OmniMD

EMR that fits the way I practice

OmniMD

USER MANUAL

Revision History

Date	Description	Author	Approver	Version
5.3.2006	User Manual	OmniMD		6.0

About the manual

User Manual helps end users to familiarize with OmniMD application. It is recommended to go through this guide before starting with the application.

The manual is organized in various chapters that explain about OmniMD, components that constitute the OmniMD. It also explains the steps involved in setting up OmniMD.

Audience

It is recommended that users should study the guides provided with the application to get clarity of OmniMD.

Document Convention

Convention	Description
Text matter in Verdana font and 10 as font size.	Explains the guide
Text matter	Click on the link to reach target text.
	Note:
	Important:
	Warning:
	Tip:

Contact Information

In case of any queries or suggestions regarding document, do write to us at:

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Contents

INTRODUCTION TO OMNIMD

OmniMD is a Web based application that enables you to proactively monitor and manage your practice in a better way. It is a complete application that provides physicians a leading solution to streamline the practice workflow.

Also, the OmniMD application is HIPAA compliant that meets the stringent health care security and privacy laws that are intended to ensure confidentiality and Privacy for all patient's heath care related information.

OmniMD is a new and unique online solution that is provided as an ASP service over the Internet and as Enterprise application running locally. OmniMD helps you to make smarter, faster decision on patient's case history. It also continuously monitors the progress of patients in your existing OmniMD accounts.

Once OmniMD is set up, you can import data of your patient's list, referring physicians and insurance list to the system.

OmniMD, thus acting as a single gateway, integrates the complete staff across all processes- the pharmacy, billing, transcription services, data indexing and laboratory and front desk.

WORKING IN...

LOGIN OMNIMD

Once the clinic is registered with OmniMD, and the information is entered into OmniMD, Users are provided with unique user name and password to access the application. Using this user name and password, physicians can even set up application as per their requirements.

Screen: Login

To login OmniMD

1. Open Internet Explorer and enter the URL http://www.omnimd.com to access the application. This will open web site of OmniMD.
2. Enter User Code and Password and click on Go button.
3. This will open today's list of appointments made by the logged in physician.

> Important: OmniMD will provide User Code and Password

TODAY'S LIST

Today's List is the default page that appears after logged in OmniMD account. A provider can change his default page if he/she has admin rights. Following information appears on Today's List Screen.

Screen: Today's Patient Flow

This section displays Location of Clinic, Provider's name for whom today's patient list is shown and current date.

LISTING FOR TODAY

Listing for Today Jan 07, 2005				
Time	**Patient**	**Chief Complaint**	**Progress** i	**Location**
Arrived				
8:30 AM ▶ Diaz, Nicholas		[Fol Up] Followup [BLOO]	☑	Bellnorth Center
8:30 AM ▶ Carter, Mark		[Initial] lump in the abdomen	Rx $ °F ₹$	Bellnorth Center
9:05 AM ▶ Meadows, Mary		[Initial] lump in abdomen	☑	Bellnorth Center
12:00 PM ▶ Martin, Art		[Initial]	Rx $	Bellnorth Center
12:30 PM ▶ Wilson, Matthew		[Initial] Injury [EEG]	$ ₹$	Bellnorth Center
2:25 PM ▶ Taylor, James		[Initial] Carcinoma/Bladder	Rx $	Bellnorth Center
3:30 PM ▶ Carter Jessica		[Fol Up] Headaches	◀ Rx $ ☑ °F ₹$	Bellnorth Center
3:35 PM ▶ Rivera, Nancy		[Fol Up] Gastroenteritis		Bellnorth Center
Under Evaluation				
2:05 PM ▶ Cody, Michele		[Initial] Cough	◀ Rx $ ☑ °F ₹$	Bellnorth Center
2:15 PM ▶ Fontanez, Maria		[Initial] Gross hematuria	◀ Rx $ ☑ °F ₹$	Bellnorth Center
2:35 PM ▶ Smith, Brenda		[Initial] Seizures	Rx $ ☑ °F ₹$	Bellnorth Center
Lab Tests/Sample Collection				
5:00 PM ▶ Holyoke, Jim		[Initial] [CMG]	$	Bellnorth Center
Visit Completed				
12:05 PM ▶ Johnson, Barbara		[Initial] Glaucoma - Chronic	◀ Rx $ ☑ °F ₹$	Bellnorth Center
1:00 PM ▶ Meadows, Mary		[Initial] non-healing ulcer [MRI]	◀ Rx $ ☑ °F ₹$	Bellnorth Center
Scheduled				
8:30 AM ▶ Johnson, Barbara		[Initial] [ECG]		Bellnorth Center
9:00 AM ▶ Donelli, Mark		[Initial]	$ ₹$	Bellnorth Center

Screen: Listing for Today

This section shows following information:

Time: This column is divided into various time spans based on various appointments. For example, all those appointments that are under evaluation will be listed in Under Evaluation section, appointments that have been missed will be listed under Missed section and so on.

Patient: This column displays name of the patient who have taken appointment on a particular date and time. Click on patient's name to see Patient's Dashboard.

Chief Complaint: This column explains the reason for which appointment is taken, for example, Headache, Cough etc. This column also indicates the kind of visit. For example, if this is first visit then [Initial] is prefixed with the reason, if follow up visit then [Follow Up] would be prefixed.

Progress: This column shows what has been done so far on a patient in a particular visit. The images shown in progress column represent following legends:

Screen: Legends

Depending on the progress of the patient's flow in the clinic, these legends keep adding in the column. Click on add progress screen (Page 83) to view details of how legends get added in the column.

Location
This column shows the location of clinic. You can view appointments of other locations by changing location from drop-down associated with Location field.

Screen: Location

MESSAGES

Under messages, a Provider can keep track of all messages and tasks assigned to him. Messages tab works as reminder for any user who is logged in OmniMD. A user can view all messages and tasks. He/She can also generate new messages, reply to old messages, patient care alerts and search for a particular message(s) and or task(s).

VIEW MESSAGES AND TASKS

Click on Messages link to view all messages and tasks assigned to the user. Click on the subject of the message to view details of the message. Messages can be searched on the basis of patients first or last name and / or subject of the message.

Screen: Messages

| | Note: | The arrows in the From column indicate the priority of the message. Red arrow indicates High priority, Blue arrow indicates Normal priority and Green arrow indicates Low priority. |

CREATE NEW MESSAGE/TASKS

To create new message

1. Click on New Message link available on Message tab. This will open Message & Task screen.

Screen: Add Message/Task

2. Specify your message/task criteria:
   a. To and CC: click on Add Recipient(s) button to select the name of the person to whom message is to be sent. This will open add recipient dialog box. From this, check name of the Provider to whom you wish to enter in To field and in CC field. Click on Add Selected button.

Screen: Add Provider's Name

b. Subject: Enter subject for the message/task.

c. Patient: Click on Lookup to select patient for whom message/task is generated.

d. Type: Select priority of message/tasks. And select whether you are creating a message or assigned a task to the recipient.

e. Notes: Type observations, notes or any other information that is useful for understanding the message/task.

3. You can also enter a telephone message by clicking on the Telephone Message link. This will display the Telephone Message screen.

Screen: Telephone Message Screen

4. Specify the following information:

a. Please Call/Urgent/Personal/Returning Your Call: Click on the appropriate checkbox to specify the subject of your message.

b. Phone #: Enter the recipient's phone number.

c. Message: Type the message in this field.

d. Received By: Enter the name of the person who received the telephone call.

e. Presc. Medication: If the message is for a prescription, then type the name of the medication(s) prescribed by the provider.

    f.   Pharmacy: Enter the name of the pharmacy from where the medication will be available.

    g. Pharmacy #: Enter the telephone number of the suggested pharmacy.

    h. Called in By: Type the name of the person writing the telephone message.

    i.   Date: Click the calendar icon to enter the date of the telephonic message.

5. Click on Submit else click on Close.
6. Once all information is filled in, click on Send Message button. This message will appear in Message list of recipient(s).

REPLY TO A MESSAGE/TASK

To reply to a message/task

1. Click on the message/task to which you want to reply. This will open the message/task.

From	Subject		Date	
Dr. Steve Russel	lithiuym level		4/29/2006 6:37 PM	
❗ Dr. Ronald Sabraw	Follow up	COMP	4/29/2006 6:25 PM	Task

To: Ms. Noah Hanft CC: Dr. Steve Russel

Pls call patient to check any drug reaction

For Patient: Rivera, Nancy Task: Completed Due: 05/01/2006 1:10PM

Change Status

Message History

Screen: Message/Task Details

2. Click on the Reply icon to send a reply to the sender of the message. This will display the Reply screen. Click on the Reply All icon to send a reply to the sender of the message. This will display the Reply screen. (pt.5)

3. Change Status – click the change status icon to change the status of the task

Open
In-Progress
Completed
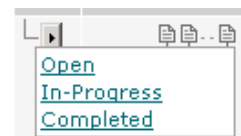
4. Click the message history 📄📄--📄 icon to view past messages.

Messages & Tasks

Patient Care Alerts
New Message/Task

Search Criteria

[All messages and tasks ▼] [For Me ▼] Patient Name [_____] [Patient] Subject Contains: [_____] [Search]

Messages History of : RE[1]:Follow up , Created on : 4/29/2006 4:39 PM   Back

To	Subject	Date	
! Ms. Noah Hanft	Follow up	COMP 4/29/2006 6:25 PM	Task
! Dr. Ronald Sabraw	RE[1]:Follow up	4/29/2006 4:39 PM	

Screen: Message History

Reply To

To	Dr. Ronald Sabraw	[Add Recipient(s)]
CC	[_____]	
Subject	RE[1]:Follow up	
Patient	Rivera, Nancy [Look Up]	
Type	Message ▼ Original Task: Completed ▼ High Priority ▼	
Due Date	05/03/2006 1:10 PM ▼	
Notes	[_____]	**Telephone Message**

(Long messages (>250 characters) will only be shown online.)

[Send Message]

Date	From	Notes
5/1/2006 6:25 PM	Dr. Ronald Sabraw	Task Pls call patient to check any drug reaction
5/1/2006 4:39 PM	Dr. Steve Russel	checked

Screen: Reply Screen

5. Type the reply for the message in the Notes field and click on Send Message button.

SEARCH MESSAGES AND TASKS

From search criteria section, select from drop-down the messages or tasks that you would wish to search. The system also has a text and patients first name, last name search option.

MY PROFILE

Under My Profile link, an OmniMD user can view his profile. Depending on the role assigned to a user, some of the fields are read-only. He/She can modify his profile and make changes as per his desire, for example changing password, fax number etc. Once desired changes have been made in the profile, click on Submit button.

Screen: My Profile

Note: Click on Modify Profile to modify the profile of the logged-in provider.

CLINIC

Depending on the role assigned to an OmniMD user. He/She can view and modify clinic settings and EMR settings.

To view/modify clinic settings:

1. Click on Clinic link. This will open Clinic Settings screen. A user can view/modify clinic settings/reports and EMR settings from this screen.

Clinic Settings / Reports

Clinic Settings

Modify Clinic Information
List/Add New Clinic Location
List/Add New Insurance Payer
Patient Reminder Settings
Settings for Patient Care Alerts

EMR Settings

EMR Dataset Designer
Note Template Designer
Other Doc. Template Designer
Case Report Template Designer

Clinic Reports

Audit Trail Report
Provider Activity Report

Search/List Users

First Name	
Last Name	
Role	--- Select ---
Doctor Code	--All--
Primary Specialty	--- All ---
Sort by	All

[Search]

Screen: Clinic Settings

CLINIC SETTINGS/REPORTS

MODIFY CLINIC INFORMATION

To modify/view clinic details:

1. Click on Modify Clinic Information link on the Clinic Settings screen. This will open Clinic Info screen.

Screen: Clinic Info

Clinic Name	Displays name of clinic
Clinic Code	Displays code of clinic
Home Page	Type the page that you want to be displayed by default on login.
Address 1 & Address 2	Type address of Clinic
City	Type city in which clinic is situated
State	Type state in which clinic is situated
Zip	Type zip code
Work phone	Type phone number on which you are available in clinic
Fax	Type fax number of clinic
PDA Sharing	OmniMD recommends for NO as value in this field.
DOCUMENT SETTINGS	Under this we have following two settings
Local Path	Type local path of the server where documents are stored.
WEB PATH	Type web path of the server to access documents through Internet.

2. To modify details, click on Modify Clinic link. This will edit clinic information. Make changes as required, and click on Submit button. Or click on Cancel not to make any changes in details.

Note: Fields that are suffixed by * are compulsory fields and should be filled in to save the information.

LIST/ADD NEW CLINIC LOCATION

To list clinic location:
1. Click on Clinic -> List/Add Clinic Location link on the Clinic Settings screen. This will display a list of the existing clinic locations along with Location Type, Address, Telephone/Fax, Email and Provider Codes.

Screen: Clinic Location List

ADD CLINIC LOCATION

To add a clinic location:

1. Click on Clinic -> List/Add Clinic Location link on the Clinic Settings screen. This will display a list of all clinic locations.
2. Click on Add Clinic Location Link on the Clinic Location List screen to add new location for clinic. This will display the Add Clinic Location screen.

Screen: Add Clinic Location

3. Specify location criteria:

Location Name	Type location name of clinic.
Clinic Code	This is read only field.
Location Code	Type location code for clinic.
Address1	Enter address of the clinic.
Address 2	Enter address of the clinic.
City, Zip, State, Country	Enter city, zip, state and country of clinic in respective fields.
Phone, Fax and E-mail	Enter phone, fax and email of clinic in respective fields.
Type	Select from drop-down whether this information is for internal or external clinic.

4. If the location selected is External, then choose the Provider who is assigned to look after that location.
5. Once the information is filled in, click on Submit button. This will add new location in Clinic link.

LIST/ADD NEW INSURANCE PAYERS

To list insurance carriers:

1. Click on Clinic -> List/Add Insurance Payers link on the Clinic Settings screen. This will display a list of all Insurance Payers along with Address, Telephone/Fax, and E-mail.

Screen: Insurance Payers List

ADD PAYER

To add a new insurance payer:

1. Click on Clinic -> List/Add New Insurance Payers link on the Clinic Settings screen. This will display a list of all insurance payers.

2. Click on Add Payer link on the <u>Insurance Payers List</u> screen to add new Insurance Payer for clinic. This will display the Add Insurance Payer screen.

Screen: Add New Insurance Payer

3. Enter the values as applicable and click on Save button. This will add new insurance payer in OmniMD.

SET MASTER PROVIDER INFO

To set the master provider info:

1. Click on Clinic -> List/Add New Insurance Payers link on the Clinic Settings screen. This will display a list of all insurance payers.
2. Click on Set Master Provider Info link on the <u>Insurance Payers List</u> screen. This will display the Master Carrier Provider Info screen.

Master Payer Provider Info

Master Payer Name	Payer Assigned Number
ACCORDIA	
AMC	
ARIC	
BCBS MINNESOTA	
BCBS NC	
BCBS OF AL	
BCBS OF FL	
BCBS OF NEW MEXICO	
BCBS OF TEXAS	
BLUE CROSS BLUE SHIELD VA	
CIGNA NATIONAL	
CORESOURCE (MD/PA/IL)	
CORESOURCE (OH)	
CPA	
EMPIRE BLUE CROSS AND BLUE SHI	
ERIN GROUP ADMINISTRATORS(EGA)	
HEALTHFIRST INC (NY)	
IDAHO MEDICAID	
MEDCOST	
MEDPAY	

Screen: Master Carrier Provider Info

3. A list of all the master payers is displayed. Enter the Payer Assigned Number for the master payers for the selected clinic.
4. Click on Save. This will save the master payers information.

ELIGIBILITY SETTINGS

To define the eligibility settings:

1. Click on Clinic -> List/Add New Insurance Payers link on the Clinic Settings screen. This will display a list of all insurance payers.
2. Click on Eligibility Settings link on the Insurance Payers List screen. This will display the Eligibility Settings screen.

Screen: Eligibility Settings

3. Select the Insurance type for the clinic as Primary, Secondary or Tertiary from the drop-down menu. By default, Primary is selected.
4. Select the Auto Eligibility as True or False, from the drop-down menu. By default, True is selected.
5. Click on Save. This will save the eligibility settings for the clinic.

PATIENT REMINDER SETTINGS

To add a new insurance payer:

1. Click on Clinic -> Patient Reminder Settings link on the Clinic Settings screen. This will display the Patient Reminder Setting screen.

Screen: Patient Reminder Setting

2. Specify the doctor-specific reminder settings:
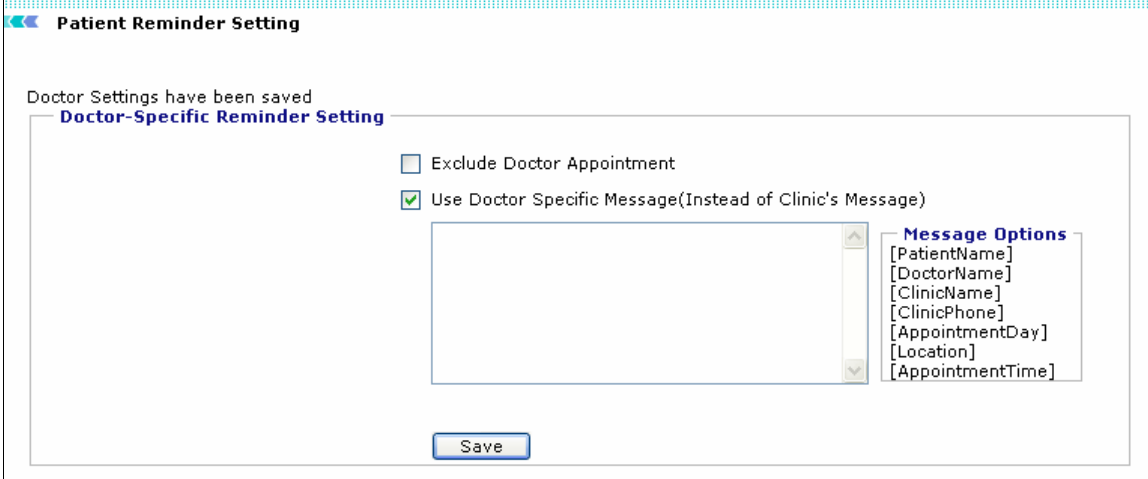
Exclude Doctor Appointment	Check this checkbox to exclude reminder for the logged in provider.
Use Doctor Specific Message	Check this checkbox to use a customized reminder message for the provider, instead of the default clinic message.

3. Once you check the Doctor Specific Message checkbox, the screen expands as shown:

Screen: Doctor-Specific Reminder Setting

4. Enter the customized reminder message for the logged-in provider, using the Message options.
5. Click on Save to save the doctor-specific reminder settings.
6. Specify the clinic-wise reminder setting:

Enable Reminder System	Check this checkbox to enable the reminder system.
Start Calling Time	Select the time from the drop-down menu to set the start time for reminders for the clinic.
Time Zone	Select the time zone for the clinic from the drop-down menu.
End Calling Time	Select the time from the drop-down menu to set the end time for reminders for the clinic.
No of days before the appointment to call	Select the number of days before the appointment, you need to call.
Default Clinic Message	Select the message options to write a default clinic message for reminder. This is mandatory.
Confirm Appointment	Check the Allow checkbox to enable user to confirm the appointment. Enter appointment information.
Reschedule Appointment	Check the Allow checkbox to enable user to reschedule the appointment. Enter rescheduled appointment information.

| Cancelled Appointment | Check the Allow checkbox to enable user to cancel the appointment. Enter cancelled appointment information. |
| Call Preference Order | Select the call preference from the drop-down menu. |

7. Click on Save. This will save the Clinic-wise Reminder settings.

SETTINGS FOR PATIENT CARE ALERTS

To define settings for patient care alerts:

1. Click on Clinic -> Settings for Patient Care Alerts link on the Clinic Settings screen. This will display the Settings for Patient Care Alerts screen.

Screen: Settings for Patient Care Alerts

2. A user can define settings for various diseases from this screen. Specify the following information

Disease Specific	Select the disease for which you wish to define settings, from the drop-down menu.
Preventive Care	Select the preventive care category from the drop-down menu.
Gender	Select the gender for which you wish to define the settings for the specific disease.
Age	Select the age for which you wish to define the settings for the specific disease.
Guideline	Select the advised guideline for he specific disease, from the drop-down menu. If a guideline that you want to suggest is not listed in the drop-down menu, enter it in the Other field.
Frequency	Select the frequency of the advised guideline for the specific disease, from the drop-down menu.

3. Click on Save Settings to save the defined patient care alerts.

CLINIC REPORTS

AUDIT TRAIL REPORT

To generate an audit trail report:

1. Click on Clinic -> Audit Trail Report link on the Clinic Settings screen. This will display the Audit Trial Report screen.

Screen: Search Audit Trail

2. A user can define the range for various audit reports for the clinic from this screen. Audit reports can be searched for the following parameters

Date Range	Defines the date wise period for which the report need to be searched. For example March 12, 2005 to March 11, 2006.
User	Select user for whom the report needs to be searched. By default, all users in your clinic will be listed in the drop down.
Patient	Select the patient for whom you wish to search the specific audit report.
Role	Select the role in the drop down – Doctor, Assistant, Nurse, Doctor Admin, for which you wish to define the settings for the specific role based audit report.
Modules	Select the OmniMD modules from the drop-down menu. You can also search a report of all the modules by selecting 'All Modules'
Operations	Select the changes that you wish to track from the drop-down menu. This includes Changes and Deletes, Changes Only, Deletes Only or All Operations.

3. Press Search to display the desired audit report.

PROVIDER ACTIVITY REPORT

To generate a Provider Activity Report:

1. Click on Clinic -> Provider Activity Report on the Clinic Settings screen. This will display the Provider Activity Report screen.

Screen: Provider Activity Report

2. Press Submit to view the visit report and Encounter Report

For All Providers   From: 4/23/2006 **To:** 4/29/2006

```
# of (Unique) Patients Served :  30
# of Total Visits : 195  ( Initial  :  131 , Fol Up  :  64)
# of New Patients Registered : 1
# of Case Reports Finished :  76
# of Transcriptions* :  118
# of Web Forms* :  0
# of Prescriptions :  207
# of Lab Orders* :  0
# of Scanned Documents* :  22
# of SuperBills :  216
# of Procedures(CPT) :  523
# of Visits with Patient Payment :  29
# of Visits with Eligibility Check :  17 ( Eligible  :  0 ,  Ineligible  : 17)
# of Incoming Referrals* :  51
# of Outgoing Referrals* :  56
# of Patient Reminders :  36 ( Successful   :  17)
```

Visit Report

3. Encounter Report –

Encounters without SuperBill, Prescription, Documentation, Transcription

Date Of Service	Patient Name	Provider Name	Status i	Action
4/29/2006 4:15 PM	Smith, Alvin	Dr. Steve Russel		Add
4/29/2006 2:50 PM	Fontanez, Maria	Dr. Steve Russel		HPI/ROS/PE/A&P/Lab
4/29/2006 1:00 PM	Shaw, Darby	Dr. Ronald Sabraw		New Prescription
4/29/2006 12:00 PM	Capshaw, John	Dr. John Smith		New SuperBill
4/29/2006 11:45 AM	Smith, Kyle	Dr. Ronald Sabraw		New Document
4/29/2006 11:05 AM	Fontanez, Maria	Dr. Ronald Sabraw		Visit Closure
4/29/2006 11:00 AM	Shaw, Darby	Dr. Steve Russel		Collect Co-Pay
4/29/2006 10:20 AM	Cody, Michele	Dr. Steve Russel		Check Eligibility
				Add

Encounter Report displays patient encounters that are without Superbill,
Prescription, Documentation or Transcription. The system offers links to Date of
Service, Patient Dashboard and also an option to entering details on the fly.

EMR SETTINGS

EMR DATASET DESIGNER

To design the EMR Dataset:

1. Click on Clinic -> EMR Dataset Designer link on the Clinic Settings screen. This will display the EMR Dataset Designer screen.

Screen: EMR Dataset Designer

2. This screen displays a list of datasets defined in the EMR. Click on a dataset to add, modify or remove its elements. For example, clicking on the Vital Signs dataset will display the Vital Signs Dataset Designer.

Screen: Vital Signs Dataset Designer

3. This screen displays a list of elements defined in the Vital Signs dataset. Click on an element to view options associated with it. A user can set an element to a default value or clear the default setting. He/She can also add an element at the same or next level, edit an element or delete it. Additionally, a user can also report an element as default.

Note: The HPI and ROS datasets have elements based on the user's Primary Specialty. These datasets have additional options of Complains and Denies associated with a dataset element. Clicking once on the dataset element selects it as Complains. Clicking twice on the dataset element selects it as Denies. Clicking thrice on the dataset element unselects the element.

4. Click on the element in the level where you wish to add an element and click on Add. An Add Element pop-up box will appear.

Level ⦿ Same level ◯ Next level
Nomenclature [   ]
(Insert * for small textbox, ** for large textbox)
Reported Text [   ]
Text Format ⦿ Append to previous sentence
◯ Generate as a new sentence
◯ Generate after a new line
◯ Generate as a new paragraph
[Add Element] [Cancel]

Screen: Add Element Pop-up

5. Specify the following details:

Level	Select the appropriate option to add the new element at the desired level.
	§ Same level: This option adds the new element at the same level as the selected element.
	§ Next Level: This option adds the new element as a child element of the selected element.
	By default, 'Same Level' is selected.
Nomenclature	Enter the text of the element as it will appear in the elements list.
Reported Text	Enter the text of the element as it will appear in reports.
Text Format	Select the appropriate option to display the text format of the new element.
	§ Append to Previous Sentence: This option adds the text to the previous sentence.
	§ Generate as a New Sentence: This option adds the text as a new sentence in the same section.
	§ Generate after a New Line: This option adds the text after a new line, in the same section.
	§ Generate as a New Paragraph: This option adds the text as a new paragraph in the same section.

6. Click on Add Element. This will add the element to the dataset and the control will return to the Vital Signs Dataset Designer screen.

Note: An element can be added to a maximum of 9 levels.

Note: Clicking Edit will display the Edit Element pop-up in edit mode, where you can make the necessary modifications.
Clicking Delete will delete the element from the dataset.

7. Once you have made the required changes, click on Save as personal version to save the dataset as customized for the logged-in provider. Else, click on Save as clinic version to save the dataset for the entire clinic.

Note: If a user creates his/her personal dataset, then that dataset will be used. If a user does not create his/her customized dataset, then the dataset created for the entire clinic will be used. But if no datasets are created for the user or the clinic, then the Master Dataset of OmniMD will be used.

EMR NOTE TEMPLATE DESIGNER

To design the Note Template:

1. Click on Clinic -> Note Template Designer link on the Clinic Settings screen. This will display the EMR Note Template screen.

Screen: EMR Note Template Designer

2. Click on Add New Template link on the Template List screen. Select the fields from the Drop down list that you wish to include in the new note template.

OTHER DOC. TEMPLATE DESIGNER

To design other document templates:

1. Click on Clinic -> Other Doc. Template Designer link on the Clinic Settings screen. This will display the Document Template Screen.
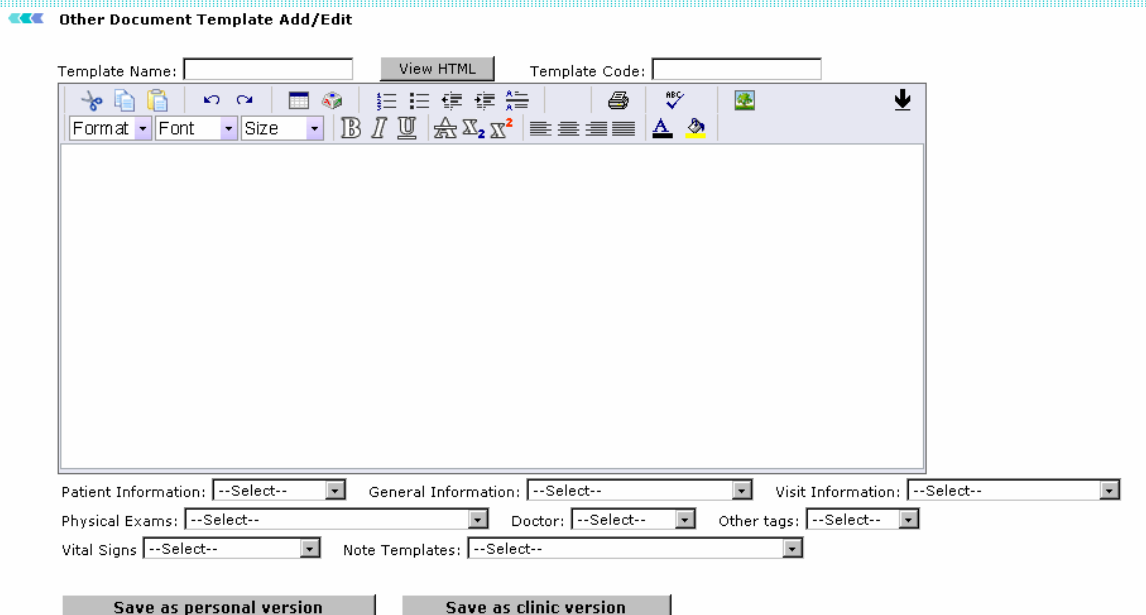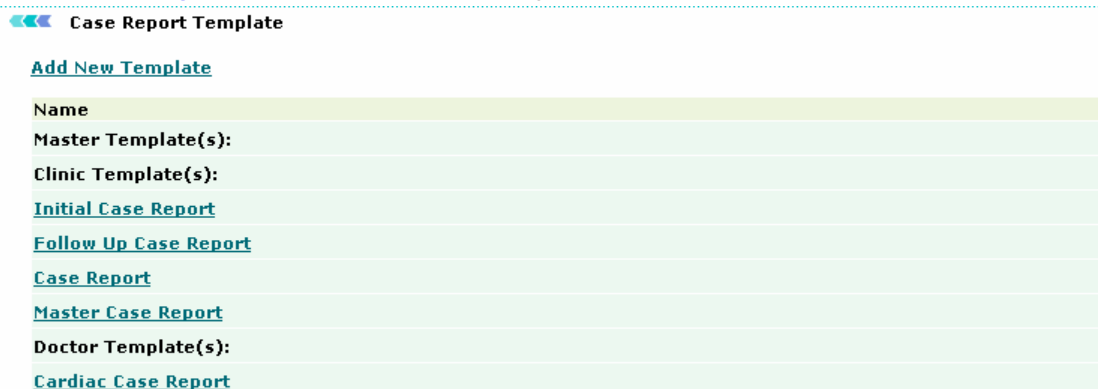

Screen: Other Doc. Template Designer

2. Click on Add New Template link on the Other Document Template List screen. Select the fields from the Drop down list that you wish to include in the new document template.

Screen: Other Document Template Add/ Edit

CASE REPORT TEMPLATE DESIGNER

To design other document templates:

1. Click on Clinic -> Case Report Template Designer link on the Clinic Settings screen. This will display the Document Template Screen

Screen: Case Report Template Designer

2. Click on Add New Template link on the Case Report Template List screen. Select the fields from the Drop down list that you wish to include in the new case report template

Screen: Case Report Template Add / Edit

SEARCH/LIST USERS

This feature of OmniMD helps you to view and search users of OmniMD. Click on Clinic link. This will display Clinic settings page.

Screen: Search / List Users

LIST USERS

1. To list all users of OmniMD, do not fill in any value in all fields and click on Search button. This will list all users of OmniMD.

SEARCH USERS

1. To search a particular user, enter first name, last name, select role, Provider code primary specialty, and sort by. Click on Search button to view search results.

Tip: For searching user, it is not necessary to fill in all fields. It depends on what information you want to fill in for search.

CALCULATORS

OmniMD provides Providers with various medical calculators that are required to analyze patient's case. For example, Body Mass Calculator.

Medical Calculators

Anion Gap
Integerated Dosing Calculator
Mean Arterial Pressure
Bayesian Analysis
Basal Energy Expenditure
Cardiac Parameters
Measurement Conversions
Pressure Conversions
Serum Osmolality
A-a Oxygen Gradient
Pregnancy Due Date
Body Mass Calculator
Coronary Heart Disease
Estimated Creatinine
Fractional Excretion

Disclaimer

Body Surface Area, Body Mass Index

Sex :   ⊙ Male   ○ Female
Weight : [   ] lbs
Height : [   ] inches

[Calculate]   [Clear]

Body Surface Area = [   ] m2
Lean Body Weight = [   ] kg = [   ] lbs
Ideal Body Weight = [   ] kg = [   ] lbs
Body Mass Index = [   ] kg/m2 = [   ]

Screen: Medical Calculator

A list of calculators is given on left side of screen. Click the calculator that you want to access. The details of calculators will appear on right side of screen.

DOWNLOADS

Various installation and setup instructions are required for setting up OmniMD on PDA. Click on Downloads link to view these instructions. (Refer to the Pocket PC Handheld Manual for instructions on installation and setup).
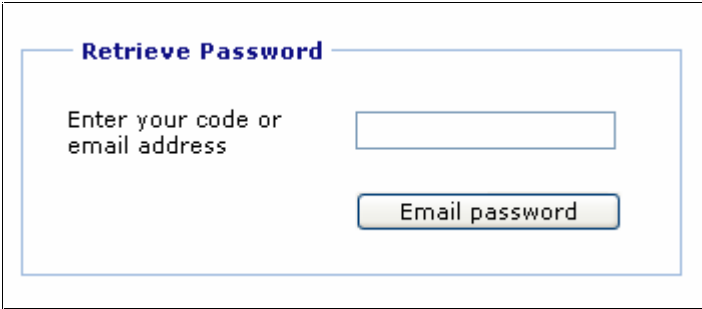
LOGOUT OMNIMD

To logout OmniMD

1. Click on ![Logout] to logout OmniMD Application.
2. Once logged out, you will reach homepage of OmniMD.

FORGET PASSWORD

If you forget password, you can retrieve that by following steps as explained below.

To retrieve password:

1. Open Internet Explorer and enter the URL http://www.omnimd.com to access the application. This will open web sit of OmniMD.
2. Click on Forget Password link. This will open Retrieve Password screen.

Screen: Retrieve Password

3. Enter your code or email address in the box provided.
4. Click on Email Password button. This will email your current password on the email address provided at the time of registration.

SET UP CALENDAR FOR APPOINTMENT SCHEDULER

Before accessing OmniMD for appointment scheduler, it is required to setup calendar settings. This is because appointments are based on clinic timings, and to schedule an appointment it is must that calendar is set up.

To set up calendar

1. Click on Appointment -> Calendar Settings. This will open Calendar settings page. Alternatively, you can click on Calendar Settings on Appointment Scheduler Screen. Please see the screen below:

Screen: Calendar Settings

Screen: Details of Calendar Settings

2. Fill in the fields as applicable

   Calendar Settings sections

   a. Working Day Timing: Fill in start time in From field and end time in To field. This will make appointment scheduler to start from that time.

   b. Lunch Timing: Fill lunch start time in From field and lunch end time in To field.

   c. Default Interval: Select from the drop down list the estimated time required for patient consultation.

   d. Default Clinic Location: Select the default clinic location from the drop down menu. This will specify at which clinic a particular Provider would be available.

   e. Default Provider: Select the name of the default provider at the selected clinic location, from the drop-down menu.

   f. Weekly Days Off: Check the days that are weekly off. This will make easy for making appointments, as these days will be displayed in different color so as to make difference between week days and weekly off days.

   g. Time zone: Select time zone from drop-down menu.

   h. Default Format: Select the default view format as Condensed view or Full view from the drop-down menu.

   i. Visit Listing Format: Select the radio button for the format in which you want to display patient appointments on Patient Dashboard.

HOLIDAYS SECTIONS

All Holidays: To create your holiday list, select the holiday from All Holidays list and click on Add button. This will add holidays in Your Selected Holidays List. This setting will show that particular date in red color.

If any holiday which is not listed in All Holidays List, you can add that holiday by following steps as:

   1. Enter the holiday in Other field and select month and date for that holiday.

   2. Click on Add button. This will add holiday in Your Selected Holidays List.

Note: To delete any holiday, select the holiday and click on Delete button. This will delete that particular holiday.

Tip: All holidays will be shown with red color in appointment scheduler so that no appointments can be made on holidays.

3. Once all information is filled, click on Submit button. This will set calendar settings.

FORMAT OF CALENDAR

Appointment calendar can be viewed in two formats: Condensed format and Full View format. Click on Appointment Scheduler screen and select from drop down of calendar settings the format in which you want calendar to appear. This will refresh the link and display the calendar in that select format.

Note: Click on to select week. This will display details of appointments in right side of screen of selected week.

COMMON PROCEDURE SETUP

Following screen shows common procedure setup.

Screen: Common Procedure Setup

This section is available under Calendar settings. Under this, you can view all procedure along with the time taken by all Providers. You can also add and delete a particular procedure.

ADD COMMON PROCEDURES

To add procedure
1. Enter procedure name in Procedure field, time in Time field and select the Provider for which you want to create procedure.
2. Once all fields are filled in, click on Add button. This will add new common procedure.

DELETE COMMON PROCEDURES

To delete procedure
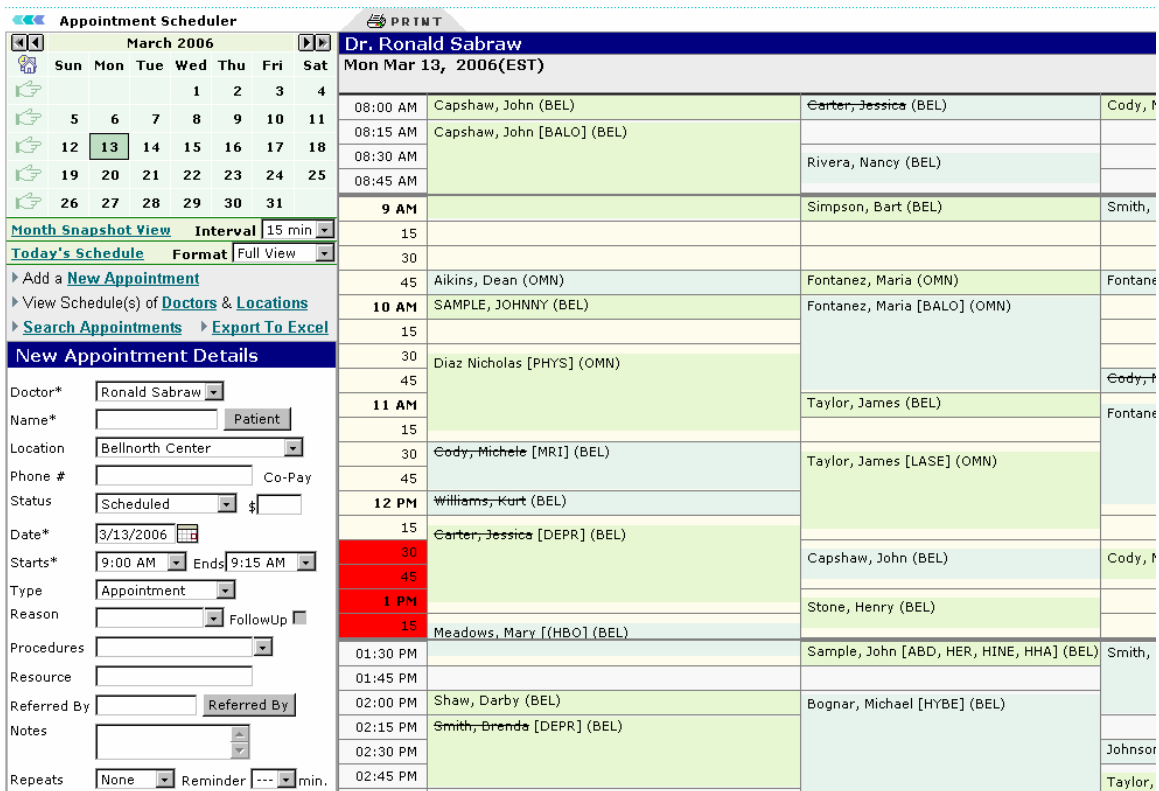
1. Click on del link corresponding to the procedure that you want to delete.
2. This will refresh the link and delete the link.

APPOINTMENT SCHEDULER

APPOINTMENT SCHEDULER AT A GLANCE

The appointment scheduler is your personal secretary, which takes charge of your appointment tracking, fixing and blocking. Providers can get a total view of their workday and efficiently manage their working schedule.

To access appointment scheduler, click on Appointments link. By default, it will show following screen.

Screen: Appointment Scheduler

Appointment Scheduler Screen is explained as below. The screen is divided into two parts.

Part 1

This part shows current month with current date, along with link of other functions that are part of appointment scheduler. Click on the link and view details of Today's Schedule, Month's Snapshot View, Adding new appointments, viewing schedules of Providers and locations and so on.

Screen: Access Appointment Scheduler

VIEW APPOINTMENTS

Appointment Scheduler allows you to view appointments of other dates.

TO VIEW OTHER APPOINTMENTS

1. From the calendar given in appointments, click on the date whose appointment you would like to view.
2. This will display appointments for selected date.

> **Note:** By default, calendar will show current month and date. To view appointments of previous month and year, click on ◄◄ and for next month and year, click on ►►

Screen: View Appointments

PART II

Screen: Details of appointment

This part of appointment scheduler displays the details of appointments made for today. The first appointment is confirmed appointment and the appointment adjacent to it is a waitlisted appointment. This means that appointment will be confirmed only if first appointment is not taken up due to any reason. An appointment that is canceled will appear as strike through appointment in appointment scheduler.

The In-Patients Round Appointments displayed at the bottom of the screen, refer to the patients admitted in the hospital. The provider attends these patients when he/she does his round visits of the hospital. These patients do not require an appointment time.
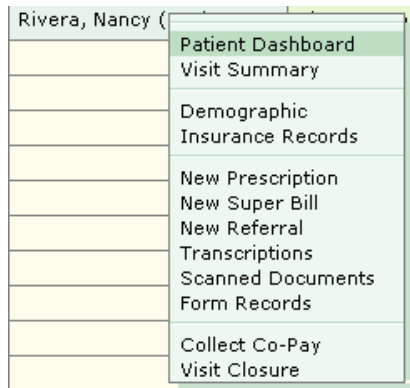
Note: Lunch timings will be shown in red color so as to make sure that no appointment can be booked within particular timings.

CANCEL / DELETE APPOINTMENT

TO DELETE AN APPOINTMENT

1. Click on patient name and select patient dashboard. The system offers the option to add details on the fly. Click on the patient name to select from the drop down list.

Screen: Select Patient Dashboard

2. From future appointments list, select the date of service that is to be updated. This will open the appointment in appointment scheduler.
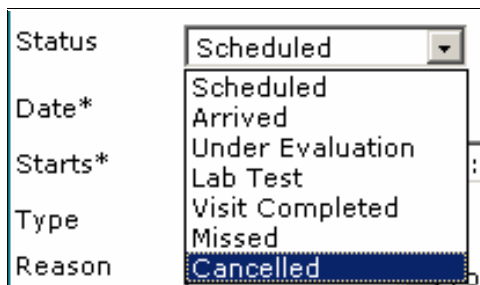
Screen: Update/ Delete Appointment

3. Click on patient's name and all details will appear in appointment details section.
4. Click on update button to update appointment.

TO CANCEL AN APPOINTMENT

1. Click on My schedule link and select patient name. All details will appear in appointment details section.

2. Make the status as Canceled and click on Update button to confirm cancellation of appointment.

Screen: Canceled Appointment

> Note: It is NOT advisable to update past appointments. If a patient is attended in the past, his records should not be used for creating a new appointment.

MONTHS SNAPSHOT VIEW

Months Snapshot view enables you to view the schedule of your month in a single screen.

1. Click on the Today's Schedule link under Appointments.

2. This will bring the snap shot view of the entire schedule for the month. You can view vacant, booked or cancelled appointments for the month in a single screen shot.

Color Coding

TODAY'S SCHEDULE

Today's Schedule link under appointments enables you to see details of schedule of your entire day.

View your entire schedule at any time

1. Click on the Today's Schedule link under Appointments.
2. This will bring up a page titled appointment scheduler; there you will see all of the appointments of current date. This is same as appointment scheduler. Appointments are displayed at an interval of 15 minutes.

> Note: You can click on Todays Schedule link available on appointment scheduler screen.

3. Click on Print button to print details of schedule.

Screen: My Schedule

VIEW APPOINTMENTS AS PER INTERVAL SET

A provider can view his appointments in various time intervals

TO VIEW APPOINTMENTS AS PER INTERVALS SET

1. From Interval drop down, select the time period after which reminder will be send for appointment. This is for view

Screen: Interval for Schedule

ADD NEW APPOINTMENT

OmniMD enables Providers adding new appointment through appointment scheduler.

> Note: Appointment Scheduler Screen is the main screen from where you can perform all tasks that are part of Appointments.

To add appointment

1. Click on Appointments -> Add New Appointment. Alternatively, click on Add New Appointment on appointment scheduler screen.

2. Enter details of appointment in New Appointment Details section.

New Appointment Details

Doctor*	Ronald Sabraw
Location	Bellnorth Center
Name*	[ ] Patient
Phone #	[ ] Co-Pay
Status	Scheduled $[ ]
Date*	1/9/2005
Starts*	9:00 AM Ends 9:15 AM
Type	Appointment
Reason	[ ] FollowUp ☐
Procedures	[ ]
Resource	[ ]
Referred By	[ ] Referred By
Notes	[ ]
Repeats	None Reminder --- min.

Save

Screen: Add New Appointment
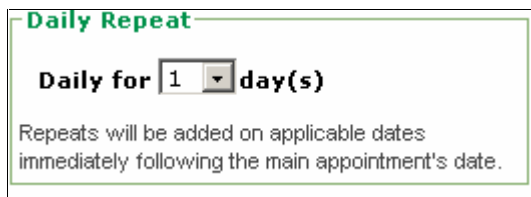
3. Fill in the fields as applicable

Doctor	Select the Provider's name from the drop down list for whom appointment is to be added.
Location	Select the location of the clinic where appointment is to be carried.
Name	Click on Patient button to select patient. This will open Patient Lookup Page in another window. This page will provide Today's Patient, Last 2 Days patient list. Select the patient from the list. You can search patient and add a new patient, if required.
Phone #	This field will be populated once patient's name is selected.
Status	Select the status of the appointment and correspondingly enter Co-Pay amount, if any.
Type	Select the type of appointment.
Reasons	Enter the reason of appointment.
Follow-Up	Depending upon the case history of patient, check this field if any follow up is required.
Procedure	From drop-down list, select the procedure for which this appointment is booked, for example, Blood Report, Bone Density etc.
Resource	Enter the resource, if any, need to be utilized during appointment. For example, X-Ray machine.
Referred By	Click on Referred By button to select referral Provider. This field is filled when other Provider refers patient.
Notes	Enter notes, observations or any additional information required for better understanding of the case history.
Repeats	Repeat can be yearly, monthly, weekly or daily. Select repeat time interval from the drop down list to repeat the appointment with same patient. Additional information will appear based on the repeat value selected.

REPEAT VALUE SELECTION

Daily Repeats

1. If you select the Daily option from the Repeat drop-down menu, then the additional information appears as shown.
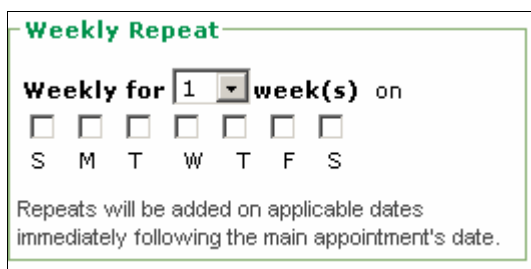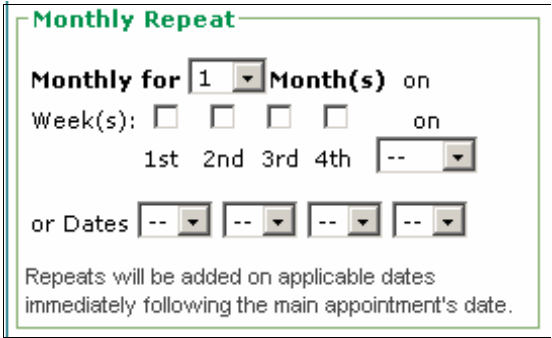

Screen: Daily Repeats

2. Select the number of days for which you want to repeat the appointment, from the Daily Repeats drop-down menu. This indicates that the appointment will be repeated daily for the selected number of days.

Note: You can repeat an appointment for a minimum of 2 days.

Weekly Repeats

1. If you select the Weekly option from the Repeat drop-down menu, then the additional information appears as shown.

Screen: Weekly Repeats

2. Select the number of weeks for which you want to repeat the appointment, from the Weekly Repeats drop-down menu.

3. Check in the checkbox of the day(s) of the week on which you want o repeat the appointment. This indicates that the appointment will be repeated weekly on the selected days.

Monthly Repeats

1. If you select the Monthly option from the Repeat drop-down menu, then the additional information appears as shown.
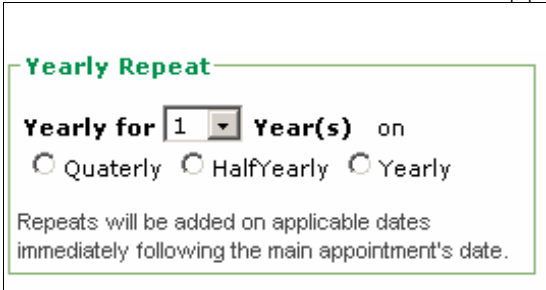
Screen: Monthly Repeats

2. Select the number of months for which you want to repeat the appointment, from the Monthly Repeats drop-down menu.
3. Check in the checkbox of the week(s) of the month and select the day(s) of the week on which you want to repeat the appointment in the month, from the drop-down menu. Alternatively, you can also select the dates of the month on which you want the appointment be repeated, from the drop-down menus.

Yearly Repeats

1. If you select the Yearly option from the Repeat drop-down menu, then the additional information appears as shown.

Screen: Yearly Repeats

2. Select the number of years for which you want to repeat the appointment, from the Yearly Repeats drop-down menu.
3. Click the appropriate radio button to divide the yearly appointments as Quarterly, Half-Yearly or Yearly.

4. Once all information is filled in, click on Save to save the appointment.

This new appointment will be displayed in Appointment Scheduler Screen as summary.

Warning: If you do not select patient from patient list and write patient's name directly in the field, this will not register the patient in OmniMD.

VIEW SCHEDULES OF DOCTORS

TO VIEW SCHEDULES OF DOCTORS

1. Click on View Schedule(s) of Doctors link on Appointment Scheduler screen. Alternatively, click on Appointment and View Schedules of Doctors.

Screen: View Schedule(s) of Doctors

2. This will open Select Doctors Screen in Appointment Scheduler Screen.

Screen: Select Doctors Screen

3. Check the checkbox of the Doctor whose appointment to be displayed.

4. Click on View button. This will show appointments of selected Provider on right side of screen.

Note: If you select multiple doctors, then appointments of all the selected doctors will be displayed in a single screen.

VIEW SCHEDULES OF LOCATIONS

To view schedules of Locations

1. Click on View Schedule(s) of Locations link on Appointment Scheduler screen. Alternatively, you can click on Appointment and View Schedules of Locations.

Screen: View Locations

2. This will open Select Locations Screen in Appointment Scheduler Screen.

Screen: Select Locations

3. Check the checkbox of the Location whose appointment is to be displayed.

4. Click on View button. This will show appointments of selected location on right side of screen.

Screen: Details of Locations

🔅 Tip: Click on Print button to print details of appointments of selected location.

SEARCH APPOINTMENTS

Providers can search appointments on the basis of the criteria per parameters they want to search.

TO SEARCH APPOINTMENTS

1. Click on Search Appointments link on Appointment Scheduler screen. Alternatively, you can click on Appointment and Search Appointments.

Screen: Search Appointments

2. This will open Search Screen in Appointment Scheduler Screen.

Screen: Search Appointments details

3. Fill in the fields as applicable

Doctor	From drop-down list, select the Provider's name.
Location	Select from drop down list the location to be included as parameter.
Name	Click on patient button to select patient.
Type	Click on drop down to select type such as appointment
Status	Select status from drop down.
Procedure	Select the procedure.
Reason	If you wish to search by reason, you can enter reason in this field.

4. On the basis of the information filled in, you can search upcoming appointments in the next week or upcoming appointments in the next month. Click on the desired search criteria.
5. This will display results on right side of appointments scheduler.

> Note: It is not necessary to fill all details in search screen. It depends on what parameters or conditions you want to make search.

PRINT

View Appointments , matching criteria
Doctor: Ronald Sabraw

Carter, Jessica	Dr. Ronald Sabraw	**Fri Mar 17, 2006**
Type: In-Patient Round	BEL Bellnorth Center	12:00AM to 11:59PM
Rivera, Nancy	Dr. Ronald Sabraw	**Fri Mar 17, 2006**
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Johnson, Barbara	Dr. Ronald Sabraw	**Fri Mar 17, 2006**
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Capshaw, John	Dr. Ronald Sabraw	**Fri Mar 17, 2006**
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Cody, Michele	Dr. Ronald Sabraw	**Fri Mar 17, 2006**
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Fontanez, Maria	Dr. Ronald Sabraw	**Fri Mar 17, 2006**
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Fontanez, Maria	Dr. Ronald Sabraw	**Fri Mar 17, 2006**
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Johnson, Barbara	Dr. Ronald Sabraw	**Fri Mar 17, 2006**
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Carter, Jessica	Dr. Ronald Sabraw	**Fri Mar 17, 2006**
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM

Screen: Next 1 Week Appointments Search Result

PRINT

View Appointments , matching criteria
Doctor: Ronald Sabraw

Carter, Jessica	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: In-Patient Round	BEL Bellnorth Center	12:00AM to 11:59PM
Rivera, Nancy	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Fontanez, Maria	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:20AM
Meadows, Mary	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 10:00AM
Fontanez, Maria	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Johnson, Barbara	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Carter, Jessica	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Rivera, Nancy	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:50AM
Johnson, Barbara	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:30AM
Johnson, Barbara	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM
Capshaw, John	Dr. Ronald Sabraw	Fri Mar 17, 2006
Type: Appointment	BEL Bellnorth Center	8:00AM to 8:15AM

Screen: Next 1 Months Appointments Search Results

CALENDAR SETTINGS

This is first thing that is required to be done before accessing appointment scheduler. To see calendar settings, click on setup calendar.

REMINDER SEARCH

To search a patient's reminders:

1. Click on Appointments -> Reminder Call Report. This will display a list of reminders and their details for the patient on the current day in the Patient Reminder Today's Report.

Screen: Patient Reminder Today's Report

2. Click on View Patient Reminder Report to view the patient's reminders. This will display the Reminder Search screen.

Screen: Reminder Search

3. Specify the search criteria to view the Reminder Calls report:

Providers	Select the provider's name whose list of reminders you wish to search, from the drop-down menu. By default, All Doctors is selected.
Clinic Location	Select the clinic location from drop down list, whose list of reminders you wish to search.
Patient Name	Click on Lookup to select the patient whose reminders are being searched.
Patient Phone	Enter the phone number of the patient whose reminders are being searched.
Reminder Call Date Between	Click on the calendar icons to select the period of call dates for which you wish to search reminders.
Patient Reminder Status	Select the status of reminders being searched, from the drop-down menu.

4. Click on View Report button. This will display the reminders conforming to the entered search criteria, as shown in Reminder Search Results screen.

◄◄◄ Patient Reminder Summary Report

Search Criterias:
Doctor: All Doctors From Date:3/19/2006

Reminder Status	No Of Calls
Your search matched no records.	

Screen: Reminder Search Results

5. On the Reminder Search screen, specify the search criteria to view the Reminder Summary report:

Providers	Select the provider's name whose summary list of reminders you wish to search, from the drop-down menu. By default, All Doctors is selected.
Clinic Location	Select the clinic location from drop down list, whose summary list of reminders you wish to search.
Reminder Call Date Between	Click on the calendar icons to select the period of call dates for which you wish to search reminders.

6. Click on View Report button. This will display the reminders conforming to the entered search criteria, as shown in Patient Reminder Summary Report screen.

Patient Reminder Summary Report

Search Criterias:
Doctor: All Doctors From Date:5/22/2005

ReminderStatus	NoOfCalls
Your search matched no records.	

Screen: Patient Reminder Summary Report

EXPORT TO EXCEL

To export details of appointment in *.csv format

1. Click on Appointments -> select Export to Excel link. This will open a dialog box that would give you an option of opening or saving the *.csv file.

2. Click on Save button to save the details of appointment. Select the location where you want to save the file.

3. Click on Save button.

Important: If you have selected open button, this will open file in read-only format.

PATIENT MEDICAL RECORDS

PATIENT MEDICAL RECORDS AT A GLANCE

Screen: Patient Medical Records

OmniMD enables Providers to maintain record of their patients. Patient Medical Record module of OmniMD works as database that maintains personal and medical information along with Insurance information of patients. Through Patient Medical Records, a Provider can add, merge, import, export and search patient records.

> **Note:** A provider can also delete a patient. But before deleting the patient, the provider must ensure that there is no existing data related to the patient.

ADD NEW PATIENT

To add new patient

1. Click on Patient -> Add New Patient link. This will display Patient Info screen.

Screen: Add New Patient

2. Provide following information to add new patient in your records.

First Name	Type first name of patient. This is mandatory.
Last Name	Type last name of patient. This is mandatory.
Middle Initial	Type patient's middle initial name in this field.
SSN#	Enter SSN# of patient. This is mandatory.
Date of Birth	Click the calendar icon to select month, date and year. This is mandatory.
Gender	Select gender of the patient from the drop-down menu.
Work Status	Select work status of patient, as full time, part time etc from the drop-down menu.
Occupation	Type occupation of the patient.
Employer	Type employer name of the patient in which he/she is employed.
Employer Address	The address of the employer
Blood Group	Select blood group of patient from the drop-down menu.
Smoker	Whether the patient smokes or not.
Marital Status	Mrital status of the patient as married, single, divorced or legal separated, from the drop-down menu.
Attorney	Type the name of the attorney of patient.
Pharmacy	Select the pharmacy where the patient buys his/her medication, from the drop-down menu.
Referring Physician	Select the name of the physician who has referred the patient to the clinic, from the drop-down menu.
Pri. Physician	Enter the name of the default physician responsible for primary care of the patient.
Attending Physician	Select the name of the physician who has attended the patient, from the drop-down menu.
Visit Location	Select location of clinic where this record is getting added, from the drop-down menu.
Address 1	Enter first line of the address of patient.
Address 2	Enter the second line of address of the patient.
City	Type the city where the patient resides. This is mandatory.
State	Select the state where the patient resides, from the drop-down menu. By default, New York is selected.
Zip Code	Enter the zip code of the city where the patient resides.
Country	Select the country where the patient resides, from the drop-down menu. By default, USA is displayed.
Preferred Phone	Select the preferred phone as Cell Phone, Work Phone or Home Phone where the patient can be contacted, from the drop-down menu. By default, Cell Phone is selected.
Home phone	Type home phone number.
Work Phone	Type work phone number.
Cell phone	Type cell phone number
Email	Enter email of patient
Race	Select the race of patient, from the drop-down menu.
Significant Others	Enter additional significant information of the patient.
Driving License	Enter the driving license number of the patient.
Emergency Contact 1 & 2	Contact details of people that can be contacted on behalf of the patient in case of any medical emergency.
Signature on File	
Release of Info Signed	
Deceased	Tick the box if the patient has passed away.
Disable Health Alerts	Tick to indicate that the patient has chose not to receive health alerts.

Once all fields are filled, click on Save button or click on Save & Add Insurance button if you wish to add the insurance details for the same patient. This will add a patient record in OmniMD. –Or click on Cancel to discard adding new record.

MERGE PATIENT

To merge patient
  1. Click on Patient -> Merge Patient link. This is useful to control duplicate records of the same patient. After merging is complete, all records from the old patient chart will be transferred to the new patient record.

IMPORT PATIENTS USING .CSV FILE

Imagine adding 1000s of patient records in OmniMD that you have been using in legacy system. This can be done by importing data through *.CSV file.

To import patient records in OmniMD

1. Click on Patients -> Import Patients link. Alternatively, click on import patients using .CSV file link available on Patient Search Form screen.

Screen: Import Patients

2. Click on Browse to locate file.

3. Click on Import Patients button to import patient records.

Tip: Click on Guidelines link to view guidelines required to be followed while importing patient data.

EXPORT PATIENTS USING .CSV FILE

Similarly, you can export patient data to .csv file.

To export patient records

1. Click on export patients using .CSV file link available on Patient Search Form screen.

2. This will display a dialog box to save the file.

Screen: File Download

3. Click on Save button to save the file. Click on Open button to view the file. This will not save the file. -Or click on Cancel to discard export file.

4. Select the location where you want to save the file and click on Save.

SEARCH PATIENT

To search patient record

1. Click on Patients link. This will display Search Patient Form screen.

Screen: Search Patient

2. Enter first name, last name, SSN# in respective fields.
3. Select Gender of patient from drop-down.
4. Enter Chart# in Chart # field.
5. Select location of clinic.
6. Enter City, Phone and select State from respective fields.
7. Click on Search button to search patient's record matching search criteria.

Tip: It is not necessary to fill all fields. It depends on the search criteria that you want to make.

ELIGIBILITY SEARCH

You can validate the insurance records of a patient, by checking for their eligibility. OmniMD allows you to search for the eligibility status of a patient. If you edit a patient's eligibility status, it is updated in 72 hours.

To search for patient eligibility:

1. Click on Patients -> Eligibility Search link. This will display Search Patient Eligibility screen.

Screen: Patient Eligibility Search

2. Select the Provider whose patient's eligibility you want to search, from the drop-down menu. By default All Doctors is selected.
3. Select the payer associated with the insurance whose eligibility you wish to search, from the drop-down menu. By default All Payers is selected.
4. Click on Lookup to select the patient whose eligibility you wish to search.
5. Click on the calendar icons in the From and To fields, to select the period of the dates of service in which you wish to search the eligibility.
6. Click on the calendar icons in the From and To fields, to select the period of the eligibility check dates in which you wish to search the eligibility.
7. Select the eligibility status, as 'Eligible' 'Not Eligible', 'Patient Not Found' or 'Patient Not Responding' from the drop-down menu.
8. Select the order in which you want sort the search, as 'Date of Service' 'Eligibility Check Date' or 'Patient Name' from the drop-down menu.

9. Click on Search button. This will display the search results conforming to the entered search criteria, as shown in the Eligibility Search Results screen.

Tip: It is not necessary to fill all fields. It depends on the search criteria that you want to make. You can also search for records one day before the current date, two days before the current date, one week before the current date or one month before the current date, by clicking on the respective links.

Note: You can also search for the patient eligibility based on the Payer, by clicking on Payer-Wise Patient Eligibility Log.

Patient Eligibility Report

Eligibility Report
Payer-wise Patient Eligibility Log

Search Criteria: Clinic Name: OmniMD Medical Center

Patient Name	Eligibility Check Date	Date Of Service	Payer Name	OmniMD Error	Response	Reject Reason	Provider	View
Maria Fontanez	3/10/2006	3/10/2006	BCBS NY		Patient Not Found	Subscriber/Insured Not found	Ronald Sabraw	View
Bart Simpson	2/18/2006	2/18/2006	BCBS NY		Patient Not Found	Invalid/Missing Subscriber/Insured Name	Ronald Sabraw	View

Screen: Eligibility Search Results

10. This screen displays all eligibility details of the patient. Click on View to view the eligibility record details. This will display the Patient Eligibility Result screen.

Patient Eligibility Result

Fontanez, Maria		Gender Female	DOB	11/27/1968
Chart # FONMA0001		SSN # 572-30-9429	Phone	914-937-7328(H) 914-379-5294(O)
DOS 05/23/2005		Chief Complaint Blood in Urine		

Eligibility Check Date **5/23/2005**

Patient: Maria Fontanez	Payer: BCBS MA	****Payer is not active for this Facility. Please contact MedData Customer Service.**
Date Of Service	5/23/2005	
Patient Info		
Name	Maria Fontanez	
SSN	572-30-9429	
Date Of Birth	11/27/1968	
Gender	Female	
Subscriber Id	490035	

Screen: Patient Eligibility Result

PAYER-WISE PATIENT ELIGIBILITY LOG

To search for a patient's eligibility based on a payer:

1. Click on Payer-wise Patient Eligibility Log link on the Patient Eligibility Search screen. This will display the Payer-wise Eligibility Search screen.

Screen: Payer-wise Patient Eligibility Log

2. You can search for the eligibility based either on the Eligibility Check Date or on the Date of Service. By default, the Eligibility Check Date option is selected.
3. Select the Provider whose patient's eligibility you want to search, from the drop-down menu. By default All Doctors is selected.
4. Select the period of the eligibility check dates in which you wish to search the eligibility, by clicking on the calendar icons in the From Date and To Date fields.
5. Select the Insurance Carrier Type associated with the eligibility from the drop-down menu.
6. Click on Submit. This will display the search results conforming to the entered search criteria, as shown in the Patient Eligibility Log screen.

Tip: It is not necessary to fill all fields. It depends on the search criteria that you want to make. You can also search for records one day before the current date, two days before the current date, one week before the current date or one month before the current date, by clicking on the respective links.

Payer-wise Patient Eligibility Log

Eligibility Report
Payer-wise Patient Eligibility Log

Search Criteria: Doctor : 4010 (Ronald Sabraw)

Payer Name	Patient Name	Total Eligibility Check	Eligible	Not Eligible	Patient Not Found	Payer Not Responding
BCBS MA						
	Maria Fontanez	4	0	0	0	4
	Barbara Johnson	2	0	0	0	2
	Nicholas Diaz	2	0	0	0	2
	Brenda Smith	4	0	0	0	4
	Michele Cody	1	0	0	0	1
	Total :	13	0	0	0	13
BCBS MA						
	James Taylor	4	4	0	0	0
	Maria Fontanez	5	5	0	0	0
	Nancy Rivera	1	0	1	0	0
	Nicholas Diaz	1	1	0	0	0
	Brenda Smith	3	0	3	0	0
	Total :	14	10	4	0	0

Page 1 of 1   1

Screen: Payer-wise Patient Eligibility Log

7. This screen displays all the patient's eligibility details associated with the payer.

PATIENT DASHBOARD

Patient Dashboard is an interface that provides entire details of a patient. It enables you to view family history, medical history, insurance records and many more.
To access patient dashboard, click on Today's list, click on the patient name from list of patients to view dashboard of selected patient.

Explanation of Patient Dashboard screen

PERSONAL INFORMATION

Screen: Personal information

This part shows personal information of patient such as Name, Address, SS#, Phone, DOB, Age, Chart#, Ref. By and message alerts.

LINKS ON PATIENT DASHBOARD

Screen: Links on Patient Dashboard

Click on link to view details, such as click on Family History to view family history details of patient. Study in detail as follows.

NEW CASE/VISIT

1. Click on New Case/Visit link to create new case or visit.

Screen: New Case/Visit

Note: In case Insurance records of patients are changed, Provider must create a new case in the OmniMD. In this way, it helps in having latest insurance information while creating super bill and viewing other information. Creation of new case is must, even if it is a follow up visit.

2. Specify values of new case/visit
  a. This will display Name, Gender, and DOB, Chart #, SSN #and Phone of patient.
  b. Other values:

Patient Name	This is read-only field, showing name of patient.
New Case: Chief Complaint	If this is new case, then select this radio button and enter chief complaint in field provided.
New Visit : Of Case	If the visit is for already registered case, then select this radio button and select from drop down the reason for visit.
Doctor	Select Provider's name who is dealing case of this patient.
Location	Select where patient is taking treatment.
Time of Service	Select from drop down, start time and end time of new case/visit.
Date of Service	Select from icon the date on which patient was treated.
Referred By	If the patient is referred by other Provider, select his name by clicking Referred By action button.
Notes	Enter observations in Notes field that might be useful for next appointment.

3. Click on Save button to save details of new case/visit.

DEMOGRAPHICS

This shows personal records of patient in detail. Click on Demographics link to view personal details.

Cody, Michele	Gender Female	DOB	2/5/1945
Chart # CODMI0001	SSN # 756-44-9021	Phone	212-453-5753(H) 212-332-1234(C) 212-453-8754(O)

Modify Patient Profile   **Print View**

First Name	Michele	Address1	475 Tenth Avenue
Last Name	Cody	Address2	
Middle Initial		City	New York
SSN	756-44-9021	State	New York
Date of Birth	2/5/1945	Zip Code	10018
Gender	Female	Country	USA
Work Status	Full Time	Preferred Phone	Home Phone
Occupation	CEO	Call Preference Order	Do Not Call
Employer	F & R Foundation	Home Phone	212-453-5753
Employer Address		Work Phone	212-453-8754
Student Status	Not a Student	Cell Phone	212-332-1234
Blood Group	O+	Email	
Smoker	No	Race	White
Marital Status	Married	Significant Others	
Attorney		Driving License	
Pharmacy	B & P Pharmacy	Emergency Contact 1	
Referring Physician		Emergency Contact 2	
Pri. Care Physician		Signature on File	
Attending Physician	Dr. John Smith	Release of Info Signed	
Location	South Broadway	Deceased	No
		Disable Health Alerts	No
		Last Modified Date	3/8/2006
		Last Modified By	Dr. Ronald Sabraw

Screen: Demographics

Click on Modify Patient Profile to edit and make modification in details. Once modifications are done, click on Save button to save changes. You can also print details by clicking on Print View link. This will open details in new window. Click on File -> Print to print details. Click on Modify Patient Profile to change or update patient demographic information.

INSURANCE RECORDS

Click on **Insurance Records** link to view list of insurance policies taken by patient. Click on the policy name that you wish to modify. This will display the policy records in Edit mode. Alternately, you can click on the Edit link in the Action field. Update patient insurance details and click on Save button to save changes. Click on Check Availability to check if the patient's insurance eligibility exists or not. If it exists, then the Patient Eligibility Result screen is displayed, else the Patient Eligibility Check screen is displayed. Click on Add a New Insurance Record to add new insurance records.

Patient Insurance						
Cody, Michele	Gender Female		DOB	2/5/1945		
Chart # CODMI0001	SSN # 756-44-9021		Phone	212-453-5753(H) 212-453-8754(O)		

List of Patient's Insurance Policies :

Carrier / Policy	Group / Plan	Member/ Subscriber	Validity	Co-Pay Details	Action
Atena (43201)	Group: 74125	MemberID: 857-65-112A	Oct 18 2004 12:00AM to	CoPay: $10	**Edit**
Long-Term Care Insurance	Plan: A Medicare + Choice Private Fee For Service Plan	SubscriberID:	Oct 19 2005 12:00AM	Ann.Deduc: $0	Check Eligibil
Aetna US Healt...	Group: Group A	MemberID:	Dec 27 2002 12:00AM to	CoPay: $10	**Edit**
Primary HMO	Plan: Medical + Rx	SubscriberID:	Dec 26 2005 12:00AM	Ann.Deduc: $0	Check Eligibil
			Page 1 of 1	1	

Add a New Insurance record

Screen: Insurance Records

Patient Eligibility Check				
Cody, Michele	Gender Female	DOB	2/5/1945	
Chart # CODMI0001	SSN # 756-44-9021	Phone	212-453-5753(H) 212-453-8754(O)	

Patient Insurance Record does not Exist Or Not Enabled

Screen: Patient Eligibility Check

ALLERGIES

Click on Allergies link to add information about patient's allergies, reactions, severity and last occurrence. This will help Provider in medicating the patient. Click on Save button once al values have been filled.

Screen: Allergies

FAMILY HISTORY

Click on Family History link to view details of family in respect of any heredity, or trouble. You can edit the information and make modification in it. Also click on Print button to print details.

Screen: Family History

SOCIAL HISTORY

OmniMD offers two (2) options to enter the patient's social history. The default option is manual typing in or editing a pre-formatted set of social history indicators. Simply edit the already typed in content and press Save button to save the record. Click on Save, go the Medical History to go directly the medical history page.

Screen: Social History

ALTERNATIVELY, YOU CAN ALSO RECORD A PATIENTS SOCIAL HISTORY BY CLICKING EDIT IN DATASET VIEW.

Screen: Edit in Dataset View

Dataset view enables you to record the data through an intuitive point and click system. Datasets are listed under categories and are automatically highlighted by pointer motion. Click on Reported to record and add the information to the patients Social History.

MEDICAL HISTORY

Click on Medical History link to view details of family in respect of Problems, Past Medical History, and Immunization etc. You can edit the information and make modification in it. Also click on Print button to print details.

Screen: Medical History

CURRENT MEDICATION

Click on Current Medication link to view what current medication patient is taking. This is important as if patient turns for another kind of trouble, a Provider should know so that his new medication should not affect him in any case, example, resulting in any kind of allergy or side-affects.

Screen: Current Medication

Rx Drug History

To view prescription details, click on Rx Drug History link. You can modify particular prescription, view online and print same prescription.

Screen: Rx Drug History

PATIENT FLOW SHEET

This will display the dates on which services were rendered to patient. Click on the link, it will show vital signs of patient. Select date range to see whether services were rendered within specified.

Patient Flowsheet

Cody, Michele   Gender Female   DOB   2/5/1945
Chart # CODMI0001   SSN #   756-44-9021   Phone   212-453-5753(H)   212-332-1234(C)   212-453-8754(O)
DOS **05/01/2006**   Chief Complaint Lumbard Epiburd Steriod Injection

Date Of Service Range
Start Date 5/1/2006   End Date 5/1/2006   [Display]

DOS :	May 1, 2006	May 1	May 1	May 1	May 1	May 1	May 1
Drug							
OxyContin 40 mg	current	current	current	current	current	Q12H	current
predniSONE 10 mg	current	current	current	current	current	current	QD
Accupril 10 mg	current	current	current	current	current	current	current
Orinase 500 mg	current	current	current	current	current	current	current
diclofenac sodium 50 mg	current	current	current	current	current	current	1XHS
nedocromil 1.75 mg/inh	current	current	current	current	current	BID	current
acarbose 100 mg	current	current	current	current	current	current	current
Rezulin 300 mg	current	current	current	current	current	current	current
ECG						Pending	

	May 1, 2006	May 1	May 1	May 1	May 1	May 1	May 1
Vital							
Temperature (F)						140	98.6
Pulse (per min.)							18
SystolicBP (mm Hg)							180
DiastolicBP (mm Hg)							90
PainLevel (0-10)							
Weight (lbs oz)							156
BMI							4199.9
BodyFat							
Height (ft in)							5.11
Length							
HeadCircumference							

	May 1, 2006	May 1	May 1	May 1	May 1	May 1	May 1
Procedures							
						01120 i	99204 i

REFERRALS LIST

This will display if selected patient is referred to other provider. Click on the link and view all referrals. You can add new referrals also through this screen.

Screen: Referral List

	Note: Click on Add Referral to add referral.

TRANSCRIPTIONS

This will display all transcriptions that are related to patient so far. Click on Transcription link to view all transcriptions. Click on Today to view current date's transcription, yesterday's transcription, Last 2 days to view transcription made last two days from current date. You can view fax status and search all transcriptions. Click on My Templates to view templates that have been created by Provider.

Screen: Transcription

SCANNED DOCUMENTS

Click on Scanned Documents link to view all documents of patients that have been scanned so far. You can add new documents, list document types, add new document types and search document forms. You can also group documents as Reports and X-Ray type. To view documents listed by document date, click on List by Document Date link. All listed documents can be updated and viewed.

Screen: Scanned Documents

FORM RECORDS

Click on Form Records link to open search form records screen. This will enable you to search form records and also displays which form is used for the selected patient. For example, Abdominal Pain form is used to treat selected patient, Cody Michele. You can add new records from this screen after selecting the from the drop down.

◄◄◄ Specialty Form Records

| Cody, Michele | Gender Female | DOB | 2/5/1945 |
| Chart # CODMI0001 | SSN # 756-44-9021 | Phone | 212-453-5753(H) 212-332-1234(C) 212-453-8754(O) |

Add New Form Record [---- Select Form --- ▼] [Add Record]

Records found for search criteria:

Dt of Service	Patient Name	Form Name	Provider Name	Updated On	Updated By	View Record
07/27/2005	Cody Michele	Abdominal Pain Form	Dr. Ronald Sabraw	07/27/2005	Dr. Ronald Sabraw	View Record
	Cody Michele	Psychological Evaluation	Dr. Ronald Sabraw	02/04/2005	Dr. Ronald Sabraw	View Record
	Piggy Little	Follow Up	Dr. Ronald Sabraw	01/24/2005	Dr. Ronald Sabraw	View Record
	Piggy123 Little	Follow Up	Dr. Ronald Sabraw	01/24/2005	Dr. Ronald Sabraw	View Record
	Cody Michele	Follow Up Visit	Dr. Ronald Sabraw	01/24/2005	Dr. Ronald Sabraw	View Record
	Cody Michele	Abdominal Pain Form	Dr. Ronald Sabraw	12/28/2004	Dr. Ronald Sabraw	View Record
	Cody Michele	Initial Visit	Dr. Ronald Sabraw	11/29/2004	Dr. Ronald Sabraw	View Record
	Cody Michele	In Hospital Form	Dr. Ronald Sabraw	11/10/2004	Dr. Ronald Sabraw	View Record
	Cody Michele	Abdominal Pain Form	Dr. Ronald Sabraw	10/26/2004	Dr. Ronald Sabraw	View Record
	Cody Michele	Asthma Flow Sheet	Dr. Ronald Sabraw	10/26/2004	Dr. Ronald Sabraw	View Record
	Cody Michele	Abdominal Pain Form	Dr. Ronald Sabraw	10/08/2004	Dr. Ronald Sabraw	View Record
	Cody Michele	Asthma Chart	Dr. Ronald Sabraw	08/30/2004	Dr. Ronald Sabraw	View Record
	Cody Michele	Asthma Flow Sheet	Dr. Ronald Sabraw	08/30/2004	Dr. Ronald Sabraw	View Record

Screen: Form Records

SUPER BILLS

Click on Super Bill link to view/edit all super bills of selected patient.

Screen: Super Bills

Select the patient name and click on View/Edit link corresponding to selected patient name to view/edit super bill. You can also search and add new superbills on the fly in this screen.

PATIENT'S CASE AND VISITS

This section displays list of last 5 cases and visits made by patient, along with chief complaint, which Provider attended him and what progress is made till date for every case. As you keep adding actions to each case, it will represent in Progress column. Remember that each action added is respect to that case/visit. In case you wish to see all the cases and visits, click the Show All link.

Screen: Patient's Case and Visits

ADD PROGRESS

Progress in legends depends on adding action in each case.

To add action

1. Click on Add button corresponding to the case that is to be updated. This will show a list of actions that can be added.

Screen: Add Progress

2. Click on the action that is required to be added in case. This will open that particular screen. For example, select New Prescription, this will open Prescription screen. Create prescription and click on Save.
3. This will add ℞ in progress as this represents prescription is added. Similarly as you keep adding actions, progress column gets updated with those icons.

VISIT CLOSURE

VISIT CLOSURE IS RECOMMENDED IF ANY FOLLOW-UP VISIT IS REQUIRED FOR THE PATIENT.

TO ADD VISIT CLOSURE

1. As per Add Progress screen, click on Add Button and select Visit Closure link. This will display Visit Closure screen.

Screen: Visit Closure

2. Specify the values of Visit Closure

3. Visit closure screen display the date on which service was rendered.
   Other values

AS ON	The date on which visit closure is created. This read-only field displays current date and time.
Disposition	Select from the drop –down the deposition as required.
Next Evaluation	If follow up appointment is selected in disposition, select the next evaluation date from drop-down. And click on calendar icon to select date on which appointment is to be created.
Start & Ends	Enter start time in Starts field and end time in Ends field.
Referred By	Click on Referred By button to select referred provider's name.
Procedures	Select the procedure to be followed.
Recommendations	Type recommendation, if any that you want to given to patient.
Message Alert	Type message alert in this field.

Disposition	No follow-up planned
Next Evaluation	---Select----
	No follow-up planned
Starts	Return as specified
	Return if needed
Refer To	Telephone follow-up planned
	Referred to other physician
Procedures	Returned to referring physician
	Admit to hospital
Recommendation	Left against medical advice
	Expired
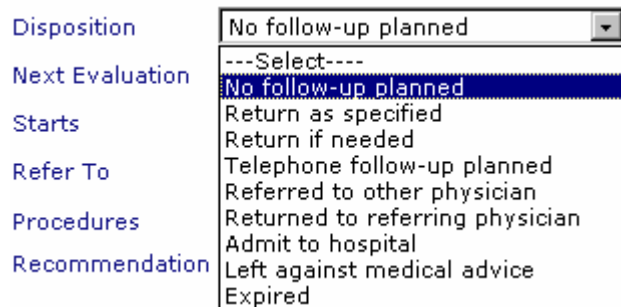
   Screen: Disposition

4. Once all information is filled in, click on Save button to save visit closure details.

COLLECT CO-PAY

TO COLLECT CO-PAY

1. As per Add Progress screen, click on Add Button and select Co-pay link. This will display Collect Co-Pay screen.

Screen: Collect Co–Pay

2. This screen displays the visit date for which patient is paying co-pay. This also lists insurance policies of patient.

3. Enter the co-pay amount in Co-Pay Collected in this Visit field and mention any note related to co-pay. If he/she has collected co-pay for advanced visits, then he/she has to clearly mention the amount and reason for collection of advanced co-pay. Click on [▶] to select the payment type.

4. Similarly, if payment is collected for any past visit on current date, select the collect co-pay action button of that visit from the dashboard. This information should be added for the past visit only and not to the current visit.

5. Click on Save button to save information. Co-pay icon will appear in progress column against particular date for which it was collected.

Note: If the clinic has collected a lumpsum amount for multiple past visits, this amount should be divided into respective visit amounts. Moreover, the amount and its related information must be clearly specified in the 'Payment Collected' and 'Notes' fields respectively.

Note: Once the payment has been collected and information added in the database, that section is frozen. In case a provider needs to modify the information, he/she has to enter new payment amount against the same appointment. This information is added in a new box. he/she also has to mention to discard the earlier payment in the 'Notes' field.

PATIENT'S FUTURE APPOINTMENTS

This section will list al future appointments.

Patient's Future Appointments

Dt.of Service			Chief Complaint	Physician	Procedures
07/18/2006	12:05 PM-12:20 PM	TUE	Spinal Cord Stimulators	Dr. Ronald Sabraw	
06/20/2006	12:05 PM-12:20 PM	TUE	Spinal Cord Stimulators	Dr. Ronald Sabraw	
05/31/2006	5:35 PM-6:05 PM	WED		Dr. Steve Russel	INVI
05/23/2006	12:45 PM-1:00 PM	TUE	Lumbard Epiburd Steriod Injection	Dr. Ronald Sabraw	
05/23/2006	12:05 PM-12:20 PM	TUE	Spinal Cord Stimulators	Dr. Ronald Sabraw	
05/09/2006	12:05 PM-12:20 PM	TUE	Spinal Cord Stimulators	Dr. Ronald Sabraw	
05/07/2006	9:45 AM-10:35 AM	SUN	Lower Back Pain	Dr. Ronald Sabraw	PHYS
05/03/2006	5:50 PM-6:05 PM	WED	Lower Back Pain	Dr. Ronald Sabraw	
05/03/2006	10:00 AM-10:15 AM	WED		Dr. Steve Russel	

Screen: Future appointments of patient

PATIENT'S PRIMARY INSURANCE DETAILS

This section displays insurance details of patient

Charts & Reports: Growth Charts

Patient's Primary Insurance Details

Payer / Policy	Group / Plan	Member/ Subscriber	Validity	Co-Pay Details	Action
Atena (43201)	Grp:	MemId:	Nov 19 1900 12:00AM to	Co-Pay:	Edit
Policy:11223333	Plan:	SubId:	Nov 19 1900 12:00AM	Ann.Deduc:	Eligibility

| | | | | | Delete Patient |

Screen: Insurance details

When a provider files the claim, by default, it goes to the Primary Insurance first and then to the Secondary Insurance. If the provider wants to claim from the Secondary Insurance first, then he/she needs to mention it in the 'Notes' field while entering Co-Pay details.
Click on Edit link if you wish to modify the insurance details. Click on Eligibility to check the insurance status of the patient.

TO VIEW GROWTH CHARTS

Click on Growth Charts link to view patient growth charts

Screen: Patient Growth Charts

PATIENT CASE DETAIL

To view details of a particular case:

1. Click on the case whose details you want to view, on the Patient's Case and Visits section of the Patient Case and Visits screen. This will display the Case Detail screen. OmniMD offers an intuitive point-and-click feature to capture patient details.

Screen: Case Detail

2. This screen displays all the details associated with the selected case. Click on the appropriate buttons to perform specific actions.
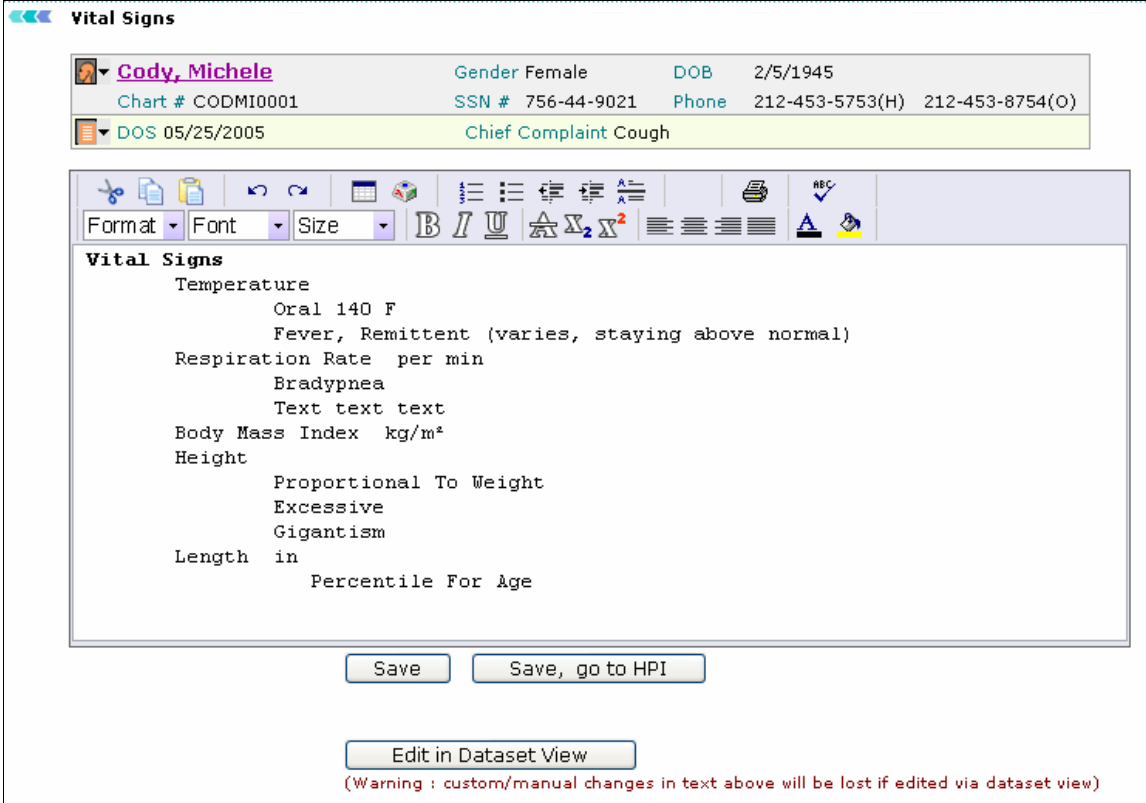
   ⬇ : Expands the menu to view details

   ⬛ : Collapses the menu to hide details

   ✏ : Edit text

ADD/MODIFY PATIENT CASE-RELATED INFORMATION

A provider can add or modify patient information related to a particular case.

To add/modify patient case-related information:

1. Click on the link whose case details you want to add on the Case Detail screen. For example, click on Vitals [°F] to add/modify details about vital signs of the patient for the selected case. This will display the Vital Signs Report screen.

Screen: Vital Signs Report

2. This screen displays all information regarding the vital signs of the patient in edit mode. Make the necessary formatting changes to the report using the editor tools. Select the data that you wish to format and use the required editor tool.

✂	This tool is used to cut selected data.
📋	This tool is used to copy selected data.
📋	This tool is used to paste the data that has been cut or copied.
↺	This tool is used to undo the previous action.
↻	This tool is used to redo the previous action that has been undone.
▦	This tool is used to insert a table in the report.
🎲	This tool is used to insert special characters in the report.
☰	This tool is used to number the data.
☰	This tool is used to bullet the data.
⬅	This tool is used to outdent the data.
➡	This tool is used to indent the data.
☰	This tool is used to insert a horizontal rule in the report.
🖨	This tool is used to print the displayed report.
✓	This tool is used to perform a spell check on the displayed data.
Format ▾	Select the format of the data from the drop-down menu.
Font ▾	Select the font face of the data from the drop-down menu.
Size ▾	Select the font size of the data from the drop-down menu.
B	This tool is used to display the data as Bold.
I	This tool is used to display the data as Italic.
U	This tool is used to display the data as Underlined.
A	This tool is used to display the data as Strikethrough.
X_2	This tool is used to display the data as a Subscript.
X^2	This tool is used to display the data as a Superscript.
≡	This tool is used to align the data to the left.
≡	This tool is used to centrally align the data.
≡	This tool is used to align the data to the right.
≡	This tool is used to align the data as justified.
A	This tool is used to select the font color of the data.
🪣	This tool is used to select the background color of the data.

3. Click on Save to save the information, and return to the Case Detail screen. Click on Save, go to HPI to save the vital signs information and go to the HPI related information of the patient.
4. Click on Edit in Dataset View to make modifications to the displayed elements of the vital signs information. This will display the Vital Signs Dataset Designer in edit mode.

Screen: Vital Signs Dataset Designer

5. This screen displays all the vital signs information entered for the patient in bold text. To select an element, click on Reported, or enter a default value if required, and click on Set. To remove a selected element or to clear a default value click on Clear.
6. Once you have made all the necessary additions/modifications, click on Continue. This will display the Vital Signs report with the modified information.

Note: If the value entered for a data element falls out of range for that element, then the 'Abnormal' alert is displayed.

VIEW CASE REPORT

To view a patient's case report:

1. Click on the Case Report link on the Case Detail screen. This will display the Case Report screen.

Screen: Case Report

> Note: A case report is generated only if some case-related information is entered for the case.

2. This screen displays the complete information about the patient for the selected case.
3. Click on Edit Report to make modifications to the report. This will display the Edit Report screen.

Vital Signs
Temperature 97.6 F
Pulse Rate 88 per min
Blood Pressure 130/81 mm Hg
Pain Level 7 (0-10)
Weight 181.6 lbs
Body Surface Area 1.94 m²
Body Mass Index 30.7 (Abnormal) kg/m²
Height 5' 4 1/2"

Prescriptions and Lab Orders

Klonopin 0.25 mg TAB, 1-2 Tab(s) PO, 1XHS for 1 month(s)
Start on: 05/02/2006, Qty: 60, Refills: 1, Brand Name Medically Necessary

Relafen 500 mg TAB, 1 Tab(s) PO, BIDWM for 1 month(s)
Start on: 05/02/2006, Qty: 60, Refills: 0, Substitute Permissible

Diagnoses

Procedures

Disposition
As On   05/02/2006 8:58AM
Disposition   Return as specified
Next Evaluation   06/05/2006, Starts at 3:45PM, ends at 4:05PM
Refer To
Recommendation

Sign Off	Edit Report	Print Report

Screen: Edit Report

4. Make the necessary changes and click on Save.
5. Click on Sign-Off Report on the Case Report screen to sign off the report.

Note: Once the case report is signed-off, the sign-off cannot be undone.

Note: Once the case report is edited or signed-off, the case related data cannot be
       edited.

CHARGE CAPTURE

CHARGE CAPTURE AT A GLANCE

Screen: Charge Capture

Under Charge capture you can Create Super Bill, Search Super Bill, Add New Favorite, Favorite Super Bills, add patient payment and Setup CPT/ICD Code Favorite Lists.

CPT/ICD Set Up

Commonly used CPT codes of each specialty are inbuilt into the system with easy retrieval facility. You can save your own list of favorite codes for easy access.

CPT Setup

Add/Edit CPT Favorites

To add CPT Favorites

1. Click on Add/Edit CPT Favorites link on Charge Capture Home. This will open Add/Edit CPT Favorites screen.

Screen: Add/Edit CPT Favorites

2. Select category from drop-down. This will refresh the link and show all CPT Codes of that selected category.
3. Type new CPT Code in Add New CPT Codes (, separated) in this category field.
4. Click on Submit button once all fields have been added. This will add new CPT code in the category.

To add CPT Code from Your Specialty Tree

1. Click on Add CPT Code from Your Specialty CPT tree link available on Add/Edit CPT Favorites screen. This will open a dialog box. Select the CPT Code and click on Submit button.
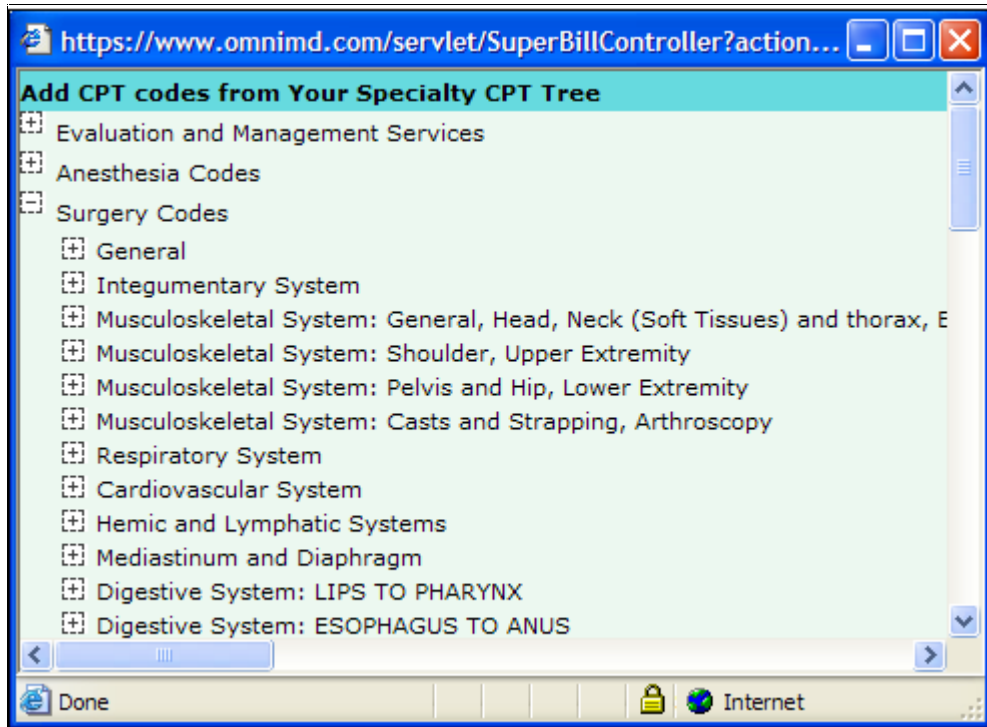
Screen: CPT Code from Your Specialty Tree

ADD CPT CODE FROM ALL SPECIALTIES TREE

To add CPT Code from All Specialties Tree

1. Click on Add CPT Code from All Specialties CPT tree link available on Add/Edit CPT Favorites screen. This will open a dialog box. Select the CPT Code and click on Close button.
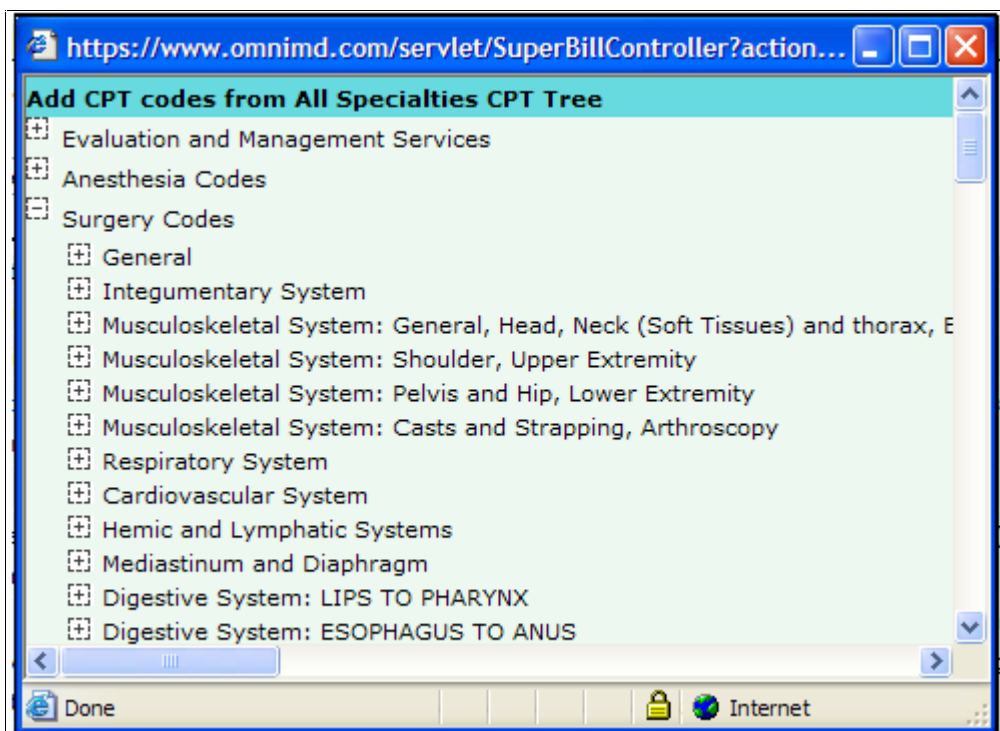
Screen: CPT Code from All Specialties Tree

EDIT CPT CODES

You can edit and modify Categories under CPT codes.

To edit and modify CPT codes

1. Click on Add/Edit CPT Favorites link on Charge Capture Home. This will open Add/Edit CPT Favorites screen.
2. Select the category that you wish to modify. This will refresh the link and display the CPT codes in selected category.
3. Uncheck the CPT Code that you wish to remove from the category and click on Submit button.

Screen: Uncheck the CPT code

4. This will remove selected CPT code from the category.

ADD NEW CATEGORY

Charge Capture module privileges Providers with ability of adding new categories for CPT Codes.

To add new category

1. Click on Add/Edit CPT Favorites link on Charge Capture Home. This will open Add/Edit CPT Favorites screen.

2. Select --New Category--from drop down menu of Category field.
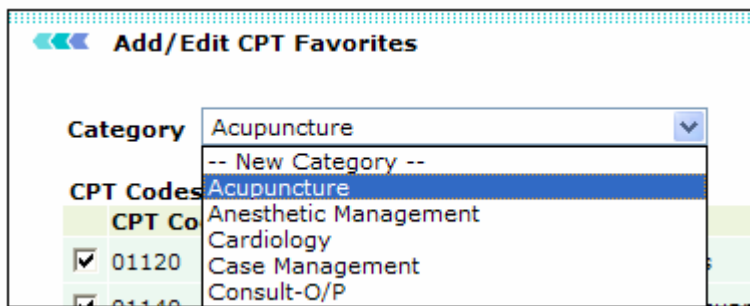
Screen: Add New Category

3. Click Yes on the dialog box to add new category else click Cancel.

4. Fill in the fields as applicable:
    a. Category: By Default, this field will show new category. However, you can select another category and proceed with adding CPT codes.
    b. New Category name: enter the name for new category.
    c. Add New CPT Codes (, separated) in this category: Type the CPT Codes that you wish to enter in the new category.

Tip: You can add CPT Codes from Your Specialty Tree and All Specialties Trees links.
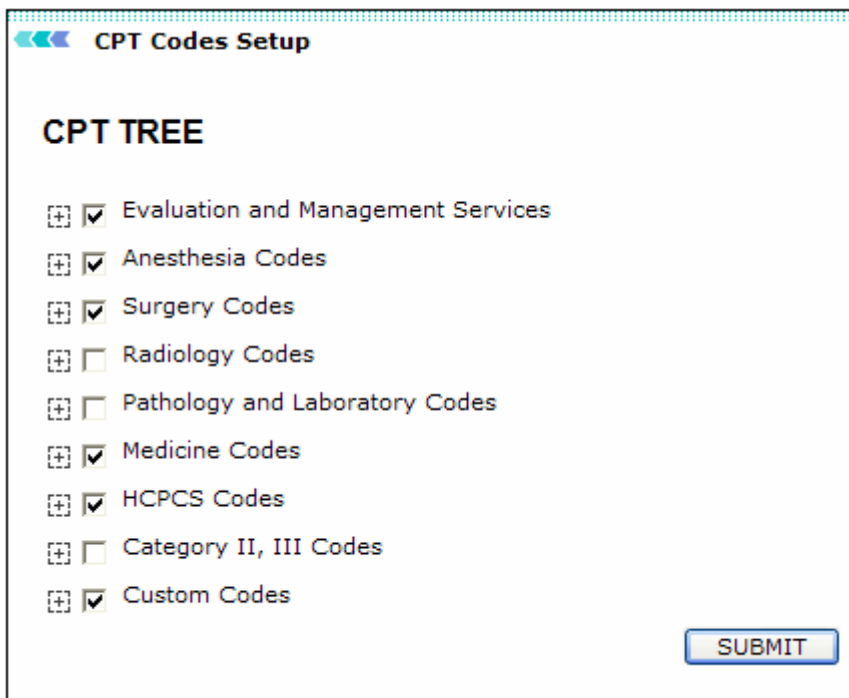
5. Click on Submit button once all fields are filled in.

Setup Your Specialty CPT List

Providers can set up their CPT List. This helps them in easy retrieval of favorite codes.

To setup your specialty list

1. Click on Setup Your specialty CPT List link available on Charge Capture Home screen. This will open CPT Codes Setup screen that displays CPT TREE category-wise.

Screen: CPT TREE

2. Expand the category and select the code that you wish to enter in specialty list.

3. Once all required CPT Codes have been selected, click on Submit button.

ICD Setup

Add/Edit ICD Favorites

To add ICD Favorites

1. Click on Add/Edit ICD Favorites link on Charge Capture Home. This will open Add/Edit ICD Favorites screen.

Screen: Add/Edit ICD Favorites

2. Select category from drop-down. This will refresh the link and show all ICD Codes of that selected category.

3. Type new ICD Code in Add New ICD Codes (, separated) in this category field.

4. Click on Submit once all fields have been added. This will add new ICD code in the category.

ADD ICD CODE FROM YOUR SPECIALTY TREE

To add ICD Code from Your Specialty Tree

1. Click on Add ICD Code from Your Specialty ICD tree link available on Add/Edit CPT Favorites screen. This will open a dialog box. Select the ICD Code and click on Close button.
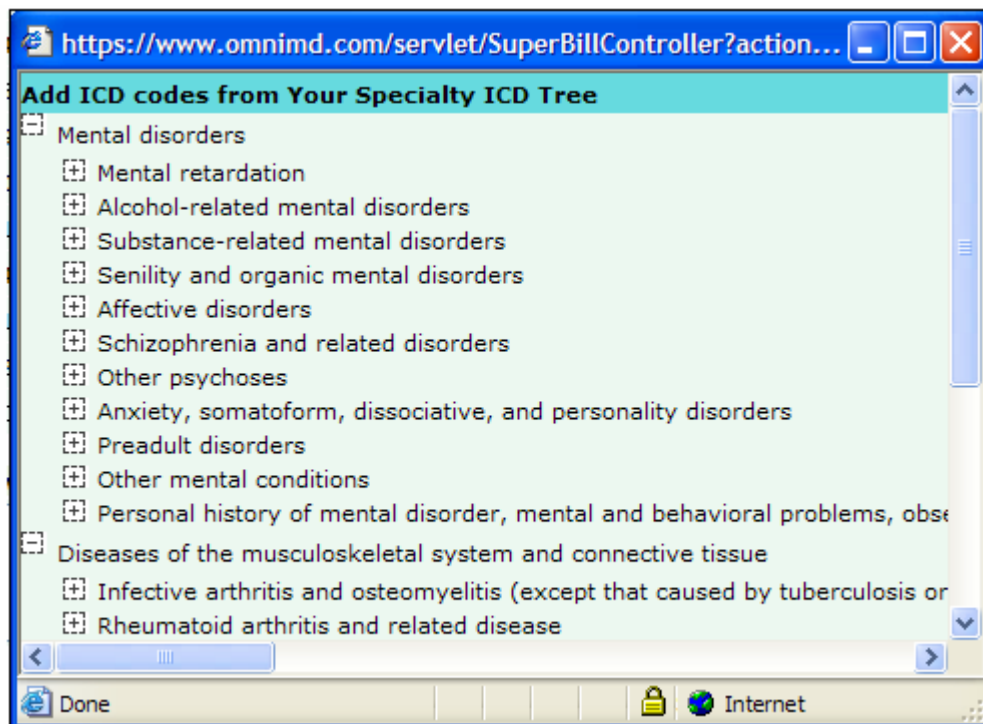
Screen: ICD Code from Your Specialty Tree

ADD ICD CODE FROM ALL SPECIALTIES TREE

To add ICD Code from All Specialties Tree

1. Click on Add ICD Code from All Specialties ICD tree link available on Add/Edit ICD Favorites screen. This will open a dialog box. Select the ICD Code and click on Close button.
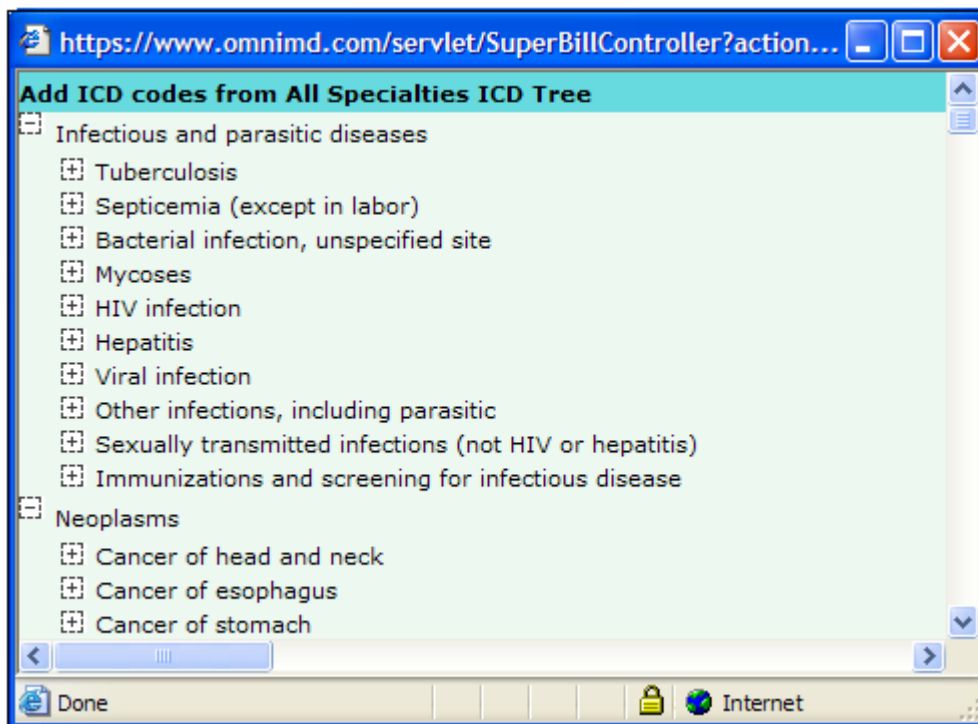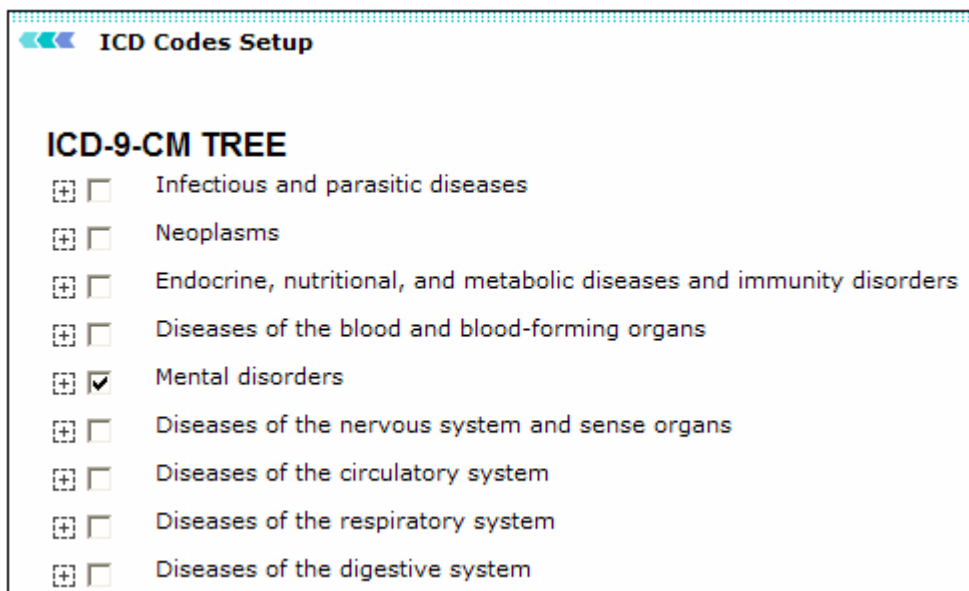
Screen: ICD Code from All Specialties Tree

EDIT ICD CODES

You can edit and modify Categories under ICD codes.

To edit and modify ICD codes

1. Click on Add/Edit ICD Favorites link on Charge Capture Home. This will open Add/Edit ICD Favorites screen.
2. Select the category that you wish to modify. This will refresh the link and display the ICD codes in selected category.
3. Uncheck the ICD Code that you wish to remove from the category and click on Submit button.

Screen: Uncheck the ICD code

4. This will remove selected ICD code from the category.

ADD NEW CATEGORY

Charge Capture module allows Providers with the ability of adding new categories for ICD Codes.

To add new category

1. Click on Add/Edit ICD Favorites link on Charge Capture Home. This will open Add/Edit ICD Favorites screen.
2. Select --`New Category`--from drop down menu of Category field.

Screen: Add New Category

3. Click Yes on the dialog box to add new category else click cancel.
4. Fill in the fields as applicable:
   a. Category: By Default, this field will show new category. However, you can select another category and proceed with adding ICD codes.
   b. New Category name: enter the name for new category.
   c. Add New ICD Codes (, separated) in this category: Type the ICD Codes that you wish to enter in the new category.

Tip: You can add ICD Codes from Your Specialty Tree and All Specialties Trees links.

5. Click on Submit button once all fields are filled in.

Setup Your Specialty ICD List

Providers can set up their ICD List. This helps them in easy retrieval of favorite codes.

To setup your specialty list

1. Click on Setup Your specialty ICD List link available on Charge Capture Home screen. This will open ICD Codes Setup screen that displays ICD TREE category-wise.
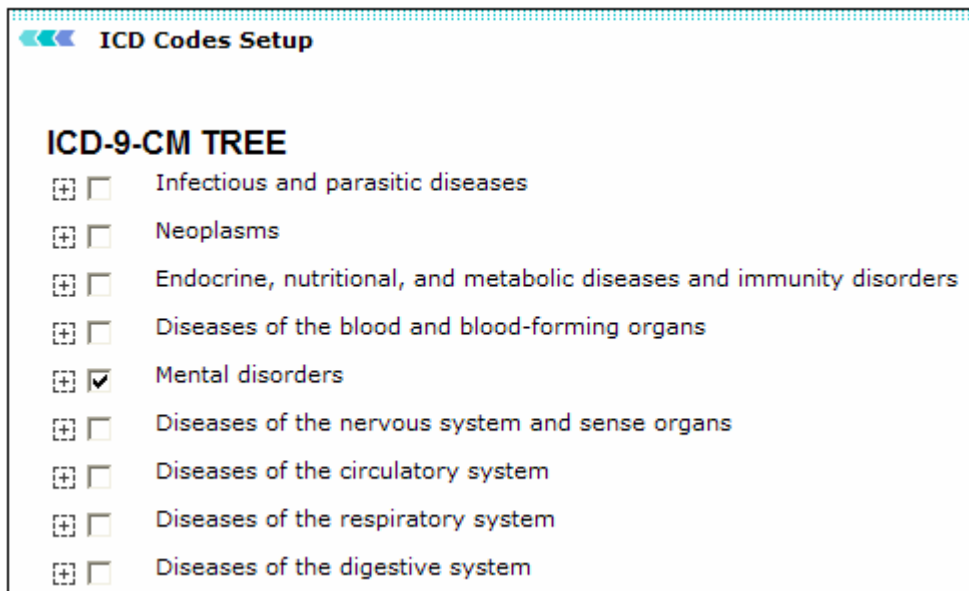
Screen: CPT TREE

2. Expand the category and select the code that you wish to enter in specialty list.

3. Once all required ICD Codes have been selected, click on Submit button.

VIEW CPT FAVORITES

A Provider can view and revise the CPT Codes maintained by him as favorites. To view CPT Favorites, click on View CPT Favorite's link available on Charge Capture Home screen.

CPT Code	Description
CPT Favorites View	**Add/Edit CPT Favorites**
CPT Code Description	
Category: Acupuncture	
01120	Anesthesia for procedures on bony pelvis
01140	Anesthesia for interpelviabdominal (hindquarter) amputation
20936	Autograft for spine surgery only (includes harvesting the graft); local (eg, ribs, spinous process, or laminar fragments) obtained from same incision
20974	Electrical stimulation to aid bone healing; noninvasive (nonoperative)
22554	Arthrodesis, anterior interbody technique, including minimal diskectomy to prepare interspace (other than for decompression); cervical below C2

Screen: View CPT Favorites

This show all CPT Codes maintained under each category.

Today's List | Messages | My Profile | Clinic | Calculators | Invoices | Downloads | Logout

CPT Favorites View

Add/Edit CPT Favorites

CPT Code	Description
CPT Code Description	
Category: Acupuncture	
01120	Anesthesia for procedures on bony pelvis
01140	Anesthesia for interpelviabdominal (hindquarter) amputation
20936	Autograft for spine surgery only (includes harvesting the graft); local (eg, ribs, spinous process, or laminar fragments) obtained from same incision
20974	Electrical stimulation to aid bone healing; noninvasive (nonoperative)
22554	Arthrodesis, anterior interbody technique, including minimal diskectomy to prepare interspace (other than for decompression); cervical below C2
99203	Office or other outpatient visit for the evaluation and management of a new patient, which requires these three key components: a detailed history; a detailed examination; and medical decision making of low complexity. Counseling and/or coordination of ca
99214	Office or other outpatient visit for the evaluation and management of an established patient, which requires at least two of these three key components: a detailed history; a detailed examination; medical decision making of moderate complexity. Counseling
Category: Anesthetic Management	
99141	Sedation with or without analgesia (conscious sedation); intravenous, intramuscular or inhalation
Category: Cardiology	
36415	Routine venipuncture or finger/heel/ear stick for collection of specimen(s)
75722	Angiography, renal, unilateral, selective (including flush aortogram), radiological supervision and interpretation
75724	Angiography, renal, bilateral, selective (including flush aortogram), radiological supervision and interpretation
75726	Angiography, visceral, selective or supraselective, (with or without flush aortogram), radiological supervision and interpretation

Screen: Details of CPT Favorites

VIEW ICD FAVORITES

In a same way, a Provider can view and revise the ICD Codes maintained by him as favorites.

To view ICD Favorites

1. Click on View ICD Favorite's link available on Charge Capture Home screen.

ICD Favorites View

Add/Edit ICD Favorites

ICD Code	Description
Category: CANCER	
781.2	ABNORMALITY OF GAIT
721.1	CERVICAL SPONDYLOSIS WITH MYELOPATHY
723.1	CERVICALGIA
722.4	DEGENERATION OF CERVICAL INTERVERTEBRAL DISC
174.9	MALIGNANT NEOPLASM OF BREAST (FEMALE) UNSPECIFIED SITE
162.5	MALIGNANT NEOPLASM OF LOWER LOBE BRONCHUS OR LUNG
162.2	MALIGNANT NEOPLASM OF MAIN BRONCHUS
162.4	MALIGNANT NEOPLASM OF MIDDLE LOBE BRONCHUS OR LUNG
183.0	MALIGNANT NEOPLASM OF OVARY
162.3	MALIGNANT NEOPLASM OF UPPER LOBE BRONCHUS OR LUNG
V11.0	PERSONAL HISTORY OF SCHIZOPHRENIA
Category: Cardiology	
421.1	ACUTE AND SUBACUTE INFECTIVE ENDOCARDITIS IN DISEASES CLASSIFIED ELSEWHERE
436	ACUTE BUT ILL-DEFINED CEREBROVASCULAR DISEASE

Screen: ICD Favorite Link

SETUP CPT CHARGES

You can set up charges for commonly used CPT codes that are inbuilt into the system. To set up charges for CPT, click on Setup CPT Charges link on Charge Capture Home screen. This will open Setup CPT Charges screen that shows list of CPT Favorites added in the CPT Favorites.

Screen: Setup CPT Charges

CREATE SUPER BILL

To create super bill

1. Click on Charge Capture-> Create Super Bill. Alternatively, click on Create Super Bill link available on Home Page of Charge Capture. This will open Super bill screen.

Screen: Create Super Bill

2. Fill in the fields as applicable
   Patient Name: click on Patient button to select patient name. OmniMD helps you in searching patient name very quickly; for example, if you are creating super bill for patient who have visited 2 days back, select his name from Last 2 days link. You can also search name from Search link. Sometimes patient visit without taking appointment in case of emergency, then you can add them from Add Patient link.

> **Note:** Once patient is selected, a message will appear to add information of earlier super bill. Click on Yes if you want to create same type of super bill else click on Cancel.

 a. Date of Service: click on New DOS to select date of service. This is the date on which patient visited Provider for treatment.

 b. Time of Service: the time at which Provider consulted patient should be filled in this field.

 c. Date of Admit: In case patient was admitted, enter month, date and year on which he/she was admitted.

 d. Duration: Enter the duration of the visit.

 e. Location: Enter location of hospital in which appointment was carried.

 f. Referring Doctor: In case other Provider referred patient, click on Referred By button to select his name.

 g. Referral Authorization Code: Enter authorization code provided by Provider.

 h. Date of Discharge: Enter month, date and year on which patient was discharged. This will be filled if date of admitted is also filled in.

 i. Status: While creating super bill, status will be pending, this will become completed when Provider receive his fees from insurance company.

> **Note:** Once the SuperBill is created, the provider should not change the status of the bill. he/she should leave it as default. The status will be updated by the billing team once their job is completed.

3. Three options are given to add CPT Code in Super Bill.

 a. CPT Favorites: Click on the CPT Favorites link to display CPT Codes added in favorite's list. Click on the CPT code to select and add in Super Bill.

 b. CP List: This shows the entire list of CPT Codes entered in OmniMD.

 c. Search CPT: Click on Search CPT if you do not find any CPT Code listed. Enter CPT Code or Text that you want to search and click on Submit button. This will list CPT as per search criteria.

Screen: CPT List

4. Check the CPT that you want to add and click on Add button. This will get added in Selected CPT List section.

5. E&M: These are Evaluation and Management Services associated with treatment.

Screen: E & M

6. If any visit that included Modifiers, click on Modifiers and Quantity to add them.

Screen: Modifiers & Quantity

7. Click on Next button.
8. Three options are given to add ICD Code in Super Bill.
    a. ICD Favorites: Click on the ICD Favorites link to display ICD Codes added in favorite's list. Click on the ICD code to select and add in Super Bill.
    b. ICD List: This shows the entire list of ICD Codes entered in OmniMD.
    c. Search ICD: Click on Search ICD if you do not find any ICD Code listed. Enter ICD Code or Text that you want to search and click on Submit button. This will list ICD as per search criteria.

9. Check the ICD that you want to add and click on Add button. This will get added in Selected CPT List section.
10. Click on Next button. Select CPT Code and check ICD name. Click on Link with selected CPT button.
11. Click on Save Super Bill button.

Note: To remove selected CPT Code, select CPT and click on Remove CPT button.
        To remove selected ICD Code, select ICD Code and click on Remove ICD Code.

Note: You can click on Back button on move to previous screen in super bill.

Note: Once the super bill is created and status changed from Pending to the appropriate status, no further modifications can be made to it. Only a super bill with 'status Pending can be edited. If a provider needs to modify any super bill, he/she will have to disable that super bill and create a new one. The billing team can then refer to the new super bill.

CREATE FAVORITE SUPER BILL

Providers are privileged with creating their favorite super bill. Favorite Super Bill works as a template for Provider so that they do not need to fill same information every time.

To create super bill through favorite super bill

1. Select favorite super bill from Use field available on Charge Capture Home screen.

Screen: Create Super Bill from Favorite Super Bill list

2. Once template is selected, click on Create Super Bill link. This will open Super Bill screen.

3. Fill in the fields as applicable. These fields are described in Create Super Bill.

SEARCH SUPER BILL

You can always search super bills that have been created. To do this, follow the steps as explained.

To search super bill

1. Click on Charge Capture - > Search Super Bill. This will open Super Bill Search Form Screen. You can enter criteria for searching a super bill based on its details. Additionally, you can also search a super bill on the basis of the payments made by a patient, from this screen.

Screen: Search Super Bill

2. To search for a super bill based on its details, fill in the fields as applicable:

    a. Doctor: Select the name of the Provider, from the drop-down menu.
    b. Patient Name: Click on Lookup to select name of patient for whom super bill was created.
    c. Location: Select the location where bill was created, from the drop-down menu.
    d. Date of Service: Enter Date of Service. In From field, select the month, date and year from which service began and in To field, select month, date and year on which treatment was completed.
    e. Date Created/Modified: Enter the date range when the super bills that you wish to search, were created or modified.
    f. Status: Select the status of super bill from the drop-down menu. See the screen below for various status of super bill.

Screen: Status of super bill

    g. Order By: In this field, select the field by which you want to sort and display search results.

3. Once all fields are filled in, click on Search button. This will open Super Bill List displaying the search conforming to entered search criteria.

4. To search for a super bill based on payments made by a patient, fill in the fields as applicable:

    a. Doctor: Select the name of the Provider, from the drop-down menu.
    b. Patient Name: Click on Lookup to select name of patient for whom super bill was created.
    c. Location: Select the location where bill was created, from the drop-down menu.
    d. Date of Payment: Enter the period of the payments that you wish to search.

e. Date of Service: Enter Date of Service. In From field, select the month, date and year from which service began and in To field, select month, date and year on which treatment was completed.

f. Order By: In this field, select the field by which you want to sort and display search results.

5. Once all fields are filled in, click on Search button. This will display payments made by the selected patient based on the entered search criteria.

Note: You can click on Search Super Bill on ICD code/Description link to search super bills based on ICD codes or description.

ADD NEW FAVORITE SUPER BILL

Providers can make their own favorite super bills as template, which are built on chief complaint basis. The super bill templates are also customized as per specialty.

To add new favorite

1. Click on Charge Capture -> Add New Favorite. This will show Super Bill screen.

Screen: Add New Favorite Super Bill

2. Fill in the fields as applicable:
    a. Chief Complaint: Enter the chief complaint for which you wan to create template.
    b. Double click on CPT to get selected in Selected CPT Codes.

3. To add modifiers, select CPT and click on Modifiers and Quantity button and check the modifier and enter the quantity for that modifier.

4. Click on Next. Select ICD Code and click on Next button.

5. Link ICD Codes with CPT Code. Click on Link ICDs with selected CPT button.

6. Once all fields are filled in, click on Save Super Bill button.

FAVORITES SUPER BILLS

To view favorite super bills

1. Click on Charge Capture -> Favorite Super Bill. This will open Favorite Super Bill screen.

Screen: Favorite Super Bill

2. Check super bill that you want to view and click on View Checked Super Bills button. This will open all checked super bills in another screen. You can click on one super bill and view that.

Multiple SuperBills View

Chief Complaint		Neck Pain		

CPT Code	ICD Codes	Modifiers	Quantity	Charge
20974	162.4		1	$0
22845	162.5		1	$0

Chief Complaint		Oxygen Continuous	

CPT Code	ICD Codes	Modifiers	Quantity
31200	493.21		1
31201	493.21		1

Screen: Multiple Super Bills

View Super Bill

Chief Complaint   Aneurysm

List of ICD and CPT codes :

CPT Code	ICD Codes	Modifiers	Quantity	Charge
99214			1	$

▶ **Create Super Bill**
▶ **Search Super Bills**

Screen: Single Super Bill

Note: From this screen also, you can create and search super bills.

ADD PATIENT PAYMENT

1. Click on Add Patient Payment. This will open Patient Payment Info screen.

Screen: Patient Payment Info

EDIT SUPER BILLS

To edit super bill

1. Search the super bill that you want to edit. From the list of displayed super bills, select the super bill and click on Edit. This will open Favorite Super Bill screen.

Superbill List

New Superbill   Search Superbills

Search Criteria:
Doctor : 4010 (Ronald Sabraw)   Date of Service: From 5/1/2006
To 5/1/2006

Patient	CPT Codes	Provider	DOS and Time	Status	Location	View
☐ Capshaw, John	00546,10022,10040	Dr. Ronald Sabraw	5/1/2006 1:30 PM	Pending	Bellnorth C...	View / Edit
☐ Capshaw, John	10022	Dr. Ronald Sabraw	5/1/2006 1:30 PM	Completed	Bellnorth C...	View
☐ Capshaw, John	10021,10022,99201	Dr. Ronald Sabraw	5/1/2006 1:30 PM	Completed	Bellnorth C...	View
☐ Capshaw, John	10021,10022,99211	Dr. Ronald Sabraw	5/1/2006 1:30 PM	Pending	Bellnorth C...	View / Edit
☐ Capshaw, John	99204,99354	Dr. Ronald Sabraw	5/1/2006 1:30 PM	Pending	Bellnorth C...	View / Edit
☐ Capshaw, John	10021,10022,99211	Dr. Ronald Sabraw	5/1/2006 1:30 PM	Completed	Bellnorth C...	View
☐ Cody, Michele	10021,10022	Dr. Ronald Sabraw	5/1/2006 1:00 PM	Completed	Bellnorth C...	View
☐ Fontanez, Maria	36415,92960,92970	Dr. Ronald Sabraw	5/1/2006 12:20 PM	Pending	Bellnorth C...	View / Edit
☐ Johnson, Barbara	10021,00546,10022	Dr. Ronald Sabraw	5/1/2006 11:35 AM	Completed	Bellnorth C...	View
☐ Williams, Kurt	10021,10022,99211	Dr. Ronald Sabraw	5/1/2006 8:45 AM	Pending	Bellnorth C...	View / Edit
☐ Williams, Kurt	10021,10022,99211	Dr. Ronald Sabraw	5/1/2006 8:45 AM	Pending	Bellnorth C...	View / Edit
☐ Fontanez, Maria	99243,99354	Dr. Ronald Sabraw	5/1/2006 8:40 AM	Pending	South Broa...	View / Edit
☐ Fontanez, Maria	10022	Dr. Ronald Sabraw	5/1/2006 8:30 AM	Pending	South Broa...	View / Edit
☐ Select All						

Screen: Edit Super Bill

2. Make modifications in the bill and click on Save Super Bill button.

Note: You can edit only those super bills whose status is 'Pending'.

DOCUMENT MANAGEMENT

DOCUMENT MANAGEMENT AT A GLANCE

The Document Manager allows the clinic to store vital patient documents such as X-Ray's, Paper Reports, and Lab Reports etc. securely within the OmniMD Suite. It is a powerful but simple way to have access to all vital documents right at one place from various locations over the Internet.

Screen: Document Management

ADD NEW DOCUMENTS

To add new documents
1. Click on Documents -> Add New Document. This will open Documents screen.

Screen: Add Documents

2. Fill in the fields as applicable:
   a. Patient Name/Others: Click on Patient button and select patient from the dialog box. You can select patient Today's Patient or Last 2 days patients. You can also search patient and add a new patient.
   b. Date of Service: Click on New DOS button to select date of service.
   c. Document Title: Enter title for document.
   d. Document Description: Enter details of the document.
   e. Date on Document: The date on which document was created.
   f. Document Type: From drop-down list, select document type.
   g. File Name(s) *(At least one required): You need to select at least one file to add in document. Click on Browse to locate and attach the document.
   h. Doctor Name: Select Provider's name from drop-down list.
   i. Referred by: Select provider name if provider refers this document.
   j. Scanned By: Enter name of the person who have scanned the documents.
3. Once all fields have been filled in, click on Submit button to add document, else click on Clear button to clear all contents entered in the document.

Tip: Fields that are marked with * are compulsory fields and should be filled in to complete the document.

SEARCH DOCUMENTS

To search documents

1. Click on Documents -> Search Documents. This will open Search Documents screen.

Screen: Search Documents

2. Fill in the fields as applicable
    a. Patient Name/Others: Click on Patient button and select patient from the dialog box. You can select patient Today's Patient or Last 2 days patients. You can also search patient and add a new patient.
    b. Date on Document: Select the starting date from From field and end date from To field. You can select Last 2 weeks dates, Last Month or Last Quarter dates from the links associated with the field.
    c. Document Type: Select the kind of document type you want to search.
    d. Select Doctor: From drop-down menu, select the Provider whose document you want to search.
    e. Search Keywords: In this field, enter the search parameters and select the search condition associated with parameters. For example, enter Blood report in search parameter and select exact phrase as condition. With this you need to select whether you want to make search on Document Title or Document Title and Document Description.
    f. Referred By: If the search is required to include any referred Provider, type the name of Provider in this field.

3. Once all fields are filled in, click on Search button, else click on clear. This will clear all contents in search screen.

This will display search results on the basis of the information filled in the search screen.

Tip: It is not necessary to fill all fields. It depends on the search criteria that you want to make.

LIST DOCUMENT TYPES

To list document types
1. Click on Documents -> List Document Types. This will open Search Document Type screen.
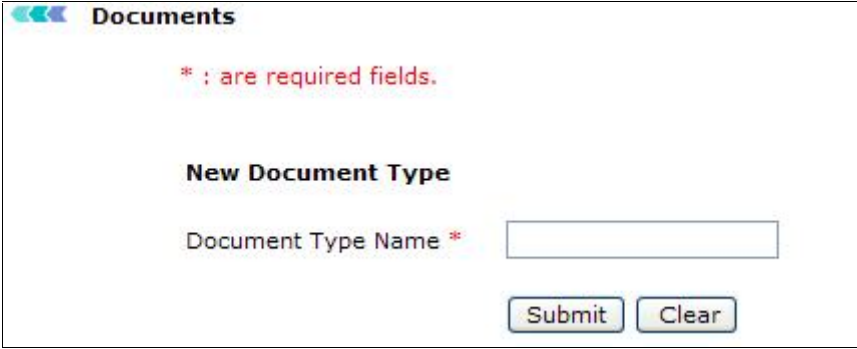
Screen: Search Document Type

2. This will display list of all document types existing in the Document Management Module.
3. Click on Edit button corresponding to document type that you wish to edit. Make required changes and click on Submit. –Or click on Clear Button to clear the name of document type and add new name to it. This will remove existing document type and add new document type.

ADD NEW DOCUMENT TYPE

To add new document type

1. Click on Documents -> Add New Document Type. This will open Documents screen.

Screen: Add Document Type

2. Type the name of the document type and click on Submit button, else click on Clear button. Clear button will clear the name of the document type entered in the field.
3. This will add new document type in the Document Management Module.

TRANSCRIPTIONS

TRANSCRIPTIONS AT A GLANCE

This feature monitors all the transcriptions dictated by a provider. Click on the Transcription link to view a list of transcriptions of the logged in provider. This list includes only those dictations that have been transcribed by OmniMD and sent back to the provider for review. By default, their status (Page 128) is 'Under Review'.

Transcription Search Results
List shows only the Transcriptions "Under Review"

Search Criteria:
Transcription Status: Under Review
Transcription Count: 19

Search All Transcriptions
Today Yesterday Last 2 days (by DOS)
My Templates   View Fax Status
Download Excel List

	Dt.of Service Dt. Dictated Dt.Translated	Doctor	Patient	Status	Template	# Lines # Pages	
☐	S:5/1/2006 D: 5/2/2006 T: 5/2/2006	Steve Russel Code: 4013	Cody, Michele SSN:	Under Review	CONSULT REPORT 4013P163418295.wav	38 Lines 1 Pages	View Options
☐	S:5/1/2006 D: 5/2/2006 T: 5/2/2006	Steve Russel Code: 4013	Fontanez, Maria SSN:	Under Review	CER LAMINAR EPI STE 4013P163490467.wav	34 Lines 2 Pages	View Options
☐	S:5/1/2006 D: 5/2/2006 T: 5/2/2006	Steve Russel Code: 4013	Cody, Michele SSN:	Under Review	INITIAL VISIT 4013P163417868.wav	59 Lines 2 Pages	View Options
☐	S:5/1/2006 D: 5/2/2006 T: 5/2/2006	Steve Russel Code: 4013	Fontanez, Maria SSN:	Under Review	CER LAMINAR EPI STE 4013P163487038.wav	34 Lines 2 Pages	View Options

☐ **Select All**

↘ **View checked transcriptions as single MS Word doc** [!]
↘ **Sign-off all checked transcriptions**

Re-import Options:

▶ **Re-import transcriptions using File Upload**

Page **1** of **1**   **1**

Screen: Transcription Search Results

Tip: You can also display this screen by clicking on Transcriptions - >"Under Review" Listing.

This screen shows the following information:

Dt. Of Service/Dt. Dictated/Dt. Translated: This column displays the date of service, date of dictation and the date of translation of the dictation.
Dt of Service: This is the date on which the patient was attended by the provider.
Dt Dictated: This is the date on which the transcription was dictated by the provider.
Dt Translated: This is the date on which the dictation was transcribed by OmniMD.

Doctor: This column displays name and code of the provider whose transcriptions are displayed. By default, transcriptions of the logged in provider are displayed.

Patient: This column displays name of the patient for whom the dictation was recorded. Click on patient's name to see Patient's Dashboard. If a patient is not linked to the transcription, then click on displayed in this column to link the patient.

Note: If the patient is not registered with OmniMD, then the provider needs to specify it in the dictation to OmniMD.

Status: This column displays the status of the transcription. A transcription can have the status as 'Pending', 'Under Review', 'Under Correction' or 'Signed'. A 'Pending transcription is one which a provider has dictated and uploaded, but OmniMD is yet to transcribe it. These transcriptions cannot be viewed. 'Under Review' transcription is one which has been transcribed by OmniMD and sent back to the provider for review. These transcriptions are displayed on the transcription search results. When the provider reviews a transcription and sends it to OmniMD for correction, its status is referred to as 'Under Correction'. Once a transcription is approved and signed off its status changes to 'Signed'.

Template: This column shows the name of the template based on which the dictation was recorded. The provider has to send this template/report to OmniMD at the time of account setup, preferably as an electronic copy, otherwise as a scanned/fax copy. The name of the voice file is displayed in this field. Click on Playback to listen to the voice file recorded by the provider.

#Lines/#Pages: This column shows the number of lines and pages used in the transcription.

> **Note:** A line includes 65 characters including blank spaces.

Two links, View and Options are displayed in the last column of every search result. Click on View to view a transcription. Click on Options to perform actions such as Sign-off Transcriptions , Request Corrections and Re-assign a transcription to a patient.

VIEW A TRANSCRIPTION

A provider can view a transcription sent by OmniMD, by clicking on the View link in the last column. This opens the transcription in MS Word format. He/she can also view more than one transcription in a MS Word document as a single document.
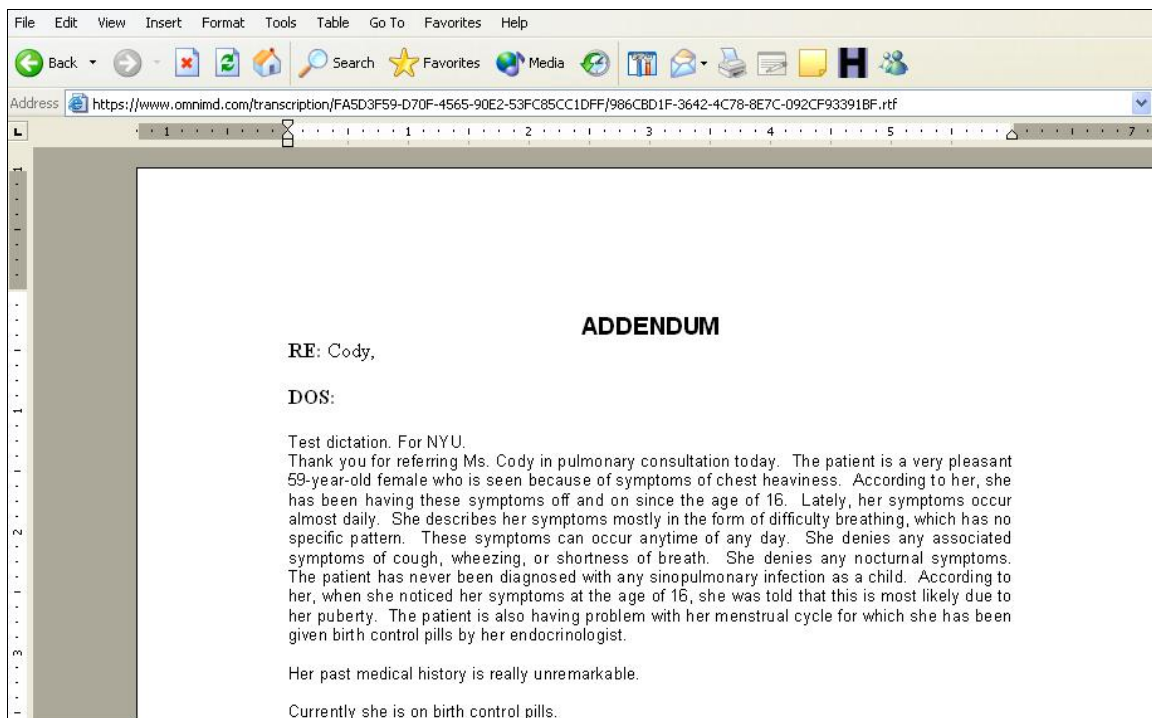
Screen: Transcription in MS Word

While reviewing the transcription, if the provider finds some corrections to be made, then he/she can either correct the transcription oneself, or send it back to OmniMD for corrections.

TRANSCRIPTION CORRECTED BY PROVIDER

To correct transcription oneself:

1. Save the transcription in MS-Word without corrections in a Rich Text Format (RTF).
2. Open the transcription RTF file and make the corrections.
3. Save the transcription.
4. Click on Re-import Transcriptions Using File Upload link on the transcription search results screen. This will upload the revised transcription with corrections on the OmniMD website.

TRANSCRIPTION CORRECTED BY OMNIMD

To get the transcription corrected by OmniMD:

1. Click on the Options link in the last column on the transcription search results screen. This displays the Transcription Details screen.

Screen: Transcription Details

From this screen, a provider can sign-off a transcription, request for corrections in the transcription and [re-assign a transcription](#) to a patient.

SIGN-OFF TRANSCRIPTIONS

To Sign-Off Transcriptions

2. Click on Sign-Off Transcription link on the Transcription Details screen. This will display a list of transcriptions. Alternately, this list can be displayed on the Home Page of Transcriptions or any search result.
3. Click on the checkbox of the transcriptions you want to confirm as signed. You can check all the transcriptions displayed on a page, by clicking on the 'Select All' checkbox.
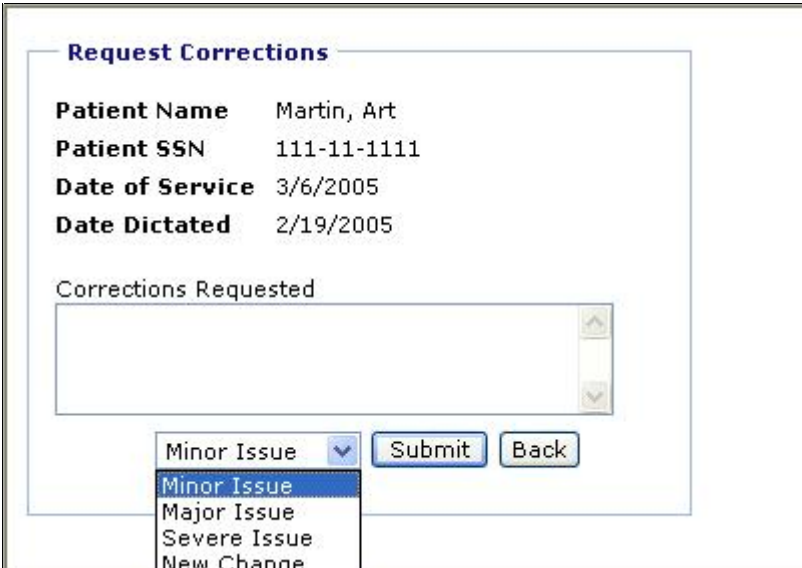
Note: You can sign off only those transcriptions whose status is "Under Review".

4. Click on Sign-Off all Checked Transcriptions link. This will display all the checked transcriptions as signed.

REQUEST CORRECTIONS

To request corrections in a transcription

1. Click on the Request Correction link on the Transcription Details screen to request for corrections in the transcription. This will display Request Corrections screen.

Screen: Request Corrections

2. Specify the following details:

    a. Corrections Requested: Enter the corrections that are to be done. These correction remarks will be reflected in the 'Under Corrections' list so that OmniMD can perform the listed corrections.
    b. Issue: Select the grade of the correction as Minor Issue, Major Issue, Severe Issue or New Change from the drop-down menu.

3. Once you have entered this information, the status of transcriptions in this stage is referred to as "Under Correction". Click on the Submit button, else click on Back. This will take the control back to the Transcription Details screen.

RE-ASSIGN A TRANSCRIPTION TO A PATIENT

To re-assign a transcription to a patient

1. Click on the Re-Assign to Patient link on the Transcription Details screen. This will display the Re-Assign to Patient screen.

Screen: Re-Assign to Patient

2. Click on Patient button and select patient from the dialog box. You can select patient Today's Patient or Last 2 days patients. You can also search patient and add a new patient.

3. Click on Submit to link the patient to the transcription, else click on Back. This will take the control back to the Transcription Details screen.

To search for all transcriptions associated with a provider, click on Search All Transcriptions. You can also view the current date's or yesterday's transcription by the clicking on the Today and Yesterday links respectively. Clicking on Last 2 days displays the transcription made last two days from the current date. Additionally, you can view the fax status of these transcriptions. Clicking on My Templates displays a list of all the templates that have been created for a provider.

LINKING THE TRANSCRIPTION

If a transcription is not linked to a patient, the icon will appear under the Patient column.

To link the transcription to a patient

1. Click on to link the transcription. This displays the Assign to Patient screen.

Screen: Assign To Patient

2. Click on Patient button and select patient from the dialog box. You can select patient Today's Patient or Last 2 days patients. You can also search patient and add a new patient.

3. Click on Submit to link the patient to the transcription, else click on Close.

VIEWING MORE THAN ONE TRANSCRIPTION IN A SINGLE MS WORD DOCUMENT

To view more than one transcription in a single MS Word document

1. From the list of transcriptions, click on the checkbox of the transcriptions you want to view as a single word document.

Screen: Checkbox of Transcriptions

Tip: Click on Select All at the bottom of the list, to select all the listed transcriptions.

2. Click on View Checked Transcriptions as a Single MS Word Document link. This will display a dialog box to view/save the file.

File Download

Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.

File name: ...lt3-7-2005H1M26S10M718.doc

File type: Microsoft Word Document

From: www.omnimd.com

Would you like to open the file or save it to your computer?

[Open] [Save] [Cancel] [More Info]

☑ Always ask before opening this type of file
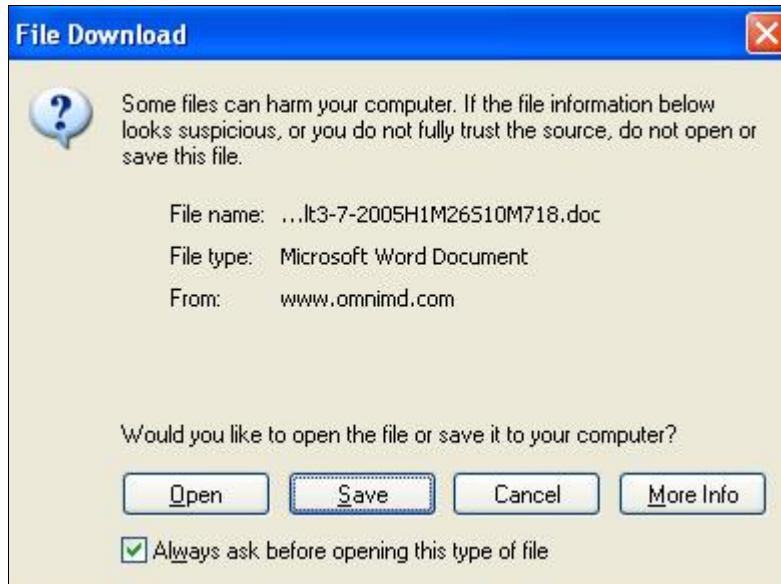
Screen: File View/Download

3. Click on Open button to view the file. This will just open the file but not save it. To save the file, click on Save button. Else, click on Cancel to discard file.

4. Select the location where you want to save the file and click on Save.

5. Click on the file to open it. This will display all the checked transcriptions in one single MS Word document.

Screen: Transcriptions in a Single MS Word Document

SEARCH TRANSCRIPTIONS

To search transcriptions

1. Click on Transcriptions -> Search Transcriptions. Alternately, click on the Search All Transcriptions link available on the Home Page of Transcriptions. This will open Search Transcription screen.

Screen: Search Transcriptions

2. Fill in the fields as applicable
   a. Doctor: Select the name of the provider whose transcriptions you want to search, from the drop-down menu. By default, the name of the logged-in provider is displayed.
   b. Template: Select the template from the drop-down menu. The searched result will display transcriptions based on the selected template.
   c. Transcription Template Category: From the drop-down menu, select the template category of the transcriptions you want to search.
   d. Patient Name: Enter the name of the patient for whom you wish to search transcriptions.
   e. Patient SSN: Enter the Social Security Number of the patient related to the transcriptions being searched.
   f. Patient Status: Select the status of the patient as old or new from the drop-down menu. Alternately, click on the Unassigned checkbox if a status is yet to be assigned to the patient related to the transcriptions being searched.
   g. Location: From the drop-down menu, select the location of the clinic where the dictations were recorded.
   h. Voice File: Enter the name of the voice file whose transcription you wish to search.
   i. Transcription Status: Select the status of the transcriptions you want to view, from the drop-down menu.
   j. Date of Service: Select the range of the date of service of the patient whose transcriptions you wish to search, from the Month, Day and Year drop-down menus.
   k. Date of Translation: Select the range of the date of transcription being searched was translated, from the Month, Day and Year drop-down menus.
   l. Order By: From the drop-down menu, select the date on the basis of which you want to sort the searched list of transcriptions.

Tip: To search for transcriptions of one day before the current date, click on the Last One Day Records link. This displays the transcriptions recorded on the previous day.

3. Once you have entered the search criteria, click on Search button. This will display search results on the basis of the information filled in the search screen.

Tip: It is not necessary to fill all fields. It depends on the search criteria that you want to make.

TRANSCRIPTIONS RECORDED TODAY

To view transcriptions made on current date irrespective of any criteria

1. Click on Today link available on Transcription Search Results screen.

2. This will display an entire list of dictations recorded by the provider on the current date.

Screen: Transcriptions for Today

Note: You can view, sign-off , request corrections or re-assign transcriptions to a patient.

TRANSCRIPTIONS RECORDED YESTERDAY

To view transcriptions done on a day before the current date irrespective of any criteria

1. Click on Yesterday link available on <u>transcription search results</u> screen.

2. This will display an entire list of dictations recorded by the provider one day before the current date.

Screen: Transcriptions for Yesterday

Note: You can view, sign-off request corrections or re-assign transcriptions to a patient.

TRANSCRIPTIONS RECORDED IN THE LAST TWO DAYS

To view transcriptions recorded in the last 2 days irrespective of any criteria

1. Click on Last 2 Days link available on transcription search results screen.

2. This will display an entire list of dictations recorded by the provider two days before the current date.

Screen: Transcriptions for Last 2 Days

Note: You can view, sign-off, request corrections or re-assign transcriptions to a patient.

MY TEMPLATES

To view a template

1. Click on Transcriptions -> Manage Templates. Alternately, click on the My Templates link available on the transcription search results screen. This will open Template Search Results screen that displays an entire list of templates used by the provider.

Doctor : Sabraw Ronald	Doctor Code : 4010		
Template Short Name / Full Name	**Date Created / Last Modified Date**	**No Of Chars**	**View/Download**
4010-ADDENDUM 4010-ADDENDUM	Created : 4/15/2003 Modified : 4/15/2003	74	View/Download
4010-CYSTOSC_REP_NOR(F) 4010-CYSTOSC_REP_NOR(F)	Created : 4/15/2003 Modified : 4/16/2003	482	View/Download
4010-CYSTOSC_REP_NOR(M) 4010-CYSTOSC_REP_NOR(M)	Created : 4/15/2003 Modified : 4/16/2003	533	View/Download
4010-CYSTOSCOPY_REPORT (F) 4010-CYSTOSCOPY_REPORT (F)	Created : 4/15/2003 Modified : 4/16/2003	636	View/Download
4010-DoctorTemplate 4010-DoctorTemplate	Created : 6/10/2004 Modified : 8/16/2004	0	View/Download
4010-S_V_HEMAT_F_U(M) 4010-S_V_HEMAT_F_U(M)	Created : 4/16/2003 Modified : 4/16/2003	832	View/Download
4010S_V_HEMAT_F_U(F) 4010S_V_HEMAT_F_U(F)	Created : 4/16/2003 Modified : 4/16/2003	560	View/Download
CONSULT REPORT 4010-CONSULT_REPORT.rtf	Created : 1/4/2004 Modified : 1/4/2004	0	View/Download

Screen: Templates Search Results

2. Click on View/Download link to view or save a template. This will display a dialog box to view/save the file.
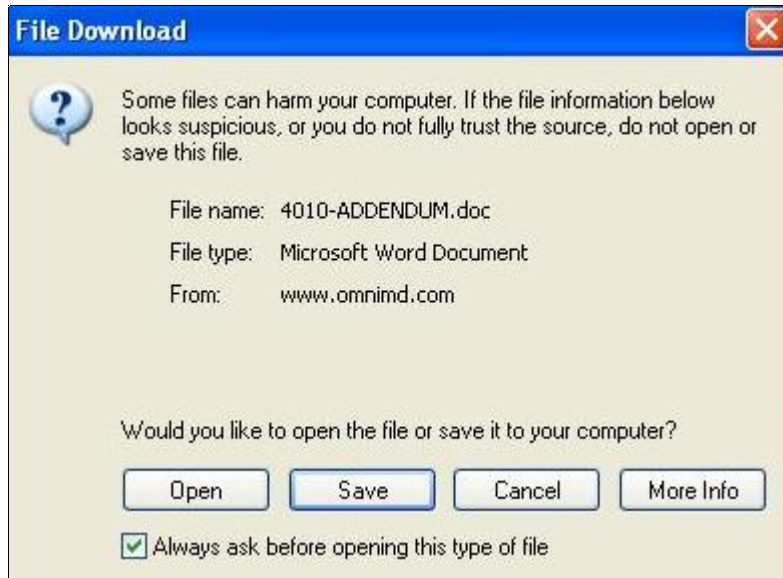
Screen: File View/Download

3. Click on Open button to view the file. This will open the file but not save it. To save the file, click on the Save button. Else, click on Cancel to discard file.

4. Select the location where you want to save the file and click on Save.

VIEW FAX STATUS

A provider can fax transcriptions to other providers related to the case. He/she can also monitor the fax status for those documents.

To view the fax status

1. Click on the View Fax Status link available on the Transcriptions Search Result screen. This will open Fax Status screen.

Screen: Fax Status

2. Enter the criteria for searching the fax details you want to view. Specify the following details:

   a. Dt From: Enter the date period from which you want to view the fax status of documents.
   b. Dt. To: Enter the date period till which you want to view the fax status of documents.
   c. Patient: Enter the name of the patient whose fax status you wish to view.
   d. Status: Select the fax status of the documents as Unsent or Successful.
   e. Fax To: Enter the name of the person to whom the fax was sent.
   f. Fax Num: Enter the fax number to which the documents were faxed.
   g. Type: Select the type of documents that were faxed, as Tx, Rx or Rf from the drop-down menu.

h. Order: Select the order by which you want to sort the search, as Date Submitted, Recipient or Patient, from the drop-down menu.

3. Once you have entered all the information, click on Go. This will display search results on the basis of the information filled in the search screen.

Tip: It is not necessary to fill all fields. It depends on the search criteria that you want to make.

4. This screen also displays the details of the search results. Click on Resend in the Retries column to try sending the fax again. This displays the Resend Fax screen.

Screen: Resend Fax

5. Click on Send to try sending the fax again. This will display a message stating a new fax request has been saved.

RE-IMPORT TRANSCRIPTIONS

To Re-Import Transcriptions

1. Click on Transcriptions -> Re-Import Transcriptions. Alternately, click on the Re-Import Transcriptions using File Upload link available on the Transcriptions Search Results screen. This will open Re-Import Transcription screen.
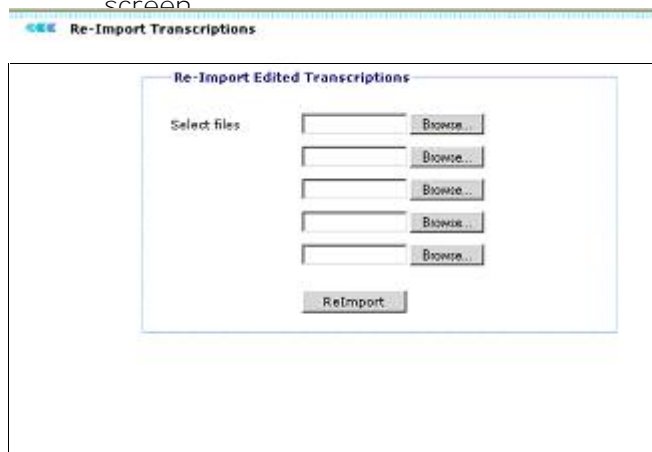
Screen: Re-Import Transcriptions

2. Click on Browse to select the file you want to re-import. You can re-import a maximum of five files in a single attempt.

Note: Only RTF files can be re-imported.

3. Click on Re-import. All the selected files will be re-imported and the message "Transcription file re-imported successfully. You can re-import another edited file below" will be displayed.

PRESCRIPTION WRITER

PRESCRIPTION AT A GLANCE

Screen: Overview of Prescription

With the number of new medications increasing exponentially each year and each drug having its unique indications, prescription writing has become a complex error prone process. The Prescription Writer streamlines the entire prescription writing process making it simple, fast and effective.

ADD NEW PRESCRIPTION

To add new prescription

1. Click on Prescription -> Add New Prescription link. Alternatively, click on Add New Prescription link available on Prescription Home Page. This will open Prescription Screen.

Screen: Prescription page

2. Specify values for prescription.

Screen: Add Prescription

Patient Name	Click on Patient button to select patient name.
Load Favorite Rx	Select the favorite prescription from list for chief complaint for which you want to write prescription.
Drug/Test	Select the drug or test you are recommending to patient. If the drug/test is not available within list, click on Other button to locate new drug/test. This will open another window, select drug/test that you want to search and write initial in Start with field. Click on Search. This will display list as per search, click on the one you want. This will get listed in Drug/Test field.
Sig	Select the number of drugs to be taken at one point of time. Or enter in the OR field if value is not matching in Sig field.
Unit	Select the unit of drug you are recommending.
PRN	Check the PRN if required, else leave it blank
Freq.	Select how many times drug has to be taken. Or enter in the OR field if value not matching in Freq. field.
Period	Select the number from first drop-down and then Day(s), Week(s), Month(s), or Year(s) for which you are recommending drug. This will show that for those numbers of day(s) or any value selected you are recommending the drug.
Disp #	This will get calculated on the basis of values entered in Sig, Frequency and Period. For example, if Sig is 2, frequency is 2 times a day and period is 3 days then Disp # will be 12
Subs. Generic	Check this option if you want to recommend generic drug.
Refill	Select from the drop-down the number of refills you are allowing.
Starts	Click on Calendar icon to select the date from which refill should begin.
Filled At Clinic	Check this option if prescription is filled at clinic. If patient's prescription was filled at pharmacy, then this option should not be checked.
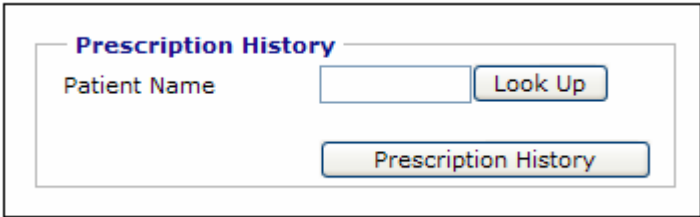
3. Once all fields are filled in, click on Add button to add in prescription. Incase you want to add more drugs, select drug and click on Add Continue button.

4. To modify medication details, select the added drug; this will edit the drug. Make changes in the drug and click on Update button. Click on Cancel button to cancel any modifications to drug. Click on Delete button to delete added drug.
5. Enter observations in Notes section.
6. Select the Pharmacy from which you are recommending to take drug.
7. Select the template on which this prescription is to be printed.
8. Check the option Send fax if you want to send fax to pharmacy.
9. Once all fields are filled in, click on Submit button.

PRESCRIPTION HISTORY

To view prescription history
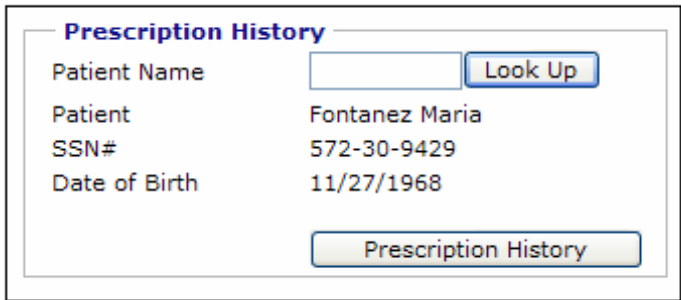
1. To view prescription history, you can directly fill in the values on Home Page of Prescription.

Screen: Prescription History

2. Click on Look Up button to select Patient name. You can select patient from Today's list, Last 2 days Patient, search patient or add a new patient.

3. Once a patient is selected, his name, SSN# and Date of Birth appears on the screen.

Screen: Values appeared when patient is selected

4. Click on Prescription History button to view prescription history details.

Screen: Prescription History of selected patient

Note: You can view online, copy and print all prescriptions

PRESCRIPTIONS WRITTEN TODAY

To view prescription written on current date irrespective of any criteria

1. Click on Prescription -> Prescriptions Written Today link. Alternatively click on Prescriptions Written Today link available on Prescription Home Page.

Screen: Prescriptions Written Today

2. This will display entire list of prescriptions written by provider written today.

Prescriptions written Today Prescribed by : Dr. Steve Russel									Add New Prescription	Search Prescriptions
DOS	**Patient Name**	**Prescriptions/Drug list**							**Action**	
05/03/2006	Tyska,James	Prescribed by : Dr. Steve Russel		Chief Complaint:					Edit	Copy
☐ Sign Off		Pharmacy : Kramer Pharmacy (914-332-5766)								Print
Fax : Failed	(3/24/2006 4:28 PM)	Drug/Test	Disp	Start	End		Refill	Subst		
		acarbose 25 mg 1 TAB TID	90	05/03-	06/02/2006					
05/03/2006	Rivera,Nancy	Prescribed by : Dr. Steve Russel		Chief Complaint:						Copy
SIGNED		Pharmacy : Cary's Pharmacy (914-235-4239)								Print
Fax : Failed	(4/26/2006 4:07 PM)	Drug/Test	Disp	Start	End		Refill	Subst		
		OxyContin 40 mg 1 ERT Q12H	30	05/03-	05/18/2006					
05/02/2006	Fontanez,Maria	Prescribed by : Dr. Steve Russel		Chief Complaint:						Copy
SIGNED		Pharmacy : Cary's Pharmacy (914-235-4239)								Print
		Drug/Test	Disp	Start	End		Refill	Subst		
		Decadron 4 mg 1 TAB BID	14	05/02-	05/09/2006					

Screen: Prescription for Today

Note: You can modify, view online, and print all prescriptions. You can also view the status of the prescription faxed to pharmacy.

UNSIGNED PRESCRIPTIONS

To view unsigned prescriptions

1. Click on Prescription -> Unsigned Prescriptions link. Alternatively click on Unsigned Prescriptions link available on Prescription Home Page.

2. This will display entire list of prescriptions that are unsigned.

Screen: Unsigned Prescriptions

Note: You can modify, view online, and print all prescriptions

PRESCRIPTIONS WRITTEN IN LAST WEEK

To view prescription written in last 1 week irrespective of any criteria

1. Click on Prescription -> Prescriptions Written in Last Week link.
   Alternatively click on Prescriptions Written in Last 1 Week link available
   on Prescription Home Page.

Screen: Prescription Written in last 1 week

2. This will display entire list of prescriptions written by provider in last one week.

Screen: Prescription in Last one week

Note: You can modify, view online, and print all prescriptions

SEARCH PRESCRIPTIONS

To search a prescription:

1. Click on Prescription -> Search Prescriptions link. Alternatively click on Search Prescriptions link available on Prescription Home Page.

Screen: Select Search Prescription

2. The prescription search form is displayed. Specify the criteria for searching a prescription.

Screen: Prescription Search Form

Doctor	Select the name of the provider whose prescription you want to search, from the drop-down menu.
Pharmacy	Select the pharmacy of the prescription, from the drop-down menu.
Location	Select the clinic location where the prescription was created, from the drop-down menu.
Patient	Click on Lookup to select the name of the patient whose prescription you wish to search.
ICD Code	Select the ICD code included in the prescription, from the drop-down menu.
ICD Code Period	Enter the ICD code period in the From and To fields.
Chief Complaint	Enter the chief complaint for which the prescription was created.
Drugs/Test	Select the drug or test included in the prescription, from the drop-down menu.
Date of Service	Enter the date of service period for which you wish to search prescriptions. In the From field, enter the date on which the service began and in the To field, enter the date on which the treatment was completed.
Date of Prescription	Enter the date range of the prescriptions that you wish to search in the From and To fields.
Order By	Select from the criteria on the basis of which you wish to sort the searched prescriptions, from the drop-down menu.
Print View	Check the box if you wish to display the searched prescriptions in a print view format.

3. Once you have entered the criteria, click on Submit button. This will display a list of prescriptions conforming to the entered search criteria.

FAVORITE PRESCRIPTIONS

Every provider has set their prescriptions as per their requirements. OmniMD provides them facility of storing their prescriptions as favorites.

To view favorite prescriptions

1. Click on Prescriptions -> Favorite Prescriptions link. Alternatively, click on Favorite Prescriptions link available on Home Page of Prescriptions.

Screen: Favorite Prescriptions

2. This will display a list of all prescriptions that are listed in Favorites.

◄◄◄ Favorite Prescriptions

	Add New Prescription	Search Prescriptions
Prescriptions/Drug list		**Action**

Chief Complaint: Angina Class I							Edit	Copy
Pharmacy : Kramer's Pharmacy (718-452-7836)								Print
Drug/Test	Disp	Start	End		Refill	Subst		
aspirin 81 mg 1 ECT QD	30					Y		
Imdur 60 mg 1 ERT QAM	30					Y		

Chief Complaint: Asthma (Mild)							Edit	Copy
Drug/Test	Disp	Start	End		Refill	Subst		Print
nedocromil 1.75 mg/inh 2 AERA BID	240							

Chief Complaint: Asthma (Moderate)							Edit	Copy
Drug/Test	Disp	Start	End		Refill	Subst		Print
Serevent Diskus 50 mcg 1 PWD Q12H	60					Y		
Azmacort 100 mcg/inh 3 AERA Q4-6H	1							

Screen: Favorite Prescription

Note: You can modify, view online, and print all prescriptions

ADD NEW FAVORITE PRESCRIPTION

To add new favorite prescription

1. Click on Prescription -> Add New Favorite Prescription link. Alternatively, click on Add New Favorite Prescription link available on Home Page of Prescription.

Screen: Add New Favorite Prescription

2. This will open Favorite Prescription screen. Specify values for prescription.

Screen: Specify Values for Prescription

Chief Complaint	Enter chief complaint for which you want to create favorite prescription.
Drug/Test	Select the drug or test you are recommending to patient. If the drug/test is not available within list, click on Other button to locate new drug/test. This will open another window, select drug/test that you want to search and write initial in Start with field. Click on Search. This will display list as per search, click on the one you want. This will get listed in Drug/Test field.
Sig	Select the number of drug to be taken at one point of time. Or enter in the OR field if value not matching in Sig field.
Unit	Select the unit of drug you are recommending. For example, Drop, Cap
PRN	Check the PRN if required, else leave it blank.
Freq.	Select how many times drug has to be taken. Or enter in the OR field if value not matching in Freq. field.
Period	Select the number from first drop-down and then Day(s), Week(s), Month(s), or Year(s) for which you are recommending drug. This will show that for those numbers of day(s) or any value selected you are recommending the drug.

Disp #	This will get calculated on the basis of values entered in Sig, Frequency and Period. For example, if Sig is 2, frequency is 2 times a day and period is 3 days then Disp # will be 12
Subs. Generic	Check this option if you want to substitute generic drug with alternative.
Refill	Select from the drop-down the number of refills you are allowing.
Starts	Click on Calendar icon to select the date from which refill should begin.
Filled At Clinic	Check this option if prescription is filled at clinic.

3. Once all fields are filled in, click on Add button to add in prescription. Incase you want to add more drugs, select drug and click on Add Continue button.
4. To modify medications, select the added drug; this will edit the drug. Make changes in the drug and click on Update button. Click on Cancel button to cancel any modifications to drug. Click on Delete button to delete added drug.
5. Enter observations in Notes section.
6. Select the Pharmacy from which you are recommending to take drug.
7. Select the template on which this prescription is to be printed.
8. Check the option Send fax if you want to send fax to pharmacy.
9. Once all fields are filled in, click on Submit button. This will add prescription in favorite list.

ADD FAVORITE DRUG

In this section, you can add all drugs that you generally recommend your patients.

To add drugs in favorites list

1. Click on Prescription -> Add New Favorite Drug link. Alternatively, click on Add New Favorite Drug link available on Home Page of Prescription.

Screen: Favorite Drug List

2. This will display Add Favorite Drugs & Lab Tests screen.

Screen: Add Favorite Drugs & Lab Tests

3. All drugs and test are alphabetically organized. Click on the alphabet under which you want to add new drug. This will open Add New Drug screen.

4. Check the drug that you want to add in your favorite list and click on Submit button.
5. Once added, this will show screen confirming that drug is successfully added.

⫷⫷⫷ Favorite Drug/Test List

Favorite Drug/Test List updated successfully..
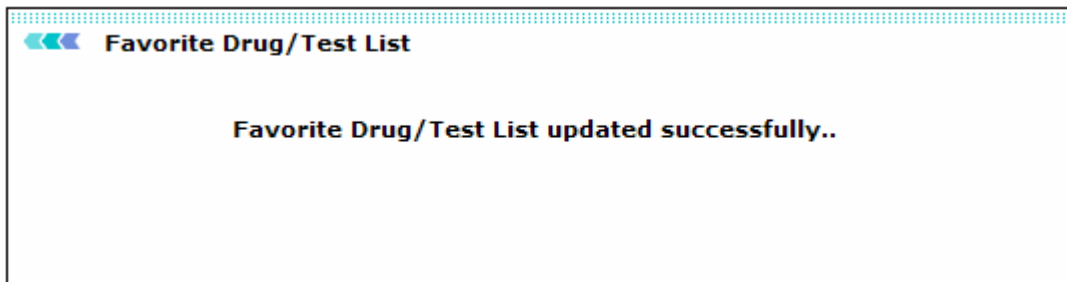
Screen: Drug successfully added

SEARCH DRUG OR LAB TEST

You can search drug or lab test by entering values on Home Page Screen. As per screen, enter the drug name or lab test that you wish to search and click on Search button. This will display search results as per search criteria.

⫷⫷⫷ Prescription Home

▸ **Add New Prescription**

▸ **Favorite Prescriptions**
▸ **Add New Favorite Prescription**

▸ **Add Favorite Drugs and Tests**
    - **Alphabetically (Test and Drugs) or by Category (Drugs)**
    - By Lab Test Name [   ] [Search]
      (Enter first few starting characters)
    - By Drug Name [   ] [Search]

▸ **Manage Pharmacies**
▸ **Manage Drug Lots**
▸ **Manage Templates**
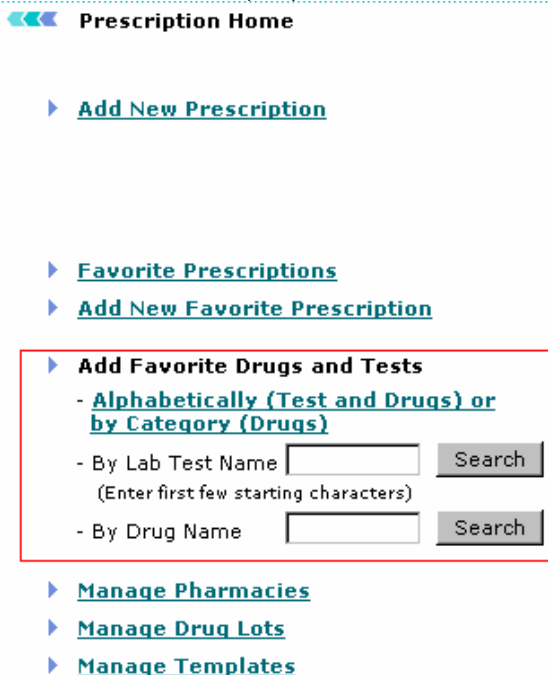
Screen: Search Drugs or Lab Test

MANAGE PHARMACIES

Under this section, you can add new pharmacy or search for existing pharmacies.

To add new pharmacy

1. Click on Prescription -> Manage Pharmacies link. Alternatively, click on Manage Pharmacies link available on Home Page of Prescriptions.

Screen: Manage Pharmacies

2. Click on Add New Pharmacy link. This will display Add New Pharmacy screen.

Screen: Add New Pharmacy

3. The fields are self-explanatory. Fill in the values and click on Submit button to add new pharmacy. All the fields are mandatory.

SEARCH PHARMACY

To search pharmacy

1. Click on Prescription -> Manage Pharmacies link. Alternatively, click on Manage Pharmacies link available on Home Page of Prescriptions.

Screen: Manage Pharmacies

2. Enter the criteria on which you wan to make search and click on Search button.

Screen: Search Pharmacy

MANAGE DRUG LOTS

To search pharmacy

1. Click on Manage Drug Lots link. This will open the Drug Lot screen.

Drug Lot

Location [Bellnorth Center ▼] [Refresh]

Drug	Lot #	NDC #	Manufacturer	Expiry Date	Action
Abbokinase					
PWDI 250000 iu					Add
Absorbase					
CREA -					Add
Accolate					
TAB 10 mg					Add
TAB 20 mg					Add
Accupril					
TAB 10 mg	12345		Rhone		Add Edit
TAB 20 mg					Add
TAB 40 mg					Add
TAB 5 mg					Add
Acetasol					
SOLN 2%					Add
Allercon					
TAB 60 mg-2.5 mg					Add
Allergen					
SOLN 54 mg-14 mg/ml					Add

Screen: Drug Lot Screen

2. Click on ADD to update drug lot details.

https://www2.omnimd.com/servlet/PrescriptionControlle...

Abbokinase PWDI 250000 iu

Lot #* [   ]
NDC #* [   ]
Start Date* [5/2/2006] 📅 [0:00 AM ▼]
Expiry Date [5/2/2006] 📅
Manufacturer [   ]

[Save]

Screen: Add Drug Lot

MANAGE TEMPLATES

1. Click on Manage Drug Lots link. This will open the Drug Lot screen.

◄◄◄ **Prescription Home**

▶ **Add New Prescription**

▶ **Favorite Prescriptions**
▶ **Add New Favorite Prescription**

▶ **Add Favorite Drugs and Tests**
  - **Alphabetically (Test and Drugs) or by Category (Drugs)**
  - By Lab Test Name [   ] Search
    (Enter first few starting characters)
  - By Drug Name [   ] Search

▶ **Manage Pharmacies**
▶ **Manage Drug Lots**
▶ **Manage Templates**

2. Click on manage template to view all prescription templates added in account.

◄◄◄ **Template Search Results**

Doctor : Sabraw Ronald	Doctor Code : 4010	Clinic Code : 4001	
Template Short Name / Full Name	Date Created / Last Modified Date	No Of Chars	View/Download
4010-DoctorTemplate 4010-DoctorTemplate	Created : 6/10/2004 Modified : 8/16/2004	0	View/Download
NewOmniMDAdvanceRx NewOmniMDAdvanceRx	Created : 11/2/2004 Modified : 11/3/2004	0	View/Download
NewPrescriptionSP NewPrescriptionSP	Created : 11/2/2004 Modified : 11/2/2004	0	View/Download
OmniMDAdvanceRxTemplate 4010-OmniMDAdvanceRxTemplate.rtf	Created : 6/15/2004 Modified : 8/16/2004	0	View/Download
OmniMDDemoTemplate 4010-OmniMDDemoTemplate.rtf	Created : 6/15/2004 Modified : 8/16/2004	0	View/Download
PrescriptionTemplate 4010-PrescriptionTemplate	Created : 6/14/2004 Modified : 8/16/2004	0	View/Download

Screen: Template Search Results

REFERRAL MANAGEMENT

REFERRAL MANAGEMENT AT A GLANCE
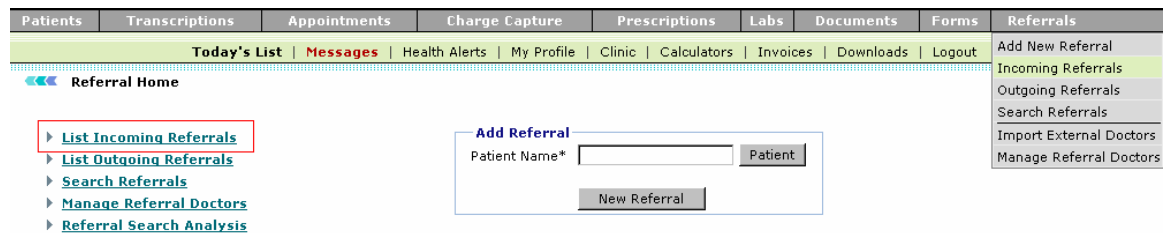
Screen: Referral Management

This module of OmniMD streamlines the process of communication between multiple physicians. OmniMD maintains co-ordination between current Provider and referring physicians. Through OmniMD, a physician can always refer a case to a specialist. He/She can also view a list of all incoming referrals that are made to him and outgoing referrals that he/she has assigned to other Providers. He/She can also set his list of Providers that he/she prefers to refer through Manage Referral Providers link.

ADD NEW REFERRAL

To add new referral

1. Click on Referral link. This will display Referral Home screen.

Screen: Referral Home

2. Specify Add Referral fields
   a. Patient Name: click on Patient button to select patient from dialog box. This will add patient's name in referral. Once patient is added, his name, SSN # and Date of Birth will appear.

3. Click on New Referral button. This will move to next step of adding referral.

◄◄◄ Add Referral - Step 1 of 2

Referred by*	Dr. Ronald Sabraw
Patient Name	**Fontanez, Maria**
Referral Date	2 MAY 2006
Refer Patient To *	**My Referral Doctors :**
	Mark Ellison (Dermatology) **Show Referral Doctors of the Clinic**
Attach Document(s) *	◉ All Records since MAY ▾ 2 ▾ 2006 ▾ Set Previous(**Week Fortnight Month**)
	OR
	○ Records By Cases/Visits (last 10 visits)

Next

Screen: Add Referral

4. Specify the referral values

◄◄◄ Add Referral - Step 2 of 2

Patient Name	**Fontanez, Maria**
Referred By	Dr. Ronald Sabraw
Referral Date	2 MAY 2006
Refer To	Dr. Mark Ellison
Referral of*	Fontanez, Maria
Authorization Code	
Authorization Detail	

Referral Expires in 1 Week ▾
Notes:

☐ Send Fax
(Email notification will be sent).

The following documents will be viewed by referral doctor.

Date	Type	Desc
---No Records--		

Back Submit

Screen: Referral Values

a. Patient Name and Referral Date: these are read-only fields that were filled in first step.
b. Refer Patient To: Select the referral Provider from drop-down list.
c. Show Records Since: Select the date from which you want to show records of patient to referral Provider. You can set week-wise, fortnightly or month-wise. After this time period the access to patient records will cease.

5. Select the radio button on the basis whether you want to show all records of your patient or only your consultation records.

6. Click on Next button. At this step, you need to enter authorization code and authorization details.
7. Check the option of Insurance records if you wish to show to referral Provider.
8. Select the time period for referral during which he/she can refer the records of patient. Once the referral time expires, the referral becomes deactivated.
9. Check the option of displaying new records till referral expires.
10. Under Notes, enter your observations or comments that would help referral Provider in understanding the case better.
11. Check the option Send Fax Notification. This will send fax to the Provider and an email will also be sent as notification. Click on Next button else click on Back button to make changes.

LIST INCOMING REFERRALS

To list incoming referrals

1. Click on Referrals -> Incoming Referrals link. Alternatively, click on List Incoming Referrals link available on Referrals Home Screen.

Screen: Incoming Referrals

2. This will list all incoming referrals. You can add a new referral and search for a particular referral from this screen.

Screen: Incoming Referral List

Note: Referrals with [icon] icon are active referrals and referrals with [icon] icon are deactivated. This means these are expired referrals.

LIST OUTGOING REFERRALS

To list outgoing referrals

1. Click on Referrals -> Outgoing Referrals link. Alternatively, click on List Outgoing Referrals link available on Referrals Home Screen.

Screen: Outgoing Referrals

2. This will list all outgoing referrals. You can add a new referral and search for a particular referral from this screen.

Screen: List of Outgoing Referrals

SEARCH REFERRALS

To search referrals
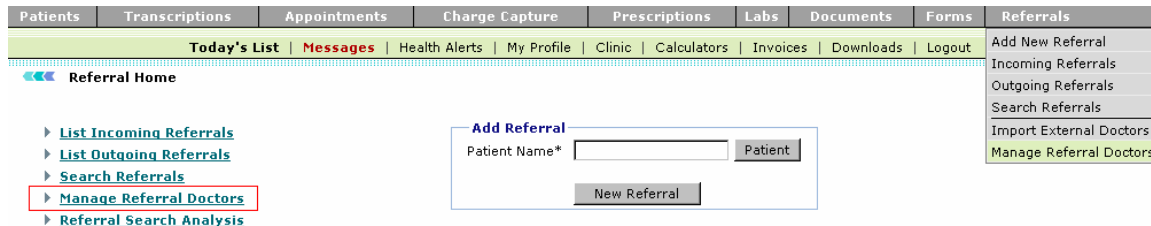
1. You need to be in list of incoming or outgoing referrals screen. Under search section, specify search values

   a. Dr. Last Name: Enter last name of Provider.
   b. From Date: Enter date from where you want to search referrals.
   c. To Date: Enter the date till which you want to make search referrals.
   d. Status: Select from drop-down of what status you want to search.

2. Once all fields are filled in, click on Search button. This will display search results in same screen.

Tip: You need not fill all values for searching referrals. It depends on what kind of search you are making.

MANAGE REFERRALS DOCTORS

1. Click on Referrals -> Manage Referral Doctor link. Alternatively, click on Manage Referral Doctor link available on Referrals Home Screen.

Screen: Manage Referral Doctor

2. From here, you can add Providers that you want to include in your referral list. Check the Provider that you want to add in list and click on Submit button.

Screen: Select Doctor for Referral List

Note: Uncheck the Provider's name to remove from Referral List.

REFER NEW EXTERNAL DOCTORS

External providers are referred as those providers who are not using OmniMD. Though they can be referred using OmniMD.

TO REFER EXTERNAL DOCTOR

1. Click on link ▸ **New External Doctor** available on Manage Referral screen.
2. This will open External Doctor Registration screen.

Screen: New External Doctor

3. Specify the values required to add new provider's information.
4. Once the information is added, click on Submit button, else click on Cancel to discard adding details.

5. This will generate a notification email and sends fax to the referred provider specifying the temporary user id and password to access OmniMD for viewing details of patients.
6. Referred providers can access the link, user id and password to view details and analyze patient's case.

REFER NEW EXTERNAL DOCTORS (OMNIMD)

External Providers (OmniMD) are referred as those providers who are using OmniMD but do not belong to same clinic.

TO REFER EXTERNAL DOCTOR

1. Click on **New External Doctor (OmniMD)** link to access external provider for referral.
2. This will display Search dialog box. Enter last name, first name and select specialty from drop-down.

Screen: Referral External Doctor

3. Once all values are filled in, click on search button to view providers matching search criteria.

4. Click on Add button to add provider in referral list, else click on Back to make new search or Close to close search.

5. The provider will get added in Manage Providers Referral List. Select the provider and click on submit button.

FORMS

FORMS AT A GLANCE

SEARCH FORMS

To search forms

1. Click on Forms -> Search Form Records link.
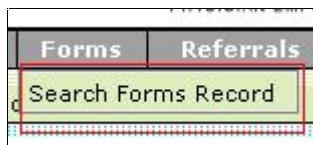
Screen: Forms

2. This will display Specialty Form & Records screen. This screen displays the search criteria for searching forms. It also displays a list of forms and allows a user to add a record for a particular form or view a list of records entered for a particular form.

Screen: Specialty Form Records

3. Specify the search criteria:

Patient	Click on Lookup to select the patient whose forms you want to search.
Last Name	Enter the last name of the patient whose forms you want to search.
Created or Modified between	Click on the calendar icons to select the date range in which the forms to be searched were created or modified.

> **Tip:** You can search for forms created/modified one day, two days, one week or one month before the current date, by clicking on the respective links.

4. Click on Find Records button. This will display a list of forms conforming to the entered search criteria. A user can add or view a list of records for a particular form.

ADD NEW RECORD

1. Click on Add Record against the form for which you want to add a new record, on the Specialty Form Records screen. This will display the Add Record screen with the selected form format.

Screen: Add Record

2. The name of the searched patient is displayed in the Patient Name field. Click on Patient to add a record for another patient.
3. The default date and time is displayed in the Date of Service field. Click on New DOS to enter a new date of service.

4. Enter the details to add a new record in displayed form format.
5. Click on Save. This will add a new record for the selected form.

VIEW LIST OF RECORDS

1. Click on List of Records against the form for which you wish to view a list of records, on the Specialty Form Records screen. This will display a list of records for the selected form.

Screen: List of Records

2. Details such as date of service, patient name and date of modification are displayed. Click on View Record against the record that you wish to view.

Tip: You can also add a new record from this screen. Select the form from the drop-down menu and click on Add Record. This will display the Add Record screen.

Screen: View Record

3. This screen displays the details of the record. It also displays a list of options:

Sign Off	Signs off the record. A record cannot be edited once it is signed off.
Print	Prints the record.
Edit	Displays the record in edit mode. You can then modify the record.
Copy	Saves a copy of the record.

LAB ORDER

Screen: Lab Order Home

All lab orders for patients can be accessed, updated and tracked through this module.

LATEST LAB RESULTS

To view latest lab results

1. Click on Labs -> Latest Lab Results link.

Screen: Latest Lab Results

2. Check select all box and Click on Marked Checked Reports as Reviewed.
3. To view single lab result click on view
4. ✔ indicates that the particular lab result has been reviewed.

Tip: Abnormal values are highlighted in Red by default.

PENDING LAB ORDERS

To view pending lab orders
1. Click on Labs -> Pending Lab Orders

Lab Orders Listing

Lab Order Search

Search Criteria: Pending Lab Orders

DOS / Lab Test(s)	Patient	Chief Complaint	Result	Provider	Review
5/3/2006 1:05 PM	Williams, Kurt	Chest Pain		Dr. Steve Russel	
1. EEG		Other Pending	-Order		
2. METALS/METALLOIDS,URINE		Other Pending			
5/3/2006 12:15 PM	Capshaw, John	Physical Exam		Dr. Steve Russel	
1. Blood Group		Other Pending	Order		
5/3/2005 9:25 AM	Williams, Kurt	Cardiac Mapping		Dr. Steve Russel	
1. EKG TRACING & INTERP		Pending	Order		

Screen: Pending Lab Orders

2. Click on Order to print requisition.

Pending Orders - Assign Lab, Print Requisition

DOS **5/8/2006 11:00 AM** Patient **Carter, Jessica** Provider Dr. Ronald Sabraw
Chief Complaint Pain during urination Overall Status **Pending**

Lab : QUEST

	Lab Test Name	Status	Action	Result
☑	HOLTER ECG	Pending	**Enter Results**	
☑	LIPID PANEL	Pending	**Enter Results**	
└	Print Requisition(s)		Reset	Cancel

Note: Barcode font is not available on your system. Font is required for printing barcode on requisitions.
Click here to download font.

Screen: Print Requisition

3. Click on Enter Results to input lab results manually.

Screen: Enter Lab Result

Important: All input, including normal or abnormal result has to be manually updated. Please use the suggested format for entering result data.

SEARCH LAB ORDERS

To search lab orders

1. Click on Labs -> Search Lab Orders to search for lab orders.

Screen: Search Lab Order

TODAY'S LAB ORDERS

1. Click on Labs -> Today's Lab Orders to view lab orders for the current date.

Screen: Today's Lab Order

Note: Similar screens exist for all other search criteria's – Last 2 days, Last 1 week, All (Practice) Pending and All (Practice) Latest Lab Orders

TABLE OF FIGURES

INDEX