[redacted]

[redacted]

[redacted]

User Manual

Version 1.0 June 2021

[redacted]

[redacted] is a health information software development and systems integration company, providing services and solutions used daily by thousands of clinicians and administrative staff nationwide, to reduce costs, streamline workflows, and improve patient care. For more information, visit [redacted]

[redacted]

[redacted] helps healthcare provider organizations deliver highly reliable care via standardized workflows, data visualization tools and analytics that together lead to reduced care variation and the ability to continuously monitor processes, performance and outcomes. For more information visit [redacted]

The patient data contained in this document has been generated on fictitious patients for demonstration and educational purposes. There is no actual Protected Health Information (PHI) contained in any "patient's" record.

Revision history

Date	Version	Description of Change	Author
06/01/2021	v1.0	Updated most screenshots and added new Menu items.	[redacted]
07/06/2020	v1.0	Added SPM Alert Manager Chapter	[redacted]
07/02/2020	v1.0	Updated screenshots and text.	[redacted]
06/22/2020	v1.0	Updated screenshots and text.	[redacted]
12/02/2019	v1.0	Updated screenshots & text.	[redacted]
10/24/2019	v1.0	Patient Follow-up feature updates.	[redacted]
10/01/2019	v1.0	Updates10/01/2019.	[redacted]
09/01/2019	v1.0	First Draft.	[redacted]

Table of Contents

Introduction

Company Overviews

[redacted]

[redacted] is a software development and solutions integration company focused on providing the fast path to healthcare breakthroughs to improve patient access to care, satisfaction, and performance outcomes. [redacted] products and integration software development toolkits are used for bi-directional Health Information Exchange, Integrating Commercial Off-The-Shelf (COTS) products into Electronic Health Records and sharing information across disparate Health Information Technology (IT) systems. Since our first involvement with VistA, we have modernized and transformed the legacy system into a robust platform with hundreds of Best-of-Suite, Best-of-Breed, custom applications, and integrated components.

[redacted]

[redacted] provides healthcare information technology solutions and systems integration services to healthcare provider organizations and revenue cycle management firms. Hospitals, physician groups, and companies providing medical billing services rely on [redacted] award winning solutions to prevent medical errors, to improve care coordination, and to strengthen and simplify their financial operations.

Product Overview

[redacted] helps [redacted] facilities ensure the delivery of highly reliable suicide prevention care for veterans. To accomplish this, the software:

- Integrates with [redacted] facility electronic health records (EHR) systems;
- Pulls information in real time; and
- Helps [redacted] facilities achieve methodical compliance with the administrative and clinical business rules pertaining to veterans at high risk for suicide.

[redacted] enables [redacted] facilities to monitor, in real time, its performance with respect to those business rules and the Strategic Analytics for Improvement and Learning (SAIL) metrics that map to suicide prevention workflows and patients identified to be at high risk. These include:

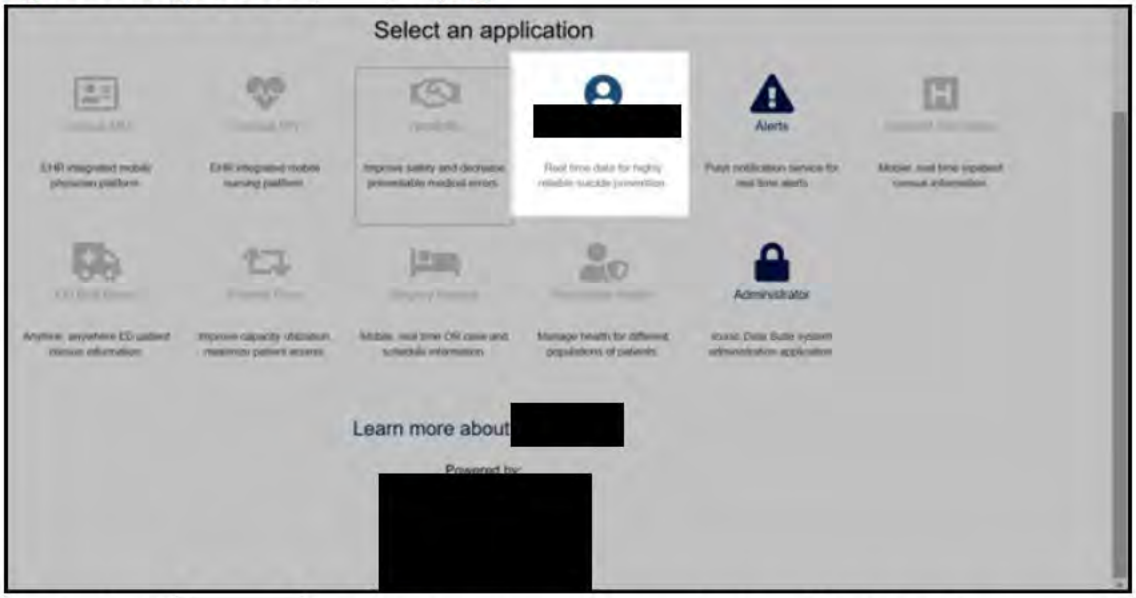
- Timely suicide prevention safety plans
- HRF ambulatory care engagement at 30 days
- Appropriate HRF case review at 100 days
- Care process composite for [redacted] at high risk for suicide
- HRF veterans receiving all recommended interventions
- Inpatient and residential Mental Health post-discharge engagement

[redacted] provides real time situational awareness to stakeholders involved in the administrative and clinical aspects of suicide prevention care via email push notification infrastructure. This allows [redacted] to deliver timely insights identified from its continuous monitoring of high risk suicide patients and their care without end users even having to login to the application. By providing the option for end users to subscribe to the various notifications, [redacted] is able to close gaps in communication, decrease the time to awareness of issues potentially requiring intervention, and prevent lapses in care.

Getting Started with [redacted]

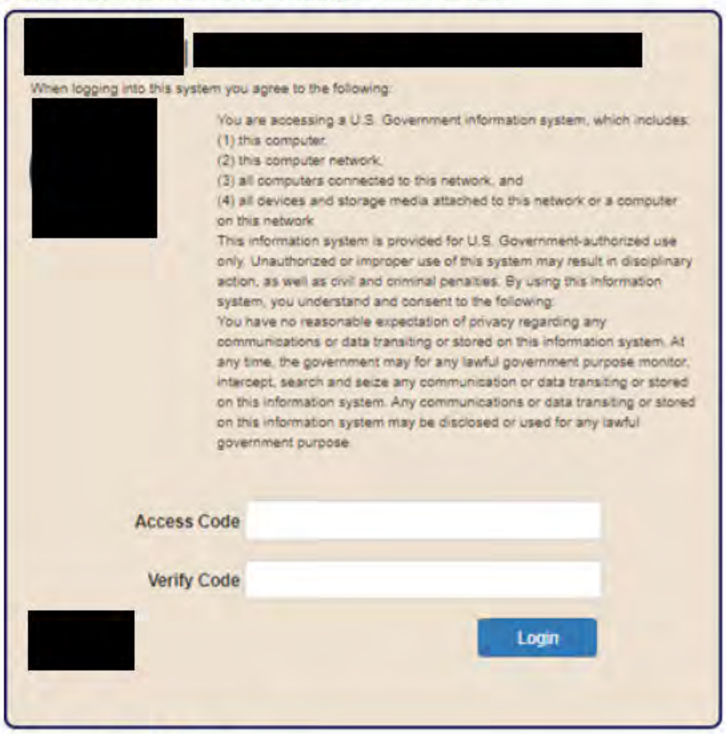
1. Launch Google Chrome and navigate to the [redacted] home page.
2. Click the [redacted] icon.

Figure 1: Navigate to the [redacted] Webpage



3. On the [redacted] Login window, enter your **Access Code** and **Verify Code**.

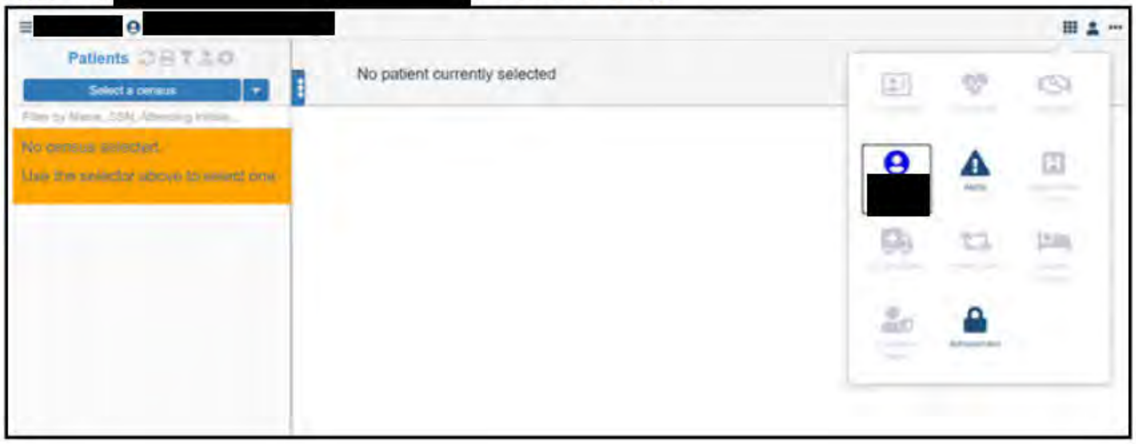
Figure 2: Access and Verify Code Fields



4. Click **Login**.

The [redacted] Censuses page opens.

Figure 3: [redacted] Censuses Page



[redacted] Menu Options

In the top left corner of the [redacted] program is the **Menu** button.

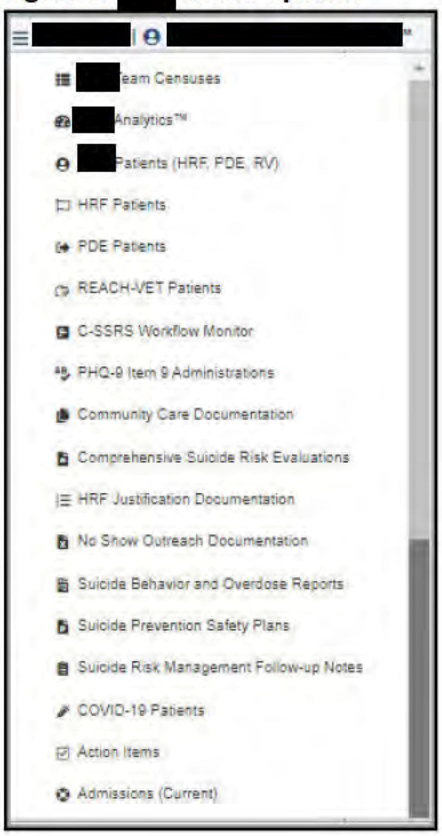
Figure 4: Menu Button

Click this button to access the [redacted] Menu options:

- [redacted] Analytics™” on page 7
- “[redacted] Patients (HRF, PDE, REACH-VET)” on page 11
- “HRF Patients” on page 13
- “PDE Patients” on page 15
- “REACH-VET Patients” on page 16
- “C-SSRS Workflow Monitor” on page 17
- “PHQ-9 Item 9 Administrations” on page 19
- “Community Care Documentation” on page 21
- “Comprehensive Suicide Risk Evaluations – CSREs” on page 22
- “HRF Justification Document” on page 24
- “No Show Outreach Documentation” on page 26
- “Suicide Behavior and Overdose Reports” on page 28
- “Suicide Prevention Safety Plans” on page 30
- “Suicide Risk Management Follow-up Notes” on page 32
- “COVID-19 Patients” on page 33
- “Action Items” on page 34
- “Admissions (Current)” on page 36
- “Appointments” on page 37
- “Appointment Cancellations” on page 39
- “Appointment No Shows” on page 41
- “Consults” on page 43
- “Discharges” on page 45
- “ED Visits” on page 47
- “Lab Results” on page 49
- “MH Instrument Administrations” on page 51
- “Notes” on page 53
- “Orders” on page 55
- “Outpatient Encounters” on page 57
- “Patient Record Flag Assignments” on page 59
- “Patient Treatment File Entries” on page 65
- “Problem List Entries” on page 68
- “Prescriptions” on page 71

- "[redacted] Patient Panels" on page 73
- "Radiology / Nuclear Medicine Reports" on page 75
- "Readmissions" on page 77
- "Scheduled Admissions" on page 79
- "Surgeries" on page 81
- "Visit ICD Diagnoses" on page 83
- "Visit Health Factors" on page 86
- "About [redacted] Suite" on page 88

Figure 5: [redacted] Menu Options

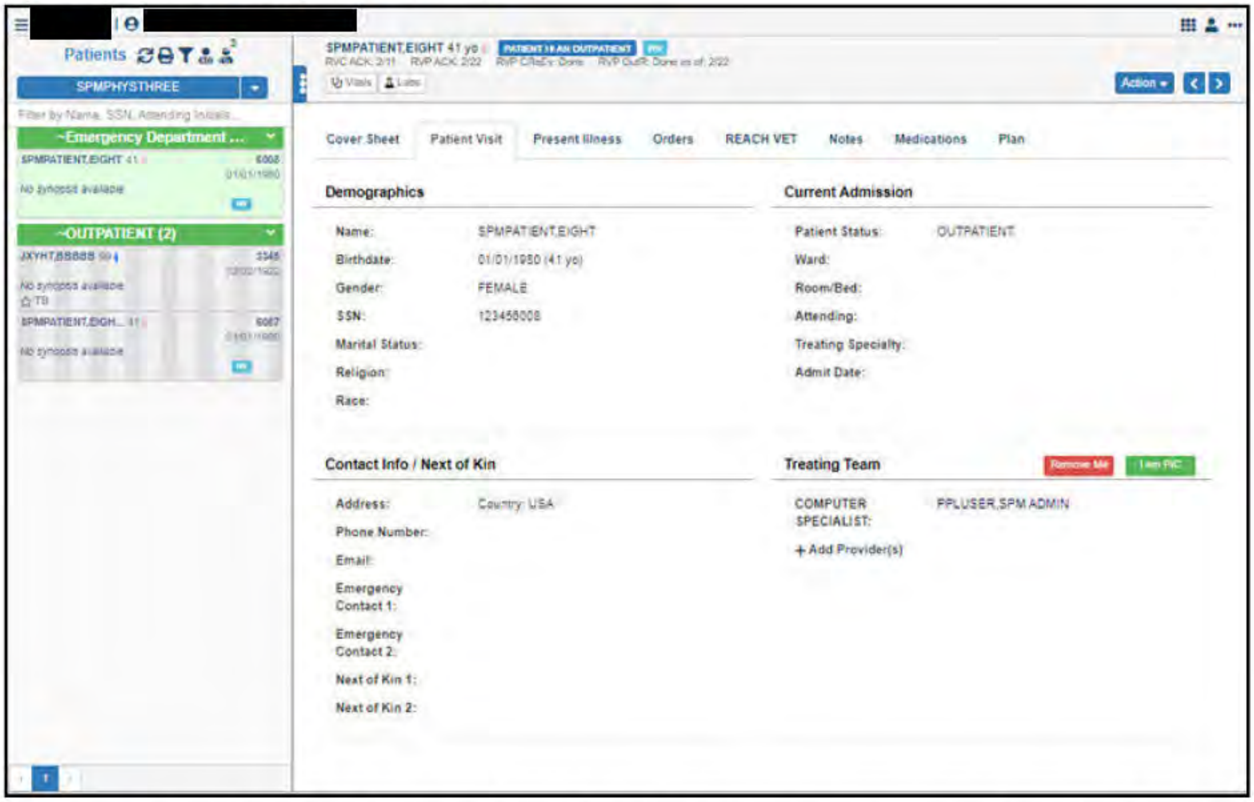


Team Censuses

To open a census:

1. From the **Menu** drop-down list, select [redacted] **Team Censuses**.
2. Click the **Select** a census button to select a different census.
3. Click any patient in the census column to open their patient information. Patient information includes: Cover Sheet, Patient Visit, Present Illness, Orders, Notes, Medications, and Plan.

Figure 6: Census and Open Patient Data



The census patient list on the left column shows a list of the patients in the census, and provides the patient names, age, gender, last 4 of the patient's social security number, the patient type, the patient date of birth, and if available, the patient synopsis.

For more information on the Patient data available from a census, see "Team Collaboration and Care" on page 89.

[redacted] Analytics™

From the **Menu** drop-down list, select [redacted] **Analytics**. The Safety Plans dashboard opens. In the left column, there are 4 dashboard components from which to select:

- Safety Plans (HRF1)
- MH Visits (HRF2)
- PRF Reviews (HRF5)
- HRF Workload

Safety Plans (HRF1) opens by default.

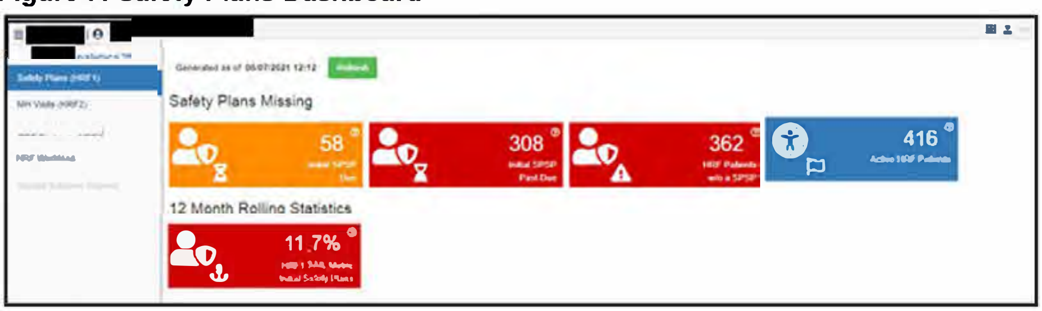
Click the **question mark** icon in the top right corner of any tile in this section to view data definitions or to edit the target thresholds.

Safety Plans (HRF1)

The Safety Plans dashboard shows:

- Safety Plans Missing
    - Initial SPSP Due
    - Initial SPSP Past Due
    - HRF Patients w/o a SPSP
    - Active HRF patients
- 12 Month Rolling Statistics
    - HRF1 SAIL Metric Initial Safety Plans

Figure 7: Safety Plans Dashboard



At the top of the dashboard, click the **Refresh** button to refresh the Safety Plans metrics.

MH Visits (HRF2)

To open the MH Visits dashboard, click the **MH Visits (HRF2)** option in the left column. The MH Visits dashboard shows the following metrics:

- [redacted] in First 30 days of HRF
    - Less than 1 MH Visit 1st week HRF
    - Less than 2 MH Visits 2nd Week HRF
    - Less than 3 MH Visits 3rd Week HRF
    - Less than 4 MH Visits 22-30 days HRF
- 90 Day Rolling Historical Performance
    - At least 1 MH Visit by Week 1
    - At least 2 MH Visits by Week 2
    - At least 3 MH Visits by Week 3
    - At least 4 MH Visits by 30 Days
- 12 Month Rolling HRF2 SAIL Metric
    - HRF2 SAIL Metric Mental Health Visits

Figure 8: MH Visits Dashboard

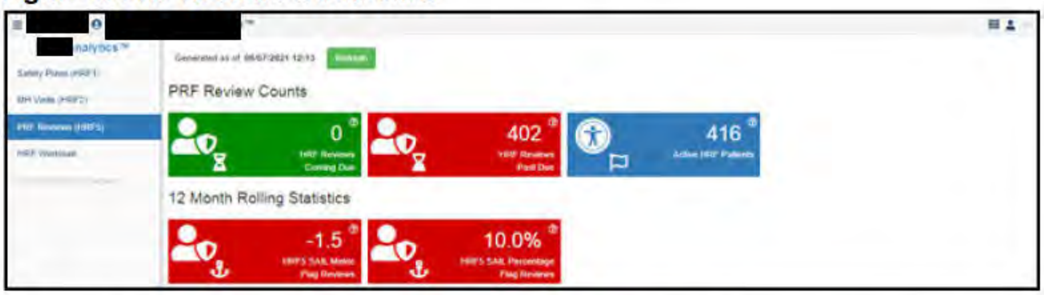
At the top of the dashboard, click **Refresh** to refresh the dashboard metrics.

PRF Reviews (HRF5)

To view the PRF Reviews dashboard, click **PRF Reviews (HRF5)** in the left column. The PRF Reviews dashboard shows the following metrics:

- PRF Review Counts
  - HRF Reviews Coming Due
  - HRF Reviews Past Due
  - Active HRF Patients
- 12 Month Rolling Statistics
  - HRF5 SAIL Metric Flag Reviews
  - HRF5 SAIL Percentage Flag Reviews

Figure 9: PRF Reviews Dashboard



At the top of the dashboard, click **Refresh** to refresh the dashboard metrics.

HRF Workload

The HRF Workload dashboard contains the following metrics:

- HRF Patients
  - HRF Patients @ Period Start
  - HRF Patients @Period End
  - HRF Additions
  - HRF Removals
- HRF Actions
  - HRF New Assignments
  - HRF Continuations
  - HRF Reactivations
  - HRF Inactivations
  - HRF Entered in Error

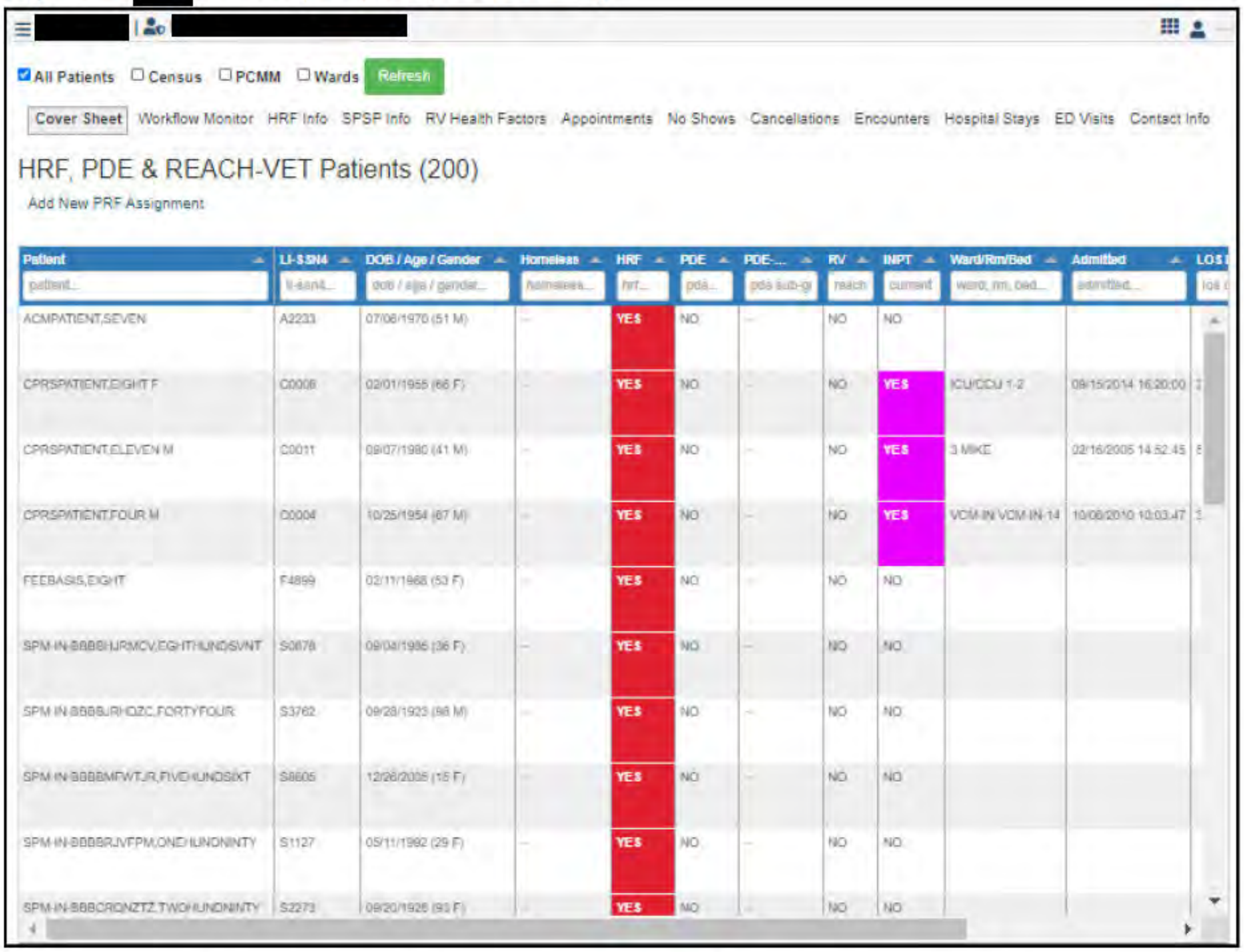
Figure 10: HRF Workload Dashboard

The HRF Workload can be filtered by date. At the top of the page, select the start and end dates and click **Refresh** to set the period for the metrics.

[redacted] Patients (HRF, PDE, REACH-VET)

From the **Menu** drop-down list, select [redacted] **Patients (HRF, PDE, REACH-VET)**. The HRF, PDE, and REACH-VET Patients page opens.

Figure 11: [redacted] Patient (HRF, PDE, REACH-VET)



The HRF, PDE, & REACH-VET Patients table contains the following data:

- Patient name
- LI-SSN4
- DOB/Age/Gender
- Homeless
- HRF status
- PDE status
- PDE-Sub-group
- RV (REACH-VET status)
- INPT (current inpatient status)
- Ward/Rm/Bed
- Admitted
- LOS Days

- In ED
- ED Location

These data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 12: Filter Options

The patients can be shown according to: **Cover Sheet**, or by **Workflow Monitor**, **HRF Info**, **SPSP Info, RV Health Factors, Appointments, No Shows, Cancellations, Encounters, Hospital Stays, ED Visits,** or **Contact Info**.

Figure 13: Patient Listing Options

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

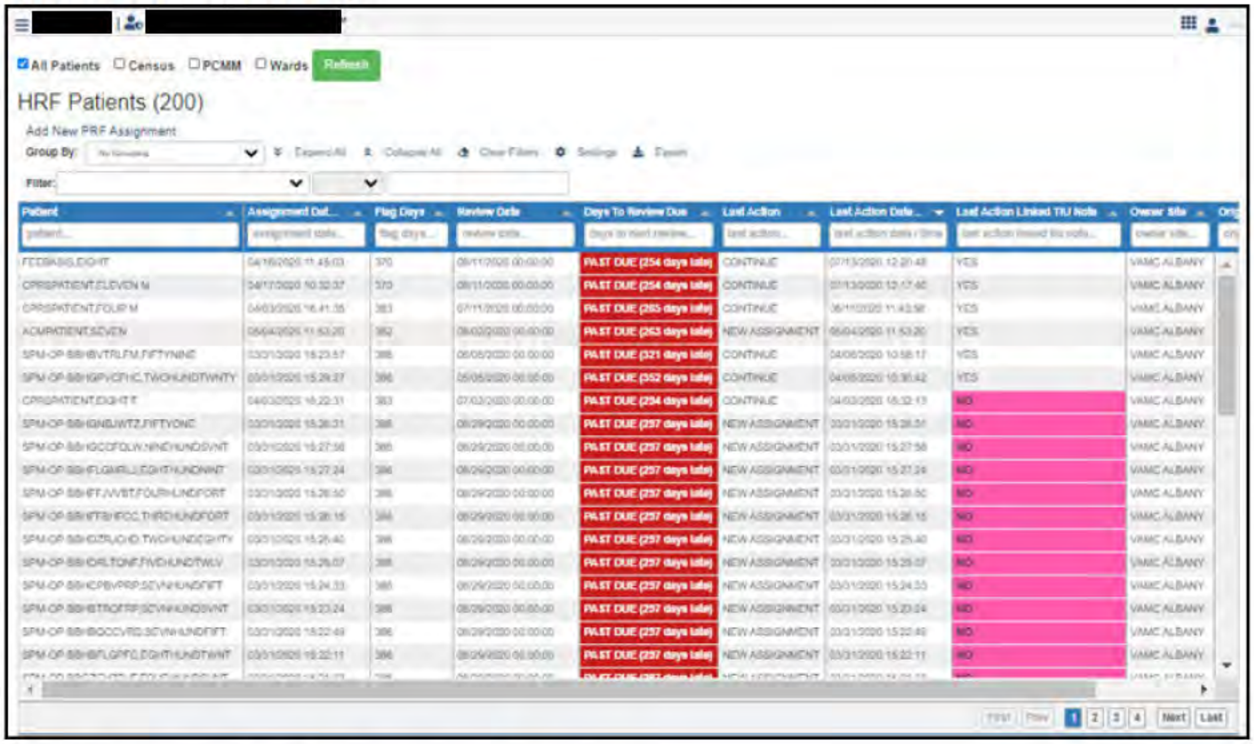
Figure 14: Group by Options

Above the Group By options, is the **Add New PRF Assignment** option. For steps to add a new PRF Assignment, go to "Add New PRF Assignment" on page 62.

HRF Patients

From the **Menu** drop-down list, select **HRF Patients**. The HRF Patients tracking table opens.

Figure 15: HRF Patients Page



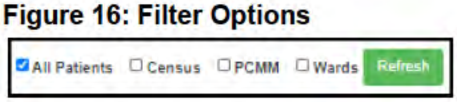
This table provides the following patient information:

- Patient
- Assignment Date
- Flag Name
- Flag Days
- Review Date
- Days to Review Due
- Last Action
- Last Action Date
- Last Action Linked TIU Note
- Owner Site
- Originating Site

These data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

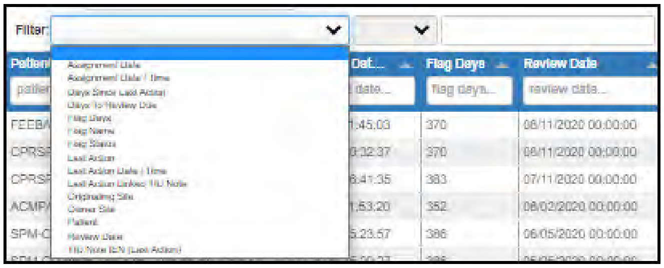
Figure 16: Filter Options



If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 17: Filter HRF Patient Options



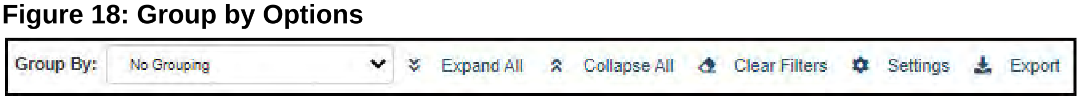
The filter options are:

- Assignment Date
- Assignment Date / Time
- Days Since Last Action
- Days to Review Due
- Flag Days
- Flag Names
- Flag Status
- Last Action
- Last Action Date / Time
- Last Action Linked TIU Note
- Originating Site
- Owner Site
- Patient
- Review Date
- TIU Note IEN (Last Action)

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 18: Group by Options



Above the Group By options, is the **Add New PRF Assignment** option. For steps to add a new PRF Assignment, go to "Add New PRF Assignment" on page 62.

PDE Patients

From the **Menu** drop-down list, select **PDE Patients**. The PDE Patients Follow Up Visit Report opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 19: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

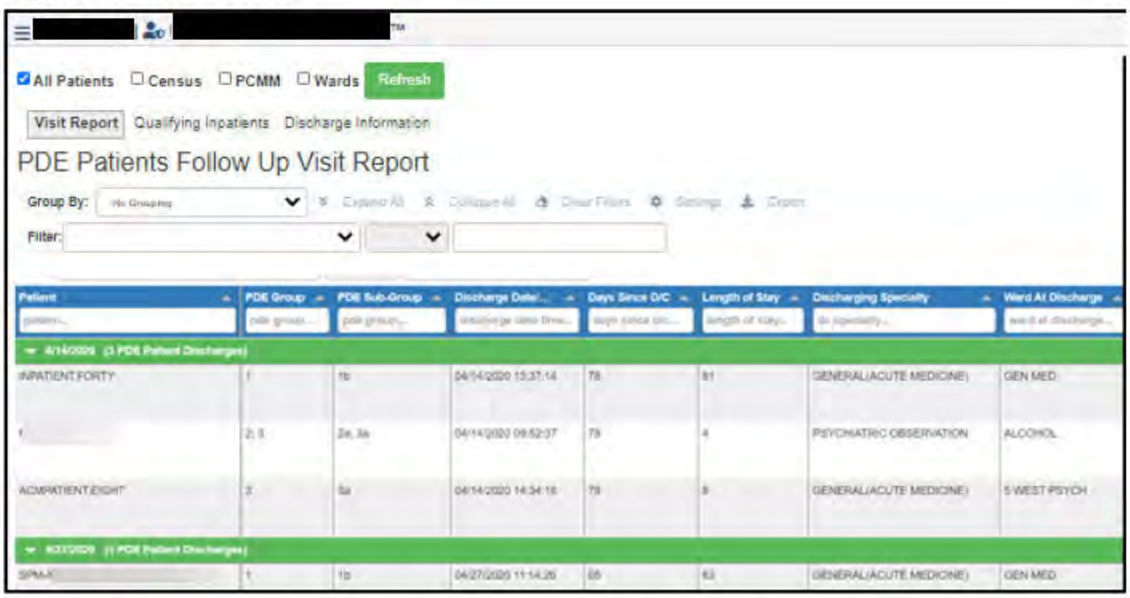
To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

These data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

Figure 20: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 21: PDE Patients



There are three PDE Patient Follow Up pages: **Visit Report**, **Qualifying Inpatients**, and **Discharge Information**. Click the buttons above the page title to view the different information.

REACH-VET Patients

From the **Menu** drop-down list, select **REACH-VET Patients**. The REACH-VET Workflow Monitor page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 22: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

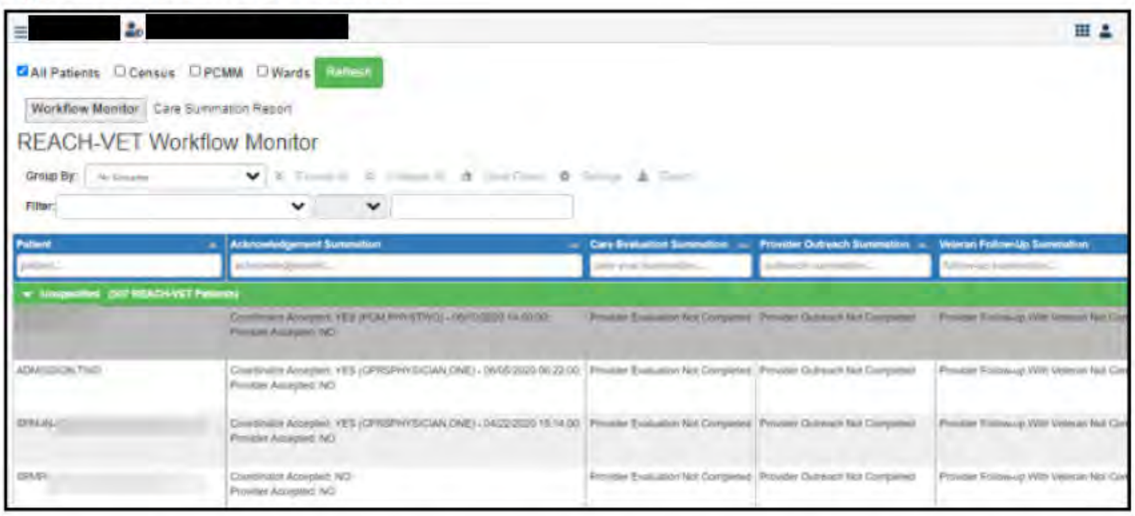
To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 23: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

Figure 24: REACH-VET Patients

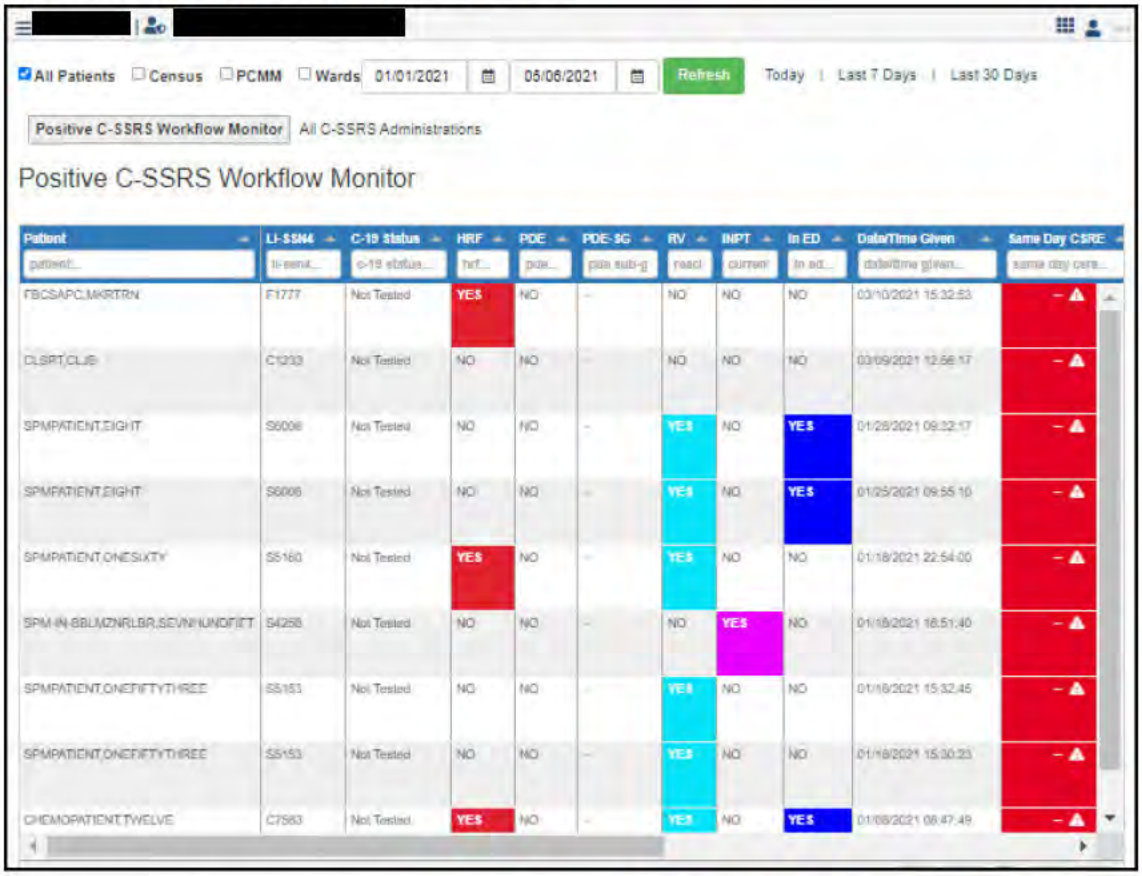


To see the REACH-VET Patients care summary page, click the **Care Summation Report** button above the page title.

C-SSRS Workflow Monitor

From the **Menu** drop-down list, select **C-SSRS Workflow Monitor**. The Positive C-SSRS Workflow Monitor page opens.

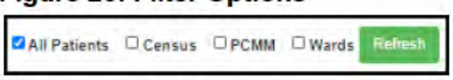
Figure 25: Positive C-SSRS Workflow Monitor



Patient	LI-SSN4	C-19 Status	HRF	PDE	PDE-SG	RV	INPT	In ED	Date/Time Given	Same Day CSRE
FBCSAPC,MKRTRN	F1777	Not Tested	YES	NO	-	NO	NO	NO	03/10/2021 15:32:53	–
CLSPT,CLJB	C1233	Not Tested	NO	NO	-	NO	NO	NO	03/09/2021 12:56:17	–
SPMPATIENT,EIGHT	S6006	Not Tested	NO	NO	-	YES	NO	YES	01/28/2021 09:32:17	–
SPMPATIENT,EIGHT	S6006	Not Tested	NO	NO	-	YES	NO	YES	01/25/2021 09:55:10	–
SPMPATIENT,ONESIXTY	S5160	Not Tested	YES	NO	-	YES	NO	NO	01/18/2021 22:54:00	–
SPM-IN-BBLMZNRLBR,SEVNHUNDFIFT	S4258	Not Tested	NO	NO	-	NO	YES	NO	01/18/2021 16:51:40	–
SPMPATIENT,ONEFIFTYTHREE	S5153	Not Tested	NO	NO	-	YES	NO	NO	01/18/2021 15:32:45	–
SPMPATIENT,ONEFIFTYTHREE	S5153	Not Tested	NO	NO	-	YES	NO	NO	01/18/2021 15:30:23	–
CHEMOPATIENT,TWELVE	C7583	Not Tested	YES	NO	-	YES	NO	YES	01/08/2021 08:47:49	–

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 26: Filter Options



If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 27: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

To view the C-SSRS Administrations, click the A**ll C-SSRS Administrations** button above the page title.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

To view a patient's C-SSRSMH Instrument Administration, click the patient in the table. The C-SSRSMH Instrument Administration page opens. View the Administration Detail and the Questions and Responses. Click **Done** to return to the PHQ-9 Item 9 Administrations page.

Patient Data Included in Positive C-SSRS Workflow Monitor Table

The following patient data is included in the C-SSRS Workflow Monitor Table:

- Patient
- LI-SSN4
- C-19 Status
- HRF
- PDE
- PDE-SG
- RV
- INPT
- In ED
- Date/Time Given
- Same Day CSRE
- Time to CSRE Hours
- SPSP within 3 Days
- ED Visit Same Day
- Same Day ED Visit Disposition

These data columns can be re-ordered by dragging them to the desired position in the table. This order is auto-saved. Use the **Settings** icon to add or remove columns as applicable to your workflow.

Patient Data Included in All C-SSRS Administrations

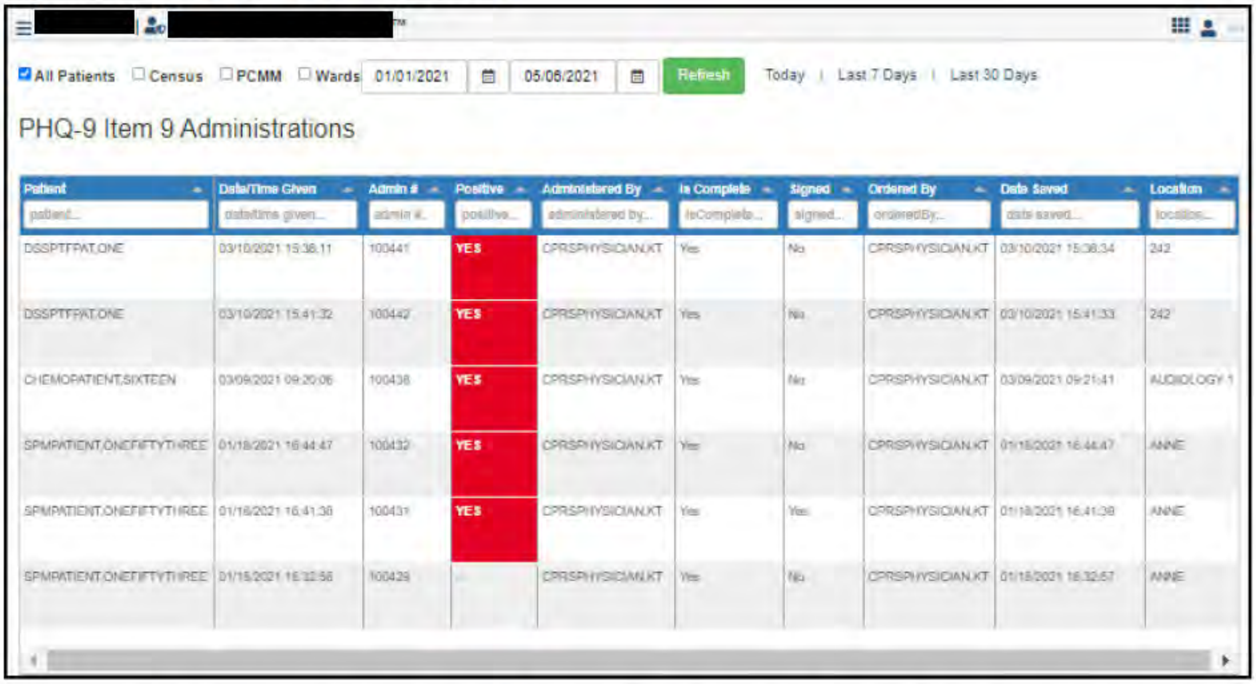
- Patient
- Date/Time Given
- Admin #
- Positive
- Administered By
- Is Complete
- Signed
- Ordered By
- Date Saved
- Location

These data columns can be re-ordered by dragging them to the desired position in the table. This order is auto-saved. Use the **Settings** icon to add or remove columns as applicable to your workflow.

PHQ-9 Item 9 Administrations

From the Menu drop-down list, select **PHQ-9 Item 9 Administrations**. The PHQ-9 Item 9 Administrations page opens.

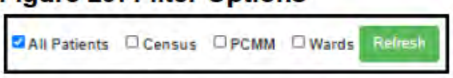
Figure 28: PHQ-9 Item 9 Administrations



Patient	Date/Time Given	Admin #	Positive	Administered By	Is Complete	Signed	Ordered By	Date Saved	Location
DSSPTFPAT,ONE	03/10/2021 15:38:11	100441	YES	CPRSPHYSICIAN,KT	Yes	No	CPRSPHYSICIAN,KT	03/10/2021 15:38:34	242
DSSPTFPAT,ONE	03/10/2021 15:41:32	100442	YES	CPRSPHYSICIAN,KT	Yes	No	CPRSPHYSICIAN,KT	03/10/2021 15:41:33	242
CHEMOPATIENT,SIXTEEN	03/09/2021 09:20:06	100438	YES	CPRSPHYSICIAN,KT	Yes	No	CPRSPHYSICIAN,KT	03/09/2021 09:21:41	AUDIOLOGY 1
SPMPATIENT,ONEFIFTYTHREE	01/18/2021 16:44:47	100432	YES	CPRSPHYSICIAN,KT	Yes	No	CPRSPHYSICIAN,KT	01/18/2021 16:44:47	ANNE
SPMPATIENT,ONEFIFTYTHREE	01/18/2021 16:41:38	100431	YES	CPRSPHYSICIAN,KT	Yes	Yes	CPRSPHYSICIAN,KT	01/18/2021 16:41:38	ANNE
SPMPATIENT,ONEFIFTYTHREE	01/15/2021 16:32:56	100429	--	CPRSPHYSICIAN,KT	Yes	No	CPRSPHYSICIAN,KT	01/15/2021 16:32:57	ANNE

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 29: Filter Options

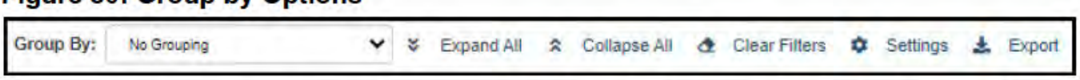


If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 30: Group by Options



To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

Patient data included in the table is: Patient, Date/Time Given, Admin #, Administered By, Is Complete, Signed, Ordered By, Date Saved, and Location.

To view a patient’s C-SSRSMH Instrument Administration, click the patient in the table. The C-SSRSMH Instrument Administration page opens. View the Administration Detail and the Questions and Responses. Click **Done** to return to the PHQ-9 Item 9 Administrations page.

Community Care Documentation

From the Menu drop-down list, select **Community Care Documentation**. The Community Care Documentation page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 31: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

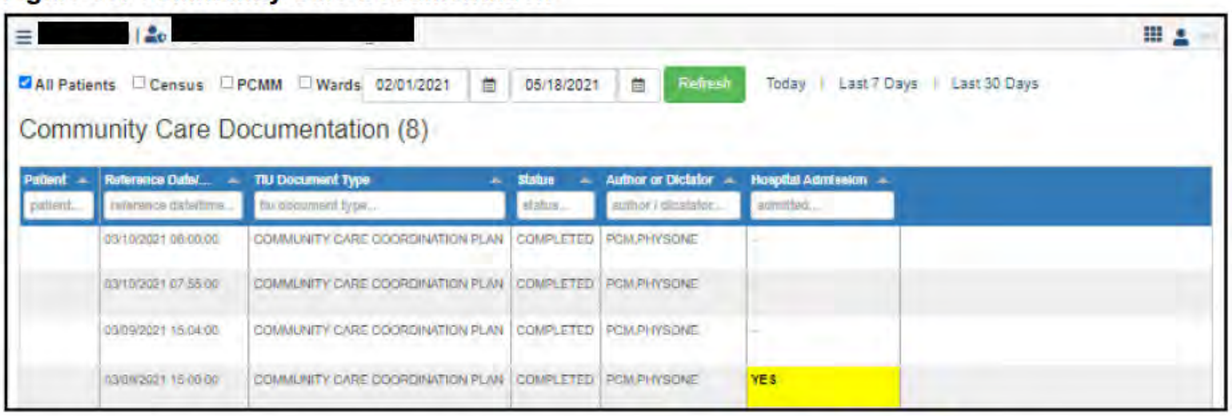
To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 32: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

Figure 33: Community Care Documentation



The Community Care Documentation table provides the following data by default:

- Patient Name
- Reference Date/Time
- TIU Documentation Type
- Status
- Author or Dictator
- Hospital Admission

Click a row in the table to see the Note for the patient. Click **Done** to return to the Community Care Documentation page.

Comprehensive Suicide Risk Evaluations – CSREs

From the Menu drop-down list, select **Comprehensive Suicide Risk Evaluations – CSREs**. The Comprehensive Suicide Risk Evaluations – CSREs page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 34: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

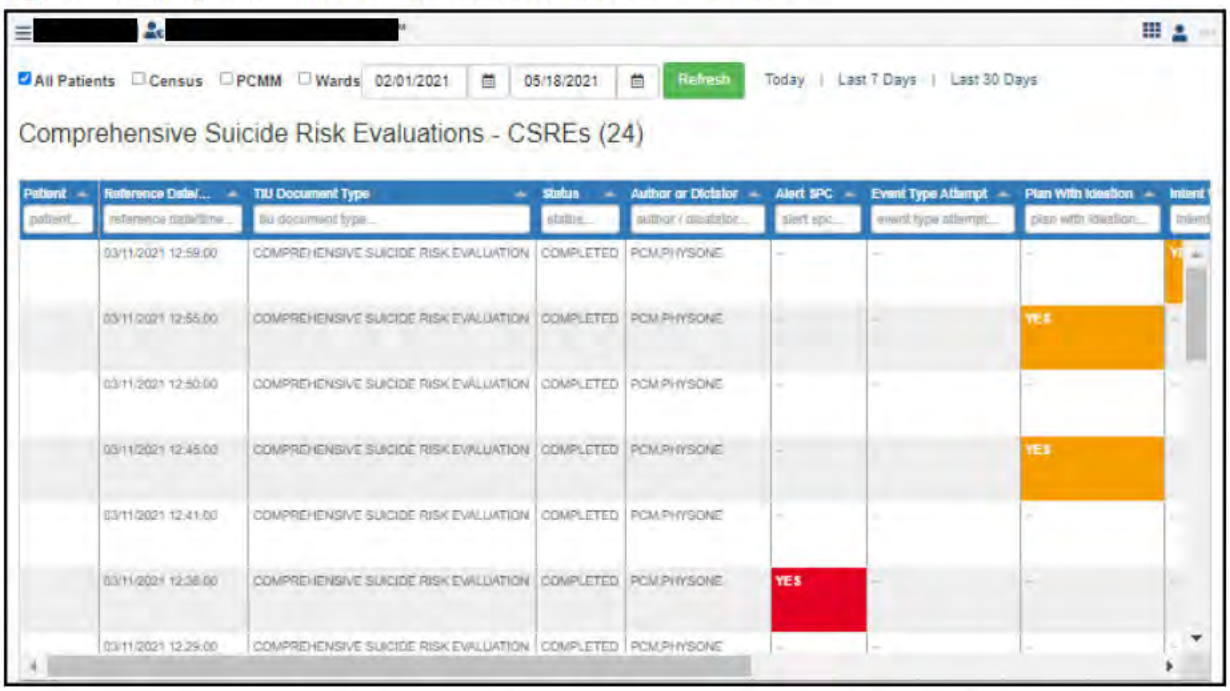
If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

Figure 35: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 36: Comprehensive Suicide Risk Evaluations – CSREs



The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

The Comprehensive Suicide Risk Evaluations table provides the following data by default:

- Patient Name
- Reference Date/Time
- TIU Documentation Type
- Status
- Author or Dictator
- Alert SPC
- Event Type Attempt
- Plan With Ideation
- Attempt With Injury
- Acute Risk
- Chronic Risk

Click a row in the table to view the Note for the patient. Click **Done** to return to the Comprehensive Suicide Risk Evaluations – CSREs page.

HRF Justification Document

From the Menu drop-down list, select **HRF Justification Document**. The High Risk Flag (HRF) Justification Notes page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 37: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

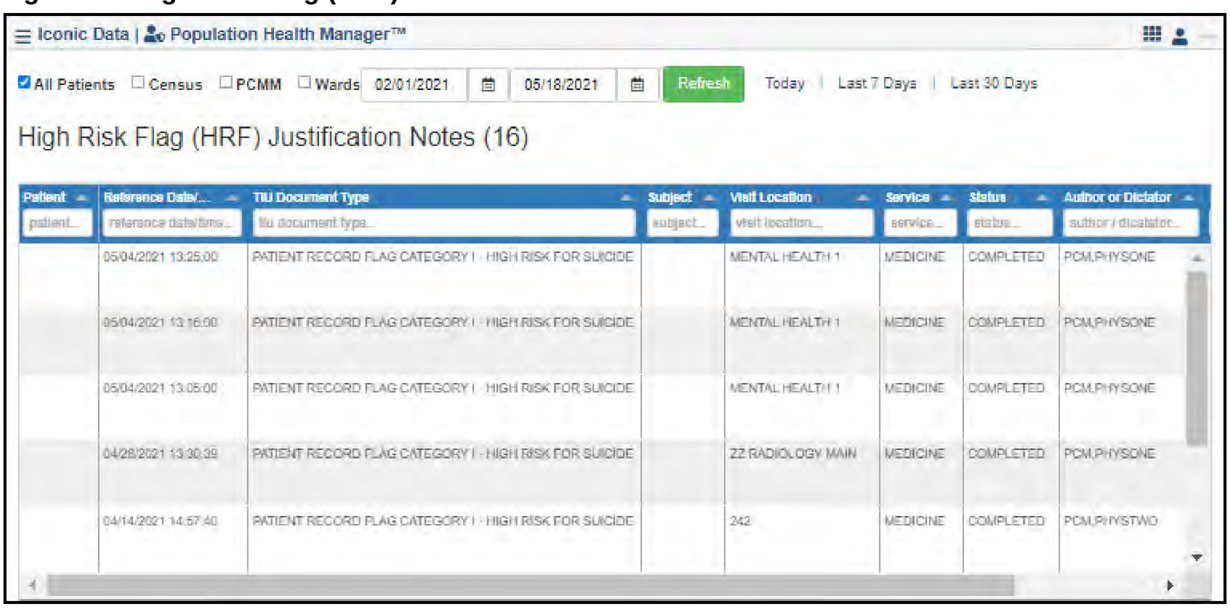
If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 38: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

Figure 39: High Risk Flag (HRF) Justification Notes



The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

The HRF Justification Notes table provides the following data:

- Patient Name
- Reference Date/Time
- TIU Documentation Type

- Subject
- Visit Location
- Service
- Status
- Author or Dictator
- Signature Date/time

To view the PRF note, click the patient’s row in the table. To return to the HRF Justification Notes page, click **Done**.

No Show Outreach Documentation

From the Menu drop-down list, select **No Show Outreach Documentation**. The No Show Outreach Documentation page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 40: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 41: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

Figure 42: No Show Outreach Documentation

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

The No Show Outreach Documentation table provides the following data:

- Patient Name
- Reference Date/Time
- TIU Documentation type
- Subject
- Visit Location
- Service
- Status
- Author or Dictator
- Signature Date/Time

To view the Now Show Follow Up note, click the patient’s row in the table. To return to the No Show Outreach Documentation page, click **Done**.

Suicide Behavior and Overdose Reports

From the Menu drop-down list, select **Suicide Behavior and Overdose Reports**. The Suicide Behavior and Overdose Reports – SBORs page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 43: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

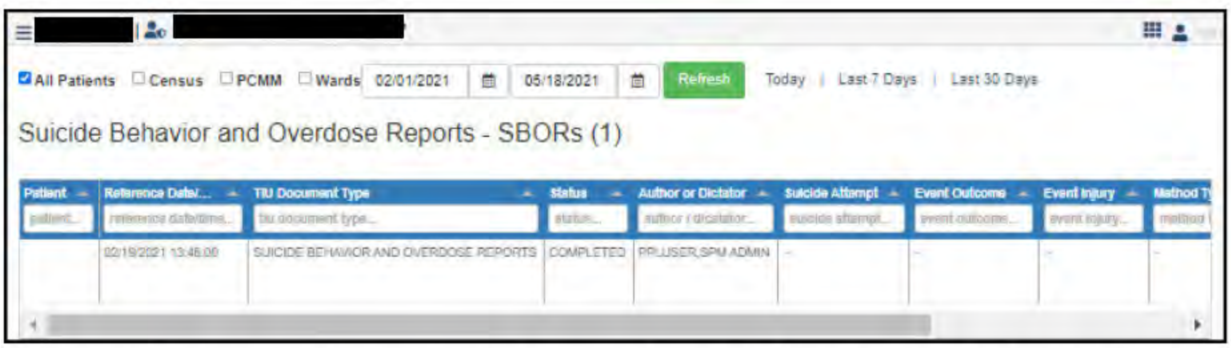
If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 44: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

Figure 45: Suicide Behavior and Overdose Reports – SBORs



The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The SBORs table provides the following data:

- Patient Name
- Reference Date/Time
- TIU Documentation type
- Status
- Author or Dictator
- Suicide Attempt
- Event Outcome
- Event Injury
- Method Type
- On VA Property

- Within 7 Days Of D/C

To add or remove columns from this table, click the **Settings** icon and choose which data is shown. Additional data columns available include:

- Amended By
- Amendment Signed Date/Time
- Cosignature Date/Time
- Cosigned By
- Event Status
- Expected Cosigner
- Prep Only
- Reference Date
- Related Visit Health Factors
- Service
- Signature Date/Time
- Signed by
- Subject
- TIU Document IEN
- Visit Health Factors
- Visit Location

To view the SBOR note, click the patient's row in the table. To return to the SBOR page, click **Done**.

Suicide Prevention Safety Plans

From the Menu drop-down list, select **Suicide Prevention Safety Plans**. The Suicide Prevention Safety Plans – SPSPs page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

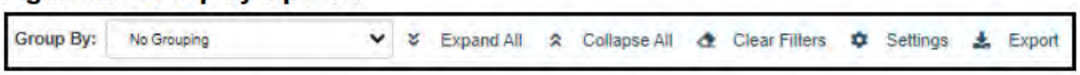
Figure 46: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

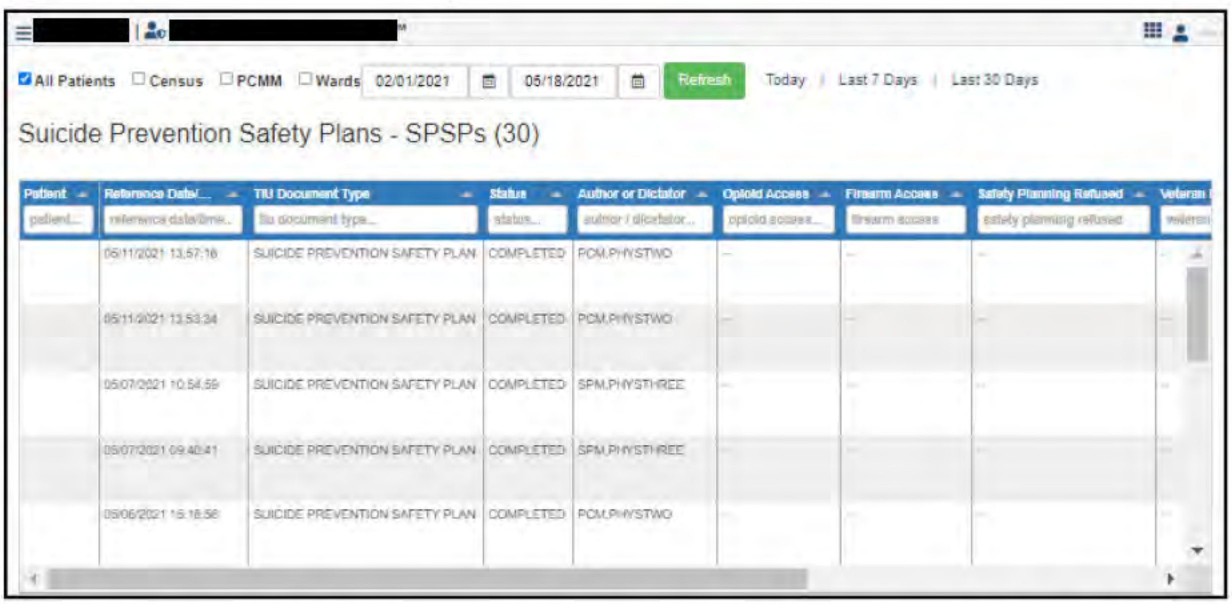
To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 47: Group by Options



To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

Figure 48: Suicide Prevention Safety Plans – SPSPs



The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The SPSPs table provides the following data:

- Patient Name
- Reference Date/Time
- TIU Documentation
- Status

- Author/Dictator
- Opioid Access
- Firearm Access
- Safety Planning Refused
- Veteran NOT Given Copy
- Naloxone Status
- Emergency Contact Needs Update

To view the Suicide Prevention Safety Plan note, click the patient’ s row in the table. To return to the SPSPs page, click **Done**.

Suicide Risk Management Follow-up Notes

From the Menu drop-down list, select **Suicide Risk Management Follow-up Notes**. The Suicide Prevention Safety Plans – SPSPs page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 49: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 50: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

COVID-19 Patients

From the Menu drop-down list, select **COVID-19 Patients**. The COVID-19 Patients – Active page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 51: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

Figure 52: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. You can also filter by date range using the date fields at the top of the page.

There are three patient-centric Covid-19 pages: **Active C 19 Patients**, **Historical C 19 patients**, and **All C 19 Patients**. There are also 8 health care repeated Covid-19 pages:

- **Consults** – Covid-19 Consults
- **Lab Results** – Covid-19 Laboratory Test Results
- **Notes** – Covid-19 Notes
- **Notes (SP)** – Covid-19 Suicide Prevention Notes
- **Orders** – Covid -19 Orders
- **Problem List** – Covid-19 Problem List Entries
- **Visit Health Factors** – Covid-19 Visit Health Factors
- **Visit ICD Diagnoses** – Covid-19 Visit ICD Diagnoses

Figure 53: Covid-19 Patients Page Options

Action Items

From the **Menu** drop-down list, select **Action Items**. The Active Action Items page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 54: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

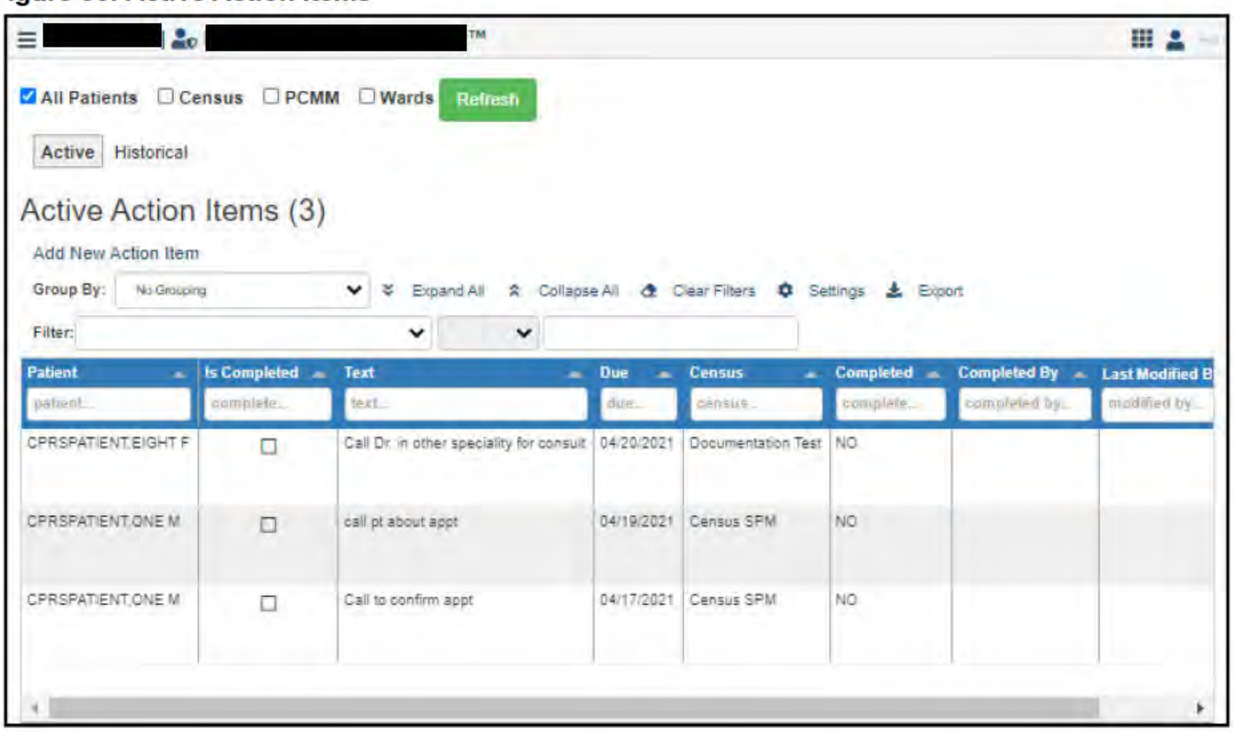
Figure 55: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

There are two pages of Action Items: **Active Action Items** and **Historical Action Items**. Select the page with the buttons above the page title.

Figure 56: Active Action Items

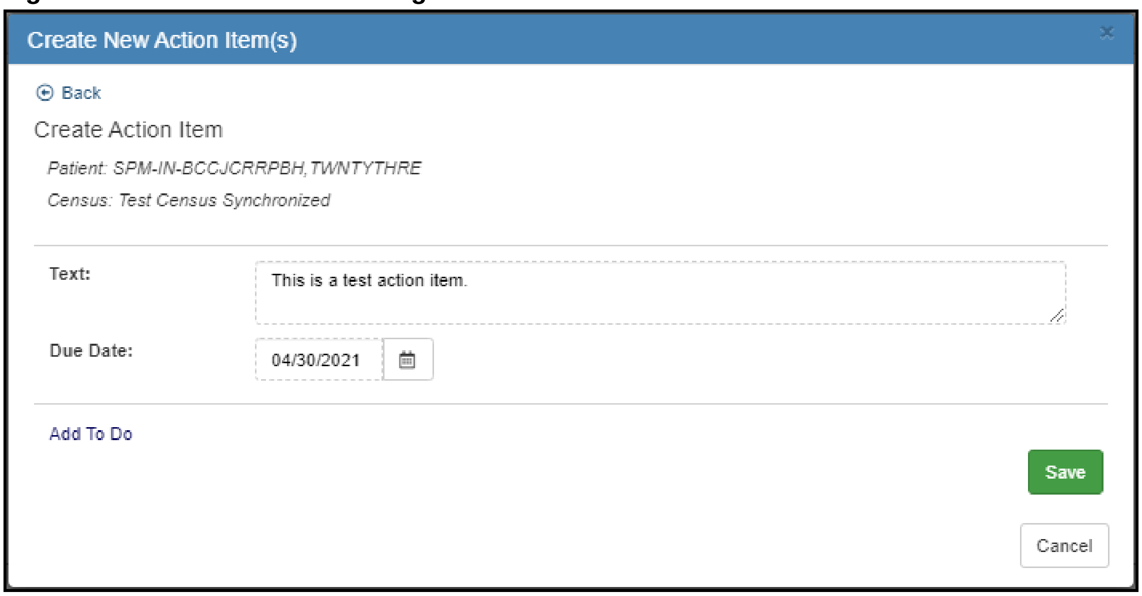


Add New Action Item

To add a new action item:

1. From the Active Action items page, click **Add new Action Item**. The Create New Action Items page opens.
2. Select a census from the list.
3. Select a case from the list.
4. In the **Text** field, enter the Action Item text.
5. In the **Due Date** field, select the due date for the action item.
6. Click **Save**, or **Add To Do** to add another action item.

Figure 57: Create Action Item Page



The new action item is added to the Active Action Items table.

Admissions (Current)

From the **Menu** drop-down list, select **Admissions (Current)**. The Admissions page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 58: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

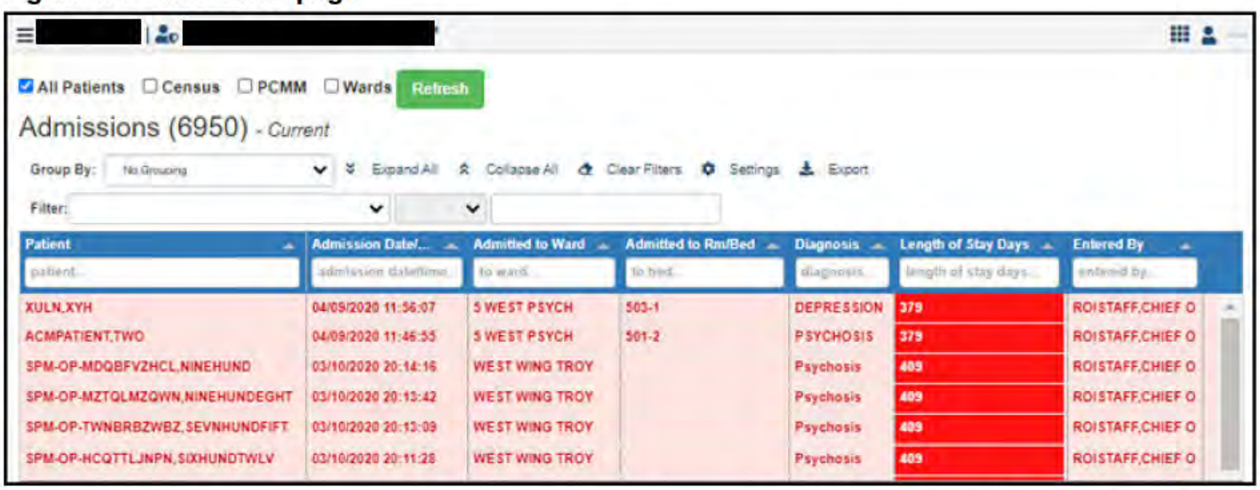
If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 59: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 60: Admissions page



The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Admissions table contains the following data by default:

- Patient Name
- Admission Date and Time
- Admitted to Ward
- Admitted to Rm/Bed
- Diagnosis
- Length of Stay Days
- Scheduled Admission
- Type of Movement
- Entered By Name

Appointments

From the **Menu** drop-down list, select **Appointments**. The Appointments page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 61: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, or **Last 7 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

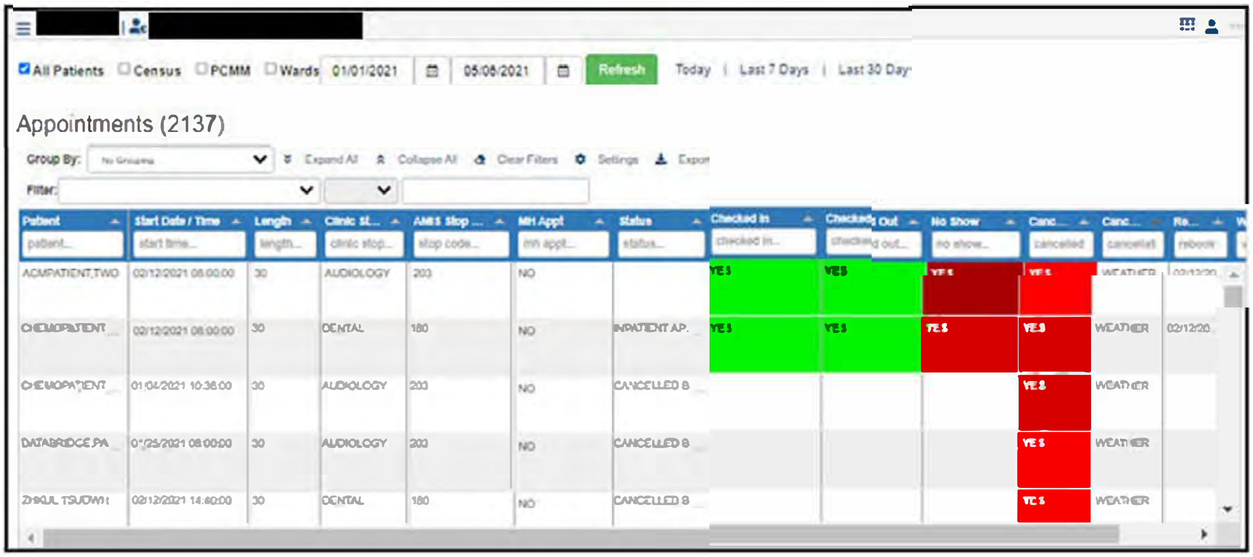
Figure 62: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Appointments table is grouped by patient by default. The table provides the following data:

- Patient Name
- Start Date/Time
- Length
- Clinic Stop
- AMIS Stop Code
- MH Appointment
- Status
- Checked In
- Checked Out
- No Show
- Cancellation Reason
- Rebooked Date/Time
- Walk In

Figure 63: Appointments Table



Click a patient row to open the Appointment Detail page. The page shows the Patient Identifiers, the Appointment data, Encounter Info, Visit Info, Visit Providers, and Related TIU Documents. Click **Done** to return to the Appointments page.

Appointment Cancellations

From the **Menu** drop-down list, select **Appointment Cancellations**. The Appointment Cancellations page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 64: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, or **Last 7 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

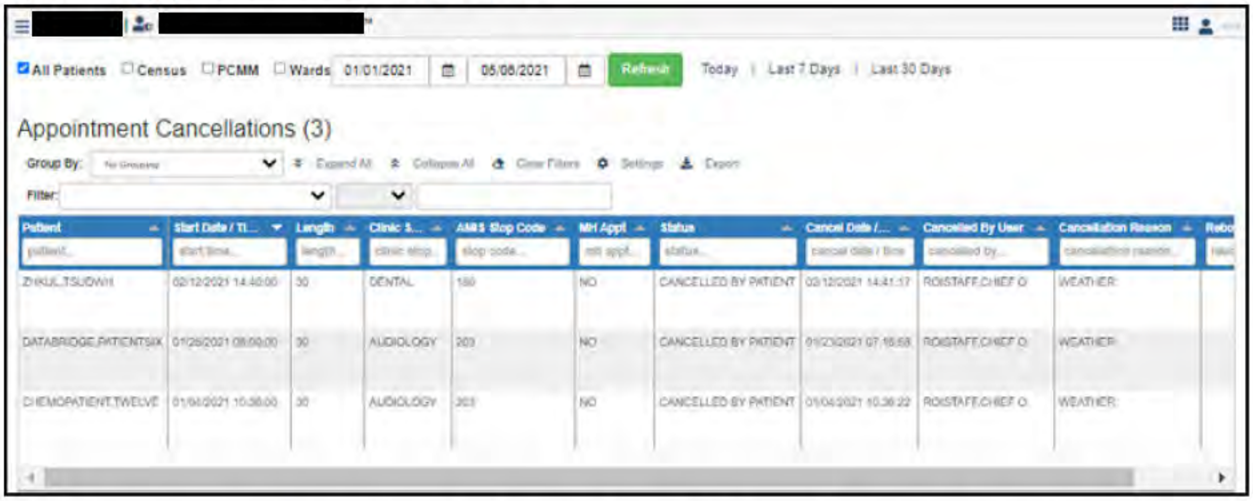
Figure 65: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. The Appointment Cancellations table is grouped by patient.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The table provides the following data:

- Patient Name
- Start Date/Time
- Length
- Clinic Stop
- AMIS Stop Code
- MH Appointment
- Status
- Cancel Date/Time
- Cancelled by User
- Cancellation Reason
- Rebooked Date/Time

Figure 66: Appointment Cancellations Table



These data columns can be re-ordered by dragging them to the desired position in the table.

Click a patient row to open the Appointment Detail page. The page shows the Patient Identifiers, the Canceled Appointment data, Encounter Info, Visit Info, Visit Providers, and Related TIU Documents. To return to the Appointment Cancellations page, click **Done**.

Appointment No Shows

From the **Menu** drop-down list, select **Appointment No Shows**. The Appointment No Shows page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 67: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, or **Last 7 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

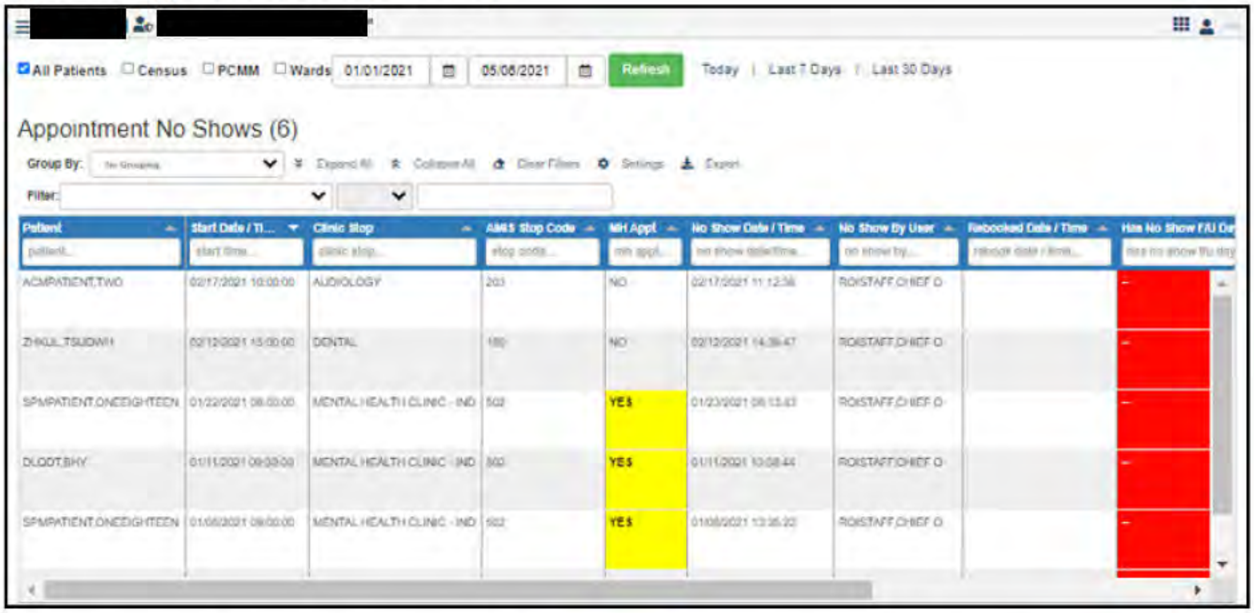
Figure 68: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Appointment No Shows table is grouped by patient. The table provides the following data:

- Patient Name
- Start Date/Time
- Clinic Stop
- AMIS Stop Code
- MH Appointment
- No Show Date/Time
- No Show By User
- Rebooked Date/Time
- Has No Show F/U Day Zero
- No Show F/U Notes On Day Zero

Figure 69: Appointment No Shows Table



Click a patient row to open the Appointment Detail page. The page shows the Patient Identifiers, the No Show Appointment data, Encounter Info, Visit Info, Visit Providers, and Related TIU Documents. To return to the Appointment No Shows page, click **Done**.

Consults

From the **Menu** drop-down list, select **Consults**. The Consults page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 70: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, or **Last 7 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

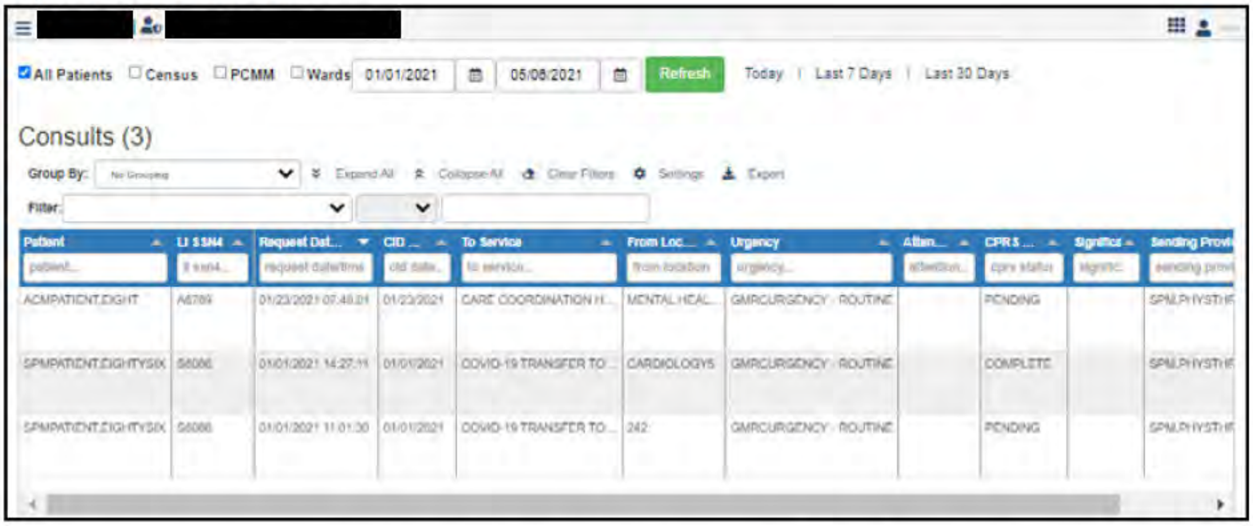
Figure 71: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Consults table shows the consults grouped by patient. the Consults table provides the following data:

- Patient Name
- LI SSN4
- Request Date/Time
- CID Date
- To Service
- From Location
- Urgency
- Attention
- CPRS Status
- Significant Findings
- Sending Provider
- Request Type

Figure 72: Consults Table



Click a patient row to open the Consult Detail page. The page includes the following data: Patient Info, Consult data, Result Narrative, Reason for Request, Request Processing Activity, Related Order, and Related Order Dialog Responses. Click **Done** to return to the Consults page.

Discharges

From the **Menu** drop-down list, select **Discharges**. The Discharges page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 73: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, or **Last 7 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

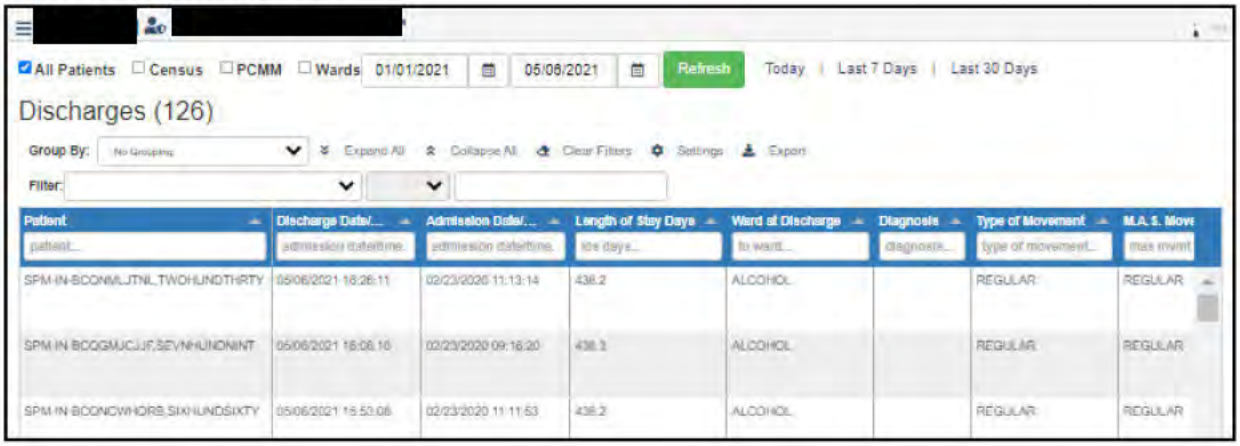
To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 74: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. The Discharges table shows patients discharged grouped by date. The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The table includes the following data:

- Patient Name
- Discharge Date and Time
- Admission Date and Time
- Length of Stay Days
- Ward at Discharge
- Diagnosis
- Type of Movement
- M.A.S. Movement Type

Figure 75: Discharges Table



Click on a patient row to open the Patient Movement Detail page. The page contains the following information: Movement Info, Related Admission Movement, Same Admission Movements, Admission Patient Treatment File (PTF) Data, and Admission Movement Associated TIU Documents. To return to the Discharge page, click **Done**.

ED Visits

From the **Menu** drop-down list, select **ED Visits**. The ED Visits page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 76: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, or **Last 7 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

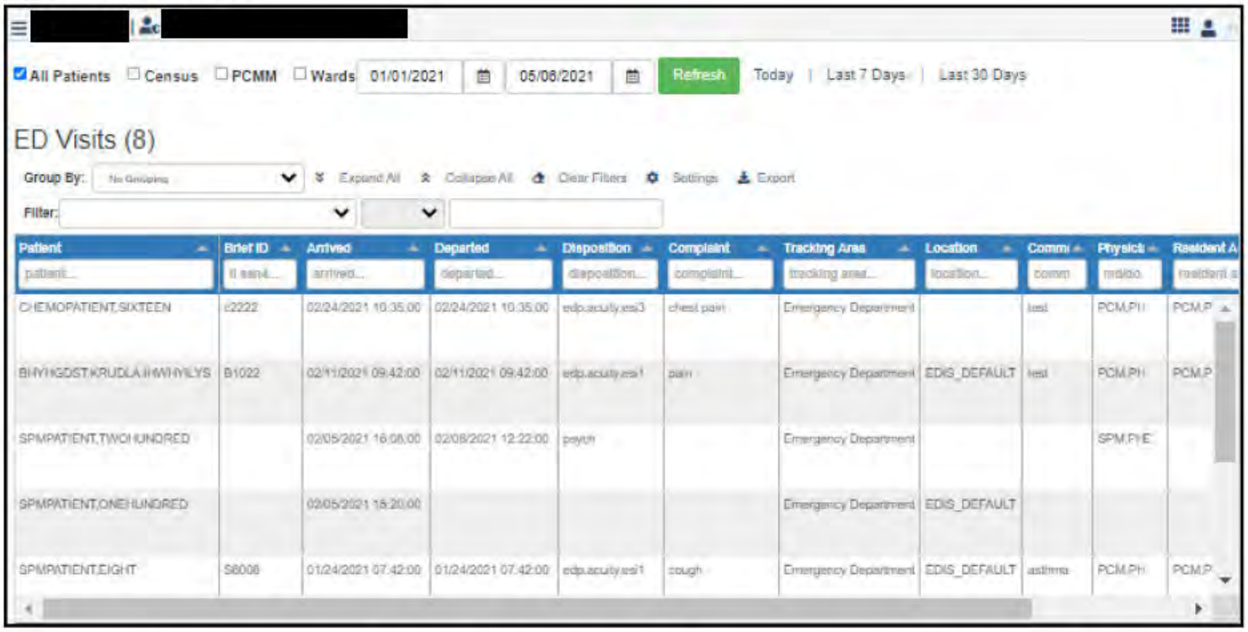
Figure 77: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table. The Discharges table shows patients discharged grouped by date.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The table includes the following data:

- Patient Name
- Brief ID
- Arrived Date/Time
- Departed Date/Time
- Disposition
- Complaint
- Tracking Area
- Location
- Comment
- Physician Assigned
- Resident Assigned
- Nurse Assigned
- Institution

Figure 78: ED Visits



Click on a patient row to open the ED Visit Detail page. The page contains the following information: Patient Identifiers, Patient Care Events, Complaint/Status, ED visit Discharge Diagnoses, visit Providers, Related TIU Documents, Location Info, Care Team for Patient, Visit/'Clinic Identifiers, Vitals, ED Visit Orders, Visit Health Factor Data, Encounter Info, Visit Info, Delay Tracking, and ED Log Transaction Data. To return to the ED Visits page, click **Done**.

Lab Results

From the **Menu** drop-down list, select **Lab Results**. The Lab Results page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 79: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

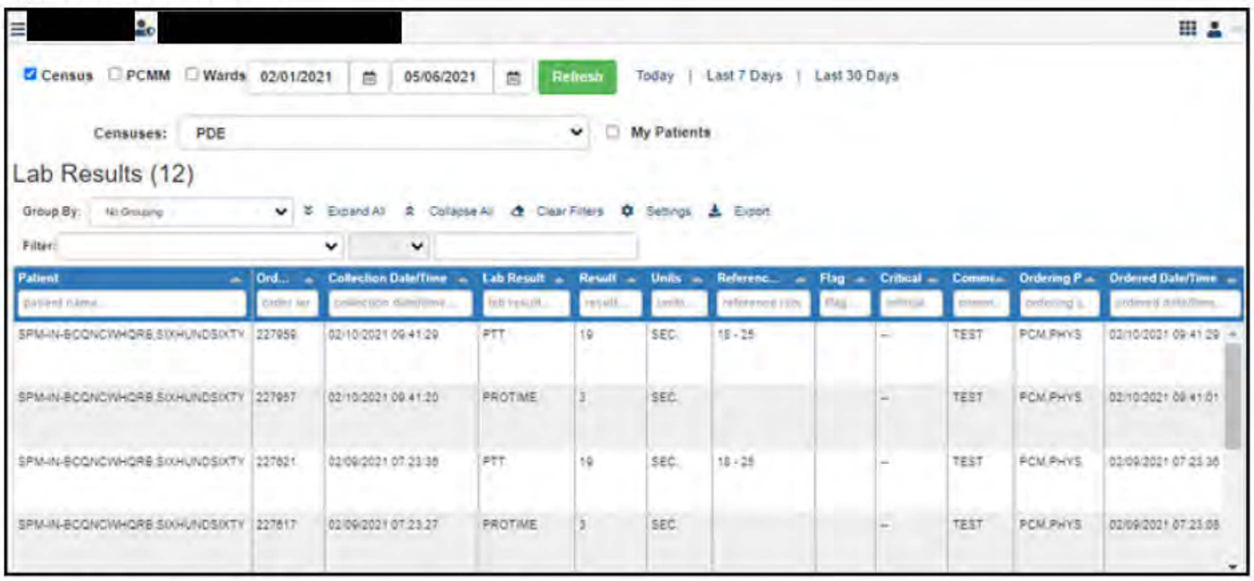
At the top of the page, select a date range, **Today**, or **Last 7 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

Figure 80: Group by Options

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 81: Lab Results



The Lab Results table shows patients alphabetically by patient name.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The table includes the following data:

- Patient Name
- Order IEN
- Collection Date/Time
- Lab Result

- Result
- Units
- Reference Range
- Flag
- Critical Result
- Comments
- Ordering Provider
- Ordered Date/time

These data columns can be re-ordered by dragging them to the desired position in the table.

To review a lab result, click one of the patient rows in the table. The Lab Result Detail page opens. This page provides the following data: Provider name, Specimen, Specimen Collection Date, Test name, Result, Units, Ref. Range, and Flag.

Figure 82: Lab Result Detail Page

Click **Done** to return to the Lab Results page.

MH Instrument Administrations

From the **Menu** drop-down list, select **MH Instrument Administrations**. The MH Instrument Administrations page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 83: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

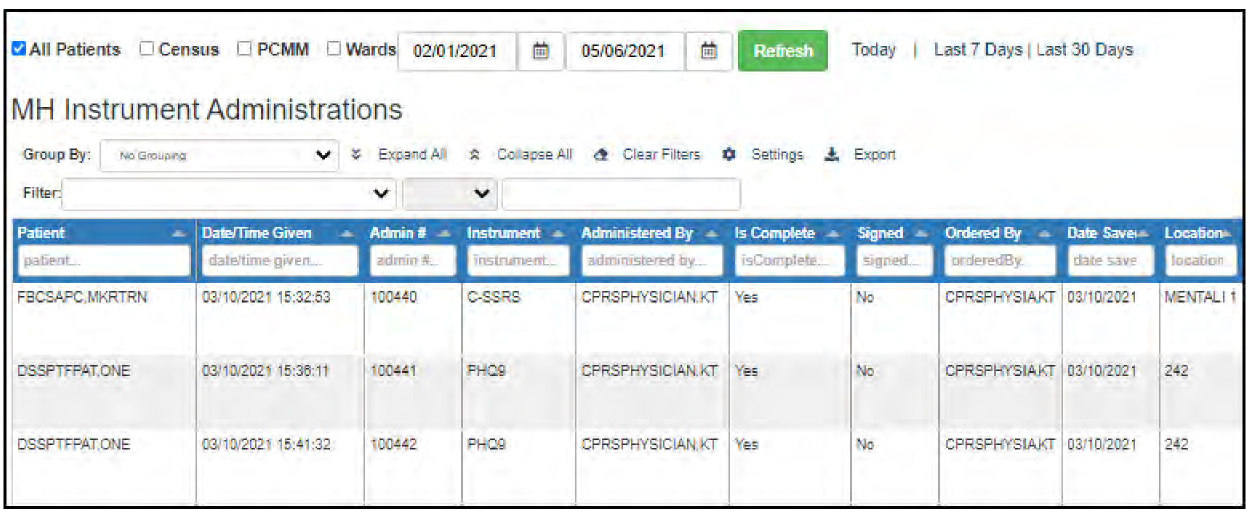
If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 84: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 85: MH Instrument Administration



Patient	Date/Time Given	Admin #	Instrument	Administered By	Is Complete	Signed	Ordered By	Date Save	Location
FBCSAPC,MKRTRN	03/10/2021 15:32:53	100440	C-SSRS	CPRSPHYSICIAN,KT	Yes	No	CPRSPHYSIAKT	03/10/2021	MENTALI 1
DSSPTFPAT,ONE	03/10/2021 15:36:11	100441	PHQ9	CPRSPHYSICIAN,KT	Yes	No	CPRSPHYSIAKT	03/10/2021	242
DSSPTFPAT,ONE	03/10/2021 15:41:32	100442	PHQ9	CPRSPHYSICIAN,KT	Yes	No	CPRSPHYSIAKT	03/10/2021	242

The MH Instrument Administrations table shows patients listed by Date/Time given.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The table includes the following data:

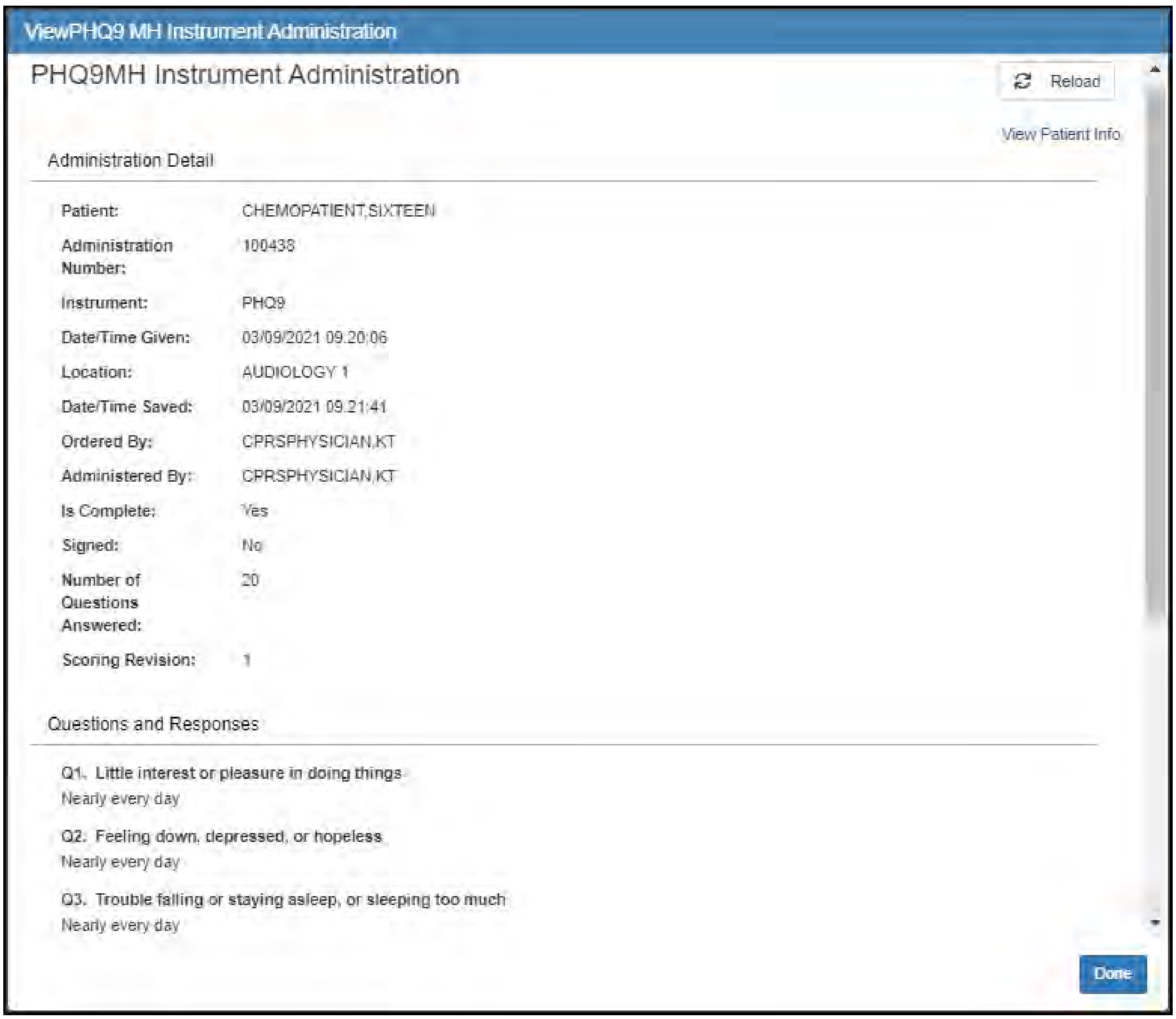
- Patient Name
- Date/Time Given
- Admin #

- Instrument
- Administered By
- Is Complete
- Signed
- Ordered By
- Date Saved
- Location

These data columns can be re-ordered by dragging them to the desired position in the table.

To view the Instrument Administration details for the patient, click on the patient row in the table. The Instrument Administration page opens. This page provides Administration details and the questions and responses.

Figure 86: Instrument Administration Details



Click **Done** to return to the MH Instrument Administrations page.

Notes

From the **Menu** drop-down list, select **Notes**. The Notes (EHR Clinical Documentation) page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 87: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

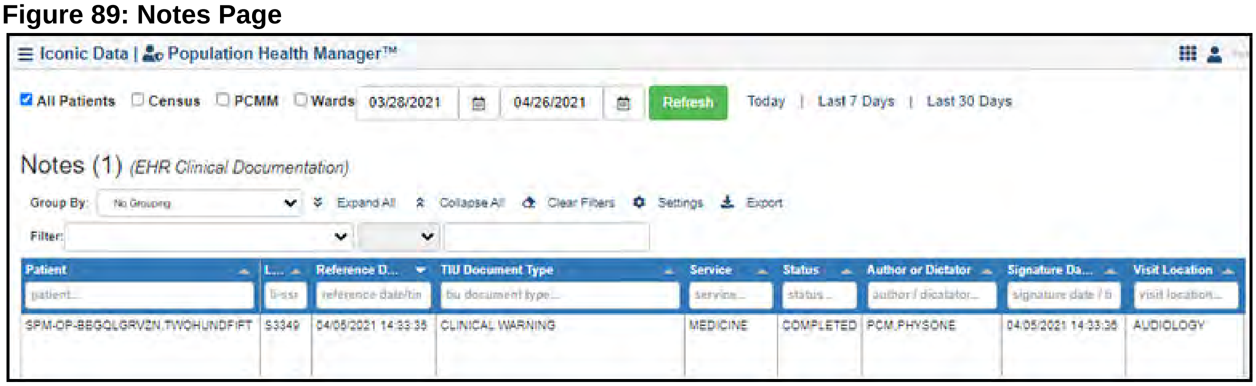
If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 88: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 89: Notes Page



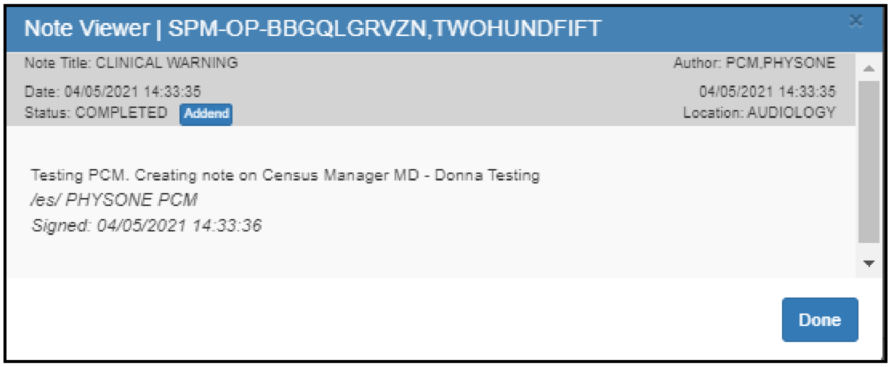
The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Notes table contains the following data:

- Patient Name
- LI-SSN4
- Reference Date/Time
- TIU Document Type
- Service
- Status
- Author or Dictator
- Signature Date/Time
- Visit Date/Time

- Visit Location

To view the note, click the note row in the table. The Note Viewer page opens. The Note Viewer shows the note text, Note Title, Date, Status, and Location. To return to the Notes table page, click **Done**.

Figure 90: Note Viewer



Orders

From the **Menu** drop-down list, select **Orders**. The Orders page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 91: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 92: Group by Options

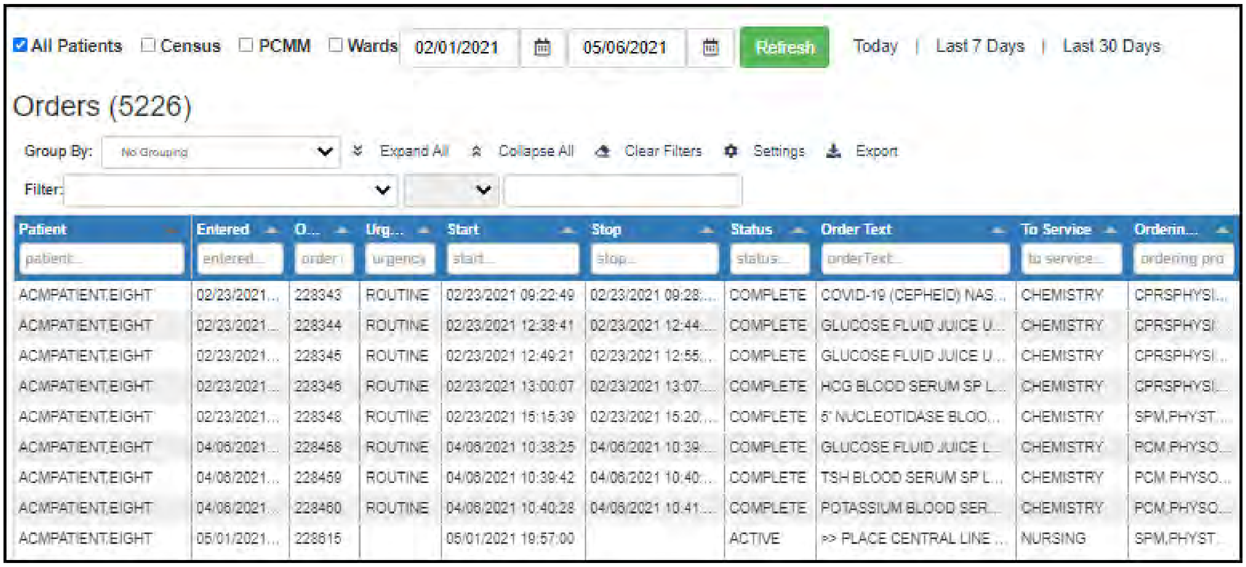
To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

The Orders table shows the following data, ordered by alphabetical patient name:

- Patient name
- Entered Date/Time
- Order IEN
- Urgency
- Start Date/Time
- Stop Date/Time
- Status
- Order Text
- To Service
- Ordering Provider
- Patient Location

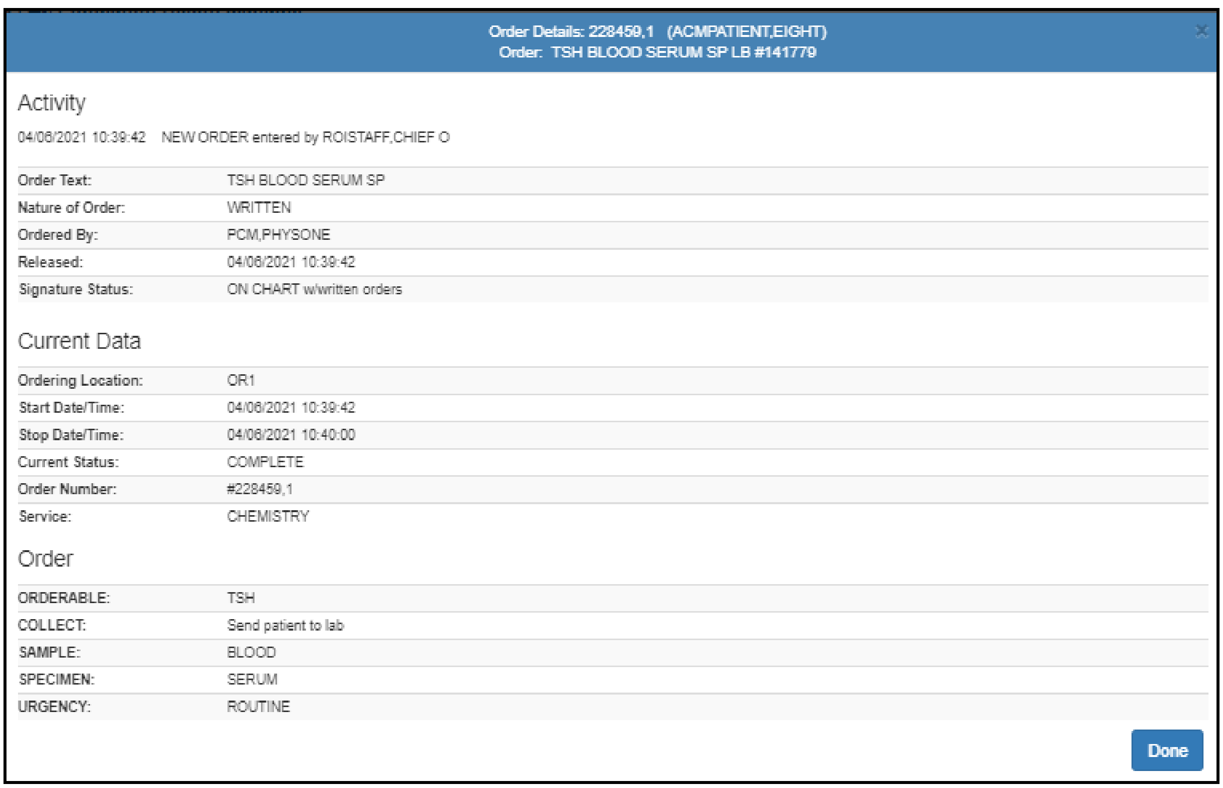
Figure 93: Orders Table



Patient	Entered	O...	Urg...	Start	Stop	Status	Order Text	To Service	Orderin...
patient...	entered...	order i	urgency	start...	stop...	status...	orderText...	to service...	ordering pro
ACMPATIENT,EIGHT	02/23/2021...	228343	ROUTINE	02/23/2021 09:22:49	02/23/2021 09:28:...	COMPLETE	COVID-19 (CEPHEID) NAS...	CHEMISTRY	CPRSPHYSI...
ACMPATIENT,EIGHT	02/23/2021...	228344	ROUTINE	02/23/2021 12:38:41	02/23/2021 12:44:...	COMPLETE	GLUCOSE FLUID JUICE U...	CHEMISTRY	CPRSPHYSI
ACMPATIENT,EIGHT	02/23/2021...	228345	ROUTINE	02/23/2021 12:49:21	02/23/2021 12:55:...	COMPLETE	GLUCOSE FLUID JUICE U...	CHEMISTRY	CPRSPHYSI...
ACMPATIENT,EIGHT	02/23/2021...	228346	ROUTINE	02/23/2021 13:00:07	02/23/2021 13:07:...	COMPLETE	HCG BLOOD SERUM SP L...	CHEMISTRY	CPRSPHYSI...
ACMPATIENT,EIGHT	02/23/2021...	228348	ROUTINE	02/23/2021 15:15:39	02/23/2021 15:20:...	COMPLETE	5' NUCLEOTIDASE BLOO...	CHEMISTRY	SPM,PHYST...
ACMPATIENT,EIGHT	04/06/2021...	228458	ROUTINE	04/06/2021 10:38:25	04/06/2021 10:39:...	COMPLETE	GLUCOSE FLUID JUICE L...	CHEMISTRY	PCM,PHYSO...
ACMPATIENT,EIGHT	04/06/2021...	228459	ROUTINE	04/06/2021 10:39:42	04/06/2021 10:40:...	COMPLETE	TSH BLOOD SERUM SP L...	CHEMISTRY	PCM,PHYSO...
ACMPATIENT,EIGHT	04/06/2021...	228460	ROUTINE	04/06/2021 10:40:28	04/06/2021 10:41:...	COMPLETE	POTASSIUM BLOOD SER...	CHEMISTRY	PCM,PHYSO...
ACMPATIENT,EIGHT	05/01/2021...	228615		05/01/2021 19:57:00		ACTIVE	>> PLACE CENTRAL LINE ...	NURSING	SPM,PHYST...

To view an order's details, click a patient row in the Orders table. the Order Details page opens. The page provides the order's Activity data, Current Data, and Order details.

Figure 94: Order Details Page



Order Text:	TSH BLOOD SERUM SP
Nature of Order:	WRITTEN
Ordered By:	PCM,PHYSONE
Released:	04/06/2021 10:39:42
Signature Status:	ON CHART w/written orders
Ordering Location:	OR1
Start Date/Time:	04/06/2021 10:39:42
Stop Date/Time:	04/06/2021 10:40:00
Current Status:	COMPLETE
Order Number:	#228459,1
Service:	CHEMISTRY
ORDERABLE:	TSH
COLLECT:	Send patient to lab
SAMPLE:	BLOOD
SPECIMEN:	SERUM
URGENCY:	ROUTINE

To return to the Orders page, click **Done**.

Outpatient Encounters

From the **Menu** drop-down list, select **Outpatient Encounters**. The Outpatient Encounters page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 95: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

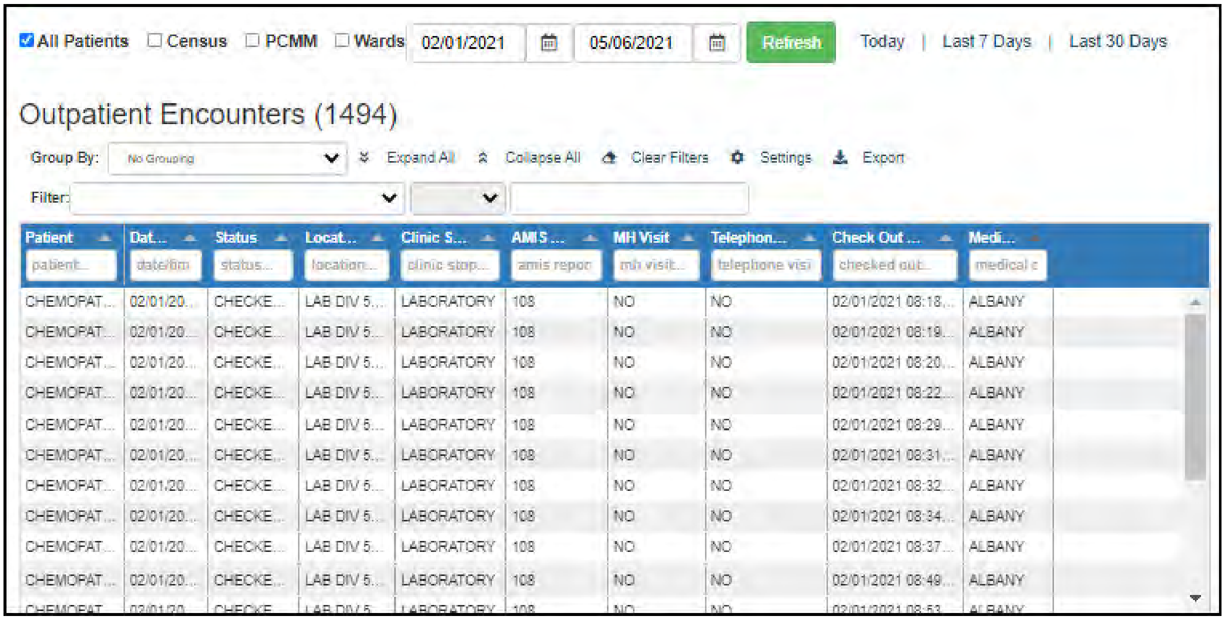
Figure 96: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Outpatient Encounters table shows the following data:

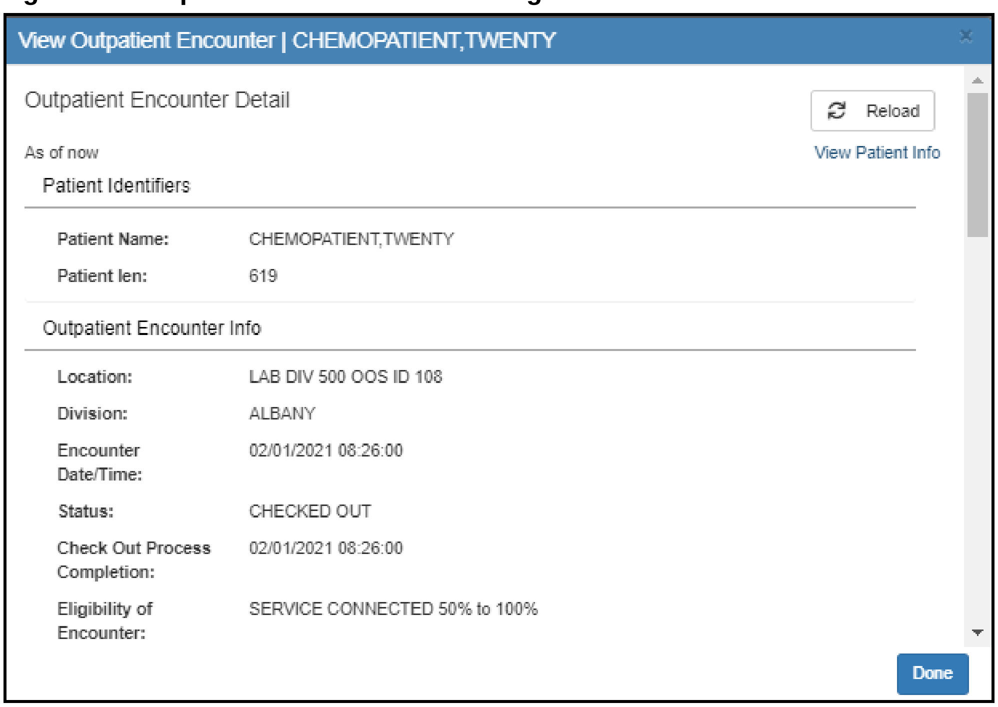
- Patient name
- Date/Time
- Status
- Location
- Clinic Stop
- AMIS Stop Code
- MH Visit
- Telephone Visit
- Check Out Completed
- Medical Center Division

Figure 97: Outpatient Encounters



To view the details of an Outpatient Encounter, click on a patient row in the table. The Outpatient Encounter Detail page opens. This page provides the following data: Patient Identifiers, Outpatient Encounter Info, Visit Providers, Related TIU Documents, Visit Health Factor Data, and Visit Info.

Figure 98: Outpatient Encounter Detail Page



To return to the Outpatient Encounters page, click **Done**.

Patient Record Flag Assignments

From the **Menu** drop-down list, select **Patient Record Flag Assignments**. The Patient Record Flag Assignments page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 99: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, you can add a new PRF Assignment. For the steps, go to "Add New PRF Assignment" on page 62.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 100: Group by Options

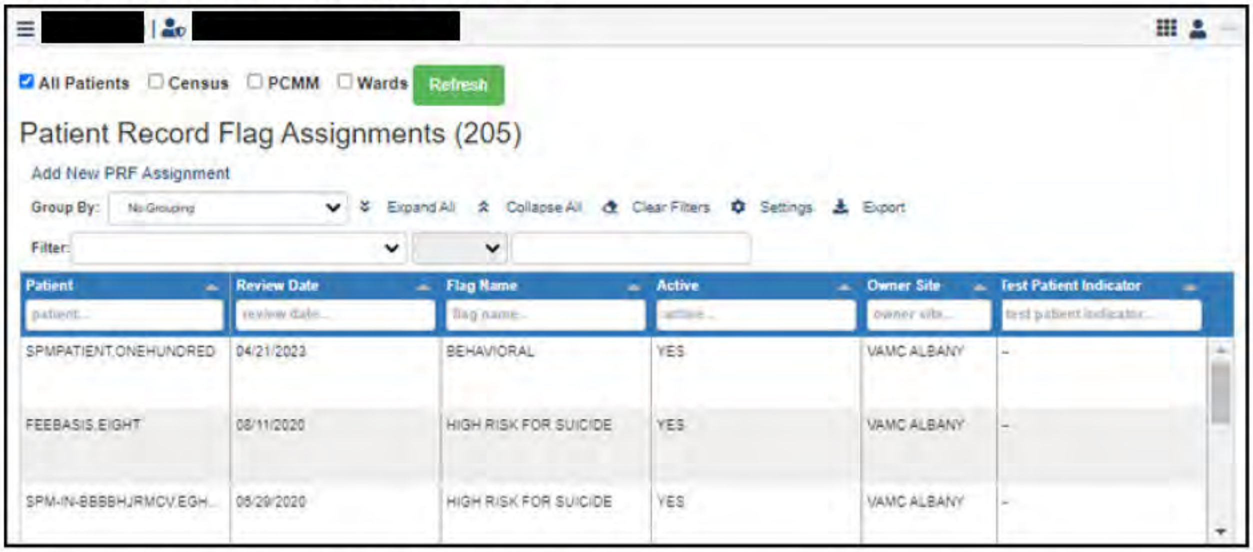
To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

The Patient Record Flag Assignments table is grouped by patient and shows the following data:

- Patient Name
- Review Date
- Flag Name
- Active
- Owner Site
- Originating Site
- Test Patient Indicator

Figure 101: Patient Record Flag Assignments

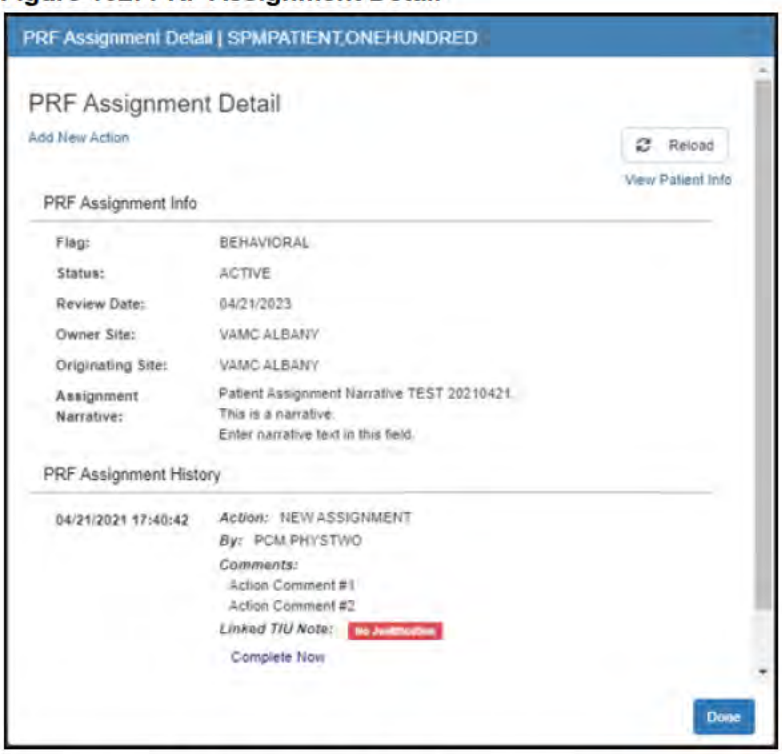


T o view the details of one of the Patient Record Flag Assignments, click a row in the PRF Assignments table. The PRF Assignment Detail page opens. The details include: flag type, status, review date, owner site, originating site, assignment narrative, and the PRF Assignment History.

You can add a new action this detail by clicking the **Add New Action** option. See "Add New Action" on page 61 for the steps.

To see the patient info, click **View Patient Info**.

Figure 102: PRF Assignment Detail



To return to the Patient Record Flag Assignments table page, click **Done**.

Add New Action

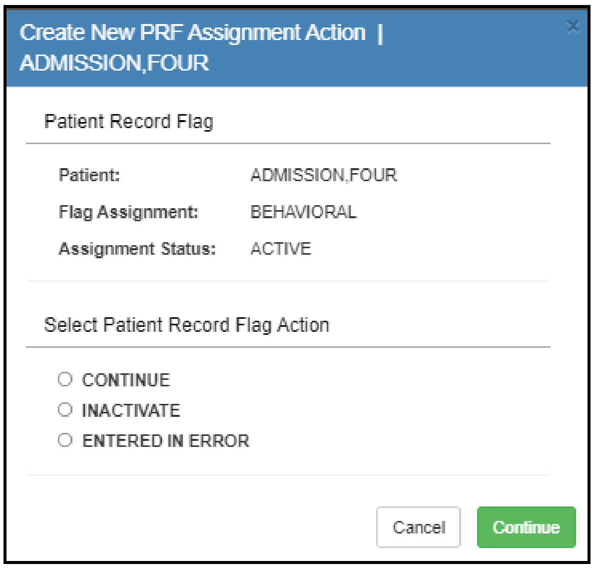
From the top of the detail page, a new action can be added.

1. Click the **Add New Action** link that is at the top of the detail page.

Figure 103: Add New Action Option

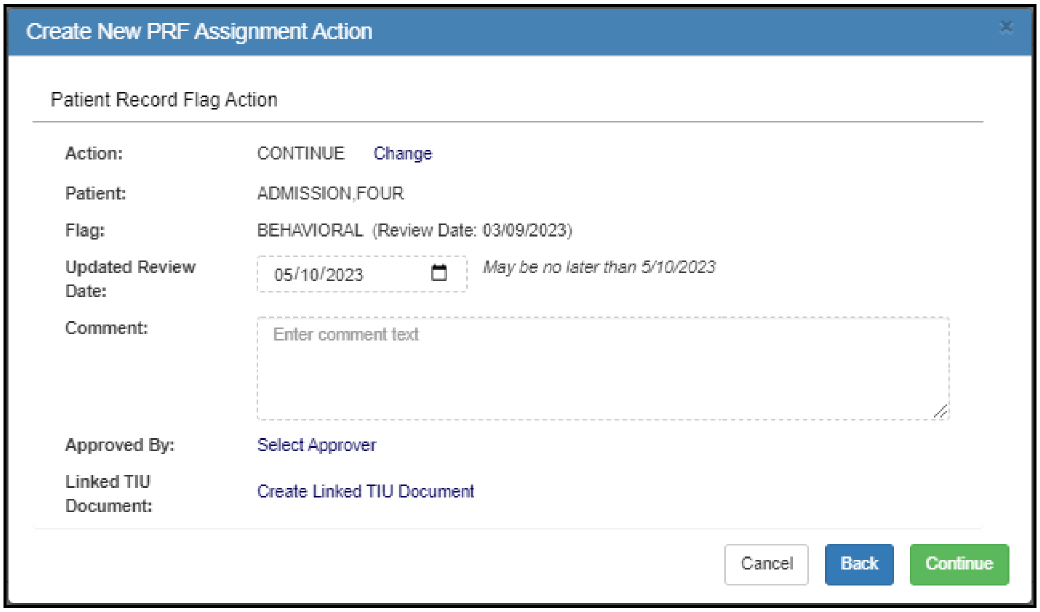
The Create new PRF Assignment Action dialog opens.

Figure 104: Select Patient to Flag Dialog



2. Choose one of the actions:
   - **Continue**
   - **Inactivate**
   - **Entered in Error**
3. Click **Continue**. The Patient Record Flag Action page opens. Depending on your action choice, you can update the review date, add a comment, select an approver, and/or create a linked TIU document.

Figure 105: Patient Record Flag Action



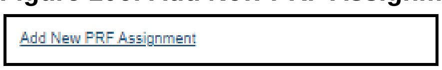
4. Make your updates and selections and click **Continue**. The Confirmation page opens.
5. Review the information on the page.
6. Click **Confirm** to confirm the patient record flag action. If changes need to be made, click **Back**.

Add New PRF Assignment

From the top of the page, a new PRF Assignment can be created. To add a new PRF Assignment:

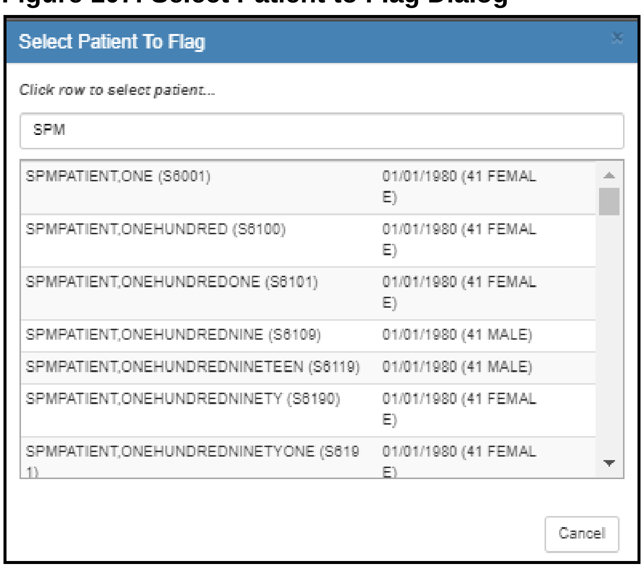
1. Click the **Add New PRF Assignment** link that is right above the patient grid.

Figure 106: Add New PRF Assignment Option



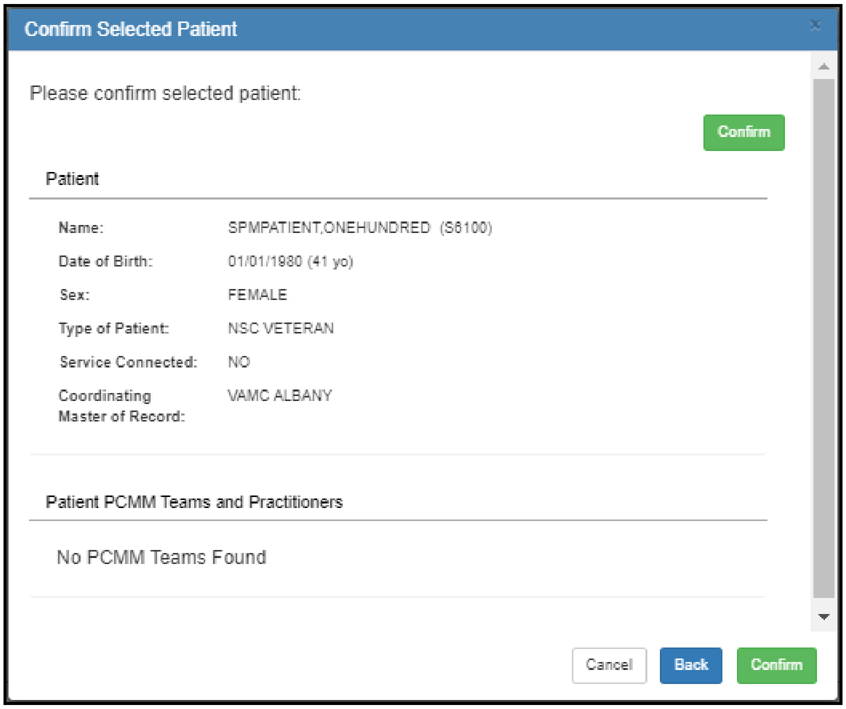
The Select Patient to Flag dialog opens.

Figure 107: Select Patient to Flag Dialog



2. Enter the first few letters of the patient's name in the text entry field.
3. Select the correct patient from the search results. The Confirm Selected Patient page opens.

Figure 108: Confirm Selected Patient

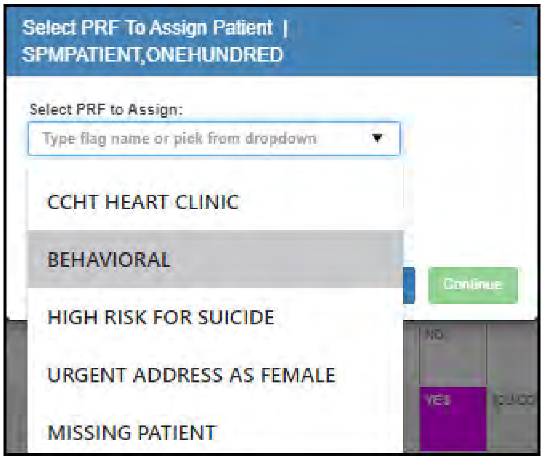


4. If the correct patient is listed, click **Confirm**. If an incorrect patient is selected, click the **Back** button to select the correct patient. After confirming the patient, the Current PRF Assignments page opens.

Figure 109: Current PRF Assignments

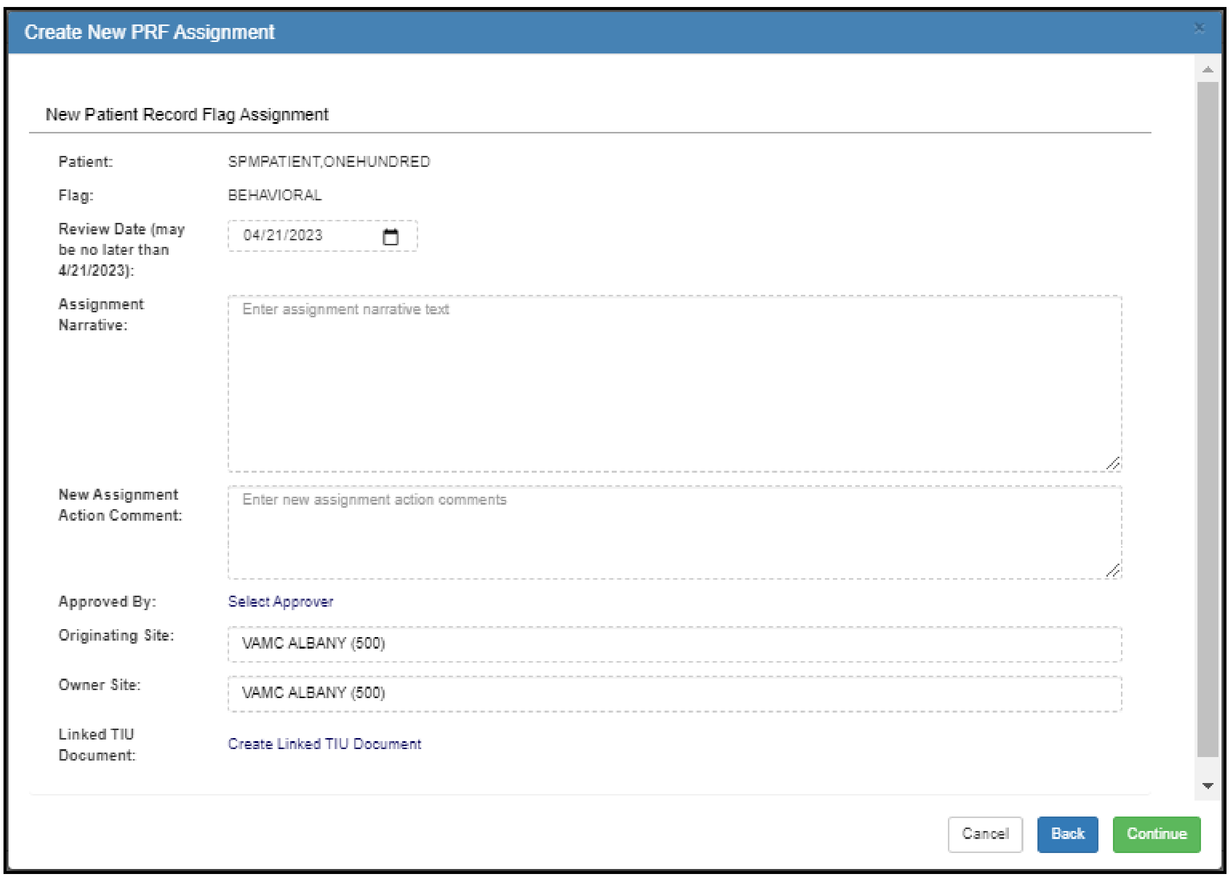
5. Click the **Add New Flag Assignment** button to add a new flag assignment to the patient's record. The Select PRF to Assign Patient dialog opens.
6. In the open text field, enter the flag name or select the flag name from the list.

Figure 110: Select PRF to Assign Patient Dialog



7. Click **Continue**. The Create New PRF Assignment page opens.
8. Fill out the **Assignment Narrative**, **New Assignment Action Comment**, select the **approver**, and optionally **Create Linked TIU Document**.

Figure 111: Create New PRF Assignment Page



9. Click **Continue**. A confirmation page asks you to confirm that the New PRF Assignment is correct.
10. Click **Confirm** to confirm the patient record flag action. If changes need to be made, click **Back**.

Patient Treatment File Entries

From the **Menu** drop-down list, select **Patient Treatment File Entries**. The Patient Treatment File Entries page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 112: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 113: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

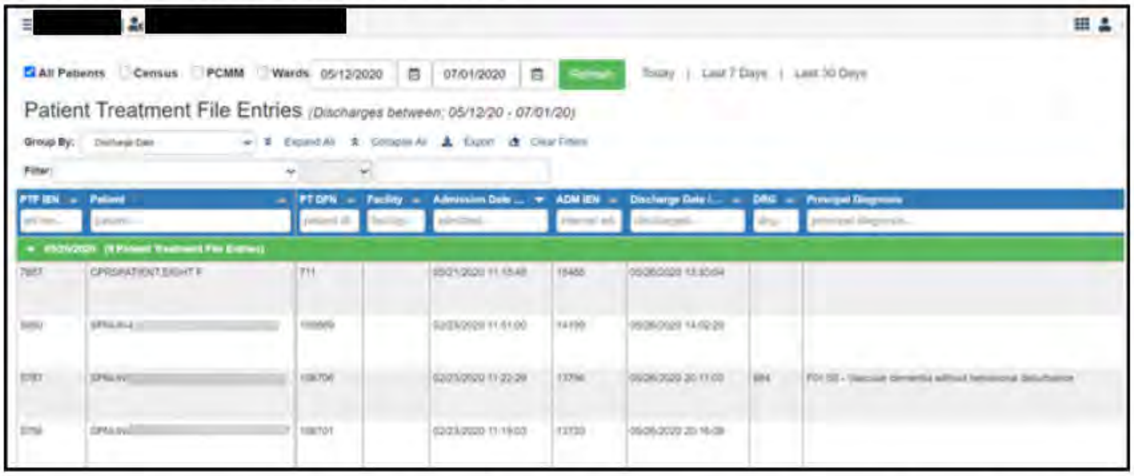
The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

The Patient Treatment File Entries table is grouped by date and shows the following data:

- PTF IEN
- Patient Name
- Patient DFN (PT DFN)
- Facility
- Admission Date and Time
- Admin IEN
- Discharge Date and Time
- DRG
- Principal Diagnosis
- Secondary Diagnosis
- Procedure 1
- Procedure 2
- Procedure 3
- Procedure 4
- Procedure 5
- Ward at Discharge

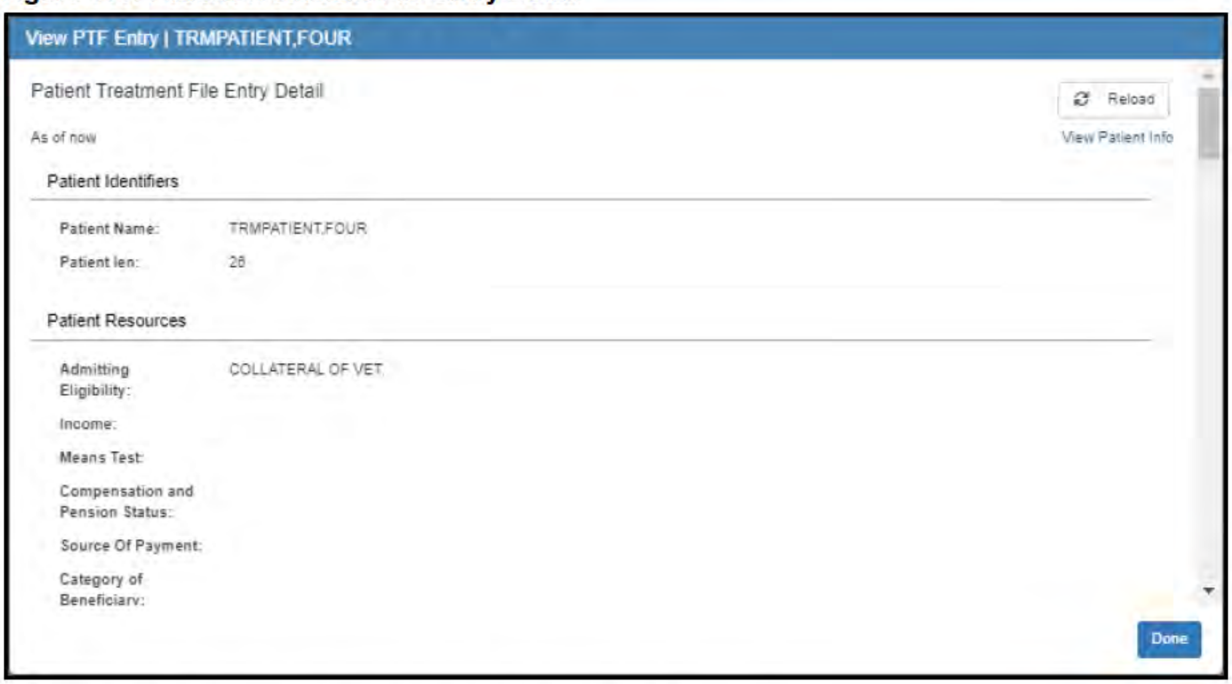
- Discharge Specialty
- Type of Disposition
- Discharge Status
- Outpatient Treatment
- Fee Basis
- Status
- Closed Out By
- Close Out Date
- Release Date
- Transmission Date
- Means Test
- Income
- Type of Record
- Corresponding PTF Record
- Source of Admission
- Admitting Eligibility
- Transferring Facility
- Transferring Facility Number
- Transferring Suffix
- Source of Payment
- Category of Beneficiary
- VA Auspices
- Place of Disposition
- Receiving Facility
- Receiving Suffix
- ASIH Days
- Compensation and Pension Status
- Provider
- Treated for SC Condition
- Kidney Source
- Suicide/Self Inflicted Indicator
- Legionnaires Disease
- Substance Abuse
- Psychiatry Class Severity
- Current Functional Assessment
- High Level Psych Class

Figure 114: Patient Treatment File Entries



To view the Patient Treatment File Entry Detail for a patient, click the patient's row in the table. The detail page includes the Patient Identifiers data, Patient Resources data, Primary Provider for Episode of Care, Diagnosis and Services Provided, Admission Info, Discharge info, PTF 501 Movement Summaries, PTF 535 Specialty Movement Summaries, PTF 401 Surgical Operation Summaries, PTF 601 Procedure Summaries, Treatment Classification, Behavioral Health Findings, Kidney Source, and PTF Status Data.

Figure 115: Patient Treatment File Entry Detail



To return to the Patient Treatment File Entries page, click **Done**.

Problem List Entries

From the **Menu** drop-down list, select **Problem List Entries**. The Problem List Entries page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 116: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If viewing data for **All Patients**, Click **Select ICD Codes** to choose the specific problem you want to view for all patients.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 117: Group by Options

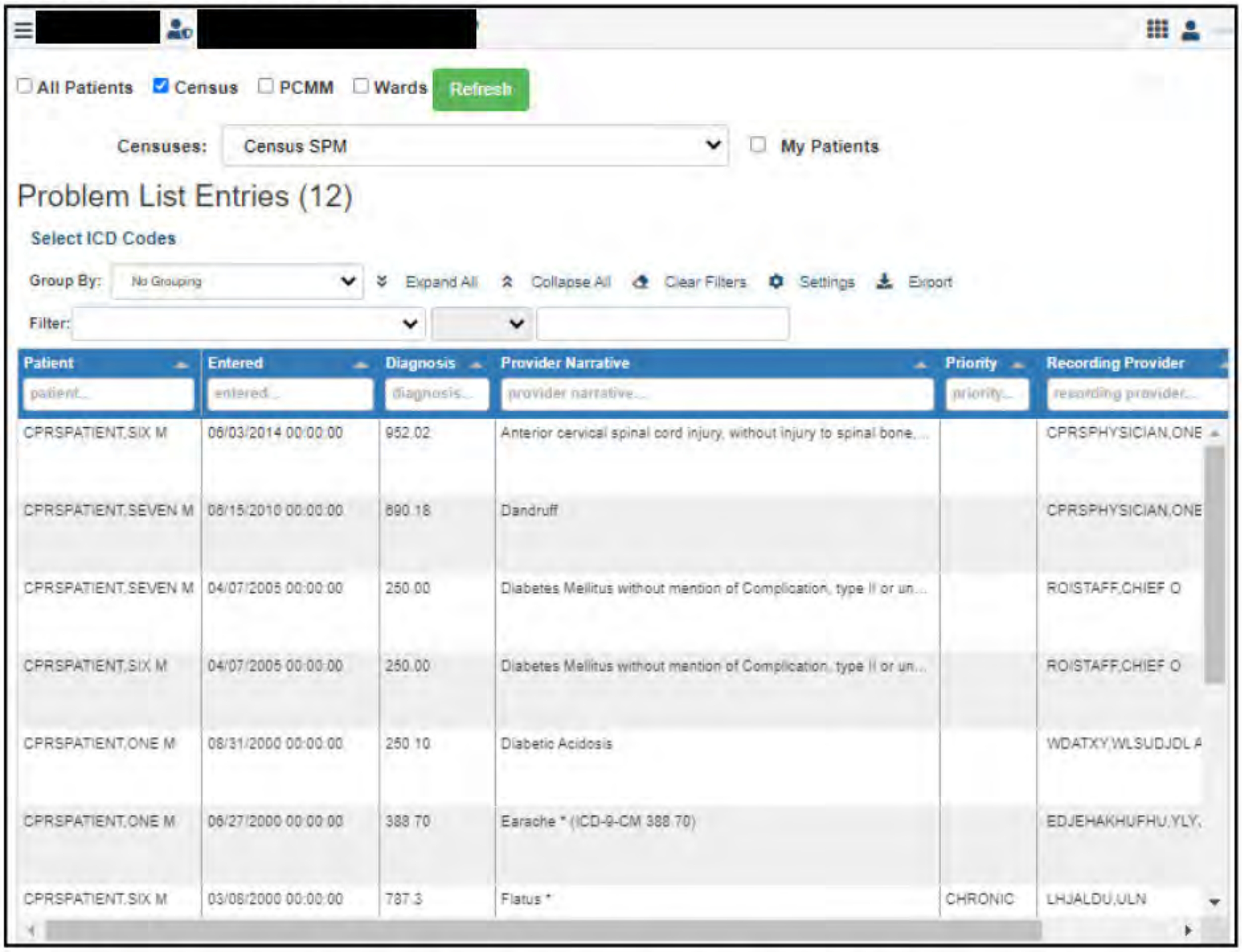
To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

The Problem List Entries table is grouped by patient and shows the following data:

- Patient Name
- Date Entered
- Diagnosis
- Provider Narrative
- Priority
- Status
- Condition
- Service Connected
- Recording Provider
- Date Resolved
- Class

Figure 118: Problem List Entries

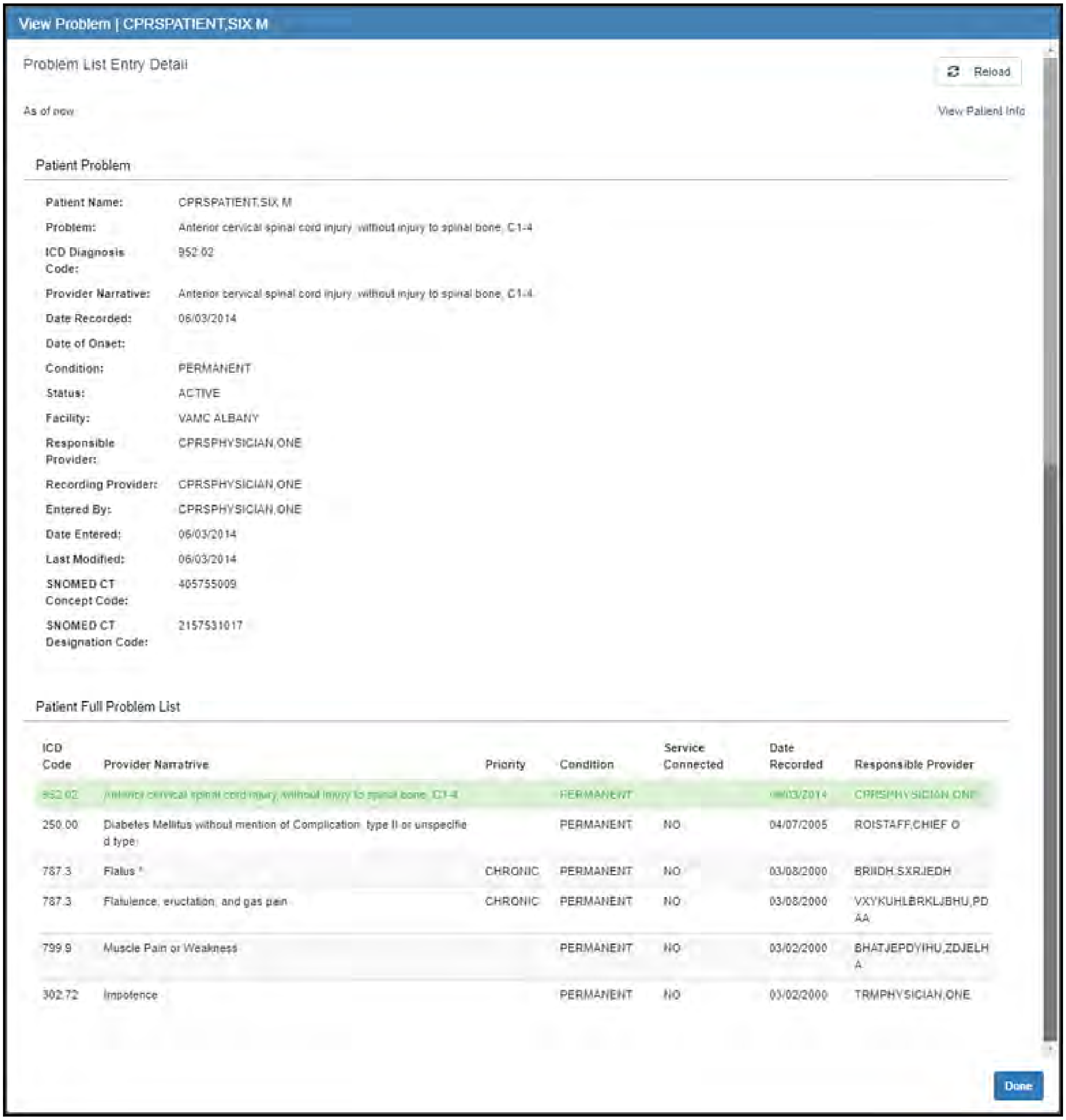


To view an individual problem, click a row in the table. The Problem List Entry Detail page opens. The page includes the following data: Patient Name, Problem, ICD Diagnosis Code, Provider Narrative, Date Recorded, Date of Onset, Condition, Status, Facility, Responsible Provider, Recording Provider, Entered By, Date Entered, Last Modified, SNOMED CT Concept Code, SNOMED CT Designation Code, and a table that details the patient's full problem list.

To see information on the patient, click **View Patient Info**.

To return to the Problem List Entries page, click **Done**.

Figure 119: View Problem Page



Prescriptions

From the **Menu** drop-down list, select Prescriptions. The Prescriptions page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 120: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

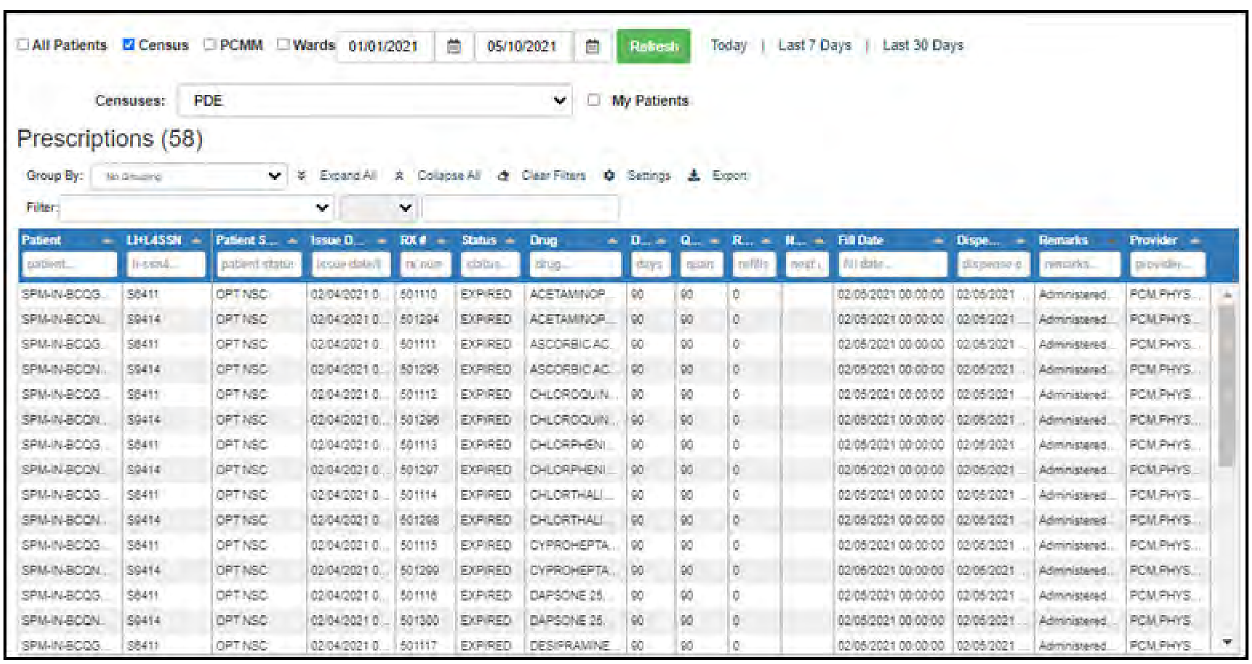
If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 121: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 122: Prescriptions Page



Patient	LH-L4SSN	Patient S...	Issue D...	RX #	Status	Drug	D...	Q...	R...	N...	Fill Date	Dispe...	Remarks	Provider
SPM-IN-BCQG...	S8411	OPT NSC	02/04/2021 0...	501110	EXPIRED	ACETAMINOP...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQN...	S9414	OPT NSC	02/04/2021 0...	501294	EXPIRED	ACETAMINOP...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQG...	S8411	OPT NSC	02/04/2021 0...	501111	EXPIRED	ASCORBIC AC...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQN...	S9414	OPT NSC	02/04/2021 0...	501295	EXPIRED	ASCORBIC AC...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQG...	S8411	OPT NSC	02/04/2021 0...	501112	EXPIRED	CHLOROQUIN...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQN...	S9414	OPT NSC	02/04/2021 0...	501296	EXPIRED	CHLOROQUIN...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQG...	S8411	OPT NSC	02/04/2021 0...	501113	EXPIRED	CHLORPHENI...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQN...	S9414	OPT NSC	02/04/2021 0...	501297	EXPIRED	CHLORPHENI...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQG...	S8411	OPT NSC	02/04/2021 0...	501114	EXPIRED	CHLORTHALI...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQN...	S9414	OPT NSC	02/04/2021 0...	501298	EXPIRED	CHLORTHALI...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQG...	S8411	OPT NSC	02/04/2021 0...	501115	EXPIRED	CYPROHEPTA...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQN...	S9414	OPT NSC	02/04/2021 0...	501299	EXPIRED	CYPROHEPTA...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQG...	S8411	OPT NSC	02/04/2021 0...	501116	EXPIRED	DAPSONE 25...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQN...	S9414	OPT NSC	02/04/2021 0...	501300	EXPIRED	DAPSONE 25...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...
SPM-IN-BCQG...	S8411	OPT NSC	02/04/2021 0...	501117	EXPIRED	DESIPRAMINE...	90	90	0		02/05/2021 00:00:00	02/05/2021 ...	Administered...	PCM,PHYS...

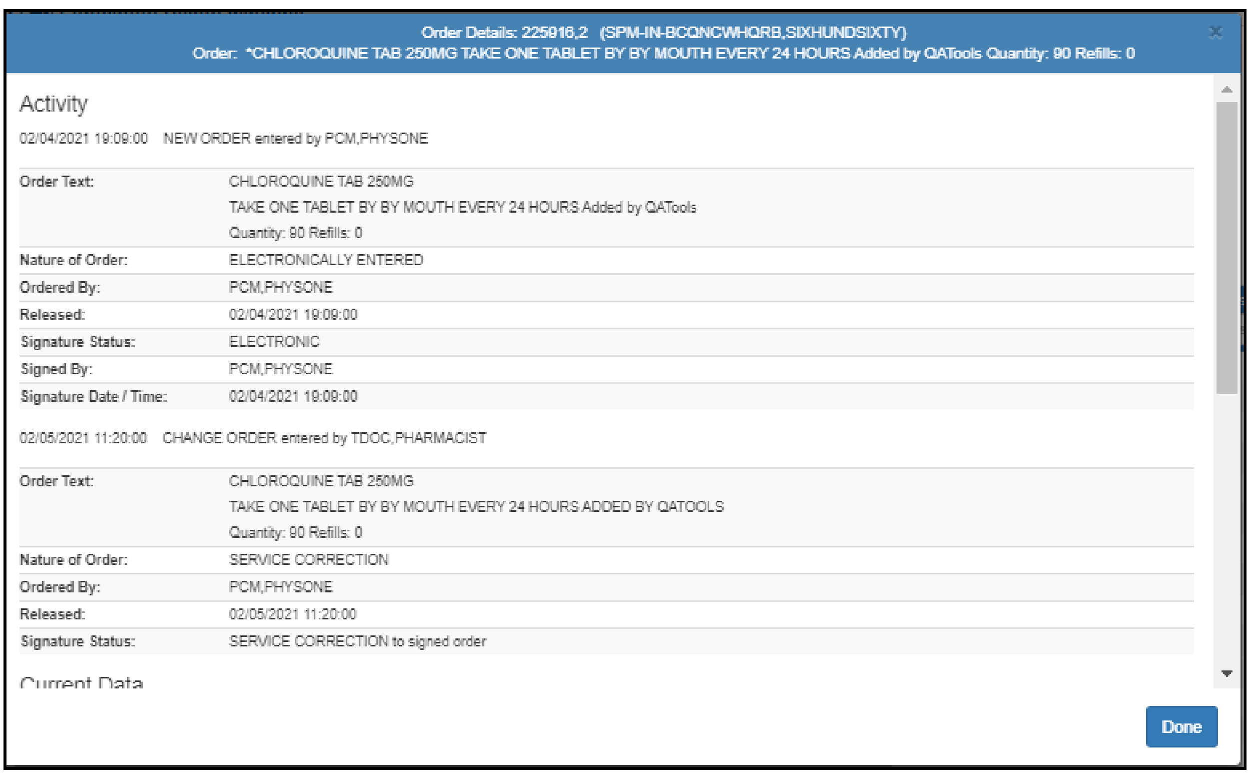
The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Prescriptions page contains the following data:

- Patient Name
- LI+4SSN
- Patient Status
- Issue Date/Time
- RX#
- Status
- Drug
- Days Supply
- Quantity
- Refills
- Next Possible Fill
- Fill Date
- Dispense Date
- Remarks
- Provider

These data columns can be re-ordered by dragging them to the desired position in the table.

To view the prescription activity for a patient, click the row in the prescription table. The Activity page opens. The page contains prescription activity, current data, and order details.

Figure 123: Prescription Activity



To return to the Prescriptions page, click **Done**.

PCMM Patient Panels

From the **Menu** drop-down list, select **PCMM Patient Panels**. The PCMM Patient Panels page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 124: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 125: Group by Options

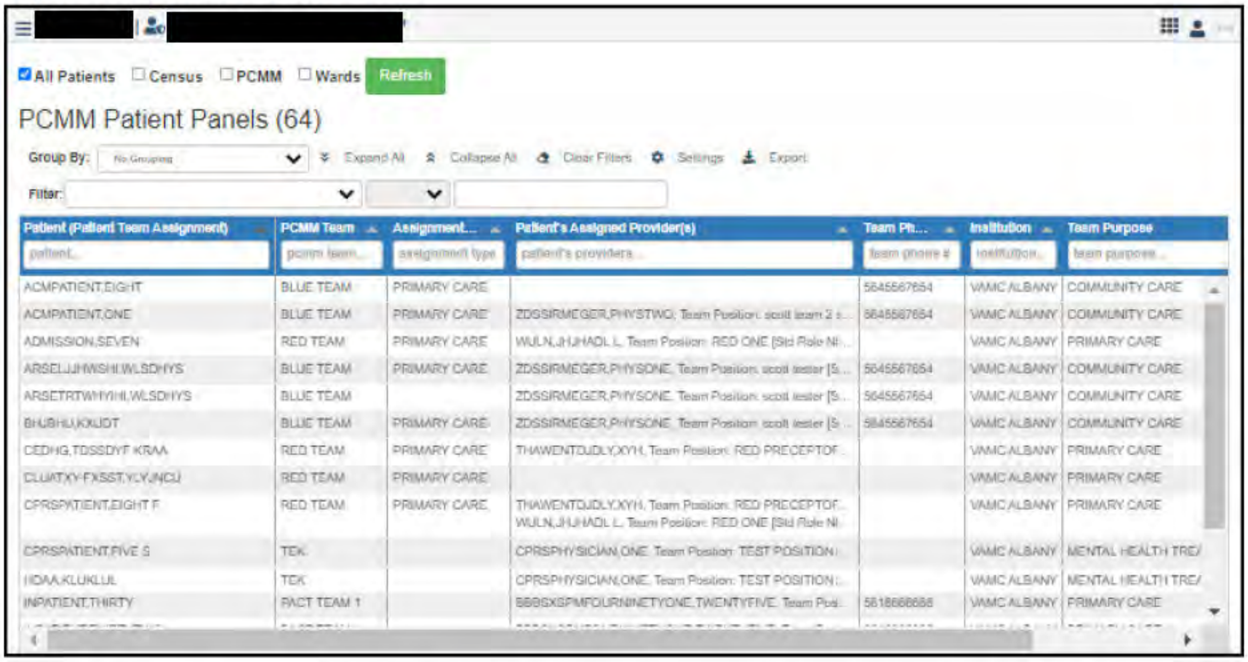
To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order.

The PCMM Patent Panels table is grouped by team and shows the following data:

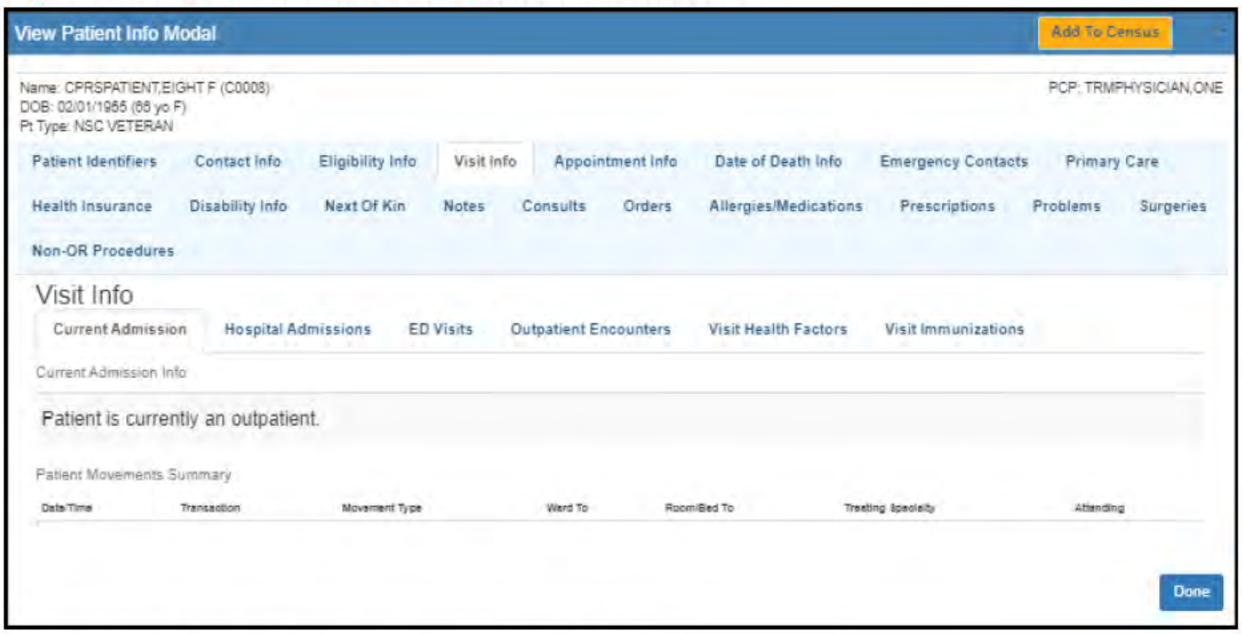
- Patient (Patient Team Assignment)
- PCMM Team
- Assignment Type
- Patient's Assignment Provider(s)
- Team Phone #
- Institution
- Team Purpose
- Team Status

Figure 126: PCMM Patient Panels



To view a patient's Current Admission Visit Info, click the patient's row in the table. The View Patient Info Modal Visit Info Current Admission tabs open.

Figure 127: Visit Info Tab and Current Admissions Sub-tab



To return to the PCMM Patient Panels page, click **Done**.

Radiology / Nuclear Medicine Reports

From the **Menu** drop-down list, select **Radiology / Nuclear Medicine Reports**. The Radiology / Nuclear Medicine Reports page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 128: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 129: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 130: Radiology / Nuclear Medicine Reports

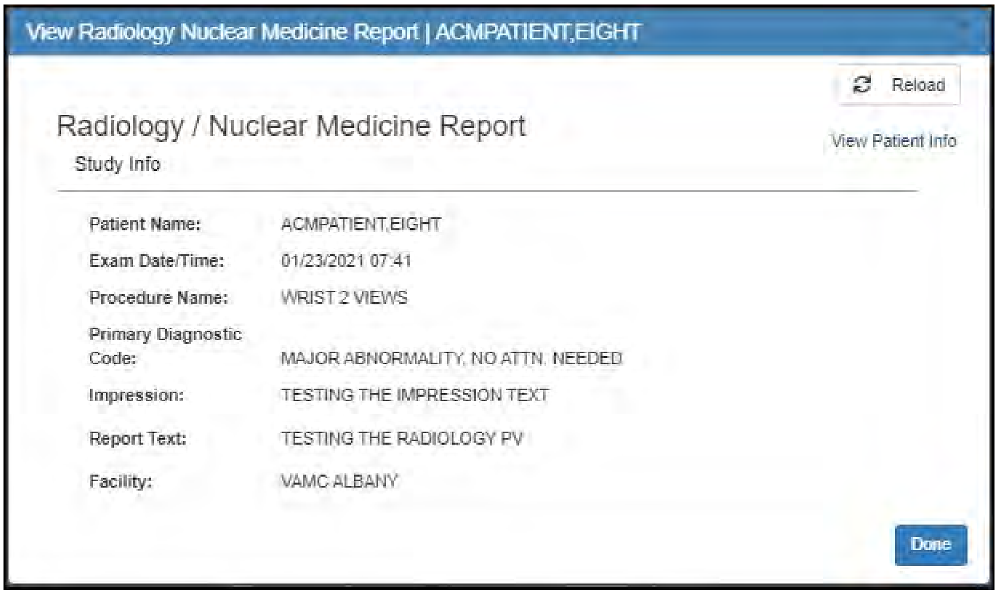
The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The table columns provide the following Radiology/Nuclear Medicine data:

- Patient Name
- Procedure
- Exam Status
- Exam Date/Time
- Primary Diagnostic Code
- No Show
- Abnormal
- Report Status
- Requesting Physician
- Primary Interpreting Staff

To view a patient's Radiology/Nuclear Medicine Report, click the patient's row in the table. The Radiology/Nuclear Medicine Report page opens. The page includes the following info:

- Patient Name
- Exam Date/Time
- Procedure Name
- Primary Diagnostic Code
- Impression
- Report Text
- Facility

Figure 131: Radiology/Nuclear Medicine Report



To return to the Radiology/Nuclear Medicine Report page, click **Done**.

Readmissions

From the **Menu** drop-down list, select **Readmissions**. The Readmissions page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 132: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

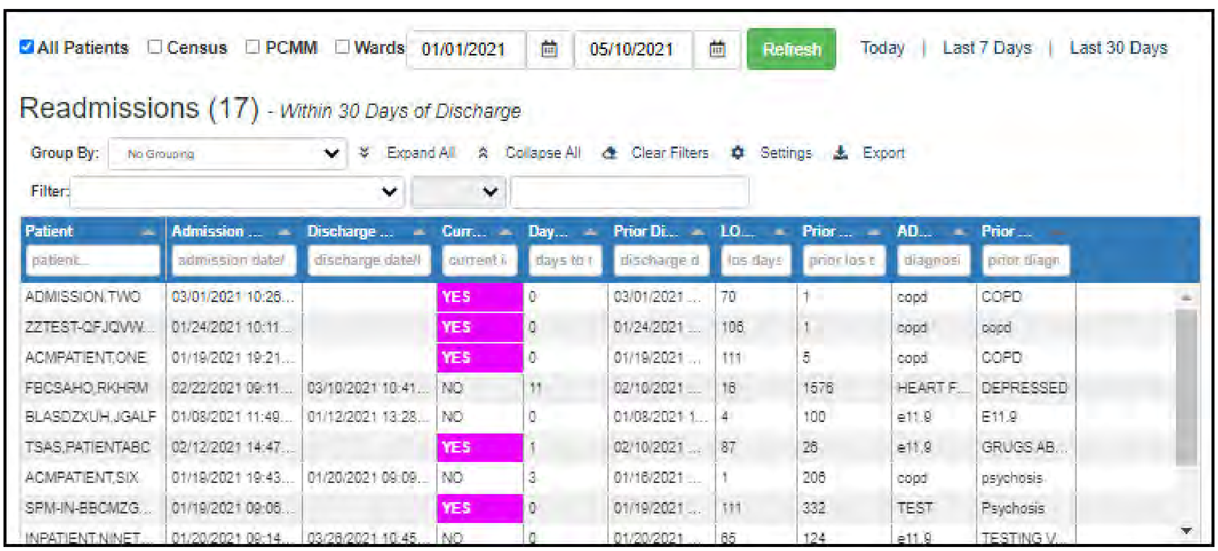
If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 133: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 134: Readmissions



Patient	Admission ...	Discharge ...	Curr...	Day...	Prior Di...	LO...	Prior ...	AD...	Prior ...
ADMISSION,TWO	03/01/2021 10:26...		YES	0	03/01/2021 ...	70	1	copd	COPD
ZZTEST-QFJQVW...	01/24/2021 10:11...		YES	0	01/24/2021 ...	106	1	copd	copd
ACMPATIENT,ONE	01/19/2021 19:21...		YES	0	01/19/2021 ...	111	5	copd	COPD
FBCSAHO,RKHRM	02/22/2021 09:11...	03/10/2021 10:41...	NO	11	02/10/2021 ...	16	1576	HEART F...	DEPRESSED
BLASDZXUH,JGALF	01/08/2021 11:49...	01/12/2021 13:28...	NO	0	01/08/2021 1...	4	100	e11.9	E11.9
TSAS,PATIENTABC	02/12/2021 14:47...		YES	1	02/10/2021 ...	87	26	e11.9	GRUGS AB...
ACMPATIENT,SIX	01/18/2021 19:43...	01/20/2021 09:09...	NO	3	01/16/2021 ...	1	206	copd	psychosis
SPM-IN-BBCMZG...	01/19/2021 09:06...		YES	0	01/19/2021 ...	111	332	TEST	Psychosis
INPATIENT,NINET...	01/20/2021 09:14...	03/26/2021 10:45...	NO	0	01/20/2021 ...	65	124	e11.9	TESTING V...

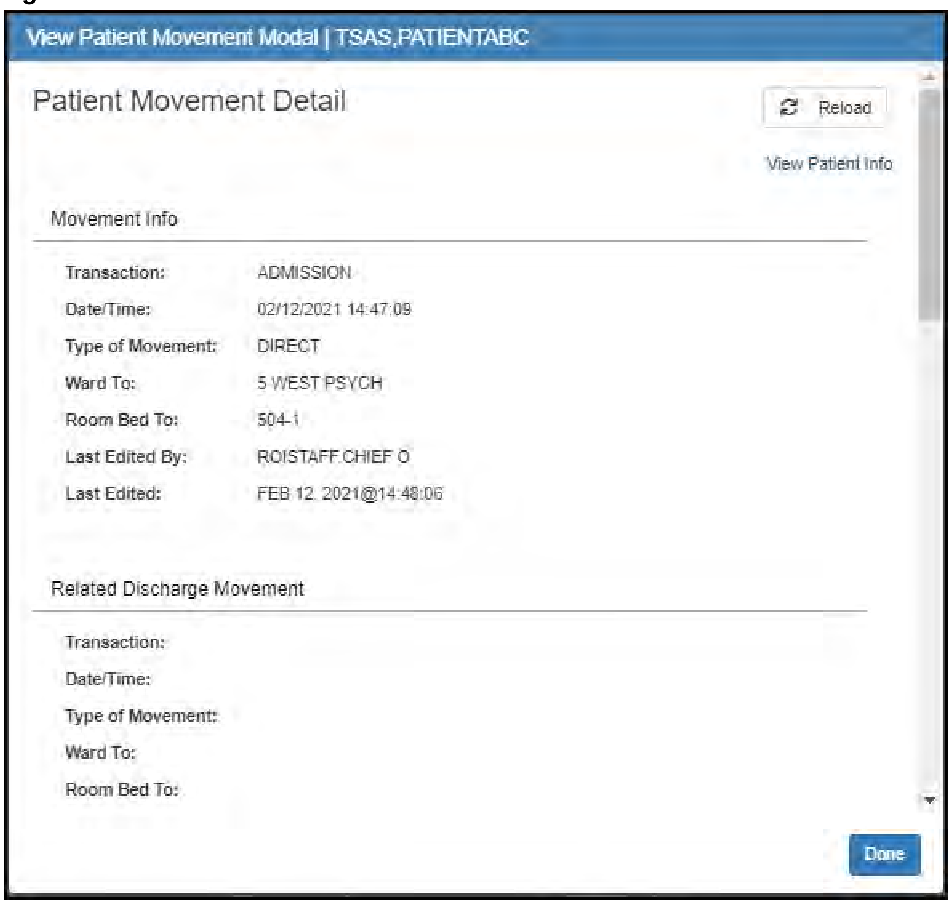
The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Readmissions page contains the following data sorted by the table columns:

- Patient Name
- Admission Date/Time
- Discharge Date/Time

- Current Inpatient
- Days D/C to ADM
- Prior Discharge Date/Time
- LOS (Days)
- Prior ADM LOS Days
- ADM Diagnosis
- Prior ADM Diagnosis

To view a patient's readmission details, click the patient row in the table. The Patient Movement Detail page opens. This page provides patient movement info, related discharge movement info, same admission movements, Admission Patient Treatment File (PTF) data, and admission movement associated with TIU documents.

Figure 135: Patient Movement Detail



To return to the Readmissions page, click **Done**.

Scheduled Admissions

From the **Menu** drop-down list, select **Scheduled Admissions**. The Scheduled Admissions page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 136: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

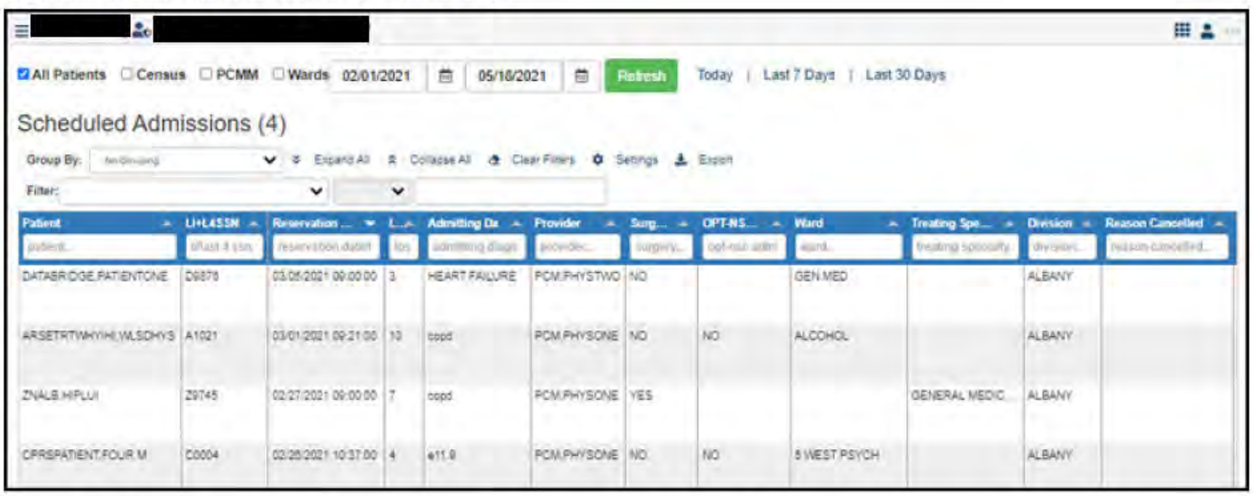
If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 137: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 138: Scheduled Admissions Page



Patient	LI+L4SSN	Reservation ...	L...	Admitting Dx	Provider	Surg...	OPT-NS...	Ward	Treating Spe...	Division	Reason Cancelled
DATABRIDGE,PATIENTONE	D9876	03/06/2021 09:00:00	3	HEART FAILURE	PCM,PHYSTWO	NO		GEN MED		ALBANY	
ARSETRTWHYIHI,WLSDHYS	A1021	03/01/2021 09:21:00	10	copd	PCM,PHYSONE	NO	NO	ALCOHOL		ALBANY	
ZNALB,HIPLUI	Z9745	02/27/2021 09:00:00	7	copd	PCM,PHYSONE	YES			GENERAL MEDIC...	ALBANY	
CPRSPATIENT,FOUR M	C0004	02/26/2021 10:37:00	4	e11.9	PCM,PHYSONE	NO	NO	5 WEST PSYCH		ALBANY	

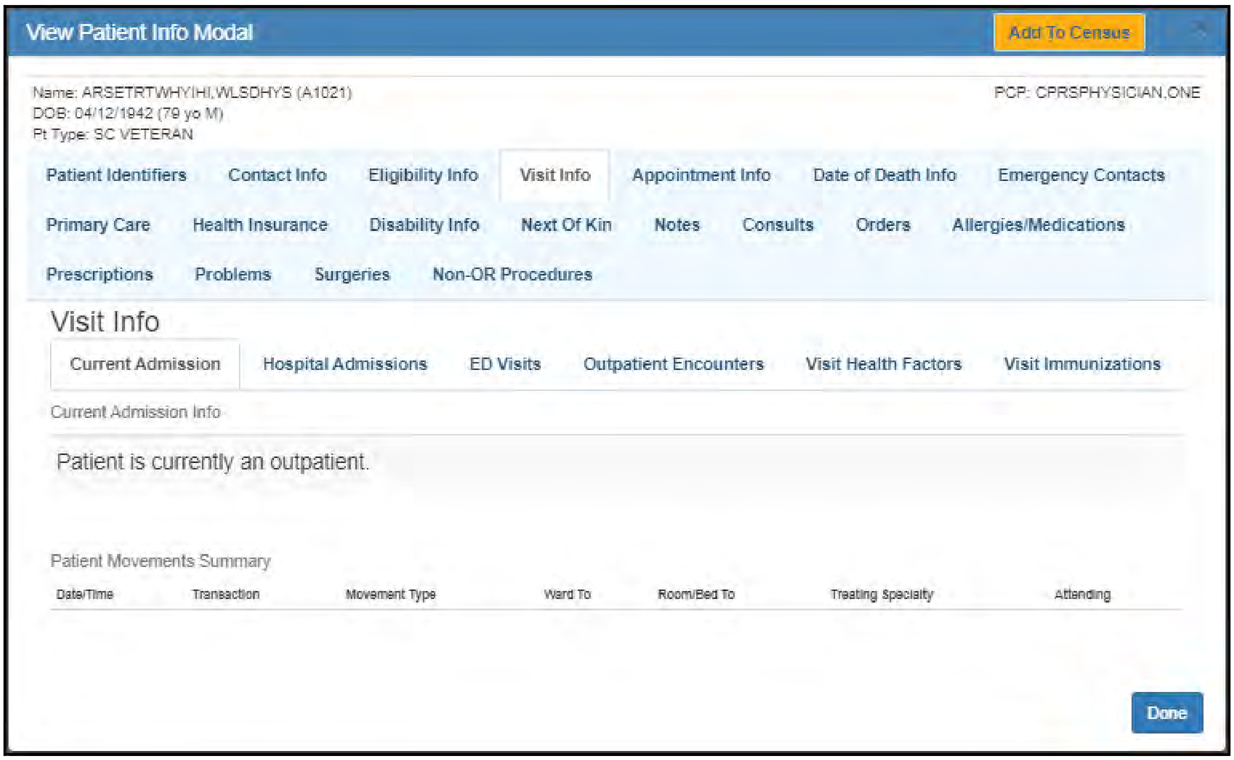
The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Scheduled Admissions table provides the following data:

- Patient name
- LI + 4SSN
- Reservation Date/Time
- LOS Expected
- Admitting Diagnosis

- Provider name
- Surgery
- OPT-NSC Admit
- Ward
- Treating Specialty
- Division
- Reason Cancelled
- Patient Notified
- Admitted Date/Time

To view a patient’s Visit Info, click the patient row in the table. The View Patient Info Modal page opens to the Visit Info tab. This tab includes 6 sub-tabs: Current Admission, Hospital Admissions, ED Visits, Outpatient Encounters, Visit Health Factors, and Visit Immunizations. To return to the Scheduled Admissions page, click **Done**.

Figure 139: Patient Visit Info



Surgeries

From the **Menu** drop-down list, select **Surgeries**. The Surgeries page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 140: Filter Options

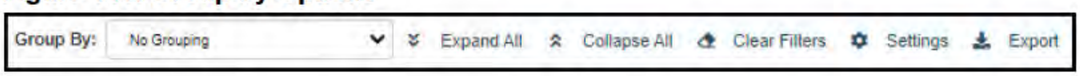
If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

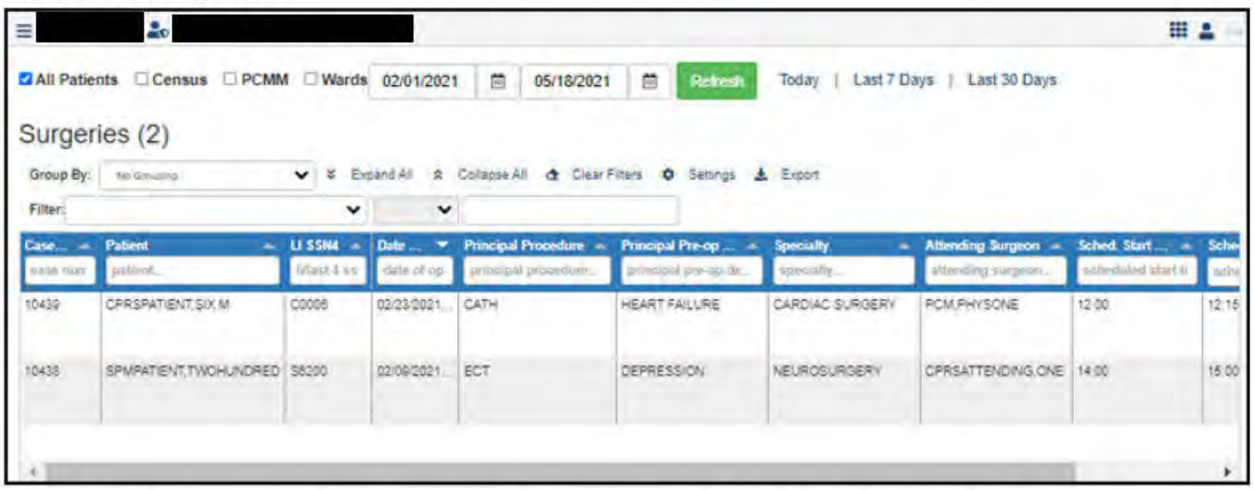
To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

Figure 141: Group by Options



To filter the table, select a filter logic from the **Filter** fields above the table.

Figure 142: Surgeries



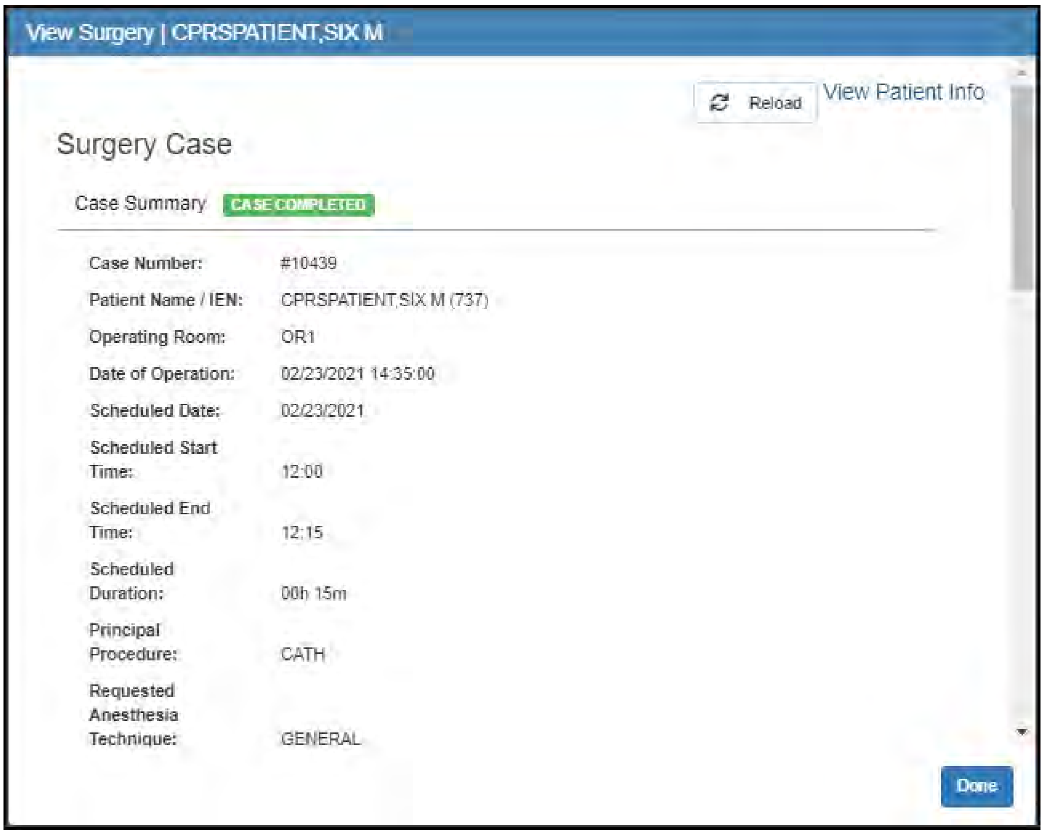
The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Surgeries table provides the following data:

- Case Number
- Patient name
- LI + 4SSN
- Date of Operation
- Principal Procedure
- Principal Pre-op Dx

- Specialty
- Attending Surgeon
- Cancel Date
- Scheduled Date
- Scheduled Start Time
- Scheduled End Time
- Scheduled Procedure

To view a patient’s Surgery Case, click the patient row in the table. The Surgery Case page opens. This page provides Case Summary, Operation/Procedure Staff, Flow of Operation/Procedure Detail, and Linked TIU Documents.

Figure 143: Surgery Case Page



To return to the Surgeries page, click **Done**.

Visit ICD Diagnoses

From the **Menu** drop-down list, select **Visit ICD Diagnoses**. The Visit ICD Diagnoses page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 144: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

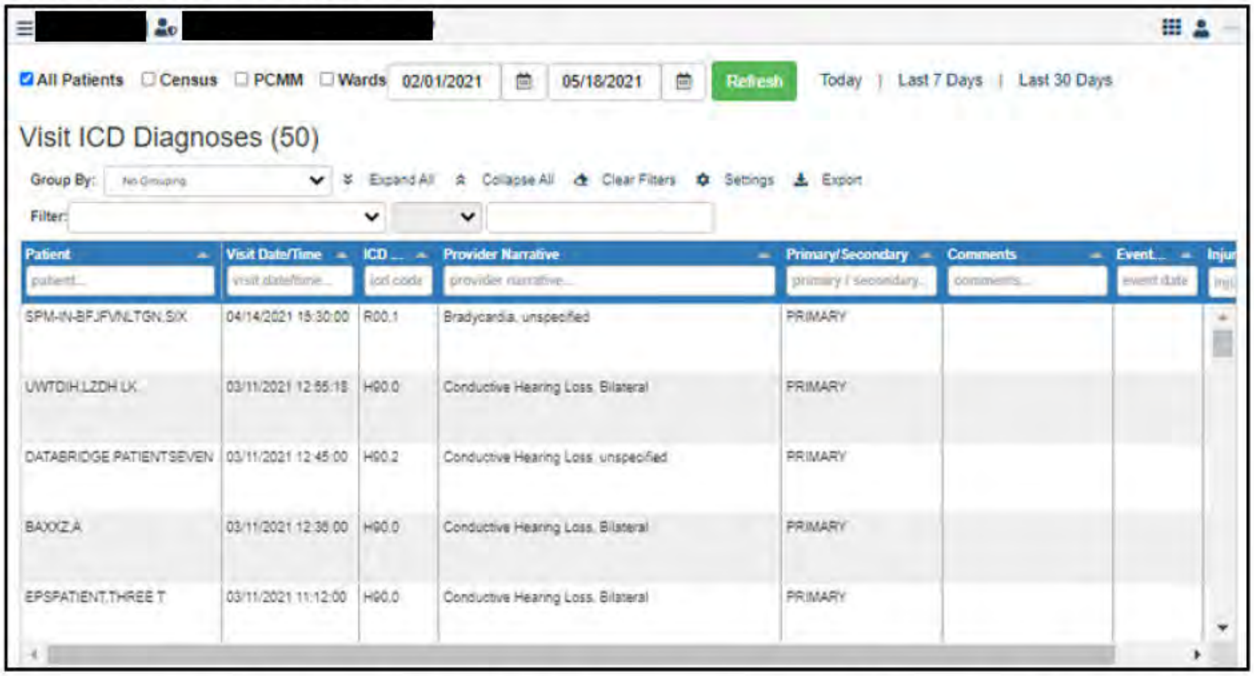
Figure 145: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Visit ICD Diagnoses table includes the following data:

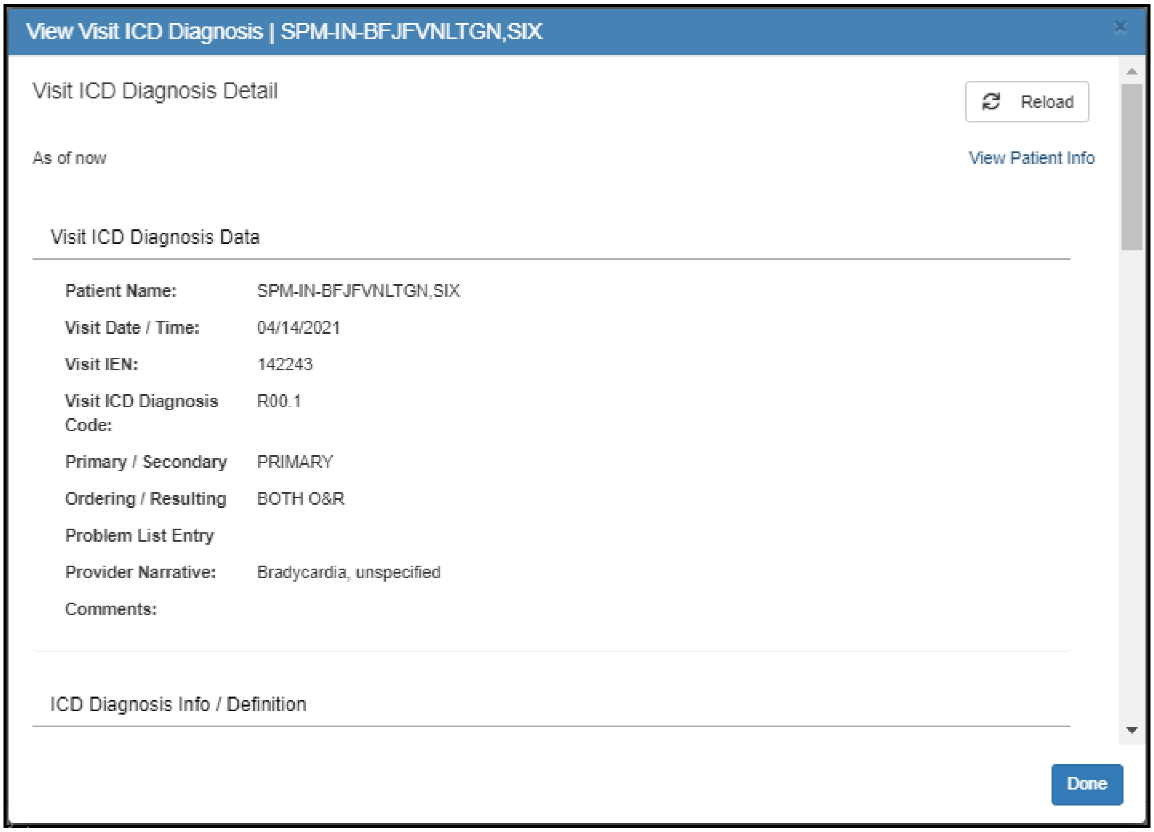
- Patient name
- Visit Date/Time
- ICD Code
- Provider Narrative
- Primary/Secondary
- Comments
- Modifier
- Encounter Provider
- Event Date
- Injury Date
- Service Connected

Figure 146: Visit ICD Diagnoses



To view a patient's ICD Diagnosis Detail, click the patient in the Visit ICD Diagnosis table. The Visit ICD Diagnosis Detail page opens. The page includes the Visit ICD Diagnosis Data, the ICD Diagnosis Info/ Definition, Encounter Info, Visit Providers, Visit Info, Related TIU Documents, and Patient Visit TIU Documents data.

Figure 147: Visit ICD Diagnosis Detail



To return to the Visit ICD Diagnoses page, click **Done**.

Visit Health Factors

From the **Menu** drop-down list, select **Visit Health Factors**. The Visit Health Factors page opens.

The patients can be viewed according to **All Patients**, by **Census**, by **PCMM**, or by **Wards**. Select your preference and click **Refresh**.

Figure 148: Filter Options

If viewing data for a particular census, team, or ward, select that specific metric from the provided field. You can further filter these results by checking the **My Patients** box.

At the top of the page, select a date range, **Today**, **Last 7 Days**, and **Last 30 Days** to filter the appointments by date. Next to the date options, click the **Refresh** button to refresh the page and get the most up-to-date information.

If your facility groups patients, you can select how to group the patients in the table using the **Group By** drop-down list above the table. Further options include: **Expand All**, **Collapse All**, **Clear Filters**, **Settings**, and **Export**.

To add or remove columns from this table, click the **Settings** icon and choose which data is shown.

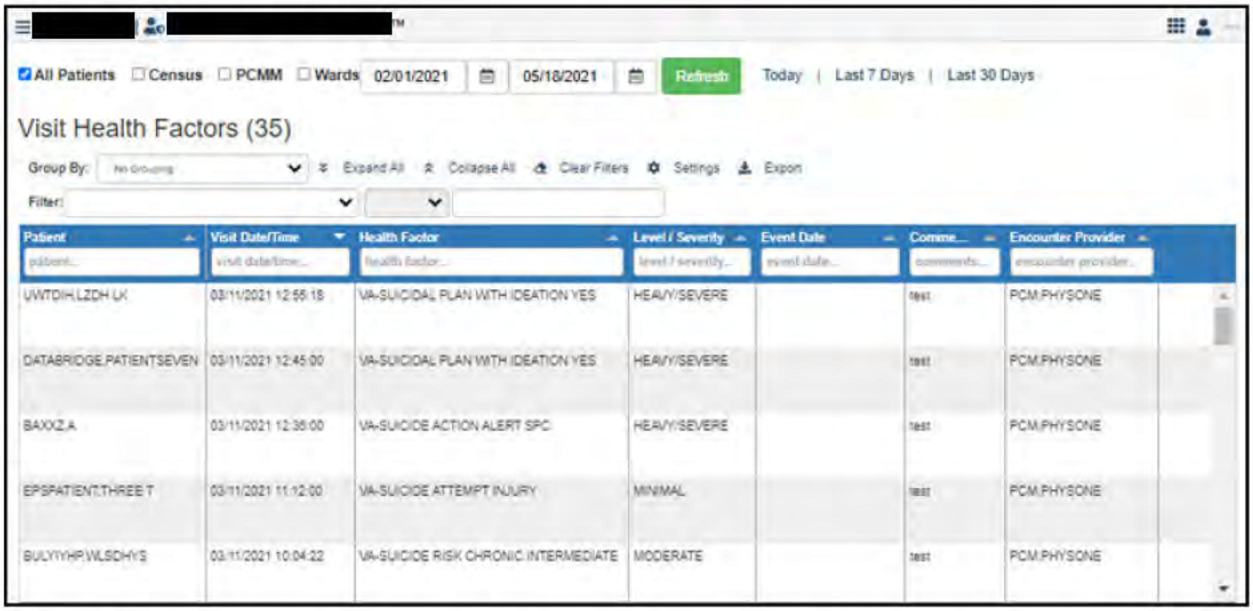
Figure 149: Group by Options

To filter the table, select a filter logic from the **Filter** fields above the table.

The table data columns can be re-ordered by dragging them to the desired position in the table. [redacted] auto-saves your custom table order. The Visit Health Factors table includes the following data:

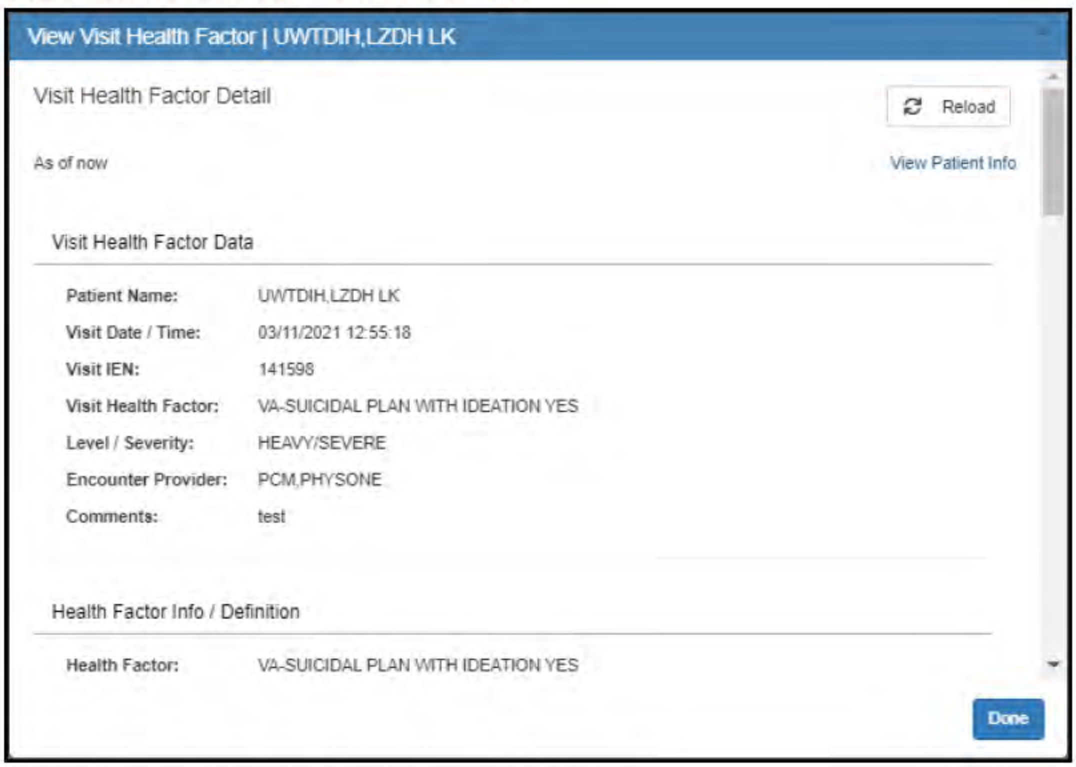
- Patient Name
- Visit Date/Time
- Health Factor
- Level/Severity
- Event Date
- Comments
- Encounter Provider

Figure 150: Visit Health Factors



To view a patient's Visit Health Factor details, click the patient row in the Visit Health Factors table. The Visit Health Factor Detail page opens for the patient. This page includes the following data: Visit Health Factor Data, Health Factor Info/Definition, Encounter Info, Visit Providers, Visit Info, Related TIU Documents, and Parent Visit TIU Documents.

Figure 151: Visit Health Factor Detail Page



To return to the Visit Health Factors page, click **Done**.

About [redacted] Suite

From the **Menu** drop-down list, select **About**. The About [redacted] pop-up opens. The pop-up shows the version number for [redacted] and the copyright information.

Figure 152: About [redacted] Pop-up

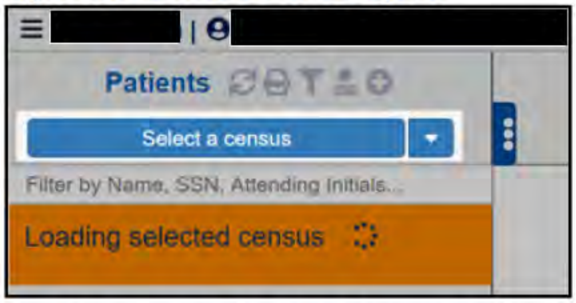
Team Collaboration and Care

In the [redacted] Team Censuses area, end users can collaborate with their team members on the care of patients in their case load. Patients under a team or end user's care are managed on lists called censuses.

To open a census:

1. From the left column, click the **Select a census** drop-down list and select a census.

Figure 153: Select a Census Option



The patients in the selected census are listed below the Select a census option in the left column.

Figure 154: Patients in Census

2. From the patients listed, select the patient for review or follow-up. The patient's chart data is shown.

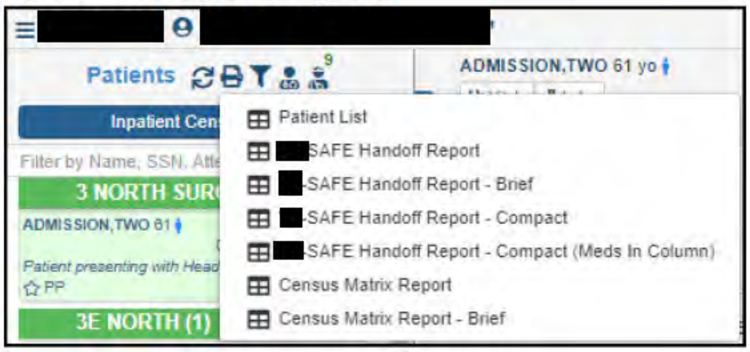
The Patient chart data includes:

- Cover Sheet
- Patient Visit data
- Present Illness data
- Orders data
- HRF data (if the patient has a high risk flag assigned to them)
- REACH VET data
- Notes
- Medications data
- Plan data

Print Census

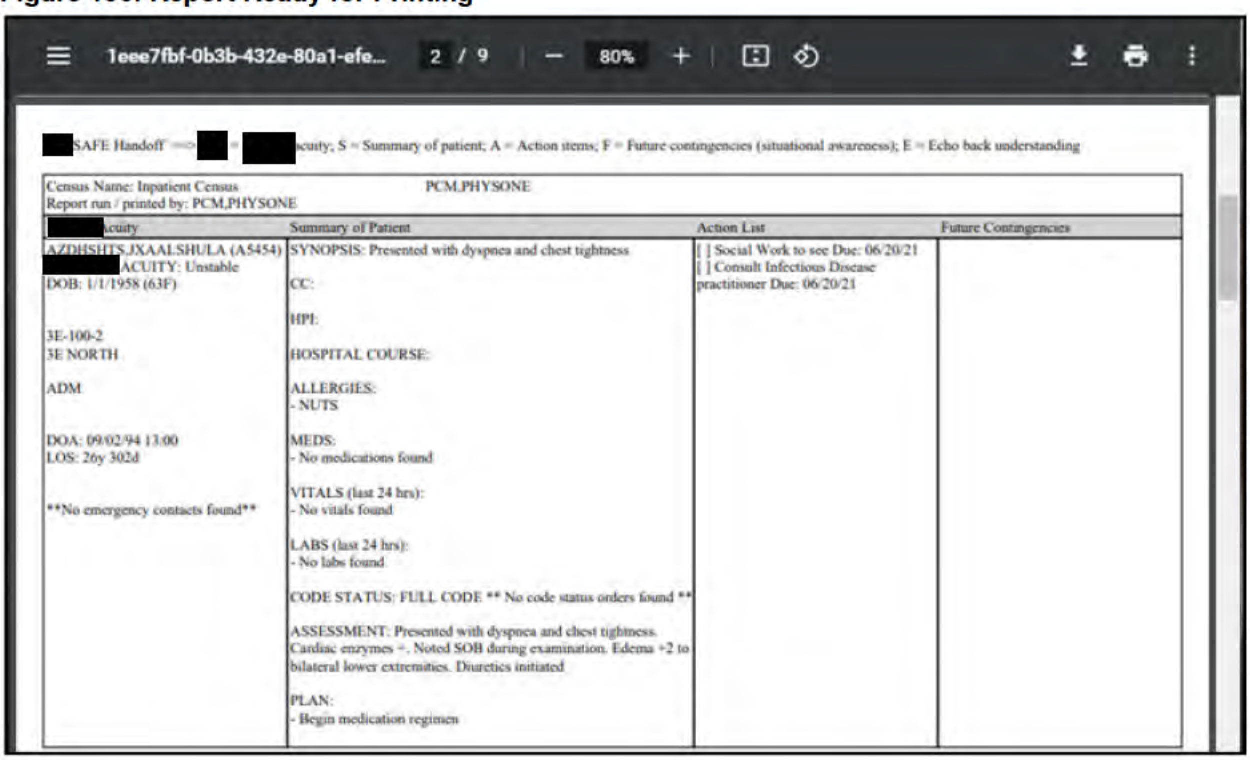
1. Above the Census Group button, click the **Print** icon. A print menu opens with the following options:
   - Patient List
   - [redacted]-SAFE Handoff Report
   - [redacted]-SAFE Handoff Report – Brief
   - [redacted]-SAFE Handoff Report – Compact
   - [redacted]-SAFE Handoff Report – Compact (Meds In Column)
   - Census Matrix Report
   - Census Matrix Report – Brief

Figure 155: Print Menu Options



2. Click an option to print. The report opens in a new browser window or tab for printing or downloading.

Figure 156: Report Ready for Printing

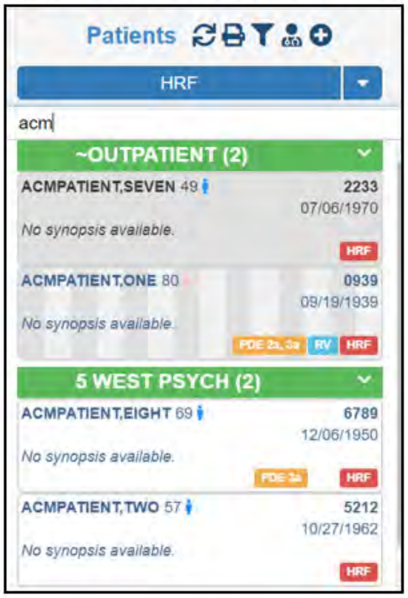


Filter Patients in a Census

Choose a method:

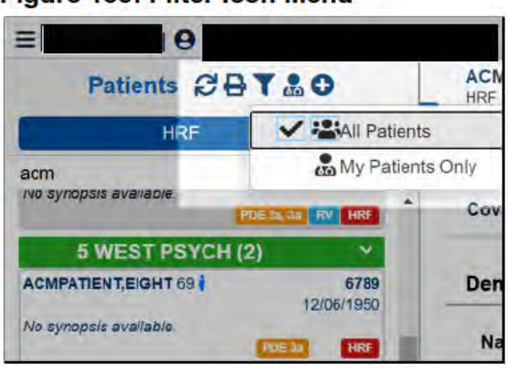
- Use the **Filter text** bar.
    a. Above the list of patients in the census, enter a patient name, SSN, or Attending initials.
    b. Press the **Enter** key. The patient list filters to show only the patient(s) with the chosen filter data.

Figure 157: Filtered Patient List



- Above the Census Group button, click the **Filter** icon:
    a. Click the **Filter** icon.
    b. Choose to filter the census for **My Patients Only**. The census refreshes to show only your patients.

Figure 158: Filter Icon Menu

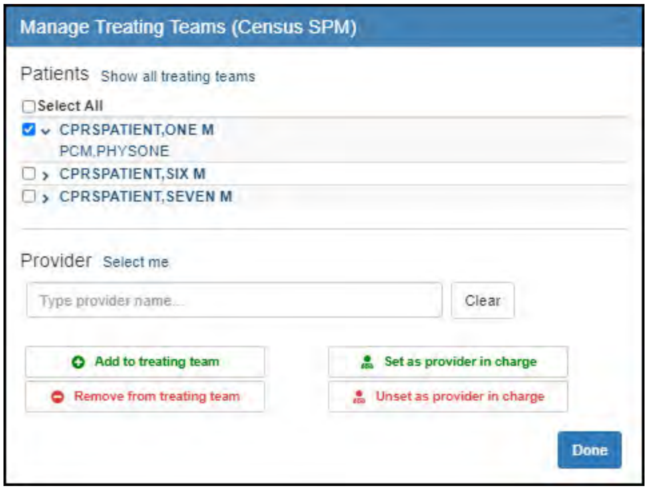


Manage Treating Team and Providers for Patients in Census

To manage the treating teams and providers for the patients in the census:

1. Above the Census Group button, click the **Manage Treating Team and Providers** icon. The Manage Treating Teams pop-up opens.

Figure 159: Manage Treating Teams Pop-up



2. Select a patient in the Patients list to expand the item to show the patient's provider.
3. Click **Set as PIC** to set the provider as the patient's Provider In Charge (PIC). Or click **Remove** to remove the provider from the patient.
4. Enter the correct provider's name in the free text field.
5. Choose an option:
   - **Add to treating team**
   - **Set as provider in charge**
   - **Remove from treating team**
   - **Unset as provider in charge**
6. When finished managing the treating teams, click **Done**.

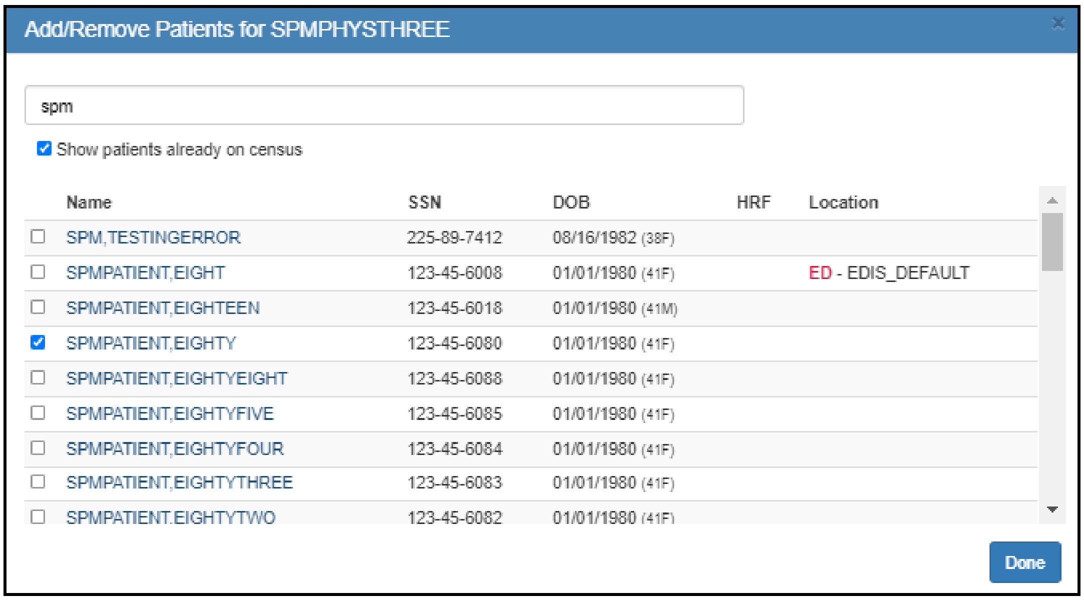
Add Patients to Census

1. Select the census you want to add the patient to.
2. Above the Census Group button, click the **Add Patient to Census** icon (last icon to the right). The icon shows the number of patients currently in the census. The Add/Remove Patients for [census] pop-up opens.

Note: If the census is synchronized, you'll receive the following warning: "This is a synchronized census. Patients added to this census will be pinned and therefore must be removed manually. Patients removed from this census will be banned and therefore must be added back manually." Click **Continue** to open the Add/Remove Patients for [census] dialog.

3. Search for the patient by entering the patient's last name, first initial of last name and the last 4 digits of the patient's social security number, or enter their full social security number.
4. Choose the correct patient(s) from the search results. You can choose one or more.

Figure 160: Add/Remove Patients for [census]



5. Choose an option
   - To add the selected patient(s) from recent admissions:
     a. Make sure only the patients you want to add to the census are selected. Patients who are already in the census are automatically selected.
     b. Click **Done**.
   - To remove the selected patients from the census:
     a. Deselect the patient name(s) that you want to remove from the census.
     b. Click **Done**.

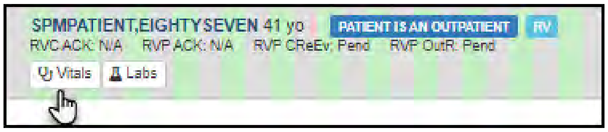
Patients removed from the census will show in an orange icon with the number of banned patients. To view the banned patients, click the orange icon. To exit, click **Cancel** or **Save**.

Review Patient Vitals

1. In the left column, from the census list, select a patient. The patient’s Follow-up Panel opens to the right.
2. Above the patient’s Follow-up Panel tabs, click the **Vitals** button.

Note: If Vitals has a red outline, there is something outside of the indicated reference range.

Figure 161: Patient Vitals Button



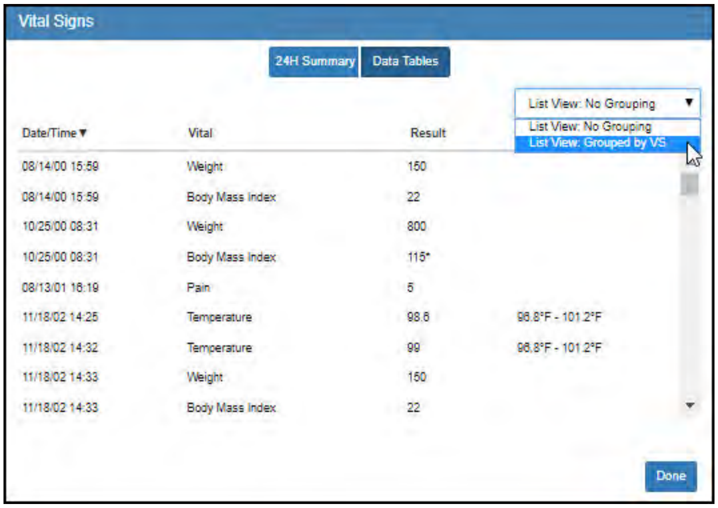
The patient’s Vital Signs pop-up appears. The pop-up provides the following data:

- 24 Hour Summary
    - Temperature
    - Blood Pressure
    - Oxygen Saturation
    - Heart Rate
    - Respiratory Rate
    - Pain score

Figure 162: 24 Hour Summary

- Data Tables
  - Date/Time
  - Vital
  - Result
  - Ref. Range
3. When viewing the Data Tables, from the **List View** drop-down list, choose **Grouped by VS** to see the data grouped by vital sign, or **No Grouping** to see the vitals sorted by date.

Figure 163: Data Tables



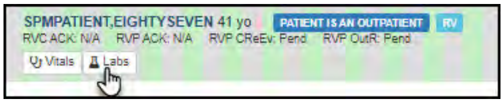
4. When finished reviewing the patient’s vital signs, click **Done** to close the pop-up.

Review Patient Labs

1. In the left column, from the census list, select a patient. The patient's Follow-up Panel opens to the right.
2. Above the patient's Follow-up Panel tabs, click the **Labs** button.

Note: If Labs has a red outline, there is something outside of the indicated reference range.

Figure 164: Patient Labs Button

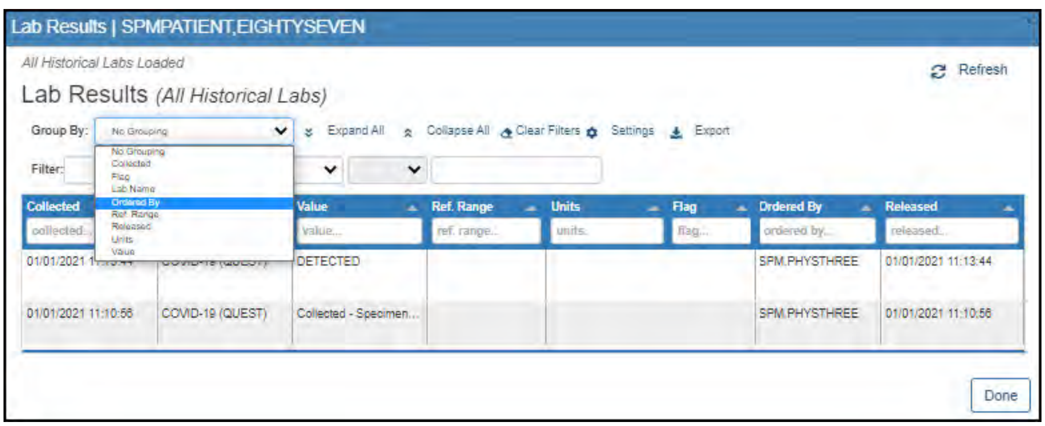


The Lab Results page opens. The Lab Results table may be grouped by:

- Collected Date/Time
- Lab Name
- Value
- Ref. Range
- Units
- Flag
- Ordered By
- Released

3. From the **Group By** drop-down list, select **No Grouping** or select one of the grouping column headers to sort the Lab Results table

Figure 165: Patient Lab Results Table

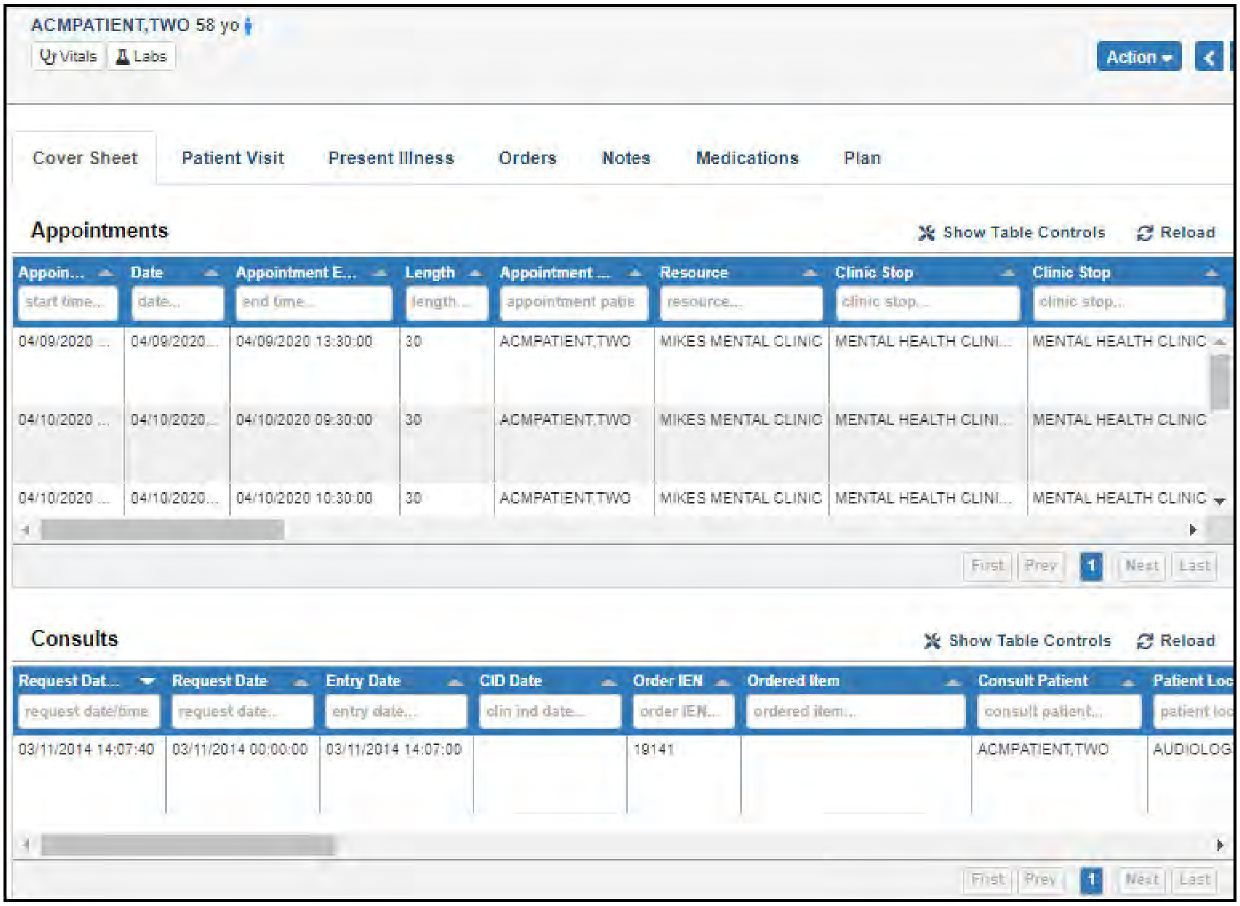


4. When finished reviewing the patient's lab results, click the **Done** button.

Review the Patient Cover Sheet

Click the **Cover Sheet** tab. The Cover Sheet shows the appointments and consults for the selected patient.

Figure 166: Patient's Cover Sheet



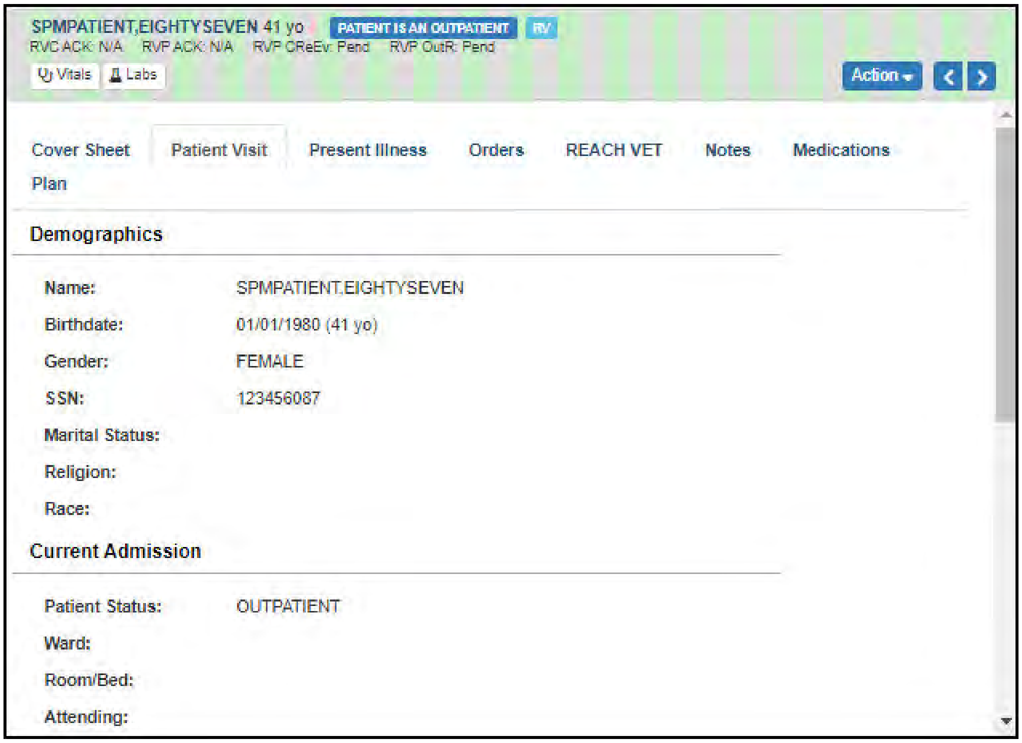
To filter column headers, enter "**Test**" in the free text boxes that are located below the column header titles.

Review the Patient Visit

Click the **Patient Visit** tab. The tab shows:

- Demographics
  - Name
  - Birth date
  - Gender
  - SSN
  - Marital Status
  - Religion
  - Race
- Current Admission
  - Patient Status
  - Ward
  - Room/Bed
  - Attending
  - Treating Specialty
  - Admit Date
- Contact Info / Next of Kin
  - Address
  - Phone Number
  - Email
  - Emergency Contact 1
  - Emergency Contact 2
  - Next of Kin 1
  - Next of Kin 2
- Treating Team
  - Signed in team member job title (such as Physician or Computer Specialist)
  - Add Providers option

Figure 167: Patient Visit Tab

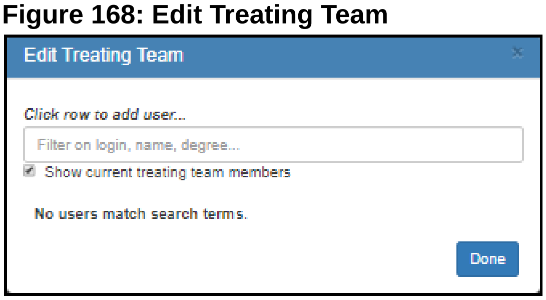


Add Patient Provider

To add to the treating team:

1. From the **Patient Visit** tab, under the Treating Team section, click the **+ Add Providers** option. The Edit Treating Team pop-up opens.
2. Enter the Provider's login, name, or degree.
3. Click **Done**. The new physician is added to the Treating Team.

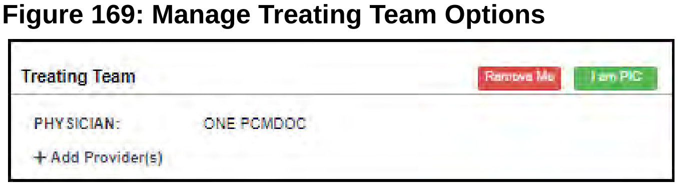
Figure 168: Edit Treating Team



Manage Treating Team

On the **Patient Visit** tab, under Treating Team, click the **Remove Me** button to remove yourself from the treating team. Click the **I am PIC** to identify yourself as the patient's PIC.

Figure 169: Manage Treating Team Options

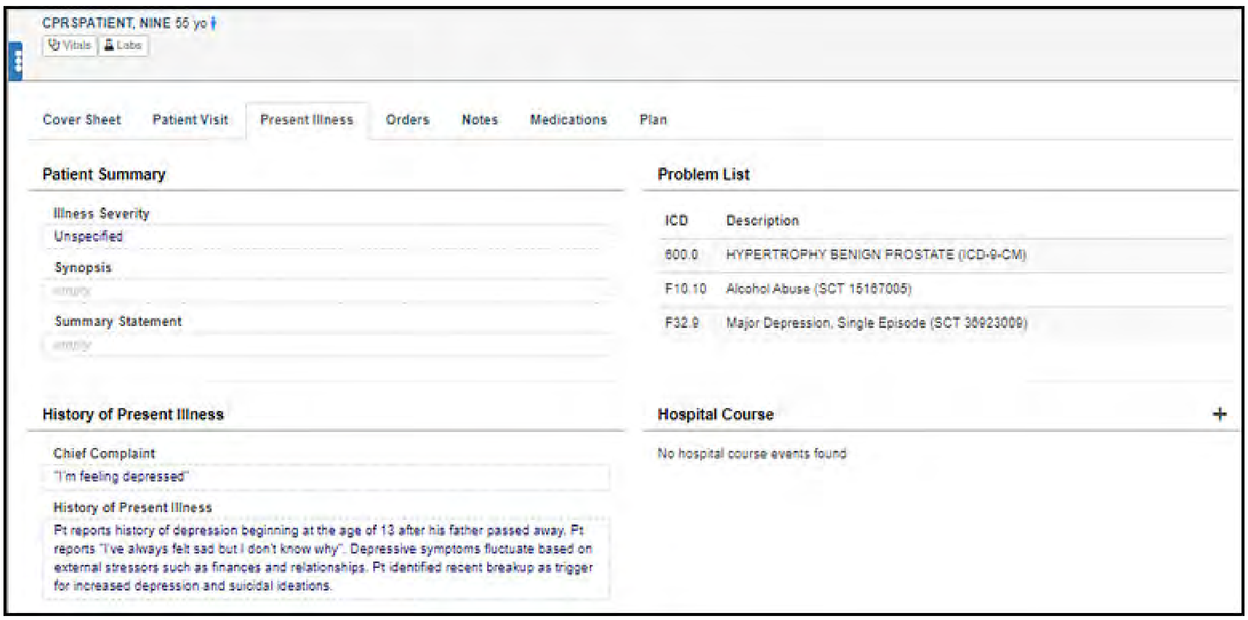


Review the Patient Present Illness Data

Click the **Present Illness** tab. This tab shows:

- Patient Summary
  - Illness Severity
  - Synopsis (This is a brief summary statement about the patient case that appears in the thumbnail view of the Census. The Synopsis allows users to quickly see details about that patient without having to go into the case.)
  - Summary Statement
- Problem List
- History of Present Illness
  - Chief Complaint
  - History of Present Illness
- Hospital Course

Figure 170: Present Illness Tab



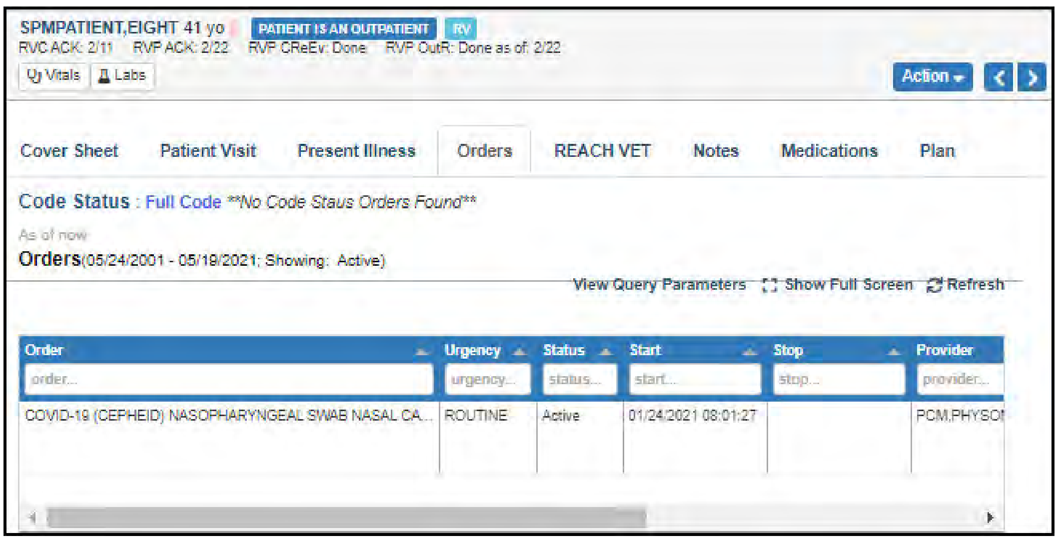
Review the Patient Orders Data

Click the **Orders** tab. The tab shows the Code Status and Orders for the patient. The Orders table contains the following data:

- Order
- Urgency
- Status
- Start
- Stop
- Provider
- Entered
- Location
- Nurse
- Clerk
- To Service
- Order Patient

These data columns can be re-ordered by dragging them to the desired position in the table.

Figure 171: Orders Tab

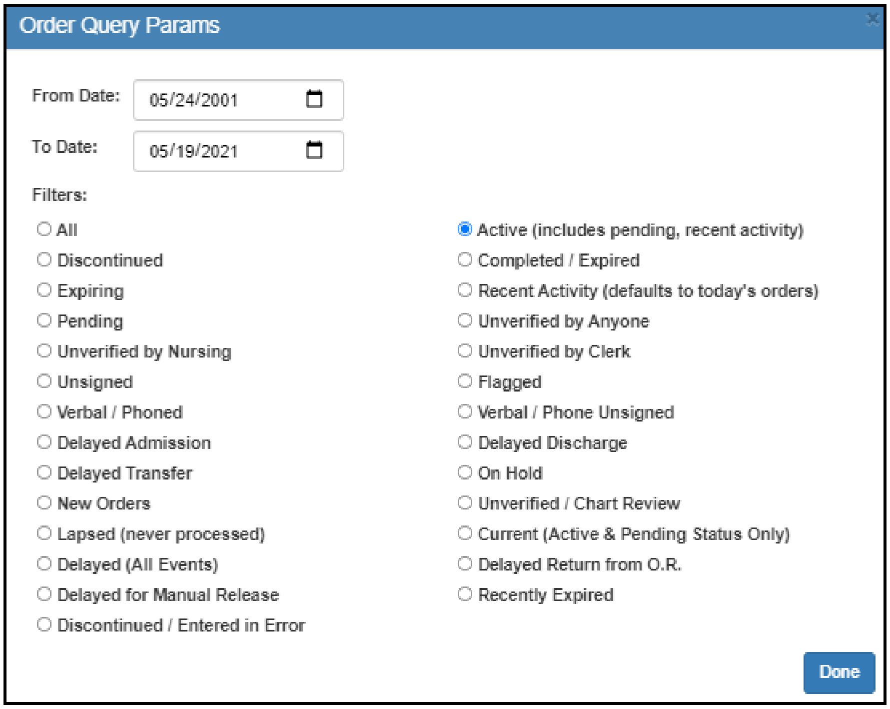


Order functions

- Click **Show Full Screen** to increase the table to the size of the full screen.
- Click **Close Full Screen** to return the table to a portion of the Orders tab.
- Click **Refresh** to refresh the table.
- Click **View Query Parameters** to open a pop-up that lists the Order Query Params. The Order Query Params pop-up includes the following data:
  - From Date
  - To Date
  - Filters
    - All
    - Expiring
    - Pending
    - Unverified by Nursing
    - Unsigned
    - Verbal/Phoned
    - Delayed Admission
    - Delayed Transfer
    - New Orders
    - Lapsed (never processed)
    - Delayed (All Events)
    - Delayed for Manual Release
    - Discontinued /Entered in Error
    - Active (includes pending, recent activity)
    - Completed/Expired
    - Recent Activity (defaults to today's date)
    - Unverified by Anyone
    - Unverified by Clerk
    - Flagged
    - Verbal/Phone Unsigned
    - Delayed Discharge
    - On Hold
    - Unverified/Chart Review
    - Current (Active & Pending Status Only)
    - Delayed Return from O.R.
    - Recently Expired

1. Select the parameters you want to apply to the Orders table, or clear parameters you want to remove from the Orders table.
2. Click **Done** to close the pop-up.

Figure 172: Orders Query Parameters



REACH VET

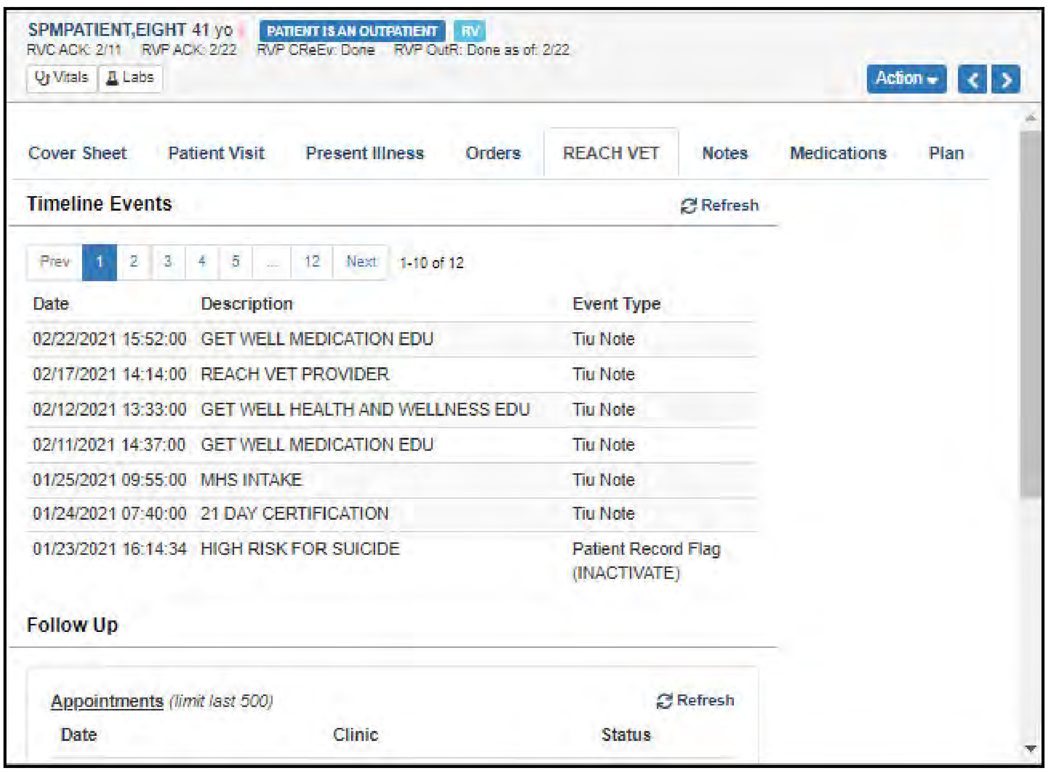
This tab is only included in the patient's case if the patient is listed as a REACH-VET.

Click the **REACH VET** tab to view the following data:

- Timeline Events
  - Date
  - Description
  - Event Type
- Follow Up
  - Appointments
  - No Show Follow up
- Suicide Prevention Safety Plans
  - Date
  - Note Title
  - Author

Click **Refresh** to refresh any of the sections on this tab.

Figure 173: REACH VET Tab

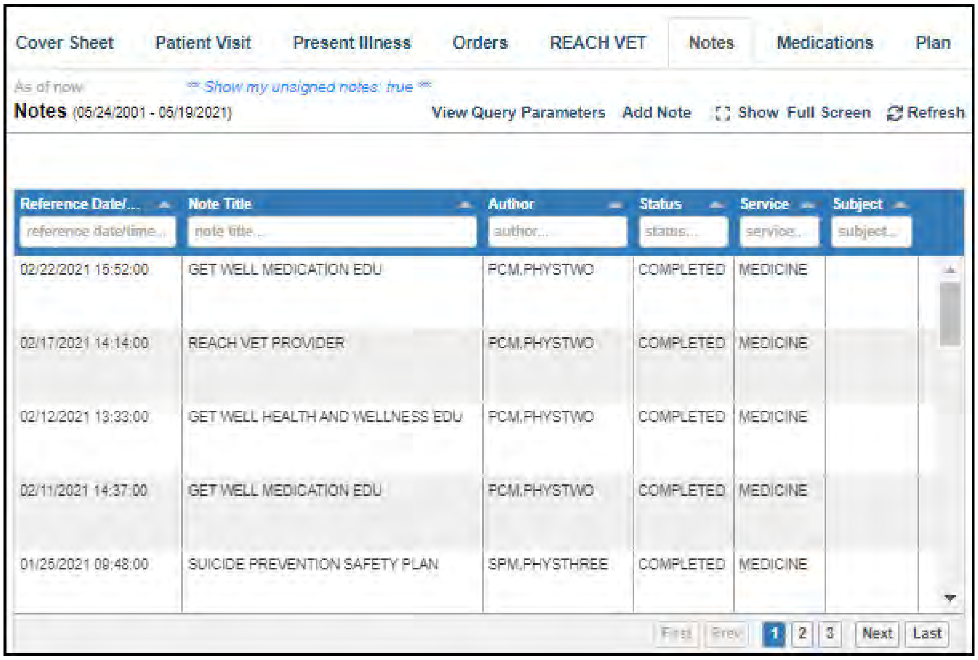


Click any of the **Timeline Events** to open the details of the event. Click any of the **Appointments** to view the Appointment Detail. Click any of the **Suicide Prevention Safety Plans** to open the Note Viewer. Click **Done** to return to the REACH VET tab.

Review the Patient Notes

Click the **Notes** tab. The tab shows the TIU Notes for the patient.

Figure 174: Notes Tab



The TIU Notes table includes the following data:

- Reference Date/Time
- Note Title
- Author
- Status
- Service
- Subject

These data columns can be re-ordered by dragging them to the desired position in the table.

Further functions for the TIU Notes table includes:

- Click **Show Full Screen** to increase the table to the size of the full screen.
- Click **Close Full Screen** to return the table to a portion of the Orders tab.
- Click **Refresh** to refresh the table.
- Click **Add Note** to create a new TIU Note
- Click **View Query Parameters** to open a pop-up to adjust the From Date and To Date. You can choose to **Include my Unsigned Notes**. Click **Done** to close the pop-up.
- Click a note in the table to open the note details. Click **Done** to return to the Notes tab.

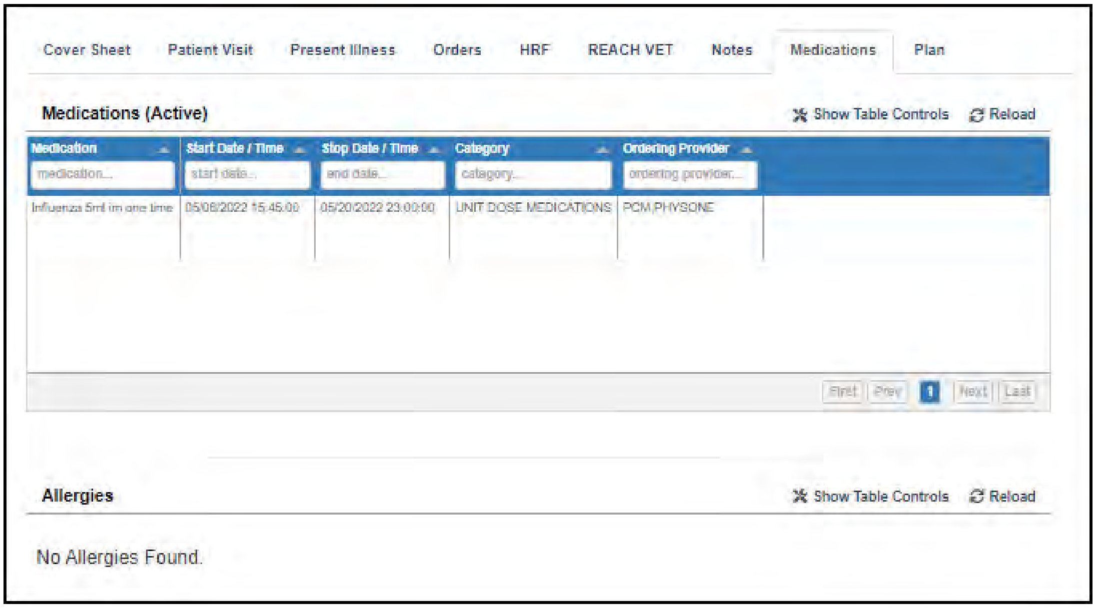
Review the Patient Medications Data

Click the **Medications** tab. The patient’s medications and allergies are listed in tables. Click the **Settings** icon to add or remove column data. Your choices are auto-saved.

Click a medication to view the medication activity, current data, and order details.

Click an allergy to read the patient’s reaction.

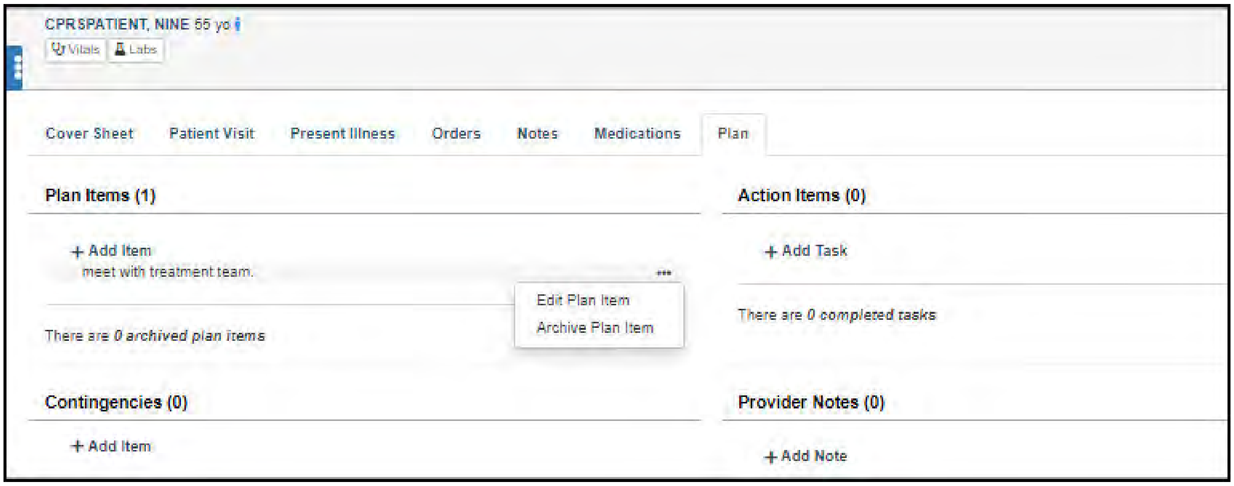
Figure 175: Medications Tab



Review the Patient Plan Data

Click the **Plan** tab. The Patient's Plan Items, Action Items, Contingencies, and Provider Notes are shown.

Figure 176: Plan Tab

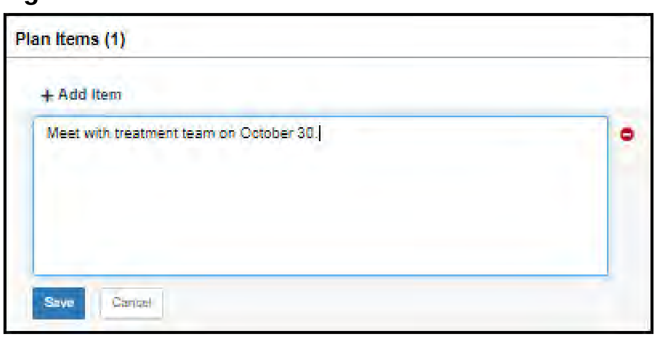


Hover over an item and click the **ellipsis** (**. . .**) to either **Edit Plan Item** or **Archive Plan Item**.

Edit Item

1. Next to the item to be edited, click the **ellipsis** button.
2. Select **Edit Plan Item**. The text box opens for editing.

Figure 177: Edit Plan Item



3. Make your changes to the plan.
4. Click **Save**.

Archive and Un-archive an Item

1. To archive an item, click the **ellipsis** button next to the item to be archived.
2. Click **Archive Plan Item**. The page refreshes with the item archived.
3. To un-archive an item, click the **ellipsis** button next to the item to be un-archived.

Figure 178: Un-archive an Archived Item

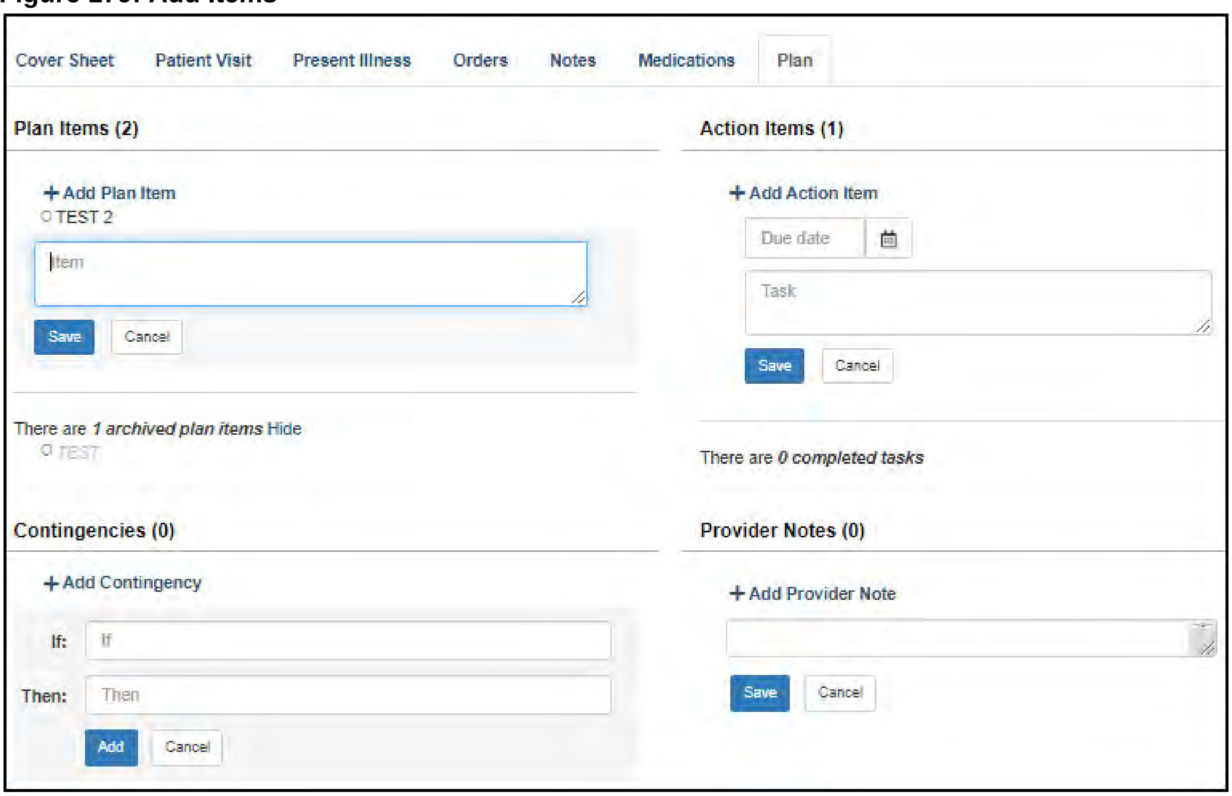
4. Click **Un-Archive Plan Item**. The page refreshes and the item is active on the Plan tab.

Add an Item

To add an item to the Plan tab:

1. Choose the type of item to be added:
   - **Plan Items** — Click **Add Plan Item** to open a free text field.
   - **Action Items** — Click **Add Action Item** to open a due date field and a free text field to describe the action item.
   - **Contingencies** — Click **Add Contingency** to open If / Then fields.
   - **Provider Notes** — Click **Add Provider Note** to open a free text field.

Figure 179: Add Items



2. Fill out the open fields with the item details.
3. Click **Save** (or **Add** for Contingencies).

[redacted] Alert Manager

Overview

[redacted] monitors the status of care for [redacted] at high risk for suicide. To do this, [redacted] identifies high risk [redacted] and tracks their suicide prevention care. This monitoring and tracking enables [redacted] to identify scenarios that may require action or intervention by a suicide preventionist or other stakeholder. An [redacted] VistA proxy account, set up at the time of installation permits the system to make remote procedure calls periodically for this purpose.

Note: The [redacted] proxy account requires the **DSHS Vista Gateway secondary menu** option and should be given the **DSHS System Administrator security key**. More information is available in the [redacted] *Installation Guide.*

[redacted] care monitoring features include the ability to generate alerts about changes in the status of care for [redacted] at high risk for suicide. The purpose of the alerts is to inform suicide prevention stakeholders about events and scenarios that may require action or intervention. Users can subscribe to specific [redacted] alerts of interest. These alerts are presented in the [redacted] Graphical User Interface (GUI) and can optionally be sent out by email.

Note: To enable [redacted] email functionality, a [redacted] email account must be created for the [redacted] server which will be the originator of the emails. Once the email account has been created, the requisite credentials and email server information is populated into the [redacted] Administrator on the [redacted] server to enable the functionality. More information is available in the [redacted] *Installation Guide.*

In the default set up, email alerts do not include Protected Health Information (PHI). In this mode, alerts will include a link for navigation to the [redacted] application where the user can log in and view the alert detail. Optionally, [redacted] can be configured to include PHI in [redacted] email alerts. However, this is only permitted if the facility has established the requisite email encryption mail flow rules.

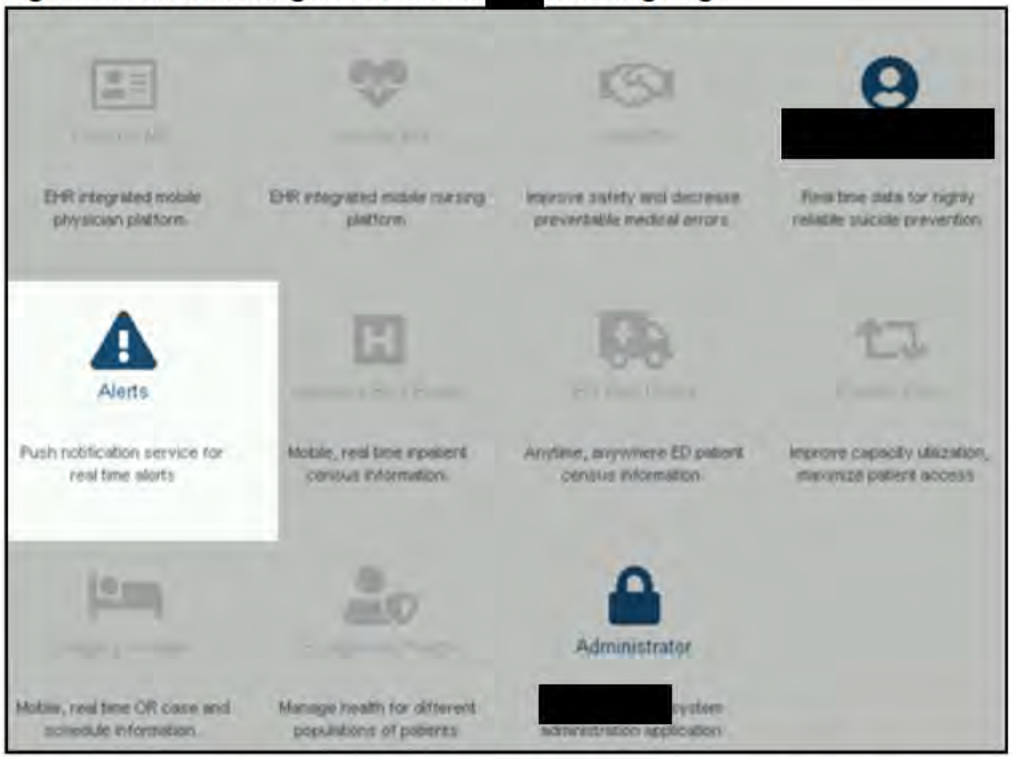
Note: Only [redacted] system administrators with access to the [redacted] server can manage the email alert functionality (turn it on/off) and mode of operation (set it to exclude PHI/include PHI). Email encryption mail flow rules can be set up by Microsoft® Office 365™'s Rights Management Service.

[redacted] end users are able to manage their alert subscriptions in the [redacted] application.

Launch [redacted] Alert Manager

[redacted] Alert Manager can be accessed directly from the application landing page or from the [redacted] Apps menu. Here is the [redacted] Alert Manager icon on the [redacted] landing page.

Figure 180: Alert Manager Icon on the [redacted] Landing Page



Here is the [redacted] Alert Manager icon on the Apps menu. To access this icon, click the checkerboard (Apps) icon in the top, right corner of the page.

Figure 181: Alert Manager Icon on the [redacted] Apps Menu

Within alert manager there are two primary areas: Alerts and Alert subscriptions. Click the menu toggle at the top left of the page to navigate between the two areas.

Figure 182: Alert Manager Navigation Menu

Manage Alert Subscriptions

[redacted] includes a suite of alerts to which end users can subscribe. Alerts can be enabled or disabled. Enabled alerts can be received in the application and/or by email (if that has been set up at the time of system installation).

There are two modes for email alerts: Batched and Real Time. Real time alerts are emailed when they are generated by the system. Batched alerts are sent at one or more scheduled times. End users can choose to receive all system alerts on all high risk patients (using the **subscribe all** option) or to have their alert subscriptions filtered by relationships established by the [redacted] Team Censuses and/or the [redacted] Patient Centered Management Module (PCMM).

[redacted] census-based filtering can be used to receive alerts for only patients on the end user's [redacted] censuses, or alternatively, for only those patients for whom the user is a member of the treating team on a given census patient case.

PCMM based filtering can be used to receive alerts for only patients on the end user's PCMM patient panels, or alternatively, for only those patients for whom the user is in a PCMM team position assigned to the patient.

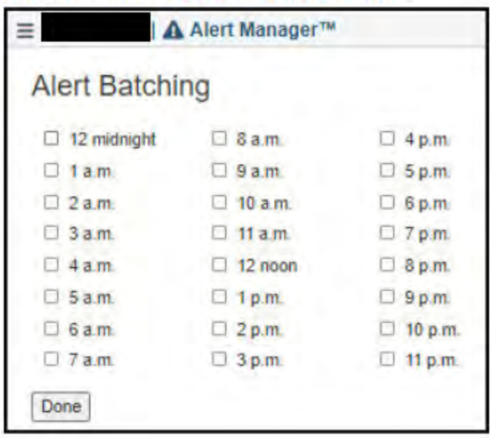
The following alerts are shown in the next image:

- Patient Flow Alerts:
  - Patient Admitted
  - Patient Discharged
  - Patient Transferred
- Suicide Prevention Alerts:
  - A Mental Health Visit Completed On Time
  - Mental health Visits Completed On Time
  - Mental Health Visits Due
  - Mental Health Visits Behind Schedule
  - A Mental Health Visit Completed Late
  - Mental Health Visits Completed Late
  - Mental Health Visits Past Due
  - Mental Health Visits Seriously Behind Schedule
  - PRF Review Completed On time (This alert triggers whenever a PRF review is completed on time.)
  - PRF Review Coming Due
  - PRF Review Completed Late
  - PRF Review Past Due
  - Initial SPSP Completed On Time
  - Initial SPSP Due
  - Initial SPSP Completed Late
  - Initial SPSP Past Due

Figure 183: Alert Subscription Management Area

Above the Alert Subscriptions table, click the **Batching** link. The Alert Batching page opens. You can set when your alerts are batched by selecting the time and clicking **Done** on the Alert Batching page.

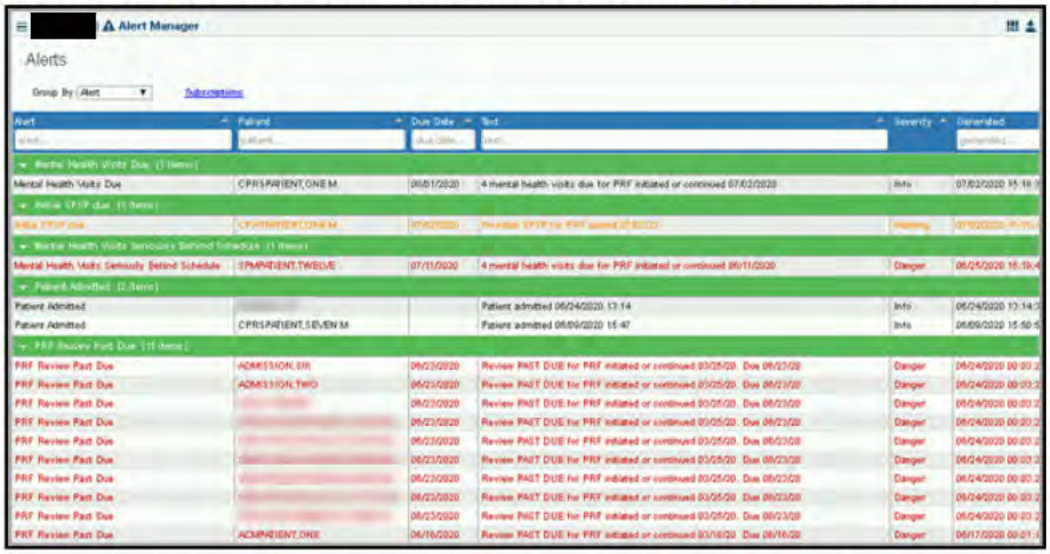
Figure 184: Alert Batching Page



View Alerts

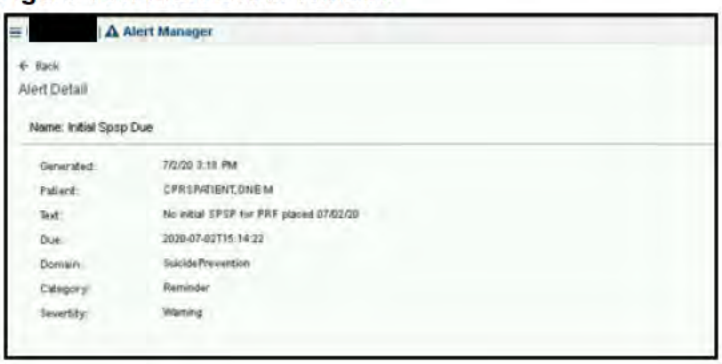
End users can see alerts generated by their alert subscriptions in the Alerts Area.

Figure 185: Alerts Area Shows System Generated Alerts for the Logged In User



To view the details of an alert, click on the alert's row in the table. The Alert Detail window opens.

Figure 186: Alert Detail Window

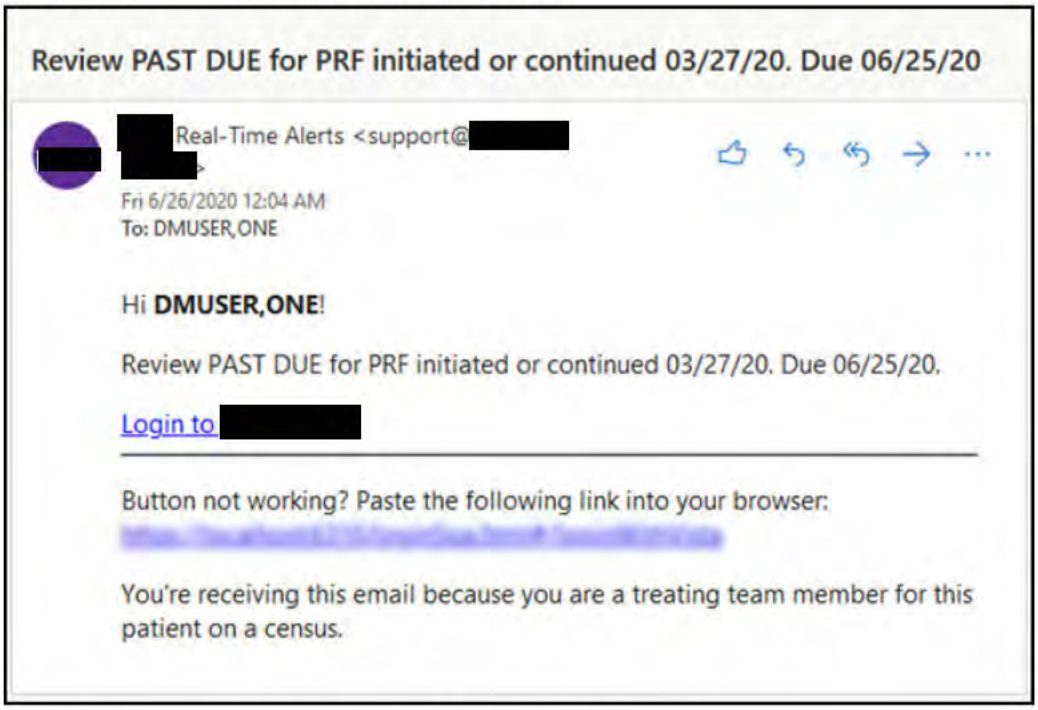


The Alert Details window provides the following information:

- Name of the alert
- Date and time the alert was generated
- Patient name
- Alert text (For example: "No Initial SPSP for PRF placed 07/02/2020")
- Domain for the alert (For example: "Suicide Prevention")
- Category of the alert (For example: "Reminder")
- Alert severity (For example: "Warning")

If a facility has configured the system to allow alerts to be sent out by email, and an end user configures their subscriptions to include email notifications of alerts, the system will automatically send out emails which can include batched summaries of active alerts and/or real-time alert notifications.

Figure 187: Real-time Alert Notification Email



The email includes the alert text and a link to log into [redacted].