, and does not manually enter the DOC ID as well, this will not count for Meaningful Use next year, this field must be updated.

Prime	Patient Data Tables
Patient Search Name	PT Name PT ID: MR #: Prov Init. From: To: Ratient Search Reset Image: Constraint of the search in the se
Image: Second state Image: Second state Imag	Allergies Appt Log Complaints Diabetes Flow Diabetic Readings Diag Test Results E Prescribing Eligibility Encounter Log OBSONO FL System Review
	DATE DATE COMPLETE LAB SPEC NO LAB REPORT NEXTBIZDATE DOCID DATE CREATED CREATED BY DATE MOD DTE 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 02/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/2011 08/25/25/25/25/25/25/25/25/25/25/25/25/25/
All Pages Img Cap Office Notes Pt Reca	
ed By Date Time L., Doc ID Pro 102499 sb 100520 sb	۲
98890 sb 5/12/2011 4 98889 sb 98891 sb	Pint Plot Graph Image: Status Bar Status Bar Status Bar Status Bar Image: Status Bar Max Records: 200
	Add New Delete O Date on TOP Hide Blank Columns Cancel View Deleted View Normal Image: Date on LEFT Exp. to Excel Mgmt. Report EDIT Add Fields

Note: if the column "DOCID" is not visible, you can right click on the Meaningful Use Tab, and choose Data Table Editor and set the Display column width for this row to be 8.

P	'T Name	PT ID:	MR#:	Prov Ir	iit: From:	To:	
Patient Search Reset					▼ 08/25/	2011 🔽 08/25/20)11 💌 Apply
Allergies Appt Log Complaints Diabetes Flow Diabetic Readings Diag Test Results E Prescribing Eligibility Encounter Log OBSONO FL System Hernovy Tasks Urinalysis User Action Log Vision Hearing Vital Signs X Ray OBSONO HC OBSONO FIB OBSONO HUM OBSONO IOD Pod Prev Services Hx Prob List Proc List Rx Eligibility Rx Warnings Overrides Rx Warnings Overrides Social History Spirometry Pit OB Custom Data Ob Plat Ob Flow Ob Sono Past Medical Hx Past Preg Hx Past Pregnancy History Past Surgical Hx Patient Demo Family Conditions Growth Param HL7 Results Imm Log Meaningful Use Medication Medication History Misc. Orders and Advice							
Field Name	# Decimal Plcs	Text Fld	Max # Chars	Units	Display Col Width	Grid Display Order	Doc Display Order
PROVINIT		V	6		8.0	2	
DATE					8.0	1	
EVENT CODE	0				10.0	3	
EVENT DESC			100		22.5	4	
DATE COMPLETE					15.1	5	
LAB SPEC NO			50		10.0	6	
LAB REPORT DTE					8.0	7	
NEXTBIZDATE					12.3	8	
DOCID	0				8.0 -	9	
<grid design="" mode=""> Notice: Gray Cells are not editable. Pint Plot Graph Status Bar Max Records: 200</grid>							
Add New Deleted View Nor	mal O Da	ite on TOF ite on LEF	P ∐ Hide	e Blank Column: o Excel Mg	mt. Report	FT Canc DIT Add Fie	el Save and Close

Inactive patients- If the patient status is marked as Inactive or if a date died is entered in the patient data editor, new reminders will not get added to the list, nor will preventive service type items get added to the reminder log.

If a patient dies and you set the date died in the editor, when the chart is opened, the inactive state will be assumed, although actual flag for inactive is not updated.

Also, you cannot add new tasks from patient screen (sending document to task is still fine), nor create new prescriptions from medications pane, updating the list is still fine, as may want to document meds taken previously. Also, cannot edit a medication that is not Seq of o.

300 - Patient Data Editor - Edit Patient	
Account #: 126881 Name (L, F): Test, Patient	DOB: 09/22/1973 - SSN:
Guarantor: Test, Adriana - 126881	User Chart No: Global ID: 47501
Cat Code: HMO v Cat Type:	Cat Desc: HEALTH MANAGEMENT ORGANIZATION
Pt Def. Demo Pt Account Employment	Insur Data Cases Case Charges Chart Data
Treating Dr.	Blood Type: -Select F Student F Handicat V Inactive
Pri Care MD:	Comment1:
Sec Treat MD:	Comment2:
Referring:	Pharmacy: eied: _/_/_ • •
Interpreter:	Pri Insu:

Filing/Exporting Chart Documents

Filing from Filing Inboxes, the workflow has slightly changed; it is no longer necessary to right-click to indicate "File Page" or "File Pages". All you do now is select the document you want to file, then type the patient's name under the "Patient Search", the message "File with REQ Log Interface" will come up, and when you click on "NO" you will then get the "Pages to File" dialog at which point you can choose the specific page ranges to be filed.

There is only one option now in the right click menu "File Page (s)", but there is no longer the need to right click first, the only reason a user had to right click and choose either "File Page" or "File Pages" in the past was when filing from a multiple page document and they wanted to choose specific page ranges to file.



You will also no longer receive a message confirming if you really want to file the document.

Note: When filing .PDF, .MHT, or single page images, or from the Hl7 inbox, users will not be prompted for the page selection dialog box, these will be filed as one document, cannot file individual pages for these types.

"Faxed Docs" chart tab stores a copy of faxed and e-mailed documents- each time a fax or an e-mail is sent from the patient's chart, a copy of the faxed/e-mailed document is now stored in a new system chart tab called "Faxed Docs".

For Faxes; the 'Doc Type" will contain information on who sent the fax, and the recipient's name "RMD Faxed to PRIME CLINICAL" (PCM user ID, followed by "faxed to" and the recipient's name), the "Comment" will contain the recipient's Fax Number, and an attempt will be made to store the final fax status as well in the comments field, as obtained from the Fax Events Service if sent using Microsoft Fax.

Procedure Pt Re All Pages Auths	calls Referration Tasks Dicom Doctor Notes Flow	Charts Laborat	ory Prescriptions	
	\bigcirc			
Doc Date	Doc Type	Author-Signor	Comment	Date
2011-07-08	RMD Faxed to PRIME CLINICAL	Scan-NOSIG	Fax Number: 62644	2011
🗖 📄 2011-07-08	RMD Faxed to PRIME TEST RX	Scan-NOSIG	Fax Number: 62644	2011
🗖 📄 2011-07-06	RMD Faxed to PRIME CLINICA	Scan-NOSIG	Fax Number: 62644	2011
2011-07-06	RMD Faxed to PRIME TEST RX	Scan-NOSIG	Fax Number: 62644	2011
🗖 📄 2011-07-06	RMD Faxed to PRIME CLINICA	Scan-NOSIG	Fax Number: 62644	2011

For e-mails; the 'Doc Type" will contain information on who sent the e-mail, and the recipient's name "AXH585 Emailed to PRIME CLINICAL" (PCM user ID, followed by "Emailed to" and the recipient's name), the "Comment" will contain the recipient's e-mail address.

Office Notes Pr All Pages Advance	rescriptions Procedure Tasks ced Directives Back Office Consents	Faxed Docs Flo	w Charts Img Cap
197	A Star		
Doc Date	Doc Type	Author-Signor	Comment
2011-07-14	AXH585 Emailed to Adriana Test Gmail	Scan-NOSIG	Email Address: ahp
2011-07-14	AXH585 Emailed to Adriana Test Gmail	Scan-NOSIG	Email Address: ahp

Important Notes:

- a. This will be a copy of the document as it was submitted to the fax service or e-mail recipient, it is NOT a confirmation that the fax was successfully sent/received.
- b. Checking off multiple documents for fax/print/email is not supported for these documents, you must click on each document entry individually from the "Faxed Docs" chart tab in order to fax/print/email these
- c. These documents will not show in the "All Pages" chart tab view, these are only visible when clicking on the "Faxed Docs" Chart tab.

- d. You cannot resend these documents, if the fax or e-mail must be resent that must be done from the original chart copy.
- e. These documents are saved as PDF, the size is much smaller, it takes up less disk space, and ensures that the documents are a permanent record
- f. These documents cannot be edited because this is a copy of what submitted to be sent.
- g. The system name "Faxed Docs" cannot be used in Doc Setup to be use as a document name
- h. The "Chart Docs" Patient Data Table now includes a "FAXID" column, which is used by the "faxevents" service to update the comment with the status.
- i. For e-mailed documents, there are some scenarios in which users get the option to e-mail text documents in "word" format, if the user chooses to send in "word" (text) format, a copy of the email will NOT be saved in the Faxed Docs tab, this option only applies for when e-mailing PDF attachments (most documents are sent as PDF, unless the user otherwise chooses to send in word format)

Some documents may be shown in the preview in a smaller size, this is due to the individual document's resolution on converting to PDF, but can click on the percentage up arrow to increase the size



Filing Images- there is a new option for saving images from a web page. The selected image can now be saved as a .BMP format to the Filing Inboxes (Image Tab) or as a .JPG directly to the patient's chart.

This was done because some web pages which display pure diagnostic images are encrypted and do not allow capture as TIF/PDF etc..., but using this new "Image Only" option and having the Filing Inboxes open gives users the option to save the images to the Image inbox as .BMP and having the chart open gives users the option to file the images directly into the chart as .JPG

a. Saving the image to the Image Filing Inbox (to be filed later)

- 1. Click on "File from Inboxes" button from the main toolbar *in the second sec*
- 2. Click on the Browse Internet 🤄
- 3. Enter the Website
- 4. (Optional) Click on the Edit button located on the upper left of the screen to view in Full screen

- 5. Click on the "Save Web/Tif/Image (bmp)"
 6. Click on the "Image Only" option
 7. Enter a File name for the image

- 8. Click Save

🕮 312 - Patien	t Chart Manage	er - 5 Username: Richa	rd M Deits M.D.			🛛
Enter a file nar	ne for saving l	mage (Image Filing Inbo	x is Required):	? 🛛	http://www.ultrasound-images.com/images/4-Chamber-view-apical.jpg	-
Save in: My Recent Documents Desklop My Documents My Computer	Gastric Image	s.bwp nage2.jpg nage.jpg	_• ← ਿ ♂ ⊞•		9 1.0 9119 3.75 1#042 DUA: 65%	2
My Network Places	File name: Save as type:	Ultracound Image3 ipd *.bmp C6		Save Cencel		
	- M. 31			an be		

9. Click OK to the message



10. Right Click on the image and select the "Copy" option



11. Click Ok to the following message



12. Double Click on the Image tab to refresh, and proceed with the filing process.



b. Filing the Image directly into the patient's chart

- 1. Open the patient's chart, this will give you the opportunity to file the image directly to the patient's chart
- 2. Click on the Browse Internet 😒
- 3. Enter the Website
- 4. (Optional) Click on the Edit button located on the upper left of the screen to view in Full screen
- 5. Click on the "Save Web/Tif/Image (bmp)"
- 6. Click on the "Image Only" option
- 7. Click OK to the following message

Patient	Chart N	lanager
---------	---------	---------

This option requires user to Click on the desired image, rt-click and choose Copy option, then the filing operation can proceed. Note, if Copy option is disabled, this function will not work.

ОК	Cancel
----	--------

- 8. Right click on the Image, Select Copy
- 9. The Date Dialog will show on the left side, choose a Date for the Image
- 10. The List of Image Names will show, choose the desired Name
- 11. Click OK
- 12. Then OK to file the image/photo(s) now, otherwise, Cancel

Olympus Dictation for Text documents- The document file name format for documents generated and sent for transcription has changed and will be as follows:

Doe_Mela\$TNX\$99653\$2011-06-01\$Office Visit\$16455\$.doc (Patient Name\$DocAuthor\$CDDocID\$DocDate\$DocName\$ReqNum\$)

Fax	HL7	Image	Photo	Text	Voice	Web	Fax Ser	ver Inbox	
24									in the
		Section 1		1.12		1.15	2-12		-
File N	lame							Ext	Date Created
	Doe_M	ela\$TNX\$9	9653\$201	1-06-01	₿Office Vi	sit\$1645(5\$	doc	2011-06-01 1

Prior to this update the file name contained the server name and clinic share name as well and there were scenarios in which the file name would not match the server name and clinic share name causing issues when trying to auto-file the returned transcription documents back into the charts. This occurred especially if the practice had multiple clinics and servers and switched clinics back and forth to generate these files, etc...

Import Note: Before this update is performed, all of the previously generated text documents which are currently in the text inbox or pending transcription, must be filed, as the new logic with this update for auto-filing will no longer work for previous documents; and they will have to be manually filed after the update.

Patient Data Tables

Tasks View -The Task view in Patient Data Tables allows users more flexibility, and the ability to sort and to view all of the outstanding tasks for all users.

- a. The task notes cannot be shown in this view due to the size of the data field, but you can right- click on a row and choose to "Open Task".
- b. The "Provinit" column is the same as the task owner.

Patient Data	Tables							
Patient Sea	rch Reset	PT Nam	IE	PT ID: M	IR#: Prov Init: From 06/24	: To 1/2011 - 07	: /08/2011	- Apply
Past Pregnancy History Past Surgical Hx Patient Demo Ppd Prev Services Hx Prob List Proc List Rx Eligibility Rx Warnings Overrides Medication Medication History Misc. Orders and Advice 0B Custom Data 0b Data 0b Flow 0b Sono Past Medical Hx Past Preg Hx Diag Test Results E Prescribing Eligibility Encounter Log Family Conditions Growth Param HL7 Results Imm Log Lipids Meaningful Use Advanced Directives Alertab Allergies Appt Log Ammittee Table Chart Docs Cindy 062211 Complaints Diabetes Flow Diabetic Readings Rx Warnings Overrides Social History Spirometry Ptt Tasks Urinalysis User Action Log Vision Hearing Vital Signs X Ray								
DATE	PROVINIT	PTID	MR NUM	PATIENT NAME	SUBIECT	COMPLETED	STATUS	
7/8/2011	NEW157	47603	67666	TEST,FRED	Test, Fred ,2011-07-07 Test Order Form-1 Open Chart		Completed	AXH585
7/8/2011	RMD	48481	68584	TEST,CLARIA	Test, C Order-1 Order-1			AXH585
7/8/2011	RMD	48481	68584	TEST,CLARIA	Test, C Open Task Form-11 Set Current Patient			AXH585
7/8/2011	RMD	48621	68724	TEST APRIL	TEST, APRIL ,2011-07-07 Laboratory Order-16773, Reg Num-16773			AXH585
7/8/2011	RMD	48621	68724	TEST APRIL	TEST, APRIL ,2011-07-07 Laboratory Order-16772, Reg Num-16772			AXH585
7/8/2011	RMD	48621	68724	TEST APRIL	TEST, APRIL ,2011-07-07 Test Order Form-16771, Reg Num-16771			AXH585
7/7/2011	NEW157	47445	67508	CROSS, DAVID M	Refill Request from Pharmacy - Drug Mart Xerox, phone: (239) 382-9384, fax: (239) 382-9380		Completed	NEW157
4								•
Grid is ReadOnly and Cannot be Edited. Pint Plot Graph Status Bar Add New Delete O Date on TOP Hide Blank Columns LEFT								
View Dele	eted View	<u>N</u> ormal	 Date 	on LEFT	Exp. to Excel Mgmt. Report		Add <u>F</u> ields	<u>C</u> lose

- c. You can click on the column headers to sort the data or use the right click on the header options to filter specific data, such as the category to view only one category at a timed. The results can be printed from this view

Patient Data	a Tables		an and the second second						
Patient Se	arch Reset	PT Name F	?T ID: M	IR#: P	rov Init	From:	To: 011 ▼07/	/08/2011 👤	Apply
Pa Medi Diag Tu Advance Rx Warning	st Pregnancy Histo cation Medication est Results E Pre- d Directives Alent gs Overrides Soci-	ory Past Surgical Hx Pati h History Misc. Orders and scribing Eligibility Encour tab Allergies Appt Log A al History Spirometry Pft	ent Demo Ppd F Advice OB Cus Iter Log Family C Itin New Tab Ch Fasks Urinalysis	Prev Services H tom Data 0b D onditions Grow art Docs Cindy User Action Lo	x Prob List Jata Ob Flo oth Param H 062211 Co og Vision H	Proc List Rx Elin w Ob Sono Pas IL7 Results Imm omplaints Diabete earing Vital Signs	gibility RxW t Medical Hx Log Lipids es Flow Diab X Ray	arnings Overrides Past Preg Hx Meaningful Use hetic Readings	
DATE	PATIENT NAME	SUBJECT		COMPLETED	STATUS	ASSIGNED TO	OWNER	CATEGORY	DCA
7/8/2011	TEST,FRED	Test, Fred ,2011-07-07 Form-16792, Req Num	Test Order 16792		Completed	AXH585	NEW157	Orders	67 Fo
7/8/2011	TEST,CLARIA	Filter					X	Orders	68 Fo
7/8/2011	TEST APRIL	Where CATEGORY	contains	•	Orders			Orders	68 On
7/8/2011	TEST APRIL			7	Filter	Cancel		Orders	68 On
7/8/2011	TEST,CLARIA	Order-16775, Reg Num	-16775			AXH585	RMU	Orders	68 On
7/7/2011	HAENA,MARY	Haena, Mary ,2011-07- Order-16751, Reg Num	06 Laboratory +16751			AXH585	RMD	Orders	67 Or
7/7/2011	TEST,FRED	Refill Request from Pha Mart Xerox, phone: (23 (239) 382-9380	armacy - Drug 9) 382-9384, fax:			NEW157	NEW157	Pharmacy Request	
4				89) 	18				•
Grid is Rea	idOnly and Cannot	be Edited.		<u>P</u> rint	Plot Gra	aph Status	s Bar S Ma	x Records:	200 👤
Add New Delete C Date on TOP Hide Blank Columns Cancel Concel Close View Deleted View Normal C Date on LEFT Exp. to Excel Mgmt. Report Cancel Close									

User Privileges

Chart Reviewer login now has access to all users' "MyDocs" – the "MyDocs" inbox containing all users' documents will now be accessible to users who log in using the Chart Reviewer privilege option.

Password Logon Screen									
User Type	UserInit	User Name	IdNum	BirthDate	License#	L 🔺			
	AAA690	Adri	690	12/18/2002					
O All Others	ADM005	Administrator	5						
 All Others 	ADT689	Alen T Davoodiar	689	12/18/2002					
O Doctors	ARN613	Arin Tahmasian	613	12/18/2002					
Doctors	AXH585	Logon as Biller	85		C22258				
	BXS692	Logon as Chart Revie	wer , 92	12/18/2002					
Change Password	CCC687	Logon as Transcriber	87	12/18/2002					
		Primary Care Provide	r 95	12/18/2002					
		Attending MD							

The Chart Reviewer user can view, delete or send documents to other users from the MyDocs inbox, individual pages cannot be sent, only the entire document. The Chart Reviewer user cannot edit these documents. Prior to this update only the "All Users Inbox" was accessible.

The file name contains the date the document was sent to a user, comment (if one was entered at the time of sending) and the user id of the user who currently has this document in their mailbox. For documents that were sent a long time ago, the file name may be different, the chart reviewer user will have to preview the documents prior to deleting or sending to other users.

All Users Inbox MyDocs		
		43
N		
4		
File Name	Ext	Г <u>^</u>
2011-08-25 10 48 07 test - AXH585.tif	Filing Inbox Doc	
2011-06-20_10_29_03 RMD.tif	Filing Inbox Doc	_
D 📄 2010-08-04_10_35_52 AXH585.tif	Filing Inbox Doc	_
D 📄 2010-06-11_12_07_32 CJM172.tif	Filing Inbox Doc	
D 📄 2010-06-09_12_13_33 RMD.tif	Filing Inbox Doc	
D a 2010-06-09_12_03_16 RMD.tif	Filing Inbox Doc	
🗖 📄 2010-06-09_11_59_19 JDS103.tif	Filing Inbox Doc	
Delta 2010-06-09_11_55_47 RMD.tif	Filing Inbox Doc	
Delta 2010-06-09_11_51_33 RMD.tif	Filing Inbox Doc	
DS103.tif	Filing Inbox Doc	_
D 2010-06-09 10 55 17 - RMD.tif	Filing Inbox Doc	×
		>

Miscellaneous Changes

Quick clinic switch option for multiple clinic users- There is a new option for switching clinics which is located on the main toolbar, to the right of the Log On/Log Off button. If a user is logged on to another clinic, they can click on the drop down and choose from the available clinics. This option is only available when the user is already logged on to a clinic. If the user is logged off, they will only be able to log in to the clinic they were already logged into.

In order to use this option, do not click on Log Off, click on the drop down menu instead and choose another clinic.

