OmniMD Help Manual

Table of Contents

Copyright

About Web help

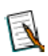
The OmniMD Web help lets end users be familiarized with the OmniMD application. It is recommended to go through this Web help before starting with the application.

The Web help is organized in sections and topics that explain 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 Web help provided with the application to get clarity of OmniMD.

Help Conventions

Convention	Description
Text matter in Verdana font and 10 as font size	Explains the Web help
Hyperlink	Click on the link to reach target text
	Note
	Important
	Tip

Document Feedback

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

Contact For	Contact Person and Email ID
Documentation Suggestions	Support, support@omnimd.com
Technical Support	Support, support@omnimd.com
Help Desk, call us at	914.332.5590

For more information, you can visit us at www.omnimd.com.

About 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.

The OmniMD application is HIPAA compliant that meets the stringent healthcare security and privacy laws that are intended to ensure confidentiality and privacy for all patients' healthcare related information.

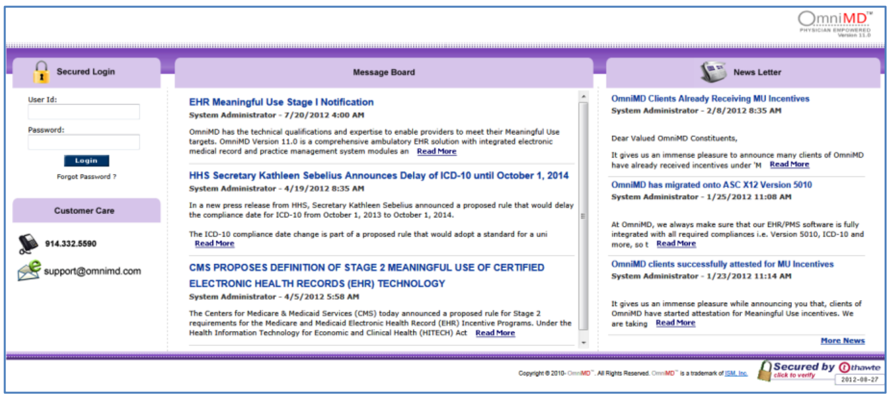
OmniMD is a new and unique online solution that is provided as an ASP service over the Internet and as an Enterprise application running locally. OmniMD helps you to make smarter, faster decisions on patient's case history. It also continuously monitors the progress of patients in your existing OmniMD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

Once OmniMD is set up, you can import your existing patient, physician, and insurance lists from your previous system.

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

Getting Started

Once the clinic is registered with OmniMD, and the information is entered into OmniMD, the users are provided with a unique User Code and Password to access the application. Using these user code and password, physicians and administrators can launch different application screens as per their requirements.



Logon Screen

Logon to OmniMD

1. In your favorite browser such as Internet Explorer, go to https://login.omnimd.com

   Or the URL provided by OmniMD Support team.

   The OmniMD Logon page is displayed.

2. In the **User Code** box, type your unique user code.

3. In the **Password** box, type your unique password.

   Note: The User Code and Password are provided by OmniMD Support Team.

4. Click **Go**.

   The **Today's List** page is displayed.

   Note: The populated Today's List is different for each provider.

Logout from OmniMD

- Click **Logout** to log out from OmniMD.

  After successful logout, you are redirected to the OmniMD home page.

Forgot Password

1. In your favorite browser such as Internet Explorer, go to www.omnimd.com or the URL provided by OmniMD Support team.

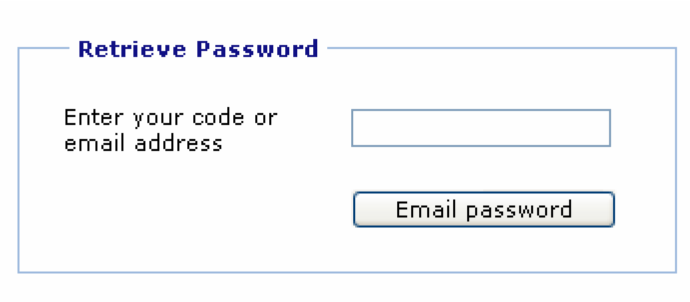
   The OmniMD Logon page is displayed.

2. Click **Forgot Password**.

   The Retrieve Password page is displayed.

3. Enter your code or email address in the box, and click **Email Password**.

   An email is sent to the specified code or email address provided during registration.



Forgot Password

Patient

Patient

From the Patient section, you can:

Add New Patient

Search Patient Record

Merge Patient

Export Patient Records

Import Patient Records

View Patient's Primary Insurance Details

View Insurance Records

Add New Patient

1. On the **Patient** menu, click **Add New Patient**.

   The Patient Demographics page is displayed.

2. Fill the required information as following:

   Patient Demographics

Field	Description
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.
Suffix	Enter the patient’s suffix.
Father Name	Enter the father’s name.
Mother Name	Enter the mother’s name
Alias Name	Enter the patient’s alias, or nickname.

Date of Birth	Click the calendar icon to select month, date, and year. This is mandatory.
Gender	Select gender of the patient from the list.
Guardian	Enter the patient’s guardian, if applicable.
Work Status	Enter the patients work status.
Occupation	Enter the patient’s occupation.
Employer	Enter the patient’s employer.
Attorney	Enter the patient’s attorney.
Student	Status Enter the patient’s student status.
Blood Group	Enter the patient’s blood type.
Race	Enter the patient’s race.
Ethnicity	Enter the patient’s ethnicity.
Smoker	Enter if the patient is a smoker.
Marital Status	Enter the patient’s marital status.
Patient Type	Enter the patient type.
Referring Physician	Enter the patient’s referring physician.
Other Ref. Physician	Enter the patient’s secondary referring physician.
Primary Care Phy	Enter the patient’s primary care physician.
VNA	Visiting Nurse Association.
Principal Provider	Enter the patient’s principal provider.
Visit Location	Select the clinic location.
Address Line 1	Enter the address where the patient lives.
Address Line 2	Enter the address where the patient lives.
City	Enter the city where the patient lives.
State	Enter the state where the patient lives.
Zip Code	Enter the zip code where the patient lives.

Country	Enter the country where the patient lives.
Preferred Phone	Enter the patient’s preferred phone.
Call Preference	Enter the patient’s call preference.
Home Phone #	Enter the patient’s home phone number.
Work Phone #	Enter the patient’s work phone number.
Cell Phone #	Enter the patient’s cell phone number.
Email Address	Enter the patient’s email address.
Drivers License	Enter the patient’s drivers license number.
Significant Others	Enter the patient’s significant other if not already listed.
Emergency Contact 1	Enter the name of the patient’s 1st emergency contact.
1st Contact Phone	Enter the 1st emergency contact’s phone number.
Emergency Contact 2	Enter the name of the patient’s 2nd emergency contact.
2nd Contact Phone	Enter the 2nd emergency contact’s phone number.
Signature on File	Use the calendar tool to mark the date the signature was attained.
Release of Info Signed	Use the calendar tool to mark the date the release of info was signed.
Preferred Language	Select the preferred language.
Pharmacy	Select the preferred pharmacy.
Disable Health Alerts	Check to disable health alerts.
External Rec#	Enter an external record number.
NPI	Enter the NPI if applicable.
Treatment Status	Use the list to indicate treatment status.
Custom Field 1	Custom field
Custom Field 2	Custom field
Generate Statement	Indicate if a statement should be generated for this patient.

Report Exempt	Indicate if the patient will be report exempt.
Patient Reminder	Indicate reminder preference, if any.
Comments	Additional comment field.
Patient denies pre-existing medications	Check if patient denies pre-existing medications.
No Known Problems	Check if patient denies existing problems.

3. Click **Save** to save the patient information.

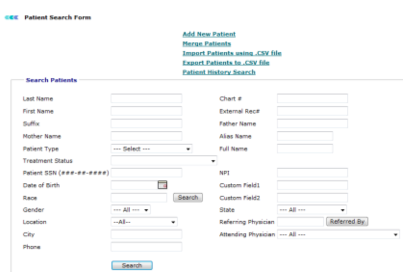
Note: Click **Save & Add Insurance** to save the patient information and go to the <Patient Insurance> page.

The patient record is added to the patient database.

Search Patient Record

1. On the **Patient** menu, click **Search Patients**.
2. On the **Patient Search Form** page, specify your search criteria.
3. Click **Search**.

   A list of patients matching the specified search criteria is displayed.



Search Patients

Merge Patient

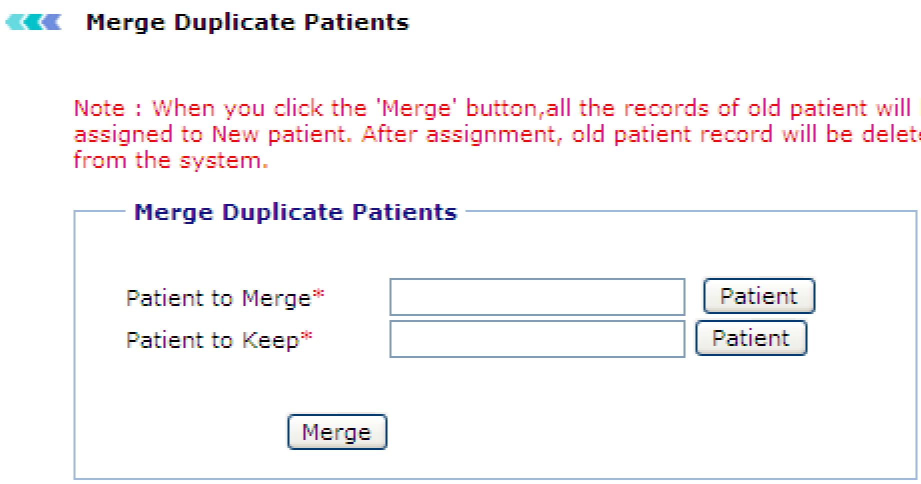
1. On the **Patient** menu, click **Search Patients**.
2. On the **Patient Search Form** page, click **Merge Patient**.
3. In the **Patient to Merge** box, type the name of the patient as per the old record.
4. In the **Patient to Keep** box, type the name of the patient as per the new record.

You can also click the Patient button to search the patient name.

5. Click **Merge**.

All the records from the old patient chart are transferred to the new patient chart.

Note: After merging is complete, the old patient record is deleted from the database.



Merge Duplicate Patients

Export Patient Records

1. On the **Patient** menu, click **Search Patients**.
2. On the **Patient Search Form** page, click **Export Patients to MS Excel File**.

The **Excel Password** window is displayed.

3. In the **Enter Passcode** box, type the password you want to set for the exported file to open.
4. In the **Confirm Passcode** box, re-type the password.
5. Click **OK**.

The File Download dialog box is displayed.

6. Click **Save** to save the file locally.

Note: You can click **Open** to open the exported file. The file opens as read-only.

The **Save As** dialog box is displayed.

7. Specify **File name**, browse to the required location, and click **Save**.

A compressed file is saved at the specified location.

File Download

Import Patient Records

1. On the **Patient** menu, click **Import Patients**.
2. In the **Select the file** box, type the path of the .csv file containing patient records.

   You can also click **Browse** to locate and select the file.

   Note: For more information on .csv file, click the **Guide Lines** link.

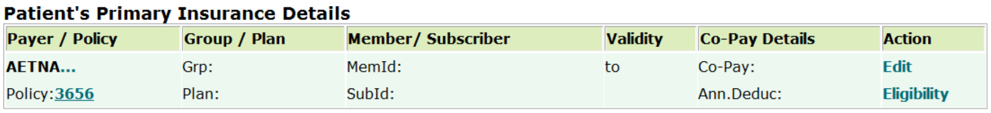
3. Click **Import Patients**.

   The patient records are added to the database.

Import Patients

Patient's Primary Insurance Details

The Patient's Primary Insurance Details section displays insurance details of the patient.



Patient's Primary Insurance Details

Payer / Policy	Group / Plan	Member/ Subscriber	Validity	Co-Pay Details	Action
AETNA...	Grp:	MemId:	to	Co-Pay:	Edit
Policy:3656	Plan:	SubId:		Ann.Deduc:	Eligibility

Patient's Primary Insurance Details

When a provider files the claim, by default, it goes first to the primary insurance and then to the secondary insurance.

- If the provider wants to claim first from the secondary insurance first, then it needs to be mentioned it in the **Notes** field while entering the Co-Pay details.
- Click the **Edit** link to modify the insurance details.
- Click the **Eligibility** link to check the insurance status of the patient.

Insurance Records

Click the **Insurance Records** link to view list of insurance policies provided by patient. Click the **Policy Name** that you wish to modify, if listed more than one. This will display the policy records in the Edit mode. Alternately, you can click the **Edit** link in the Action field. Update the patient insurance details if necessary, and then click the **Save** button to save changes. Click the **Check Eligibility Now** link to check the patient’s insurance eligibility, or click the Eligibility link to view past eligibility history by DOS (date of service).

Click on **Add a New Insurance Record** to add new insurance records or add secondary, tertiary, and Self Pay.

Patient Insurance

Appointments

Appointments

From the Appointments section, you can:

Search Appointments

Appointment Scheduler

View Appointments

Add New Appointment

Today's Schedule

View Schedules of Doctors/Providers

View Schedules of Locations

Export to Excel

Slot Finder

Reminder Search

Pending Appointments for Eligibility Check

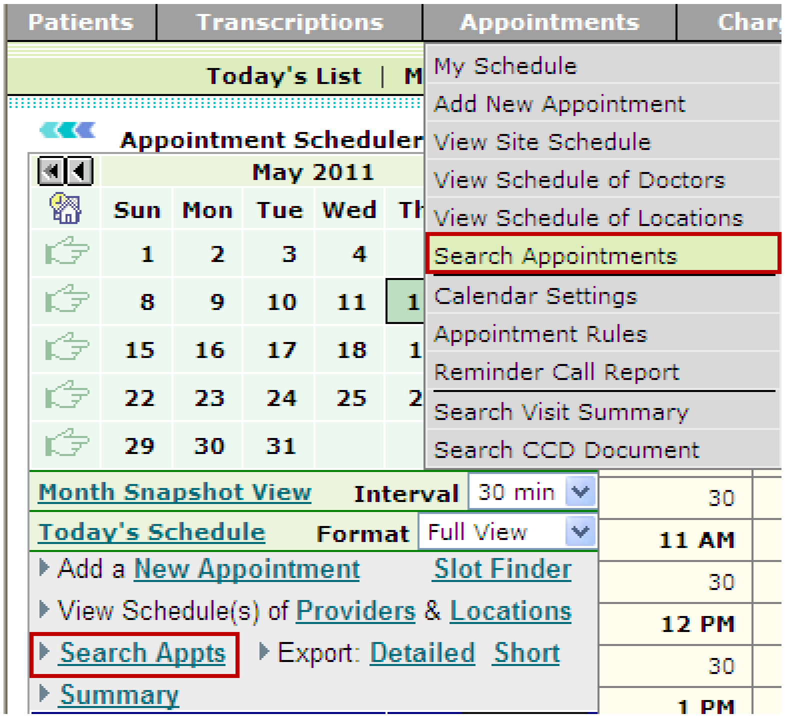
Set up Calendar for Appointment Scheduler

Appointment Rules

Search Appointments

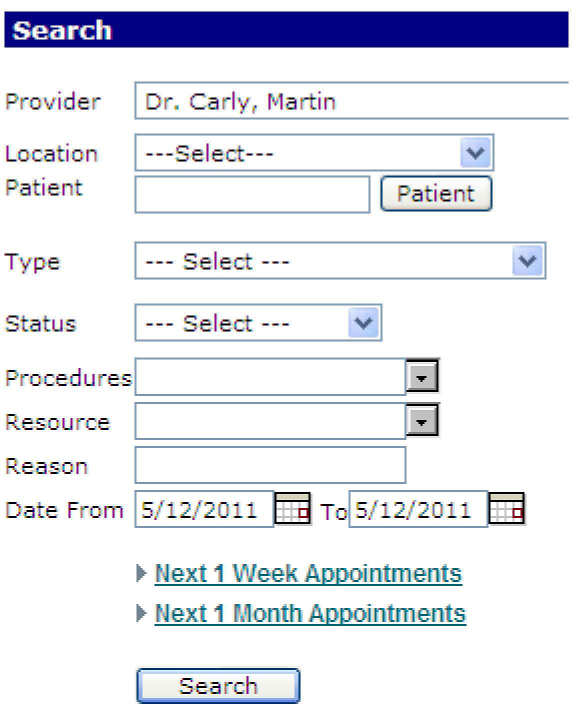
1. Click the **Search Appts** link under Appointment Scheduler.

   Alternatively, on the **Appointments** menu, click **Search Appointments.**



Search Appointments

The **Search** section is displayed under Appointment Scheduler.



Search Appointment Details

2. From the **Providers** list, select the name of the provider.
3. From the **Location** list, select a location.

4. In the **Patient** box, type the name of the patient.

   You can also click the **Patient** button to search a patient.

5. From the **Type** list, select an appointment type.
6. From the **Procedure** list, select a name of the procedure.
7. From the **Resource** list, select a name of the resource.
8. In the **Reason** box, type the chief complaint.
9. Specify the date range.

   Alternatively, You can also click the Next 1 Week Appointments or Next 1 Month Appointments.

   Note: You can specify one or more search parameters.

10. Click **Search**.

    The appointments for the specified search parameters are displayed on the right side.

Appointment List , matching criteria:
Date Range: 5/12/2011 - 5/12/2011 Doctor: Dr. Carly, Martin

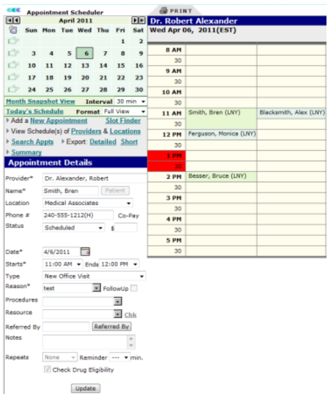
Patient	Provider	Appt Date	Procedure	Resource
Alexender, Robert Sex/Age - M/60y Ext Rec No # - Phone (H) -	Dr. Martin Carly	Thu May 12, 2011		
Established Office Visits	LNY Medical Associates	11:30AM to 12:00PM	CC: Colorectal Cancer Screening	
Eckerd, Sally Sex/Age - F/48y Ext Rec No # - Phone (H) - 814-645-2981	Dr. Martin Carly	Thu May 12, 2011		
Established Office Visits	LNY Medical Associates	12:10PM to 12:40PM	CC: Visit2	
Duminnie, Paul Sex/Age - M/70y Ext Rec No # - Phone (H) -	Dr. Martin Carly	Thu May 12, 2011		
New Office Visit	LNY Medical Associates	1:30PM to 2:00PM	CC: Pneumococcal Vaccination	

Appointments Search Result

Appointment Scheduler

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

To access Appointment Scheduler, click Appointments. By default, the following page is displayed.



Appointment Scheduler

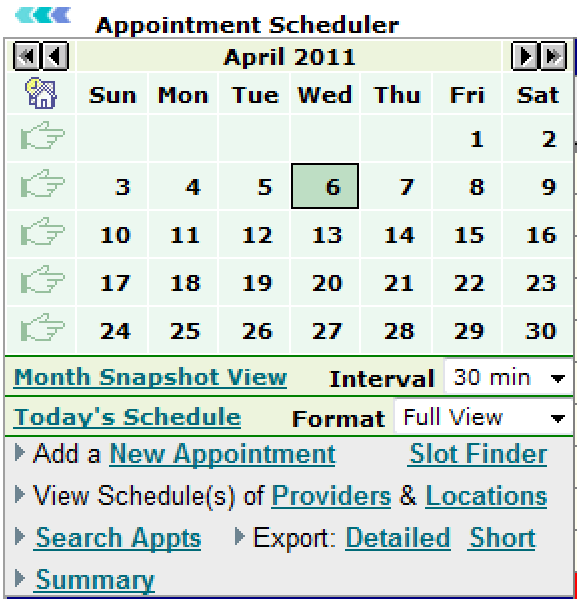
The Appointment Scheduler page is divided in two parts:

Part I

The Part I shows current month with current date, along with link of other functions that are part of appointment scheduler. Each of the links are explained below:

Appointment Scheduler Links

Link	Description
Month Snapshot View	Displays a patient load view by month
Today’s Schedule	Displays today’s schedule by appointment time
New Appointment	Displays the New Appointment Details
Slot Finder	Displays the search for available slots
View Schedule of Provider & Locations	Displays a check list of Providers & Locations, based on the link clicked
Search Appts	Searches existing appointments
Export - Detailed, Short, or Summary	Exports appointment schedule - detailed, short, or summary, based on the link clicked - to a secure, password-protected compressed file



Access Appointment Scheduler Image

Part II

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

Details of Appointment Image

The In-Patients Round Appointments displayed at the bottom of the page refer to the appointments scheduled with patients admitted in the hospital. The providers attend these patients when they does their round visits of the hospital. These patients do not require an appointment time.

Note: The lunch timings are displayed in red color, so as to make sure that no appointment is booked for the lunch time slot.

View Appointments

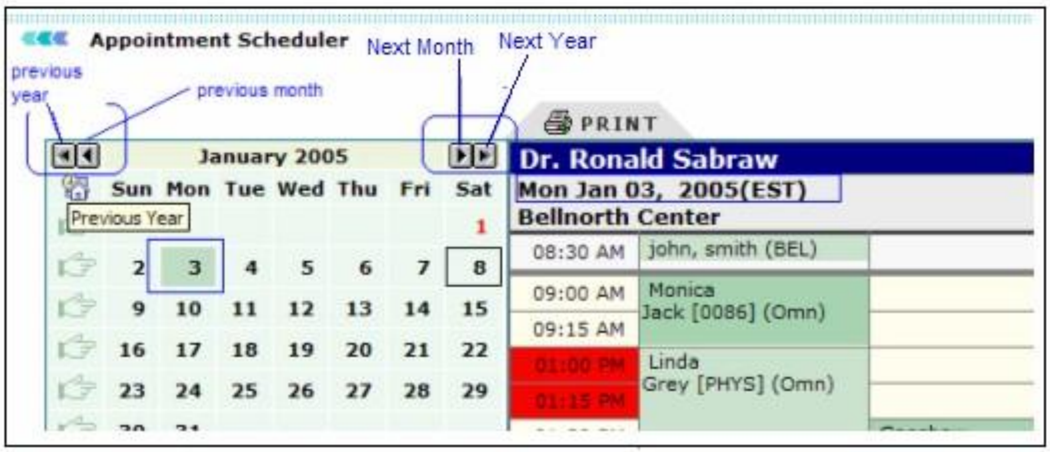
From Appointment Scheduler, you can view appointments for specific dates.

View Appointments

- In calendar, click the date, for which you want to view appointments.

  The appointments for the selected date are displayed.

> **Note:** By default, calendar displays current month and date. To view appointments of a previous date, click **Previous Month** image and **Previous Year** image. To view appointments of a future date, click **Next Month** image and **Next Year** image.



View Appointments

Cancel an appointment

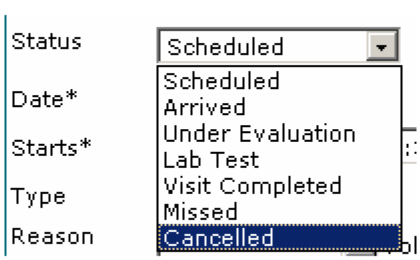
1. Click the **My Schedule** link, and then name of the patient.

   The appointment details are populated under Appointment Details.

2. From the **Status** list, select **Cancelled**.
3. Click **Update**.

   The name of the patient is struck through indicating the appointment is cancelled.

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



Cancelled Appointment

Add New Appointment

1. From the **Appointments** menu, select **Add New Appointment**.

   You can also click the **Add New Appointment** link on the Appointment Scheduler page.

2. From the **Doctors** list, select a name of the doctor with whom you want to schedule the appointment.

3. From the **Location** list, select a location for the appointment.

4. In the **Patient** box, type name of the patient.

   You can also click the **Patient** button to search a patient.

5. In the **Phone #** box, type the contact number for the patient.

6. From the **Status** list, select the status as **Scheduled**.

7. In the **Co-Pay** box, type the co-pay amount.

8. In the **Date** box, specify date for the appointment.

9. In the **Start** and **End** boxes, specify the appointment start and end times.

10. From the **Type** list, select the type of appointment.

11. In the **Reasons** box, type the chief complaint as reason for the appointment.

    You can also select a previously entered reason from the list.

12. Select the **FollowUp** check box if follow up is required, based on the history of the case.

13. From the **Procedures** list, select a procedure to be carried out during appointment.

14. From the **Resources** list, select the resources to be utilized for the procedure.

15. In the **Referred By** box, type name of the referring physician.

    You can also click the **Referred By** button to search the name of the physician.

16. In the **Notes** box, type any additional information you want to add for the appointment.

17. From the **Repeats** list, select an option if you want to repeat the appointment. The options include **None**, **Daily**, **Weekly**, **Monthly**, **Yearly**, and **Custom**.

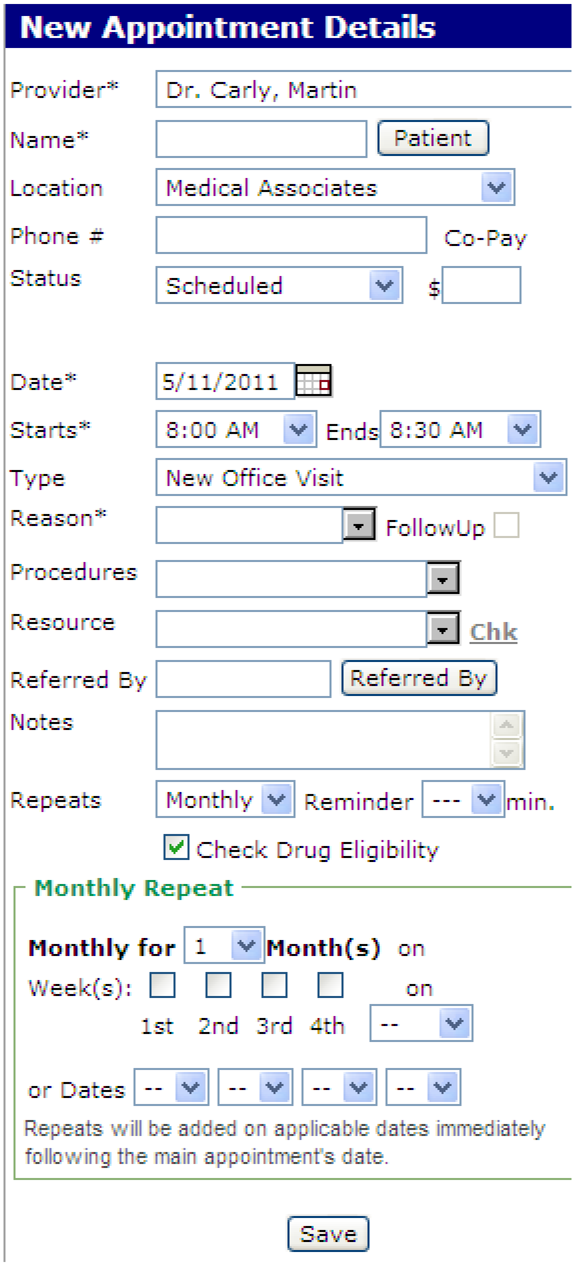
    Note: If you selected the Repeats option other than None, you need to specify repeat values. Based on the options selected, the repeat value options are populated.

18. From the **Reminder** list, select an option to set reminder.

19. Select the **Check Drug Eligibility** check box to check the patient's drug eligibility.

20. Click **Save**.

    The appointment is saved for the specified date and time.



New Appointment Details

Today's Schedule

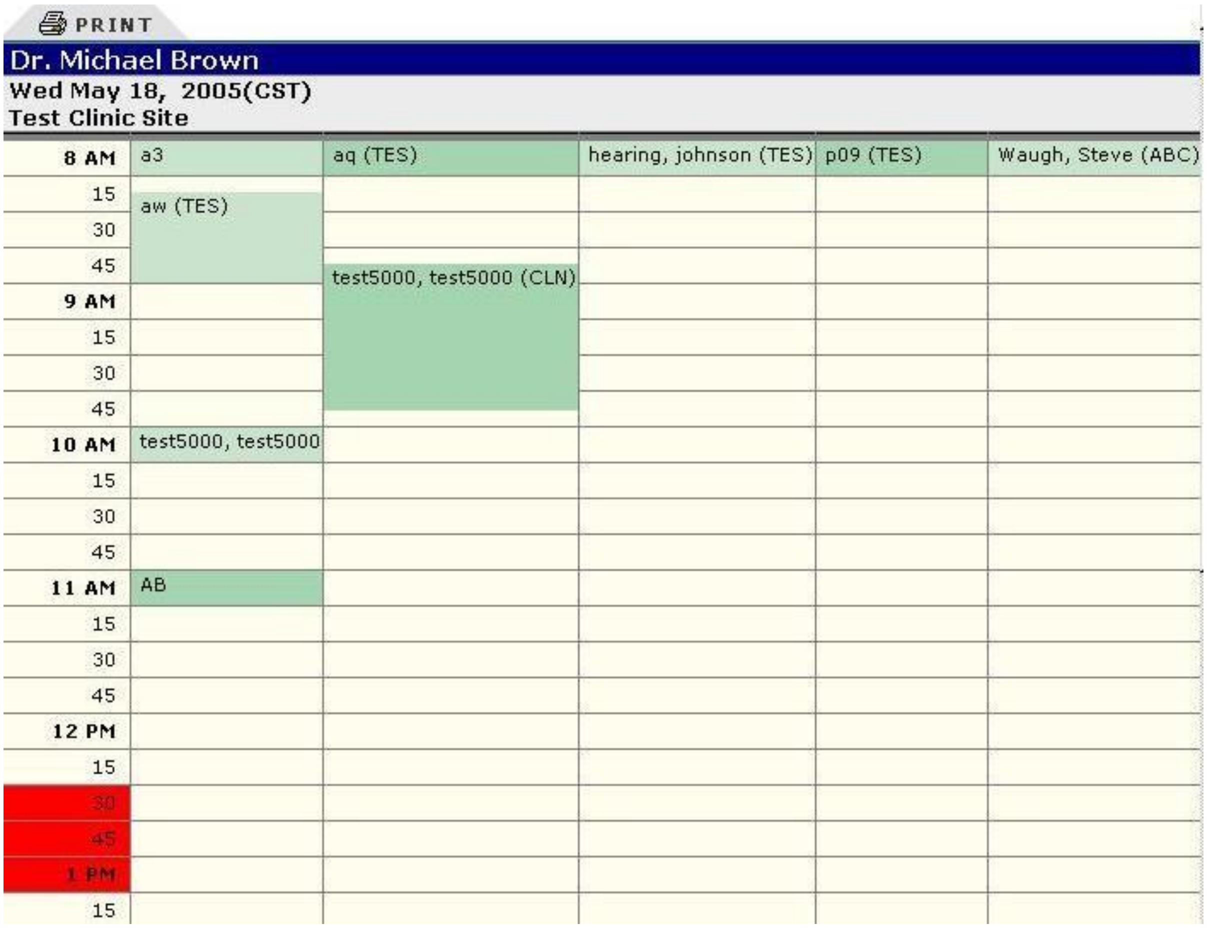
Today's schedule enables you to see details of schedule of your entire day.

View today's schedule

- From the **Appointments** menu, select **Today's Schedule**.

The Appointment Scheduler page is displayed, where you can see all the appointments of the current date. The appointments are displayed at an interval of 5, 10, 15, 20, or 30 minutes.

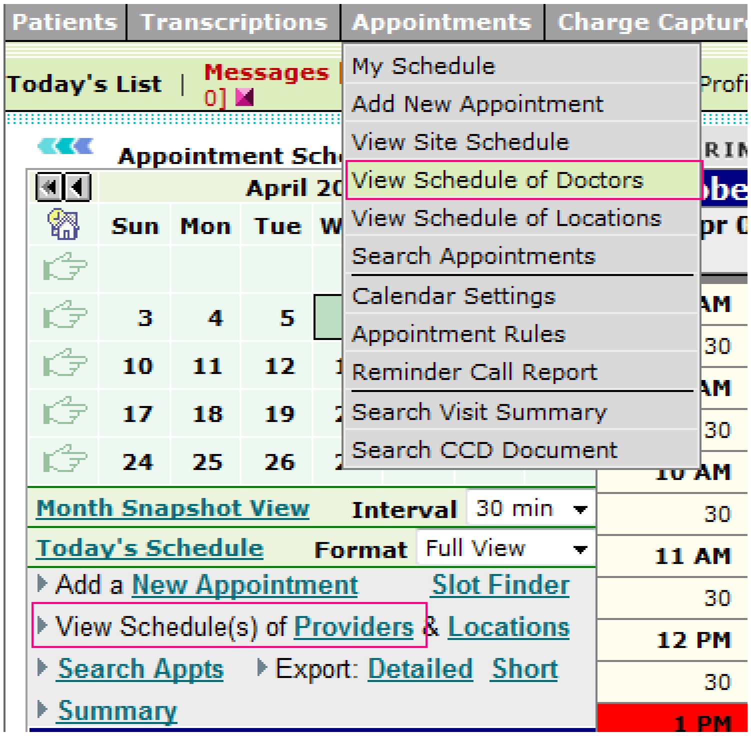
Note: Click **Print** to print the schedule.



My Schedule

View Schedules of Doctors/Providers

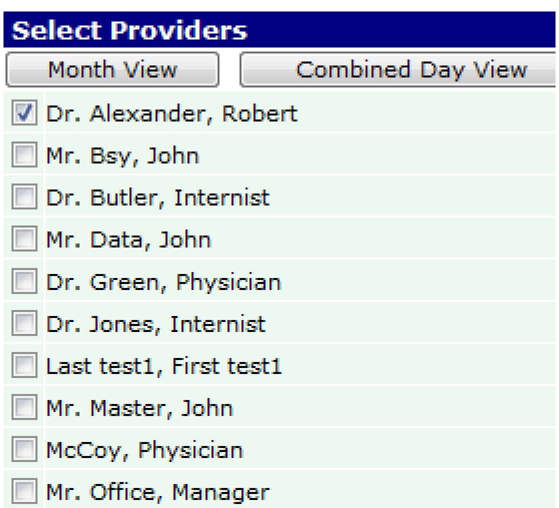
1. Click the **View Schedule(s) of Providers** link under Appointment Scheduler. Alternatively, on the **Appointments** menu, click **View Scheduler of Doctors**.



View Schedule of Providers

The **Select Providers** section is displayed under Appointment Scheduler.

2. Select the check boxes corresponding to the name of the providers, whose schedule you want to view.



Select Providers

3. Click **Month View** or **Combined Day View**.

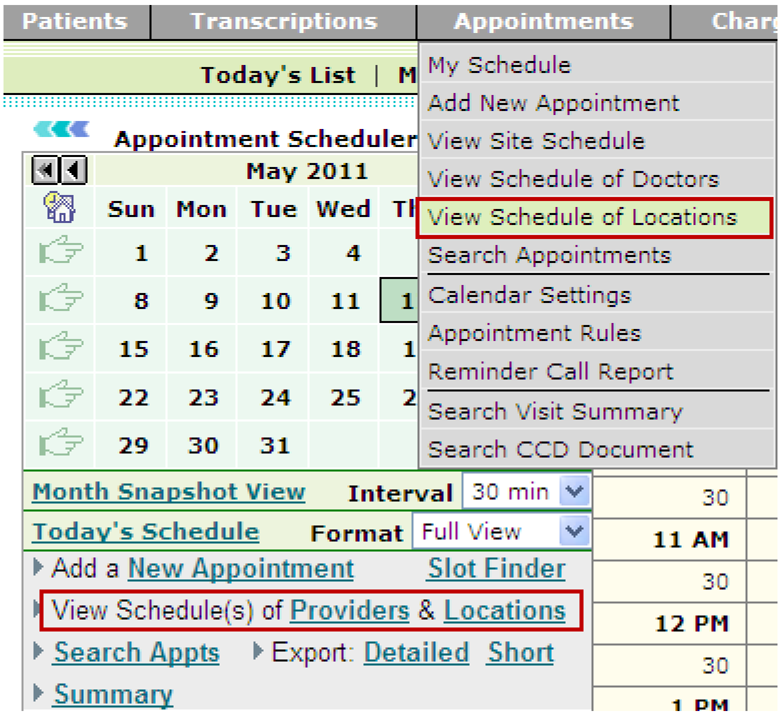
The schedules of the selected providers are displayed on the right side.

Note: You can view Month View only for one doctor. If you select multiple providers, then you can view only Combined Day View.

View Schedules of Locations

1. Click the **View Schedule(s) of Location** link under Appointment Scheduler.

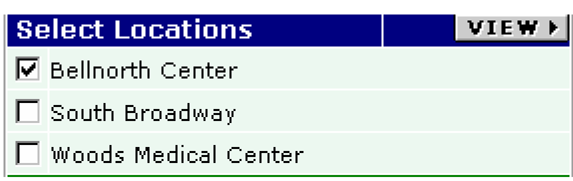
   Alternatively, on the **Appointments** menu, click **View Schedule of Locations**.



View Schedule of Locations

The **Select Locations** section is displayed under Appointment Scheduler.

2. Select the check boxes corresponding to the names of the locations, for which you want to view schedule.



Select Locations

3. Click **View**.

   The schedules of the selected locations are displayed on the right side.

Note: If you select multiple providers, then all the appointments of all the selected providers is displayed in a single page.

Export to Excel

1. Click one of the **Export** links (**Detailed**, **Short**, or **Summary**) under Appointment Scheduler.

   The **Excel Password** window is displayed.

2. In the **Enter Passcode** box, type the password you want to set for the exported file to open.
3. In the **Confirm Passcode** box, re-type the password.
4. Click **OK**.

   The File Download dialog box is displayed.

5. Click **Save** to save the file locally.

   Note: You can click **Open** to open the exported file. The file opens as read-only.

   The **Save As** dialog box is displayed.

6. Specify **File name**, browse to the required location, and click **Save**.

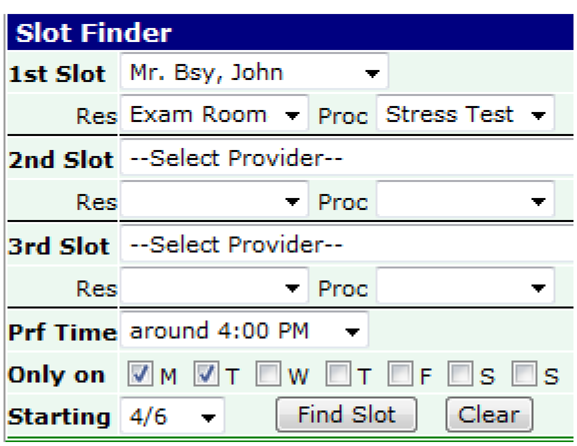
   A compressed file is saved at the specified location.

Slot Finder

OmniMD provides a feature to search for an open appointment slot. From Appointment Scheduler, click the Slot Finder link located next to the New Appointment link.

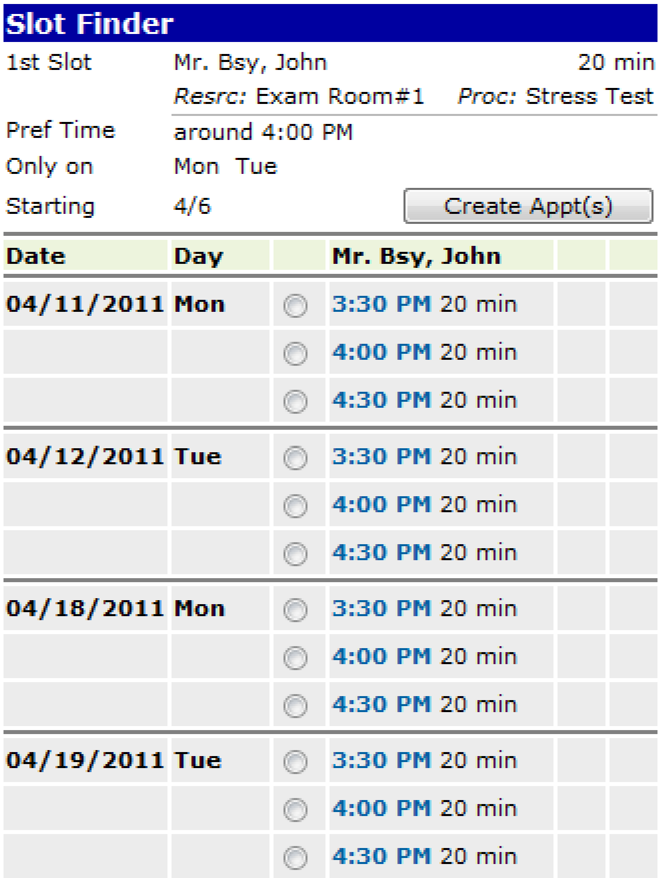
Note: Using Slot Finder, you can search slot for up to three appointments.

You can search slot by Provider, Resource, and Procedure, as well as by Preferred Time, Preferred Weekday, and from a specific Start date.



Slot Finder

The search returns the 3 closest appointments to the preferred appointment time, for approximately 25 dates.



Slot Finder Result

Select the appropriate time, and then click **Create Appt(s)** to schedule appointment for the selected slot.

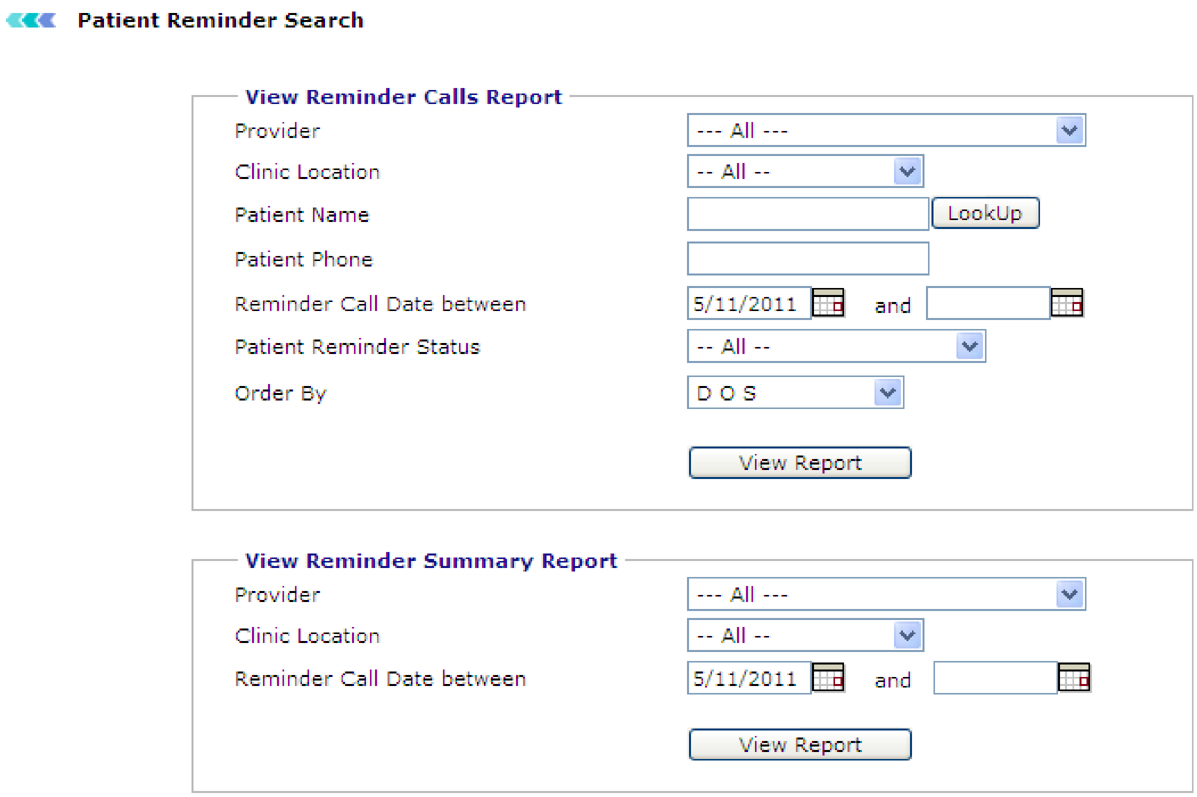
Reminder Search

1. On the **Appointment** menu, click **Reminder Call Report**.

   The Patient Reminder Today's Report is displayed.

2. Click the **View Patient Reminder Report** link above the reminder list.

   The Patient Reminder Search page is displayed.



Patient Reminder Search

3. Specify the search parameters.

View Reminder Calls Report

Parameter	Description
Provider	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.

Order By	Used the drop down menu to set an Order By date.

View Reminder Summary Report

Parameter	Description
Provider	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.
Reminder Call Date Between	Click on the calendar icons to select the period of call dates for which you wish to search reminders.

4. Click **View Report**.

The report is displayed for the specified parameters.

Pending Appointments for Eligibility Check

1. From the **Doctors** list, select the name of the doctor for whom you want to perform eligibility check for pending appointments.
2. From the **Payers** list, select the payer for the eligibility check.
3. In the **Patient** box, type the name of the patient.

Note: You can also click the **Patient** button to search and add the patient name.

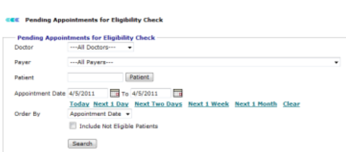
4. Specify the **Appointment Date** range or select specific period from **Today**, **Next 1 Day**, **Next Two Days**, **Next 1 Week**, and **Next 1 Month**.

5. From the **Order By** list, select an option to sort the search result.

6. Select the **Include Not Eligible Patients** check box to include non-eligible patients in the search result.

7. Click **Search**.

The pending appointments list for the selected criteria is displayed.



Pending Appointments for Eligibility Check

8. From the list, select the check box corresponding to the appointment you want to check eligibility for, and then click **Check Eligibility**.

The eligibility report displays Patient, Appointment Date, Insurance, and Comments. The comments column displays missing or incorrect fields for eligibility checks.

Pending Appointment List for Eligibility Check

Search Pending Appointments for Eligibility Check

Provider: All
Payer Name: All
Patient Name: All
Appointment Date From: 04/01/2009 to 4/5/2011
Order By: Appointment Date
Not Eligible Patient Included: No

	Appointment Date (DOS)	Patient	Provider	Insurance Payer	Last Checked Date
☐	04/04/2011 3:00 PM	Test, Test	Office Manager	(Pri)ABMA (Alta Bates Medical Assocs) Medical Corp (Hne	
☐	04/04/2011 2:00 PM	Ferguson, Monica	Office Manager	(Pri)ABMA (Alta Bates Medical Assocs) Medical Corp (Hne	
☐	04/04/2011 8:00 AM	Test, Test	Alexander Robert	(Pri)ABMA (Alta Bates Medical Assocs) Medical Corp (Hne	
☐	04/02/2011 2:00 PM	Bloom, Agatha	Office Manager		
☐	04/01/2011 8:00 AM	Test, Test	Alexander Robert	(Pri)ABMA (Alta Bates Medical Assocs) Medical Corp (Hne	
☐	03/30/2011 5:00 PM	Test, Test	Office Manager	(Pri)Self-Pay	
☐	03/30/2011 3:00 PM	TEST, TEST	Natasha Sampson	(Pri)ABMA (Alta Bates Medical Assocs) Medical Corp (Hne	
☐	03/30/2011 12:00 PM	Gardner, Mark	Alexander Robert	(Pri)Medicare Part B (PO Box No 4627 New York)	

Eligibility Results

Set up Calendar for Appointment Scheduler

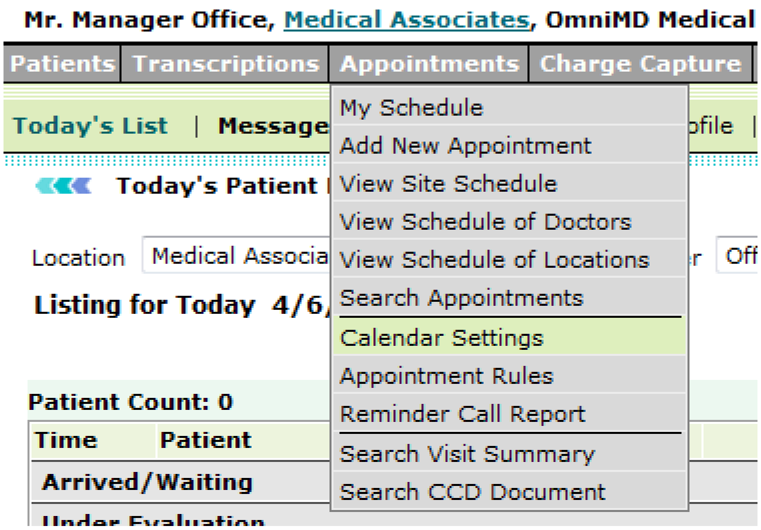
Set up Calendar for Appointment Scheduler

Before you start using Appointment Scheduler in OmniMD, the calendar settings must be set up. This is because appointments are based on clinic timings and the calendar must be set up before appointments can be made.

Set up calendar

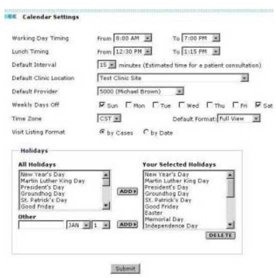
1. Click **Appointment** > **Calendar Settings**.

   The Calendar Settings page is displayed.



Calendar Settings

2. Fill in the fields as applicable.



Calendar Settings Details

Calendar Settings

Field	Description
Working Day Timings	Fill in start time in **From** field and end time in **To** field. This will make appointment scheduler to start from that time.
Lunch Timing	Fill lunch start time in **From** field and lunch end time in **To** field.
Default Interval	Select from the drop down list the estimated time required for patient consultation.
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.
Default Provider	Select the name of the default provider at the selected clinic location, from the drop-down menu.

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.
Time zone	Select time zone from drop-down menu.
Default Format	Select the default view format as Condensed view or Full view from the drop-down menu.
Visit Listing Format	Select the radio button for the format in which you want to display patient appointments on Patient Dashboard.
Holidays	To create your holiday list, select the holiday from **All Holidays** list and click **Add**. This will add holidays in **Your Selected Holidays** list. This setting will show that particular date in red color. To add a holiday, type the name of the holiday in the **Other** field, select month and date, and click **Add**. The holiday is added to **Your Selected Holidays** list. **Notes:** To delete a holiday, select the holiday, and then click **Delete**. The holiday is deleted from the list. In the Appointment Scheduler, all holidays are displayed in red color, so that no appointments are created on holidays.

3. Click **Submit**.

The calendar settings are saved.

Format of Calendar

Appointment calendar can be viewed in two formats: Condensed format and Full View format.

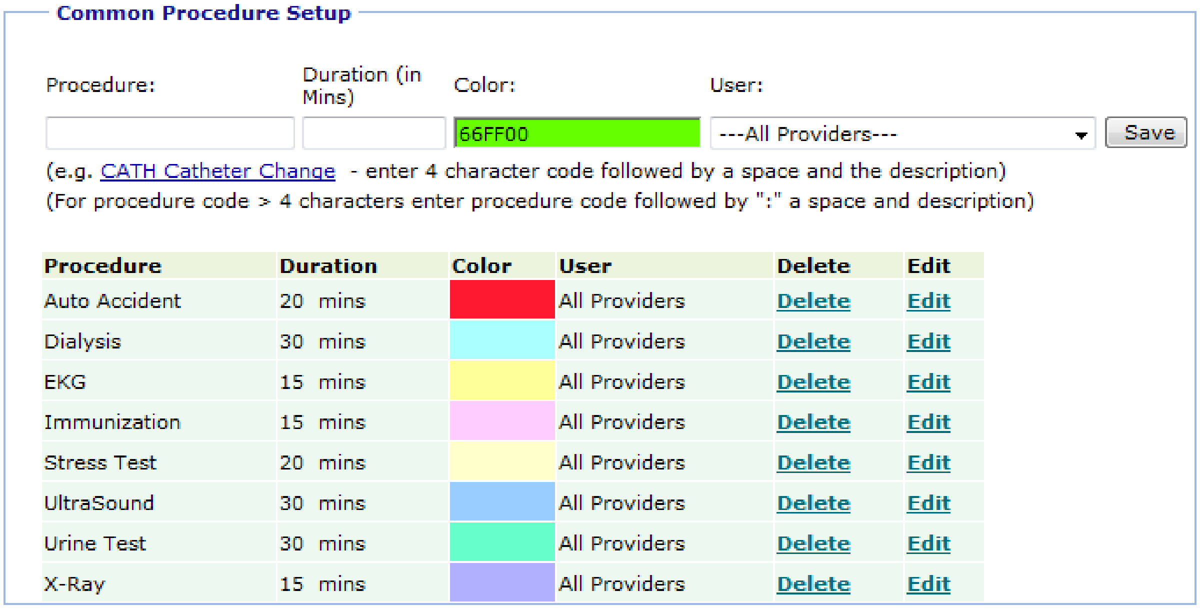
To set calendar format

- On the **Appointment Scheduler** page, from the **Format** list, select the format option, in which you want to view calendar.

The page is refreshed to display the selected format.

Common Procedure Setup

The Common Procedure Setup options are available under Calendar Settings. In this section, you can view all procedures along with the time taken by all Providers. You can also add, edit, or delete procedures.



Common Procedure Setup

Add a procedure

1. In the **Procedure** box, type name of the procedure.
2. In the **Duration** box, type a time value in minutes.
3. In the **Color** box, select a color from the color pane to specify identification color for the procedure.
4. From the **Users** list, select a user.
5. Click **Save**.

   The procedure is added to the list.

Edit a procedure

1. Click **Edit** corresponding to the name of the procedure, which you want to edit.

   The information is populated in appropriate fields.

2. Make the required changes, and then click **Save**.

   The updated procedure information is displayed.

Delete a procedure

- Click **Delete** corresponding to the name of the procedure, which you want to delete.

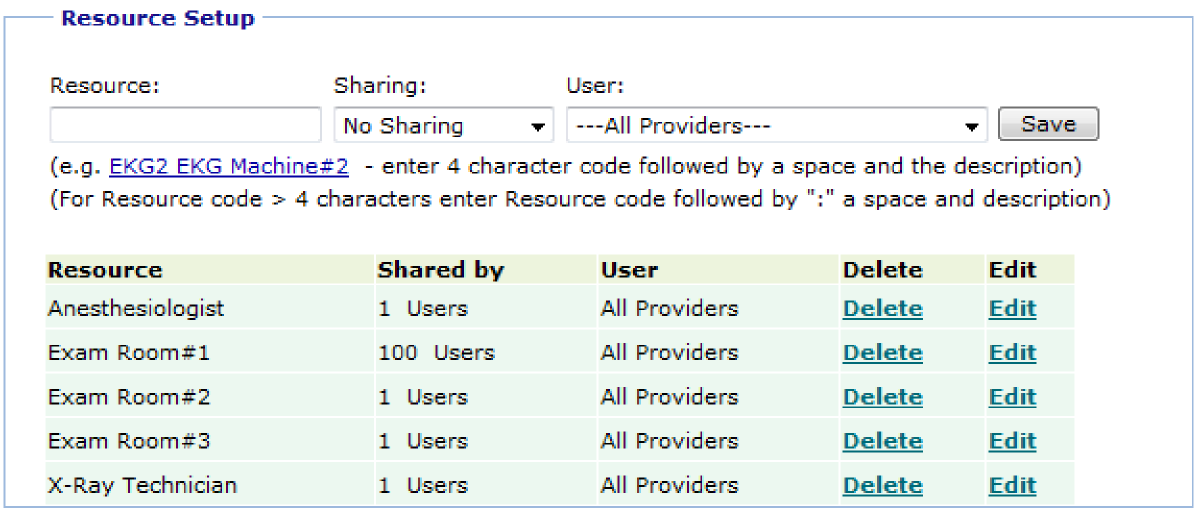
  The procedure is deleted from the list.

Calendar Settings

You need to set calendar before you start using Appointment Scheduler. For more information, refer to Set up Calendar for Appointment Scheduler.

Resource Setup

The Resource Setup options are available under Calendar Settings. In this section, you can view all the resources. You can also add, edit, or delete resources.



Resource Setup

Add a resource

1. In the **Resource** box, type name of the resource.
2. From the **Duration** list, select an option for sharing the resource.
3. From the **Users** list, select a user.
4. Click **Save**.

   The resource is added to the list.

Edit a resource

1. Click **Edit** corresponding to the name of the resource, which you want to edit.

   The information is populated in appropriate fields.

2. Make the required changes, and then click **Save**.

   The updated resource information is displayed.

Delete a resource

- Click **Delete** corresponding to the name of the resource, which you want to delete.

  The resource is deleted from the list.

Appointment Rules

From Appointment Rules, you can set up specific rules for appointments based on provider and location.

View Appointment Rules

- On the **Appointment** menu, click **Appointment Rules**.

Appointment Rules

The Appointment Rules List is displayed.

Appointment Rules list

Add New Appointment Rule

Action	Provider/Location	Rule / Applicability		Procedures	Visit type
Allow	Dr. Robert Alexander	Rule : **Monday**		- Follow-up	Initial & Follow-up visits
	Medical Associates	Days: Mon	Time: 10:00 AM - 7:00 PM	- Initial Visit - Walk-In	Edit
Disallow	Dr. Robert Alexander	Rule : **No New Patients in Last Hour**		- Initial Visit	Initial visits only
[strict]	Medical Associates	Days: Mon,Tue,Wed,Thu,Fri	Time: 4:00 PM - 5:00 PM	- Walk-In	Edit

Appointment Rules List

Add Appointment Rule

1. Click the **Add Appointment Rule** link above the Appointment Rules list.

   The **Add/Edit Appointment Rule** page is displayed.

2. In the **Rule Name** box, type a name for the rule.
3. Select the check boxes corresponding to the name of the days to specify **Weekdays**.
4. In **Time Range**, specify the **Clinic start time** and **Clinic end time**.

5. From the **Providers** list, select a provider.

Note: You cannot select multiple providers. Each provider requires their own rule.

6. From the **Location** list, select a location.

7. From the **Visit type** list, select a visit type from **Initial & Follow-up visits**, **Initial visits only**, and **Follow-up visits only**.

8. From the **Procedure(s)** list, select the name of the procedures, and then click **Add**.

The selected procedures are moved to the **Selected Procedures** list.

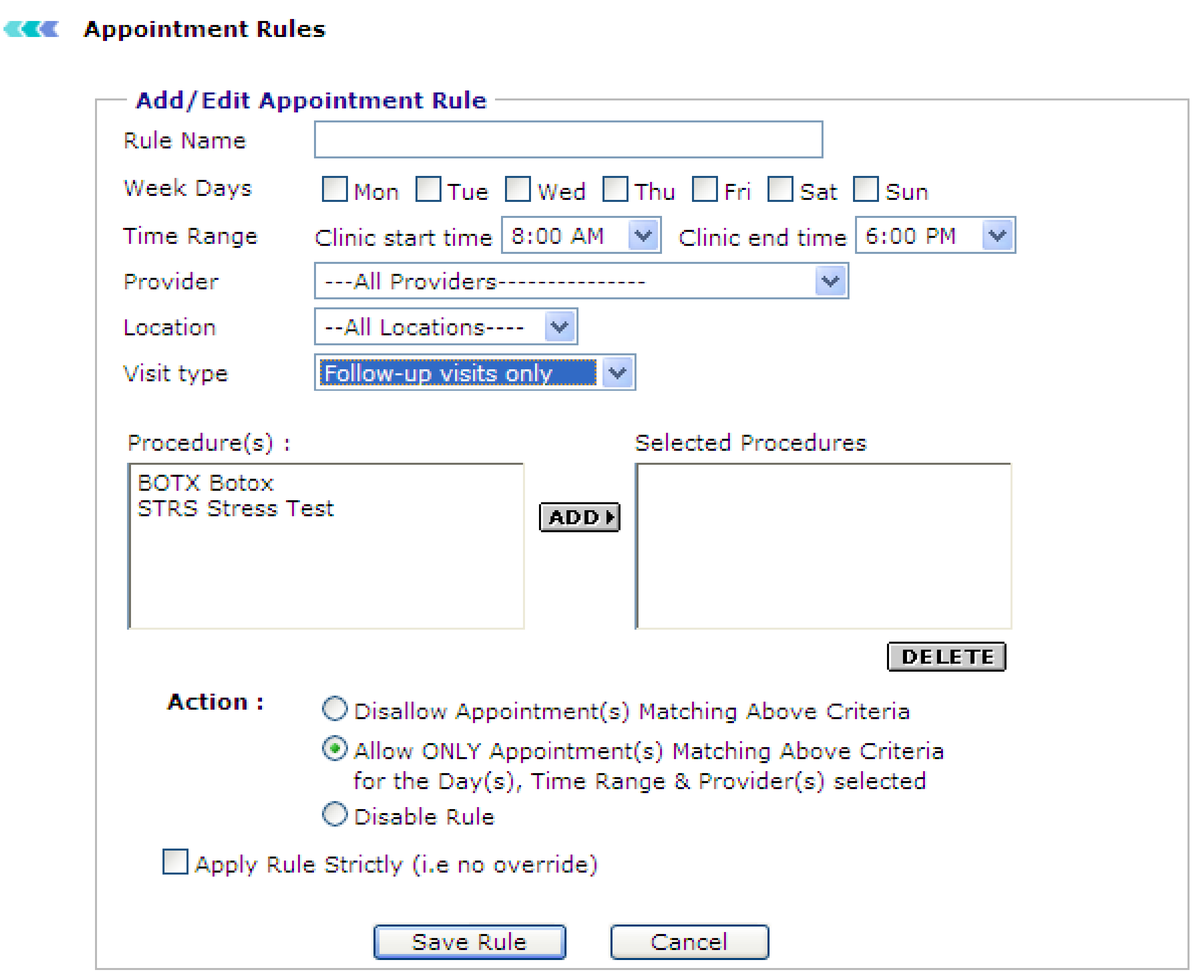
Note: To remove, select a procedure from the **Selected Procedures** list, and then click **Delete**.

9. Specify an action for the rule.

10. Select the **Apply Rule Strictly** check box if you do not want the staff using override the rule and book an appointment.

11. Click **Save Rule**.

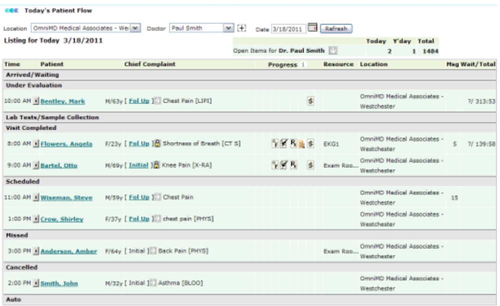
The rule is added to the Appointment Rules list.



Add Appointment Rule

Today's List

Today’s List is the default page that is displayed after logging on to OmniMD account. With appropriate access rights, providers can change the default page.



Today's Patient Flow

The Clinic Location, Provider, and Date for the populated list appear as drop-down lists at the top of the page. Change any of these drop downs and click Refresh to populate a new list.

The list shows an abundance of data regarding today’s schedule, the breakdown is as follows:

Time

This column indicates the appointment time for the associated patient.

Patient

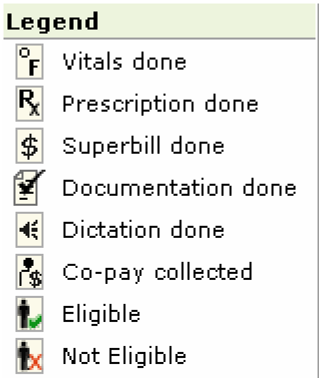
This column displays the name of the patient. Click on the patient’s name to see Patient’s Dashboard.

Chief Complaint

This column explains the appointment reason. It also includes gender, age, type of visit (Initial vs Follow Up- which will bring you to the visit summary if clicked), and the appointment reason.

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:



Progress 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 to view details of how legends get added in the column.

Resource

This column indicates if a resource (eg exam room, or piece of equipment) has been reserved for this appointment.

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.

Location

Message

Indicates the number of messages/tasks that the physician or staff must address for this patient.

Wait/Total

Displays the amount of time the patient spent under the subheader "Arrived/Waiting" (refer figure Subheader for explanation) over the total amount of time the patient spent at the clinic office.

Subheader

The subheader groups the patients based on their appointment status within the clinic (eg Arrived/Waiting, Under Evaluation, Lab Tests/Sample Collection, etc). This serves to direct the user to the patients in most need of attention. Patients are listed by appointment time under each subheader.

Arrived/Waiting
Under Evaluation
Lab Tests/Sample Collection
Visit Completed

Subheader

Open Items

In addition, there is an Open Items display above Today's List. This indicates to the user that they have items that need to be addressed. By clicking the arrow icon, the list expands with more detail regarding the type of open item (e.g., messages, Rx's, superbills, and others).

	Today	Y'day	Total
Open Items for **Mr. Office, Manager**	3	2	1557

Open Items

Patient Dashboard

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.

The Patient Dashboard displays:

Personal Information

Dashboard Links

Cases and Visits

Patient's Recent and Upcoming Health Alerts

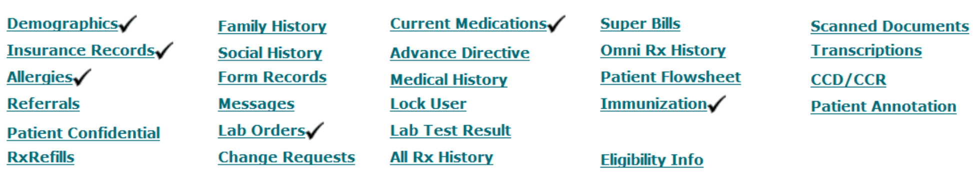
Patient's Future Appointments

Patient's Primary Insurance Details

Charts & Reports: Growth Charts

Dashboard Links

Click a link to view details.



Links on Patient Dashboard

From Dashboard Links section, you can access the following:

Demographics	Insurance Records	Allergies
Referrals	Patient Confidential	Rx Refills
Family History	Social History	Medical History
Form Records	Messages	Lab Orders

Current Medications	Advanced Directive	Lock User
Lab Test Results	All Rx History	Patient Flowsheet
Immunizations	Super Bills	Omni Rx History
Transcriptions	Eligibility Information	Scanned Documents

New Case/Visit

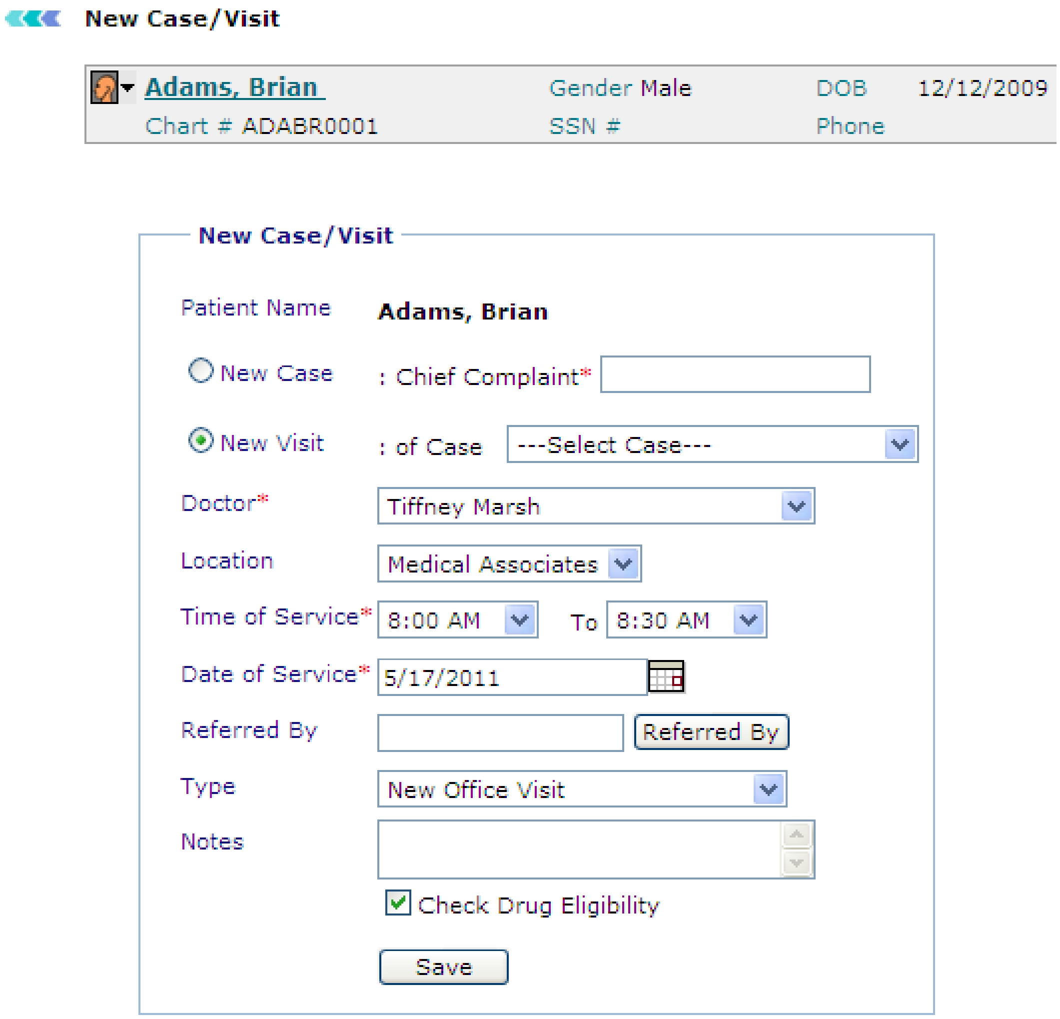
1. Click the **New Case/Visit** link above the **Cases and Visits** list.
2. Specify the following new case/visit details:

Case/Visit Details

Field	Description
Patient Name	Read-only field, displays the patient's name.
New Case: Chief Complaint	Select this option if this is a new case, and specify chief complaint.
New Visit: Of Case	Select this option and specify the case if this is a new visit for an existing case.
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.
Type	Select a case or visit type from the list.
Notes	Enter observations in Notes field that might be useful for next appointment.

3. Click **Save** to save visit details.

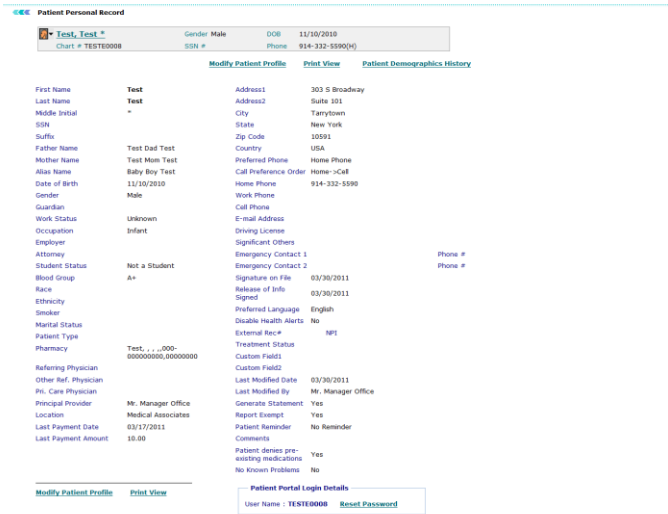
Note: In case insurance records of patients are changed, the provider must create a new case in the OmniMD. This way, it helps in having latest insurance information while creating super bill and viewing other information. Creation of new case is must, even if it is a follow up visit.



New Case/Visit Image

Demographics

The Demographics section shows personal records of the patient.



Patient Demographics

View demographics

- Click the **Demographics** link.

  The Patient Personal Records page is displayed.

Modify patient profile

1. On the **Patient Personal Records** page, click the **Modify Patient Profile** link to edit patient's profile.
2. Update the patient's demographic information.
3. Click **Save**.

   The updated patient information is displayed.

Print demographics

1. On the **Patient Personal Records** page, click the **Print View** link.

   The **Patient Personal Record** page is displayed in a new window.

2. From the **File** menu, click **Print**.

   The **Print** dialog box is displayed allowing you to print the patient demographics.

Cases and Visits

The Patient's Cases and Visits section displays a list of last 5 cases and visits made by patient, along with chief complaint. If you want to see all the cases and visits, click the **Show All** link.

Cases and Visits   Active Problem List   Patient Ledger   New Case/Visit

Date of Service	Chief Complaint	Attending Provider	Progress	Action
Case: Immunizations				
03/01/2011 8:00 AM-8:30 AM TUE	Immunizations	Dr. Internist Jones		
Case: 3 months Routine Visit				
01/31/2011 10:20 AM-10:50 AM MON	3 months Routine Visit	Dr. Robert Alexander		
Case: Newborn 1st Visit				
11/04/2010 9:00 AM-9:30 AM THU	Newborn 1st Visit	Dr. Robert Alexander		

Patient's Cases and Visits

From Cases and Visits, you can:

Add Progress

Add visit Closure

Collect Co-Pay

View Patient Visit Details

Add/Modify Patient Case/Visit-Related Information

View Case Report

Patient's Future Appointments

The Patient's Future Appointments section lists all the future appointments.

Patient's Future Appointments   Print

Dt.of Service	Chief Complaint	Physician	Procedures
05/02/2011 10:00 AM-10:30 AM MON	6 months Routine Visit	Dr. Robert Alexander	

Patient's Future Appointments

Advanced Directive

Click the **Advanced Directive** link to view current and/or add new documents. From the Advanced Directive page, you can **Review**, **Edit**, and/or **Delete** any documents.

Patient Advanced Directive

Test, Test *   Gender Male   DOB 10/30/2010
Chart # TESTE0008   SSN #   Phone 914-332-5590(H)

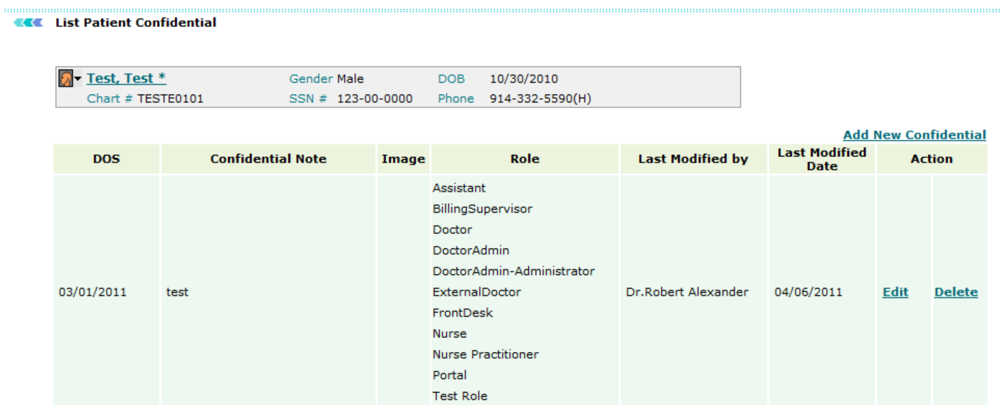
Add New Directive

DOS	Directive Type	Directive Note	Document (s)	Last Modified by	Last Modified Date	Last Reviewed by	Last Reviewed Date	Action
12/01/2010	Durable Power of Attorney	TEST		Mr.Manager Office	03/30/2011			Review Edit Delete

Advanced Directive

Patient Confidential

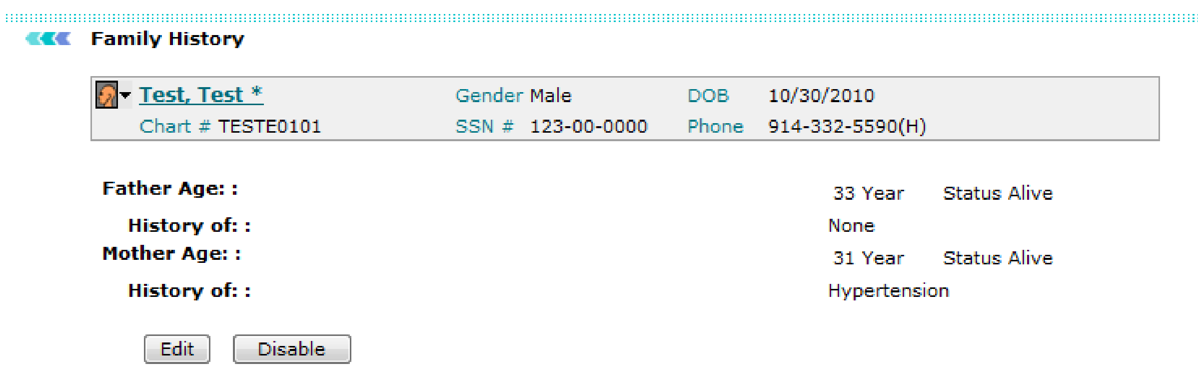
Click the **Patient Confidential** link to see previous records as well create new ones by clicking on **Add New Confidential**.



Patient Confidential List

Family History

Click the **Family History** link to view, edit, add, or disable details of patient's family history.



Family History

Social History

Click the **Social History** link to view, edit, add, or disable patient's social history details.

Social History

Test, Test *		Gender	Male	DOB	10/30/2010
Chart #	TESTE0101	SSN #	123-00-0000	Phone	914-332-5590(H)

Social History

Denies

Smoking
Alcohol use
Illicit Drug Use
Caffeine use

Occupation

Diet

Exercise

Marital status --Select--

Tobacco Consumption

Type

Amount Unit

Frequency

Duration

Smoking

Types

Amount Unit

Frequency

Duration

Caffeine

Illicit drug use

Types

Amount

Frequency

Duration

Reaction

Treatment

Alcohol consumption

Types

Amount

Frequency

Duration

Reaction

Treatment

Disability Denied --Select-- -

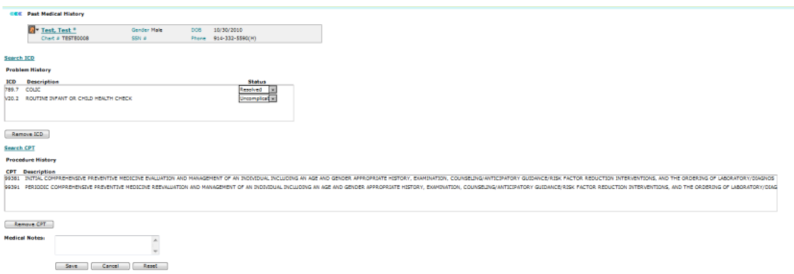
Note/Comment

Submit Cancel

Social History

Medical History

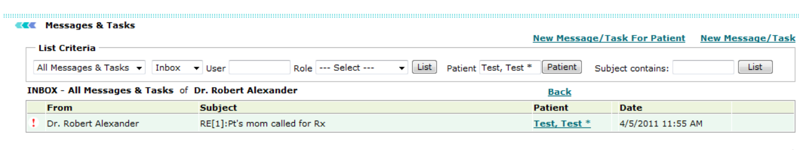
Click the **Medical History** link to view details of Problems and Status of it as well as Procedures. You can remove or add the details. Click the **Save** button once every field have been filled.



Medical History

Messages

Click the **Messages** link to view all messages pertaining to patient's records.



Messages

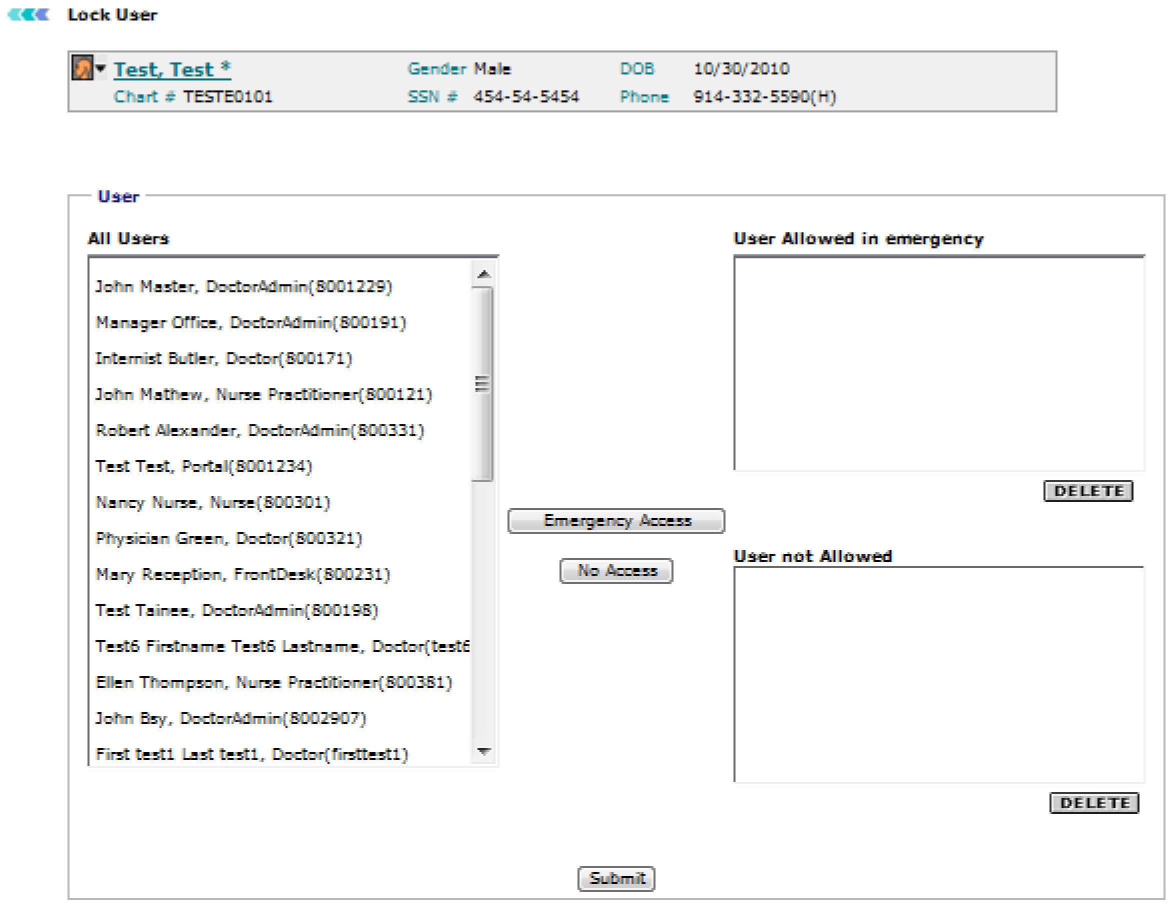
Transcriptions

Click the **Transcriptions** link to view all transcriptions. Click **Today** to view current date's transcription, **Yesterday** to view Yesterday's transcription, and **Last 2 days** to view transcription made in the last two days from current date. You can **View Fax Status** and search all transcriptions. Click **My Templates** to view templates that have been created by Provider.

Transcriptions

Lock User

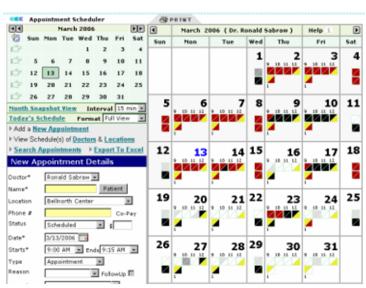
Click the **Lock User** link to lock any internal user. Locking user prevents them from accessing sensitive data in the patient's file.



Lock User

Month Snapshot View

Month Snapshot View enables you to view your schedule for the month in a single page.

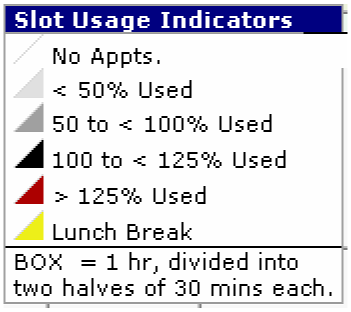


Month View

View month's snapshot

- Click **Month Snapshot View** under calendar.

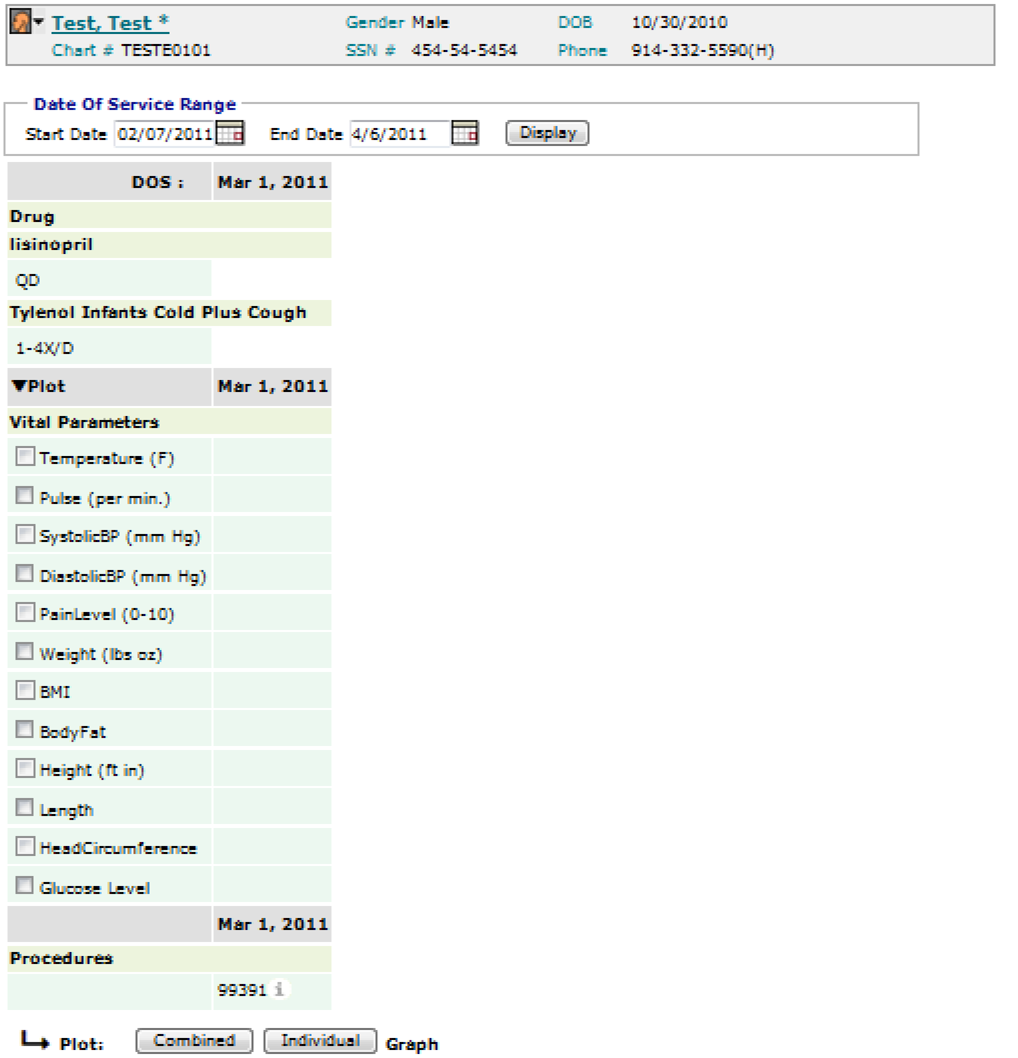
The snap shot view of the entire schedule for the month is displayed. You can view vacant, booked, or cancelled appointments for the month in a single page.



Color Code

Patient Flowsheet

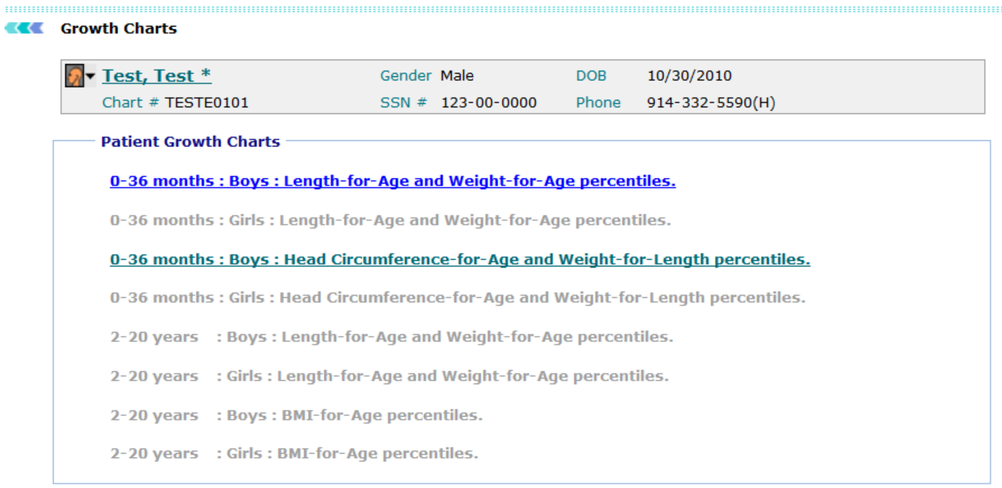
This will display the dates on which services were rendered to patient. Click the **Patient Flowsheet** link, it will show vital signs of patient. Select date range to see whether services were rendered within specified.



Patient Flowsheet

Charts & Reports: Growth Charts

Click the **Growth Charts** link to view the patient's growth charts (peds only).



Patient's Growth Chart Image

Click the highlighted link to view or print the parameters.

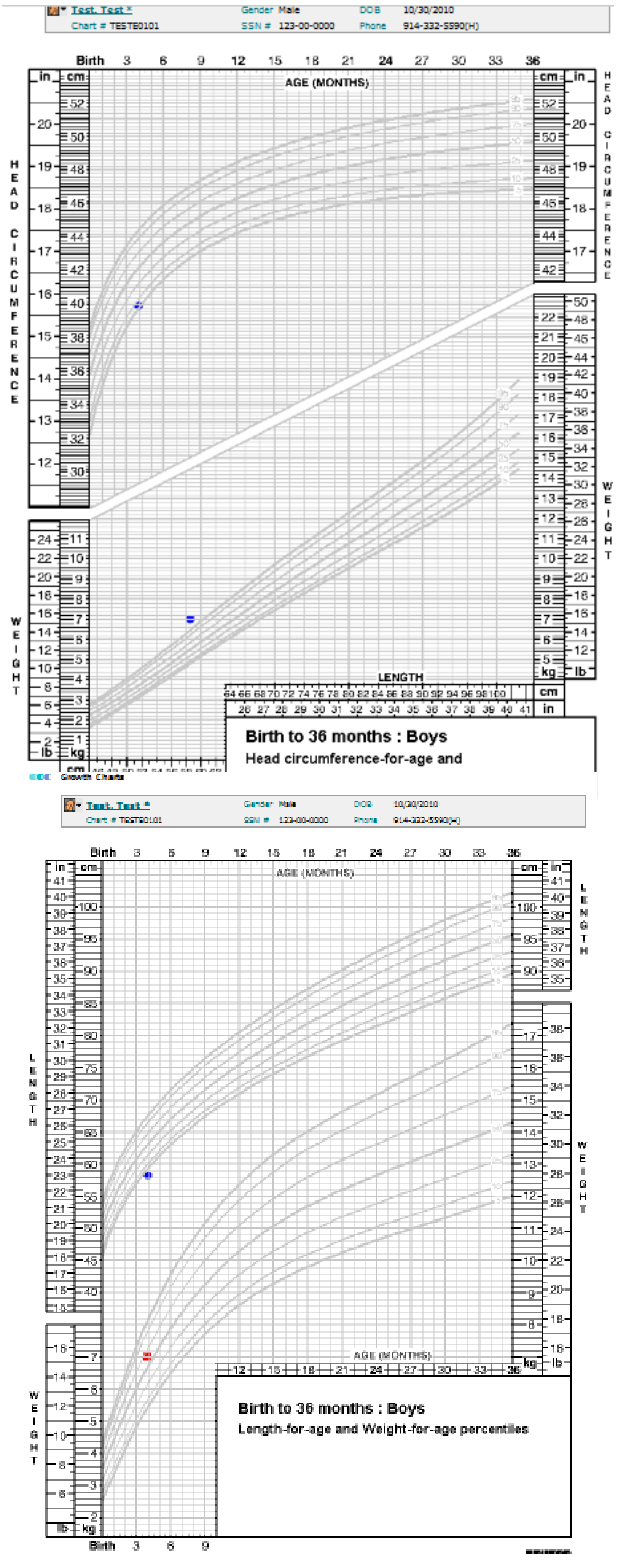
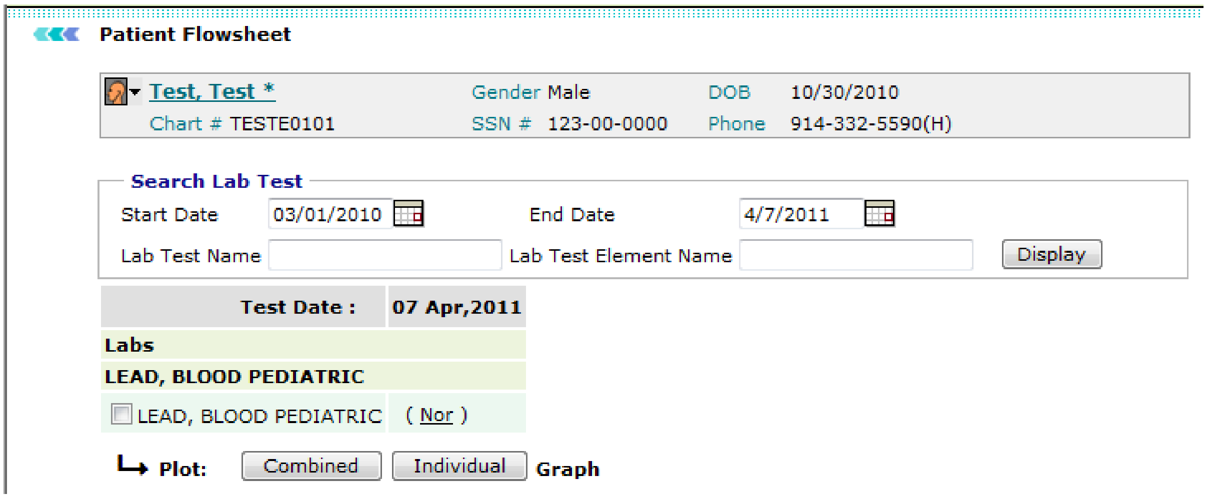


Chart I & Chart II

Lab Test Results

Click the **Lab Test Results** link to view previous and current test results.



Lab Test Results

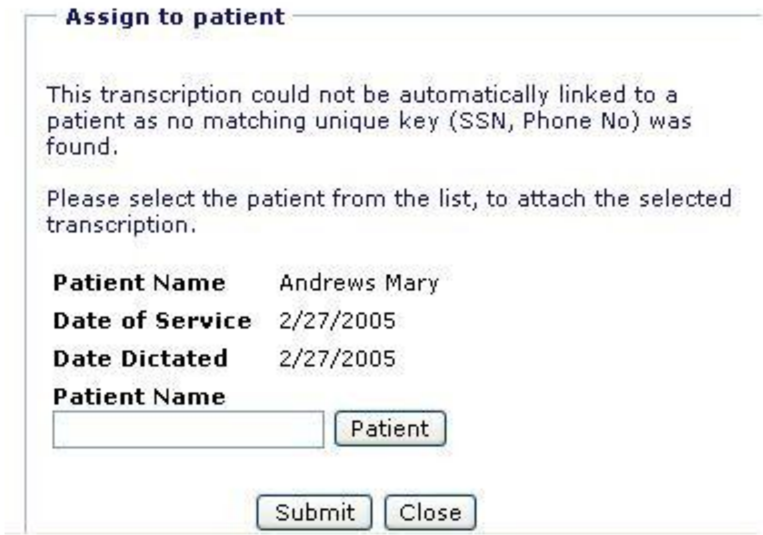
Linking the Transcription

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

Link the transcription to a patient

1. Click the  icon to link the transcription.

   The Assign to Patient page is displayed.



Assign to Patient

2. Click the **Patient** button and select patient from the dialog box.

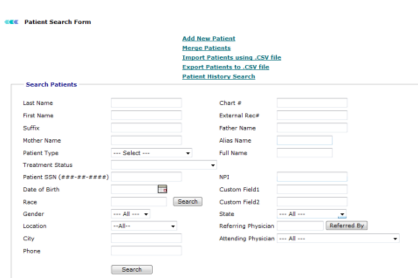
   You can select patient Today's Patient or Last 2 days patients. You can also search patient and add a new patient.

3. Click **Submit**.

   The transcription is linked to the selected patient.

Patient Medical Records

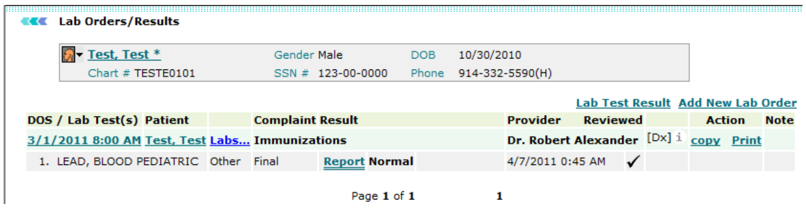
OmniMD enables providers to maintain records of their patients. The Patient Medical Record module of OmniMD works as database that maintains personal, medical, and insurance information of patients. Through Patient Medical Records, a provider can add, merge, import, export and search patient records.



Patient Search Form

Lab Orders

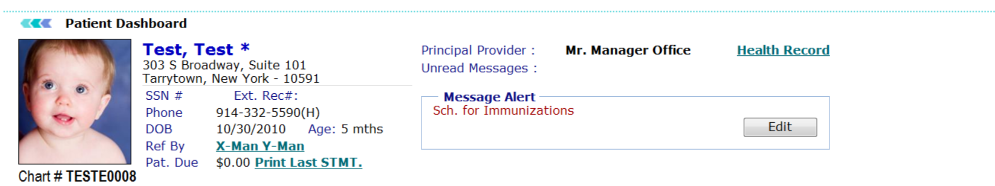
Click the **Lab Orders** link to view ordered lab tests and results or add new lab orders. You can **Copy** a lab order to re-order or print a requisition for the patient. You can also click the **Report** to view details of the test.



Lab Orders

Personal Information

The Personal Information section displays personal information of the patient such as Name, Address, SSN, Phone, DOB, Age, Ref. By, Chart#, and Message Alerts.



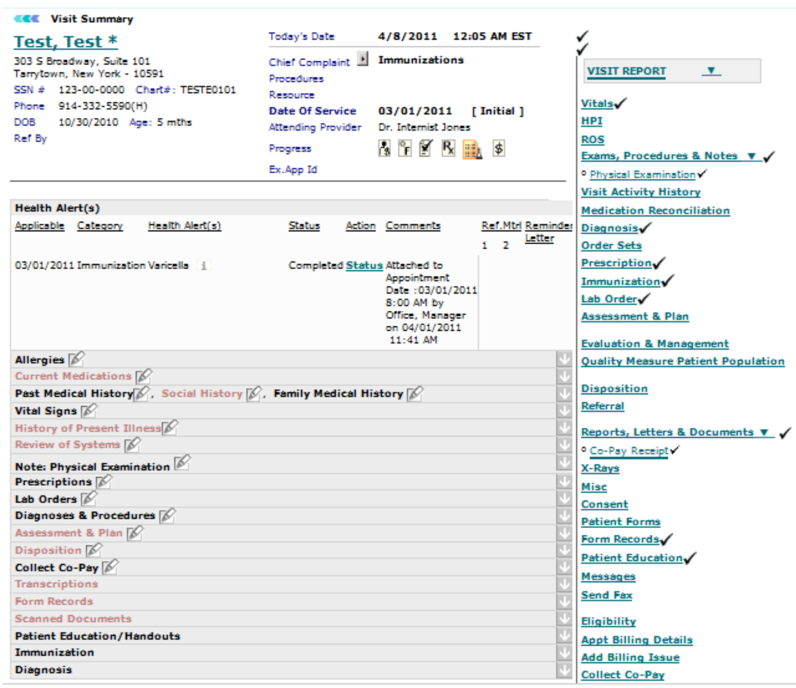
Personal Information

Visit Summary

Patient Visit Details

1. Click the visit date on the Patient's Case and Visits section.

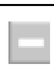
   The Visit Summary page displays all the details associated with the selected visit.



Patient Visit Summary

2. Click the appropriate buttons to perform specific actions.

Action Buttons

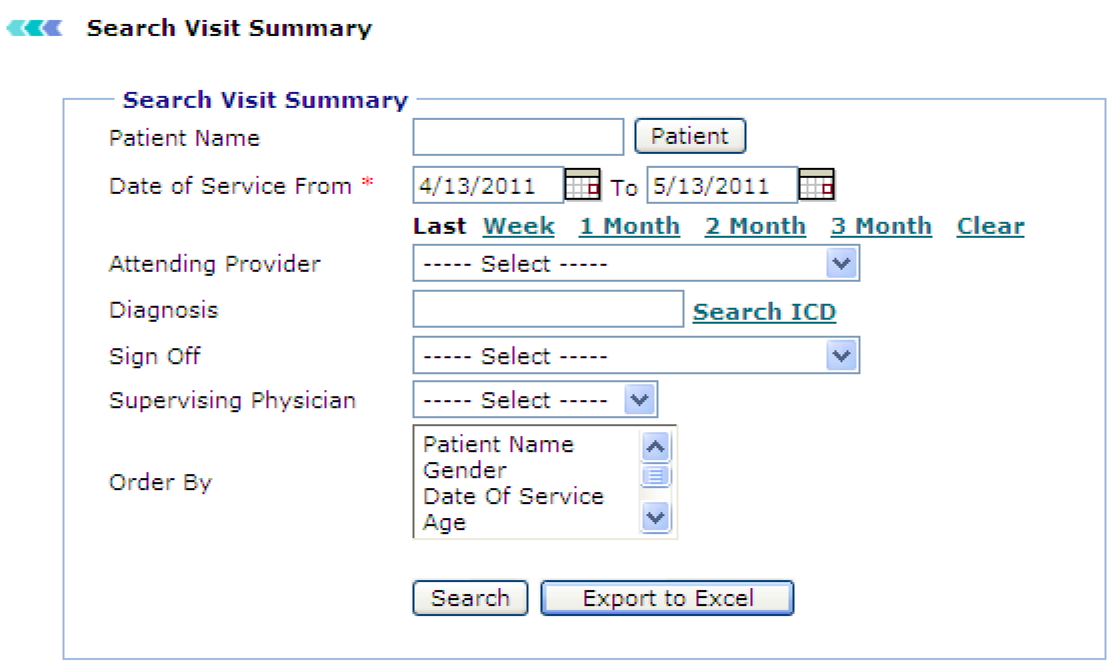
Button	Action
	Edit/Modify Text
	Expands the menu to view details
	Collapses the menu to view details

Search Visit Summary

1. From the **Appointment** menu, click **Search Visit Summary**.

Search Visit Summary

The Search Visit Summary page is displayed.



Visit Summary Search Criteria

2. In the **Patient Name** box, type name of the patient.

   You can also click the **Patient** button to search a patient.

3. Specify the **Date of Service** range.

   You can also select specific time period from last **Week**, **1 Month**, **2 Month**, and **3 Month**.

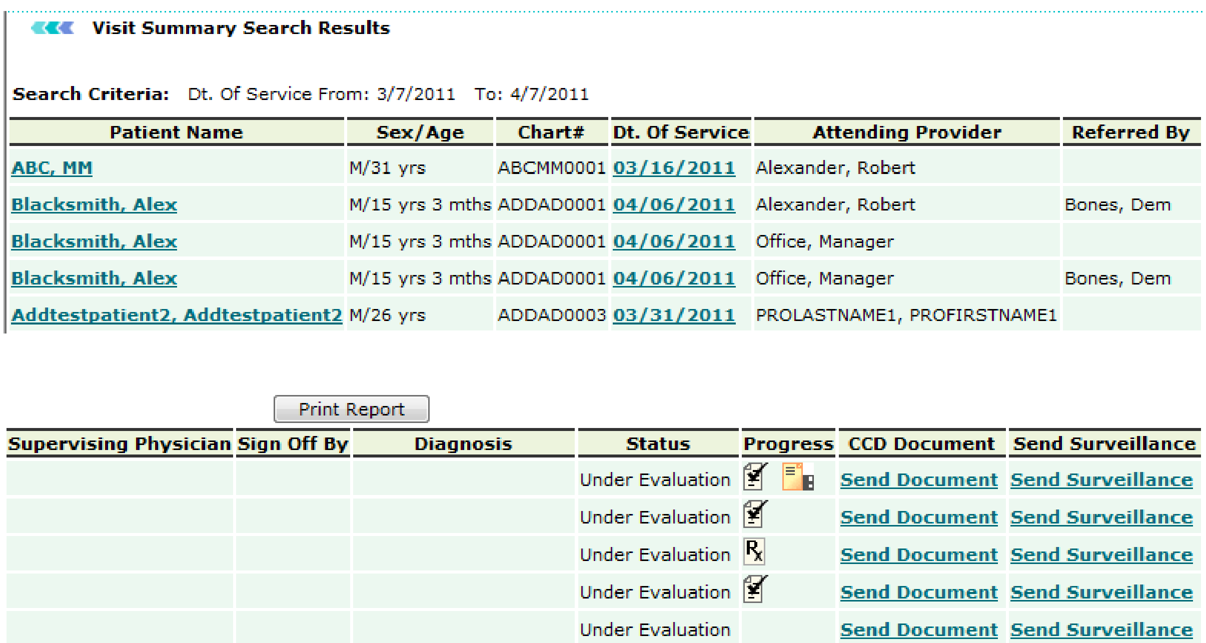
4. From the **Attending Provider** list, select the name of the provider.
5. In the **Diagnosis** box, type the diagnosis for the patient.

You can also click the **Search ICD** link to search the diagnosis by ICD codes.

6. From the **Sign Off** list, select a name of the authority who signed off the visit.
7. From the **Supervising Physician** list, select a physician.
8. From the **Order By** list, select the option to sort the search result.
9. Click **Search**.

Note: Click **Export to Excel** to save the visit summary list as a CSV file. For more information, refer to Export to Excel.

The **Visit Summary Search Result** page displays a list of all the visit summaries matching the specified criteria.



Visit Summary Search Results

Search Criteria: Dt. Of Service From: 3/7/2011 To: 4/7/2011

Patient Name	Sex/Age	Chart#	Dt. Of Service	Attending Provider	Referred By
ABC, MM	M/31 yrs	ABCMM0001	03/16/2011	Alexander, Robert	
Blacksmith, Alex	M/15 yrs 3 mths	ADDAD0001	04/06/2011	Alexander, Robert	Bones, Dem
Blacksmith, Alex	M/15 yrs 3 mths	ADDAD0001	04/06/2011	Office, Manager	
Blacksmith, Alex	M/15 yrs 3 mths	ADDAD0001	04/06/2011	Office, Manager	Bones, Dem
Addtestpatient2, Addtestpatient2	M/26 yrs	ADDAD0003	03/31/2011	PROLASTNAME1, PROFIRSTNAME1	

Print Report

Supervising Physician	Sign Off By	Diagnosis	Status	Progress	CCD Document	Send Surveillance
			Under Evaluation		Send Document	Send Surveillance
			Under Evaluation		Send Document	Send Surveillance
			Under Evaluation		Send Document	Send Surveillance
			Under Evaluation		Send Document	Send Surveillance
			Under Evaluation		Send Document	Send Surveillance

Search Visit Summary Result

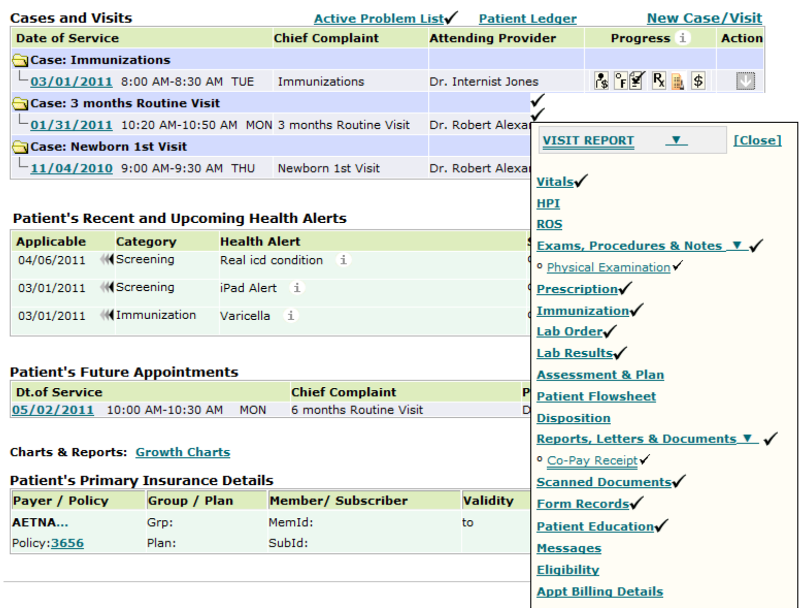
10. From the View Visit Summary Result page,
    - click **Patient Name** to view the patient's dashboard.
    - click **Dt. Of Service** to view the Date of Service page.
    - click **Send Document** to open a secure messaging window to securely send the summary to another physician.
    - click **Send Surveillance** to send a surveillance message.

Add Progress

Progress in legends depends on adding action in each case.

Add Action

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



Add Action Image

2. Click a particular link and it will prompt you to the screen of the field you are trying to add/modify.

   For example, click **New Prescription** to view Prescription page. Create the prescription, and then click **Save**.

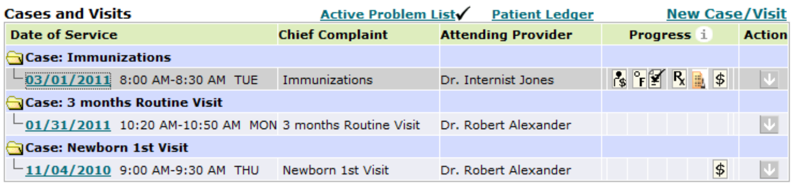
3. As you keep adding actions, the progress column gets updated with those icons.

Add/Modify Patient Case/Visit-Related Information

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

Add/modify patient care-related information

1. Do one of the following:
   - Click one of the legends under Cases and Visits on the Patient Dashboard page.

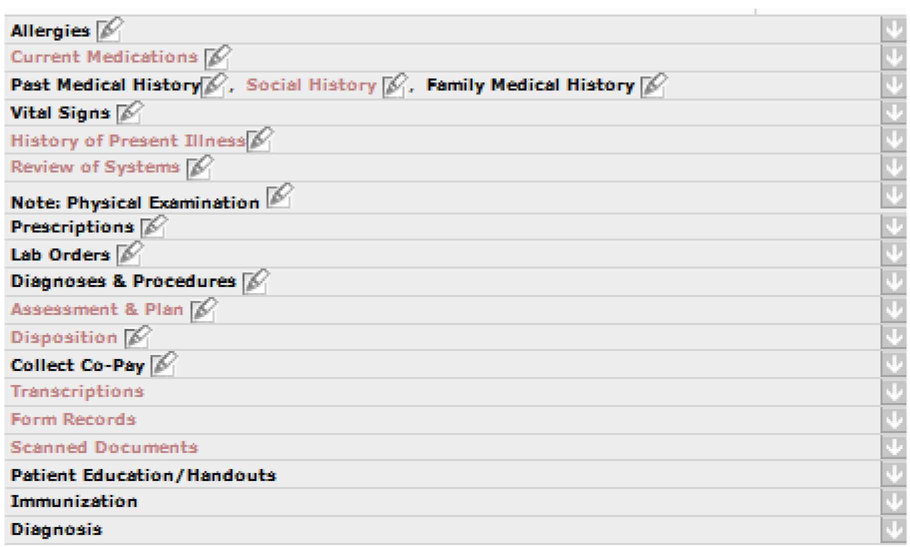


Edit Data From Cases and Visits

- Click one of the legends under Progress on the Visit Summary page.

Edit Data From Progress Visit Summary

- Click the **Edit** button on the Visit Summary page.

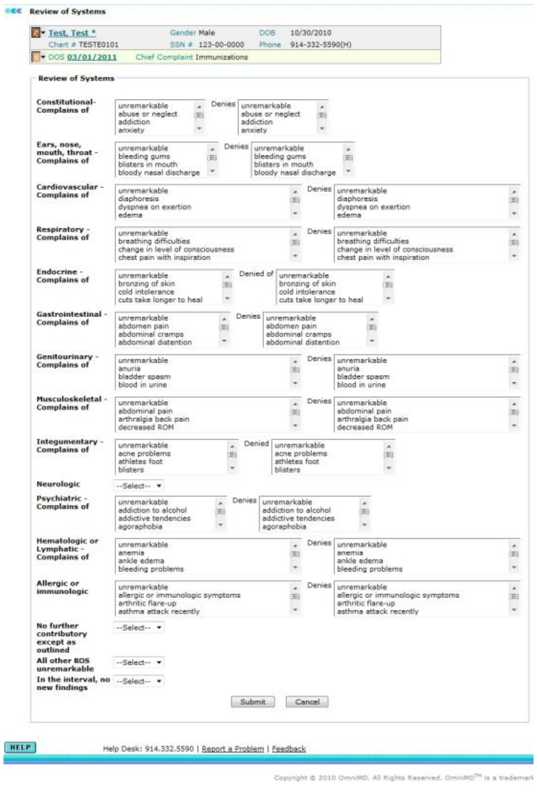


Edit Data From Patient Summary

- Click any link on the Visit Report page.

Edit Data From Visit Summary Image

The corresponding page is displayed.



Review of Systems

2. Make the necessary formatting changes to the report using the editor tools.
3. Select the data that you wish to format and use the required editor tool.
4. Click **Submit** to save all information.

Order Sets

From the Order Sets page, you can set up common prescriptions, lab orders, super bill, and referral for various ailments.

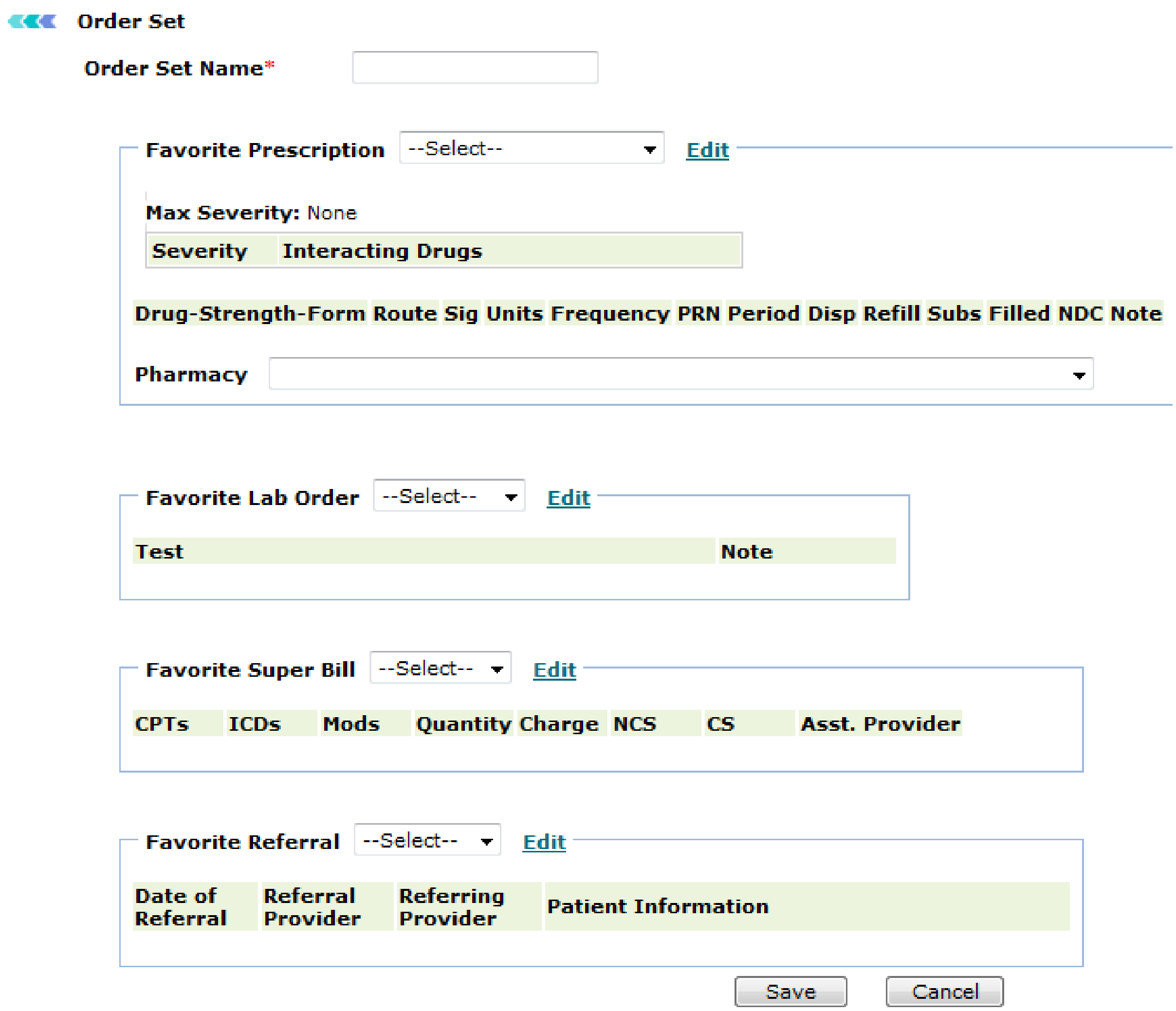
List Order Set

Add Order Set

Order Set	Fav Prescription	Fav Lab Order	Fav Super Bill	Fav Referral	Action
Test	OrderSet	Scenario 2			Edit Disable

Order Set List

Add prescriptions, lab orders, super bills and referrals as they apply to the ideal workflow for the ailment.



Order Set

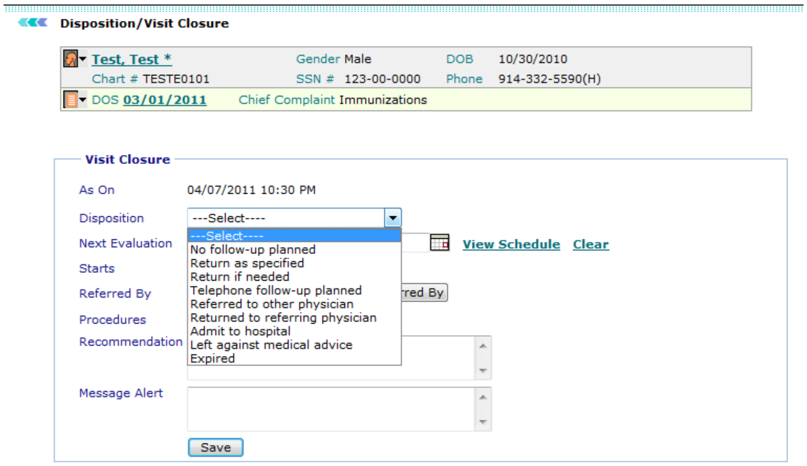
Visit Closure

Visit closure is recommended if any follow-up visit is required for the patient.

Add visit closure

1. On the **Visit Summary** page, click the **Disposition** link.

   The Disposition/Visit Closure page is displayed.



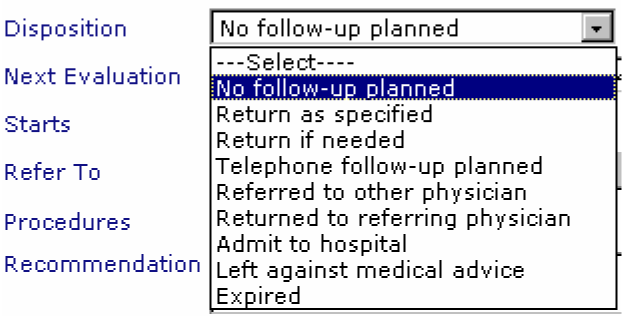
Visit Closure

2. Specify the values of Visit Closure.

The Visit closure page displays the date on which service was rendered.

Visit Closure

Field	Description
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 menu the deposition as required.
Next Evaluation	If follow up appointment is selected in disposition, select the next evaluation date from drop-down. Click the calendar icon to select date on which appointment is to be created.
Starts & Ends	Enter start time and end time of an appointment.
Referred By	Click the **Referred By** button to select referred provider's name.
Procedures	Select the procedure from the drop-down or enter manually.
Recommendations	Type recommendation, if any that you want to give to patient.
Message Alert	Type message alert in this field.



Disposition

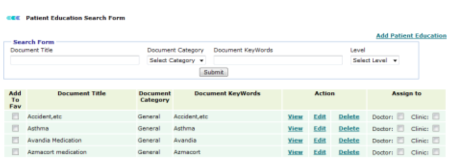
3. Click **Save** button to save the visit closure details.

Patient Education

From the Patient Education page, you can view patient education material available within the system. You can search a patient education document by: Document Title, Document Category, Document KeyWords, and Level.

The Patient Education List displays following information about each document: Document Title, Document Category, and Document Keywords.

From Patient Education List, you can view, edit or delete the document, or add it to your favorite list. You can also assign the document to doctor or clinic.



Patient Education Search Form

Add Patient Education

1. In the **Document Title** box, type the name for the patient education document.
2. From the **Document Category** list, select a category for the document.
3. In the **Document KeyWords** box, type the keywords used in document.

   These keywords are used by the users to search the document.

4. To add content, do one of the following:
   - In the **Document File 1** and **Document File 2** boxes, enter the path to the files you want to add as patient education file.

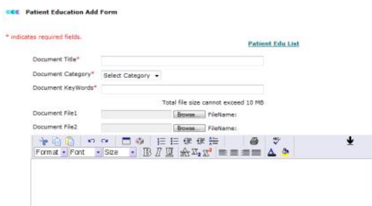
     You can also click the **Browse** button browse and locate the file.

     Note: You can upload files of maximum 10 MB size.

- In the rich text format editor, type and format the text content you want to add as patient education.

5. Click **Save**.

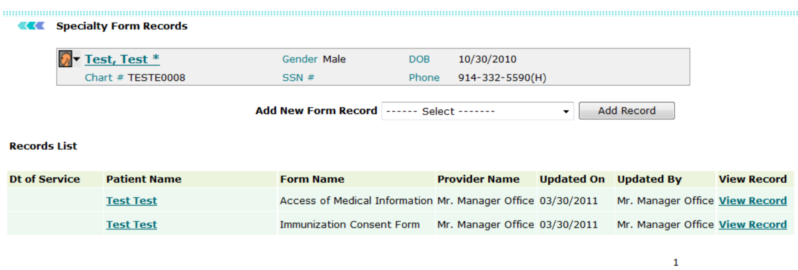
The document is added to the Patient Education List.



Add Patient Education

Form Records

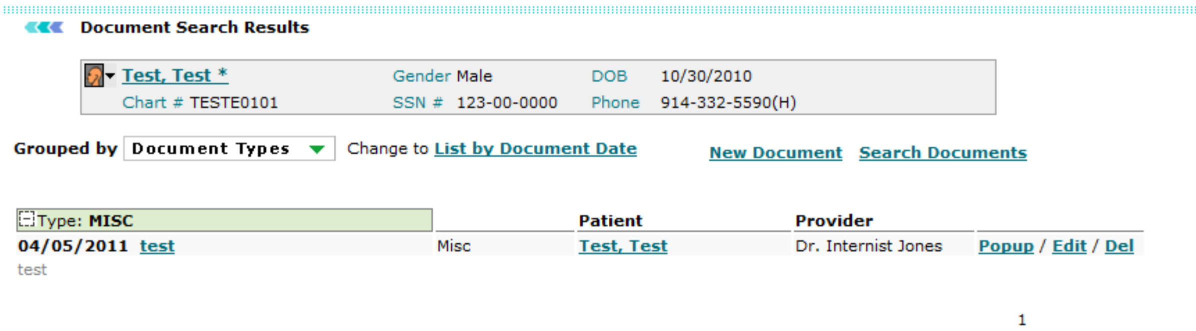
Click the **Form Records** link to view and add forms to patient's record.



Form Records

Scanned Documents

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

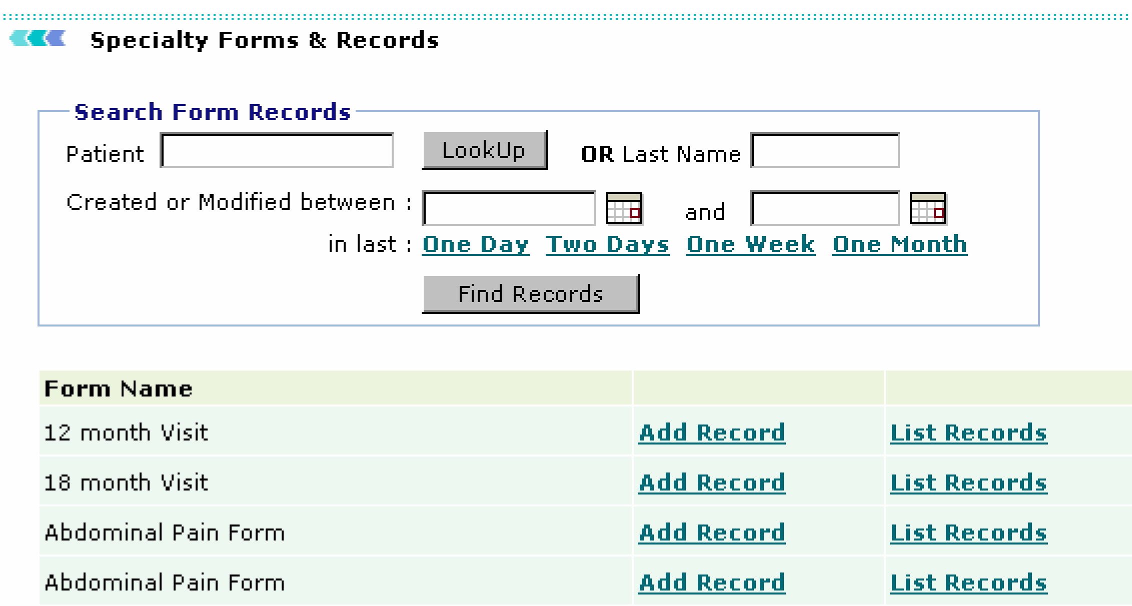


Scanned Documents

Forms

1. From the **Forms** menu, select **Search Form Records**.

The Specialty Forms and Records displays a list of forms and allows user to add a record for a particular form or view a list of records entered for a particular form.



Specialty Forms and Records

2. Specify the search parameters.

Specialty Form and Records Search Fields

Field	Description
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.

Note: 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.

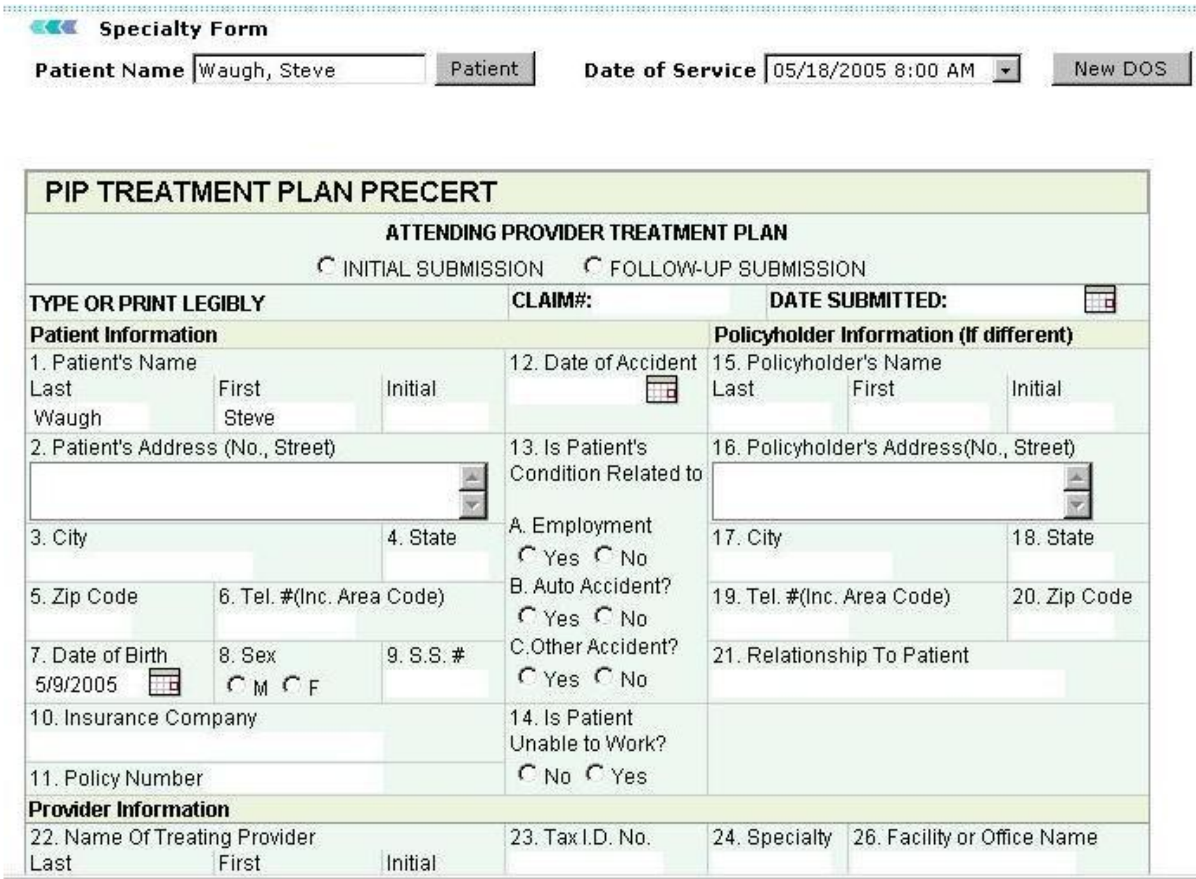
3. Click **Find Records**.

A list of forms based on the specified search parameters is displayed. You can add or view a list of records for a particular form.

Add New Record

1. On the **Specialty Forms & Records** page, click the **Add Record** link corresponding to the form for which you want to add a new record.

The Specialty Form page is displayed for the selected form. The name of the searched patient is displayed in the **Patient Name** field.



Add Record

2. Click **Patient** to add a record for another patient.

   The default date and time is displayed in the **Date of Service** field.

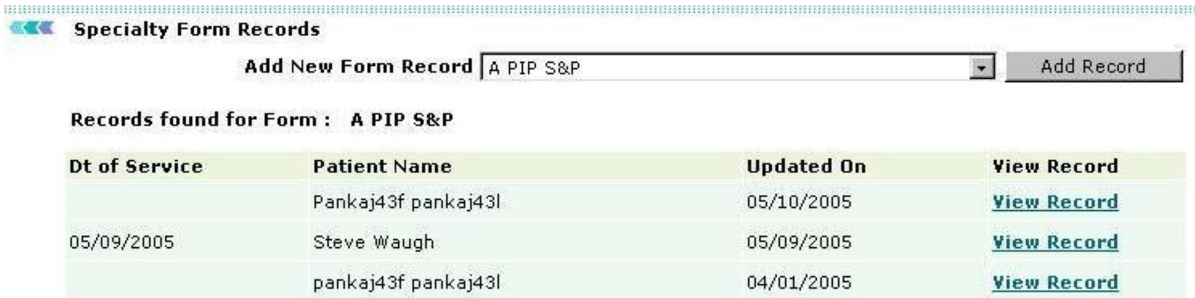
3. Click the **New DOS** to enter a new date of service.
4. Enter the details to add a new record in displayed form format.
5. Click **Save**.

   This will add a new record for the selected form.

View List of Records

1. On the **Specialty Forms & Records** page, click the **List Records** link corresponding to the form for which you want to add a new record.

   The Specialty Form page displays details such as date of service, patient name and date of modification are displayed.



Specialty Form Records

Add New Form Record: A PIP S&P — Add Record

Records found for Form : A PIP S&P

Dt of Service	Patient Name	Updated On	View Record
	Pankaj43f pankaj43l	05/10/2005	View Record
05/09/2005	Steve Waugh	05/09/2005	View Record
	pankaj43f pankaj43l	04/01/2005	View Record

List of Records

2. Click **View Record** corresponding to the record you want to view.

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

Specialty Form

Sign Off | Print | Edit | Copy

PIP TREATMENT PLAN PRECERT

ATTENDING PROVIDER TREATMENT PLAN

INITIAL SUBMISSION FOLLOW-UP SUBMISSION

TYPE OR PRINT LEGIBLY | CLAIM#: | DATE SUBMITTED:

Patient Information | Policyholder Information (If different)

1. Patient's Name — Last: pankaj43l, First: Pankaj43f, Initial
12. Date of Accident
15. Policyholder's Name — Last, First, Initial
2. Patient's Address (No., Street): ztest Address part 1 test Address part2
13. Is Patient's Condition Related to — A. Employment: Yes No; B. Auto Accident?: Yes No; C. Other Accident?: Yes No
16. Policyholder's Address(No., Street)
3. City: ztesst City
4. State: zAlabama
17. City
18. State
5. Zip Code: z7777778888
6. Tel. #(Inc. Area Code): z7655656556
19. Tel. #(Inc. Area Code)
20. Zip Code
7. Date of Birth: 8/1/1919
8. Sex: M F
9. S.S. #: z111-11-1111
21. Relationship To Patient
10. Insurance Company
14. Is Patient Unable to Work? No Yes
11. Policy Number

Provider Information

22. Name Of Treating Provider — Last, First, Initial
23. Tax I.D. No.
24. Specialty
26. Facility or Office Name
26. Facility/Office Address (No.;Street)
27. City
28. State
29. Zip Code

View Record

The Specialty Form page 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.

View Case Report

- Click the **Reports, Letters & Documents** link on the Visit Summary page.

The list of all the available reports, letters and documents is displayed.

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

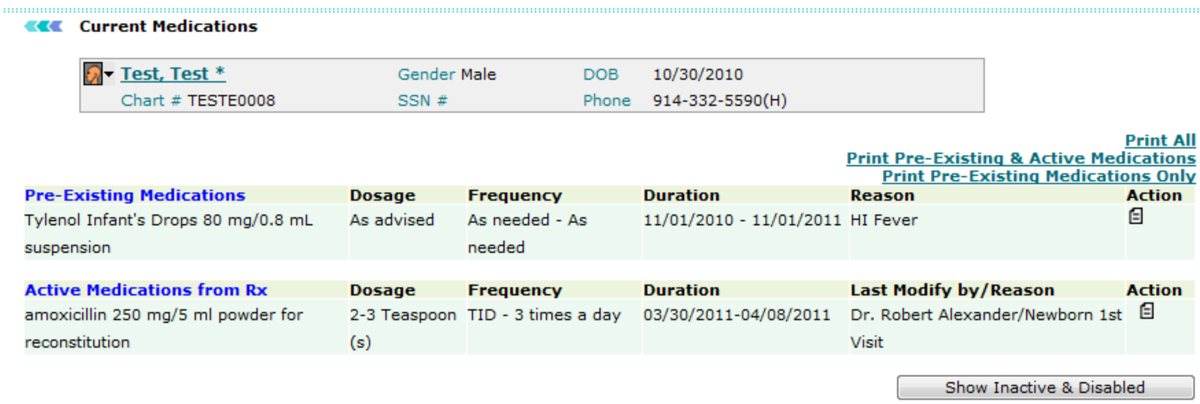
Case Report

Current Medications

Click the **Current Medication** link to view the list of medication patient is taking at present.

- **Pre-Existing Medications** log shows all medication details that were reported by patient.
- **Active Medication from Rx** log shows all medications that were prescribed by current clinic/practice. Click the **Show Inactive & Disabled** to view a list of all active and inactive medications.

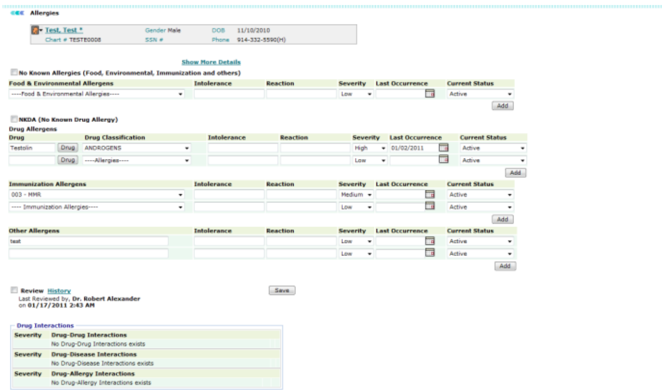
From the Current Medications page, you can **Print All**, **Print Pre-Existing & Active Medications**, or **Print Pre-Existing Medications Only**.



Current Medications

Allergies

Click the **Allergies** link to add information about the patient's allergies, reactions, severity, and last occurrence. Click the **Save** button after you have filled all the values in relevant fields.



Allergies

Messages

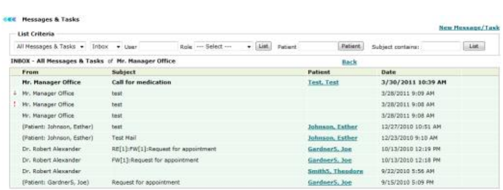
Messages

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

View Messages and Tasks

Click the **Messages** link to view all the messages and tasks assigned to the user. Click the subject of a message to view the details of the message. You can search messages by setting the following search parameters under List Criteria:

- Message/Task Status (Message, Task, Open, In-Progress, Completed, etc)
- Inbox/Outbox
- A specific user, by first name or last name
- Role of the Sender
- Patient, by first name or last name
- Subject content



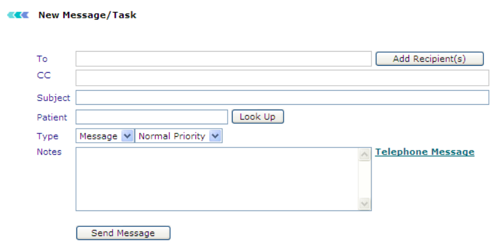
Message List

Note: The icons in the **From** column indicate the priority of the message. The exclamation point in Red color indicates High priority. The down arrow indicates Low priority.

Create New Message/Task

1. Click the **New Message** link available on the Message tab.

   The **New Message/Task** page is displayed.



New Message/Task

2. To add recipients in the **To** and **CC** boxes, click **Add Recipients**.

a. In the **To** column, select the option corresponding to the person you wan to send message to.

b. In the **CC** column, select the check boxes corresponding to the persons you want to send message to as CC.

c. Click **Add Selected**.

The selected recipients are added in the To and CC boxes.

Add Recipients

3. In the **Subject** box, type a subject for the message/task.

4. To add a patient in the **Patient** box, click **Look Up,** and then select a name of the patient.

5. From the **Type** list, select an option.

Note: If the selected type is **Message**, specify the priority. Similarly, if the selected type is **Task**, specify the status, priority, and due date and time.

6. In the **Notes** box, type observations, notes, or any other information that is useful for understanding the message/task.

7. Click the **Telephone Message** link to enter a telephone message.

a. To specify the subject of the telephone message, select the check boxes corresponding to the **Please Call**, **Urgent**, **Personal**, or **Returning Your Call** options.

b. In the **Phone #** box, type the caller's phone number.

c. In the **Message** box, type the message.

d. In the **Received By** box, type the name of the person who received the telephone call.

e. In the **Presc. Medication** box, type the name of the medication if the message is for a prescription.

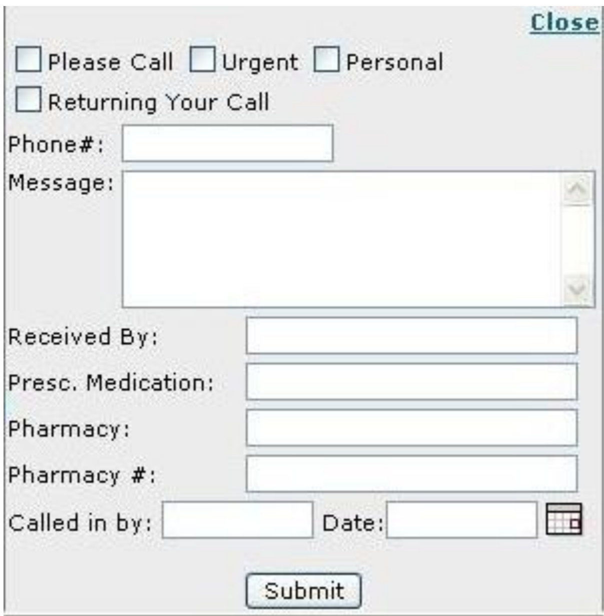
f. In the **Pharmacy** box, type the name of the pharmacy where the prescribed medication may be available.

g. In the **Pharmacy #** box, type the telephone number of the suggested pharmacy.

h. In the **Called in by** box, type the name of the person, who is writing the message.

i. In the **Date** box, specify the call date.

j. Click **Submit**.



Telephone Message

8. Click **Send Message.**

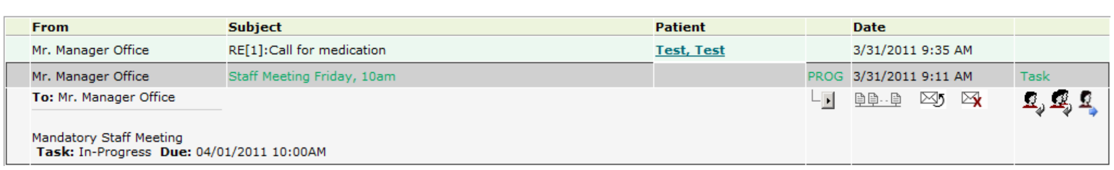
The message appears in the message list of the recipients.

Note: If the specified type is Task, the **Assign Task** button is displayed.

Reply to a Message/Task

1. Double-click the message/task that you want to reply to.

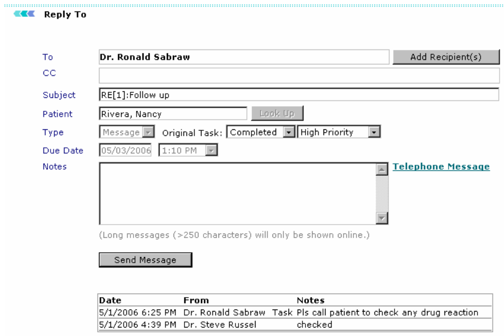
The message/task details are displayed.



Message/Task Details

2. To reply to the sender of the message, click the **Reply** icon .

The Reply page is displayed.

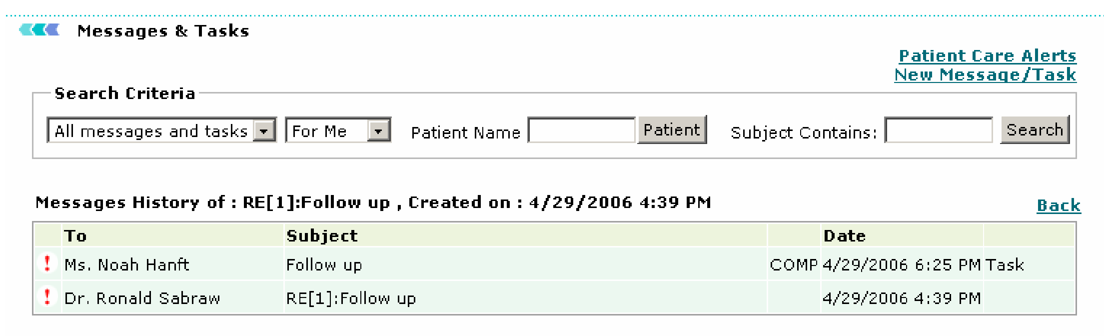


Reply Message

3. In the **Notes** box, type the message.
4. Click **Send Message**.

Notes:

- To reply to the sender and all the other recipients of the message, click the **Reply All** icon .
- To mark a message as unread, click the **Mark as Unread** icon .
- To remove a message, click the **Remove** icon .
- To change status of a task, click the **Change Status** icon .
- To view previous messages, click the **Message History** icon .



Message History Details

Health Alerts

Health Alerts

The Health Alerts tab displays a list of overdue health alerts for various patients. From the Health Alerts tab, you can:

Search Patient Health Alerts

List Alert Rules

Add New Alert Rule

List Conditions

Add New Condition

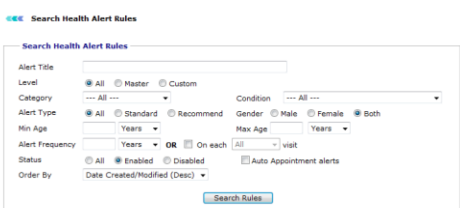
Generate Reminder List

Alerts Analysis Report

List Alert Rules

Search Health Alert Rules

Health alerts can be searched by: Alert Title, Level, Category, Condition, Alert Type, Gender, Age, Alert Frequency, Status or Order By date.



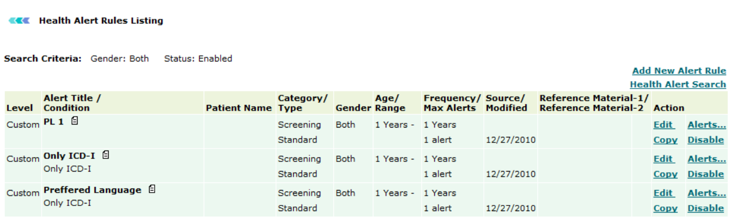
Search Health Alert Rules

The result displays the following columns:

Health Alert Rules Listing

Column	Description
Level	Displays if the rule is Custom or Master.
Alert Title/Condition	Displays the alert title and associated condition.

Patient Name	Displays name of the patient, if applicable.
Category/Type	Displays the category (Screening, Counseling, Immunization, or Chemoprophylaxis) and the type (Standard or Recommended).
Gender	Displays if the rule applies to a specific gender.
Age/Range	Displays if the rule applies to a specific age or age range.
Frequency/Max Alerts	Displays till what time the rule will run.
Source/Modified	Displays the date and time when the rule was last modified.
Reference Material 1	Displays any reference material or patient education about the rule.
Reference Material 2	Displays any additional reference material or patient education about the rule.
Action	Click **Edit** to edit the rule from the Add/Edit Health Alert Rules page. Click **Copy**: to copy the rule from the Add/Edit Health Alert Rules page. Click **Alerts** to search and view patient with the selected alert. For more information, refer Search Patient Health Alerts. Click **Disable** to disable the alert.



Health Alert Rules Listing

Add New Alert Rule

1. To add the patient name, click the **Look Up** button available adjacent to the **Patient** box.
2. From the **Patient Look Up** page, select a name of the patient.
3. In the **Alert Title** box, type a title for the alert.
4. From the **Alert Category** list, select a category for the alert.

> **Note:** If the Alert Category is Immunization, you need to select an immunization from the list.

5. To specify **Alert Type**, select an option as **Standard** or **Recommended**.

6. From the **Condition** list, select a condition for which you want to set the alert.

7. To specify **Gender**, select an option from **Male**, **Female**, or **Both**.

8. To set age range as trigger, specify **Min. Age** (minimum age) and **Max Age** (maximum age) for which the health alert needs to be active.

9. From the **Preferred Language** list, select an option to specify the language for the alert.

10. To set **Frequency**, specify the time interval (for example, Every XX Year) or visit frequency (for example, On each follow-up visits).

11. From the **Max # of Alerts** list, select an option to specify the number of times the alert needs to appear.

12. In the **Description** box, type a description for the alert.

13. In the **Source** box, specify the source from where health alert is recommended.

14. In the **Reference Material-1** and **Reference Material-2** boxes, browse and select files (for example, documents, presentations, audio-visual files) for reference or patient education.

15. In the **Add Document Title** box, type a name of the document and click the **Add Patient Documents** button.

    The list of documents matching the name you provided are displayed.

> **Note:** If you do not know the correct name, you can type few letters of the document name and then search the documents for name starting the specified letters. For example, to search the Accident Claims document, you can type only *Acc* in the Add Document Title box, and then click Add Patient Documents button. All the documents starting with *Acc* are displayed.

16. To add the documents, select the check boxes corresponding to the required document, and then click **Close**.

    The selected documents are displayed under the **Add Document Title** box.

17. To create a reminder letter, select the check box corresponding to the available options.

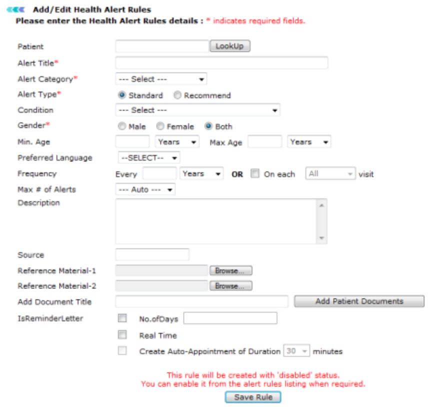
    The available options include:

    - Create a reminder letter before XX number of days
    - Create a reminder letter in real time
    - Create an auto-appointment of XX minute duration

18. Click **Save Rule**.

    The rule is created.

> **Note:** By default, the rule is created with Disabled status. You need to enable it from the alerts rule list when needed.



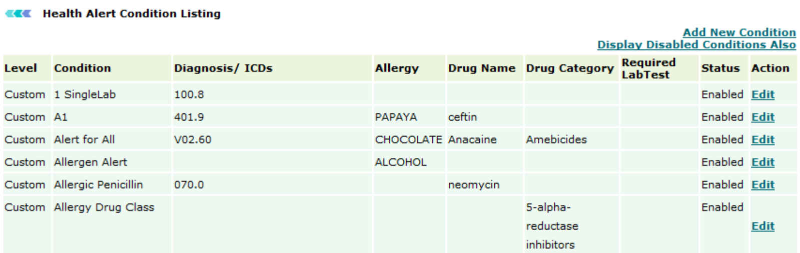
Add New Alert Rule

List Conditions

List Conditions displays a full list of all the enabled health alerts conditions.

To see the complete list of both enabled and disabled conditions, click the **Display Disabled Conditions Also** link available above the upper-right corner of the list.

To edit a health alert condition, click the **Edit** link under the **Action** column. For information on editing health alert condition, refer to Add New Condition.



Health Alert Condition Listing

Add New Condition
Display Disabled Conditions Also

Level	Condition	Diagnosis/ ICDs	Allergy	Drug Name	Drug Category	Required LabTest	Status	Action
Custom	1 SingleLab	100.8					Enabled	Edit
Custom	A1	401.9	PAPAYA	ceftin			Enabled	Edit
Custom	Alert for All	V02.60	CHOCOLATE	Anacaine	Amebicides		Enabled	Edit
Custom	Allergen Alert		ALCOHOL				Enabled	Edit
Custom	Allergic Penicillin	070.0		neomycin			Enabled	Edit
Custom	Allergy Drug Class				5-alpha-reductase inhibitors		Enabled	Edit

Health Alert Condition Listing

Add New Condition

1. In the **Condition Name** box, type the name for the condition.
2. Select the **Enabled** check box to enable the condition.
3. In the **Patient Diagnosis: ICD Code Range** box, type a range for the ICD codes you want to attach to the condition.

For example, 010.01-010.04,145.01,165.01-165.020.

Note: You can click **Fav ICDs** to add ICD codes saved in your Favorite ICDs list. You can also click the **Find ICDs** to find ICD codes.

4. From the **Patient having Allergy** list, select an item you want to attach the condition to the allergy.

5. In the **Patient taking Drug** box, type the name of the drug you want to attach the condition to drug.

   You can also type first few characters of the drug, and then click **Drug Lookup** to find drug name.

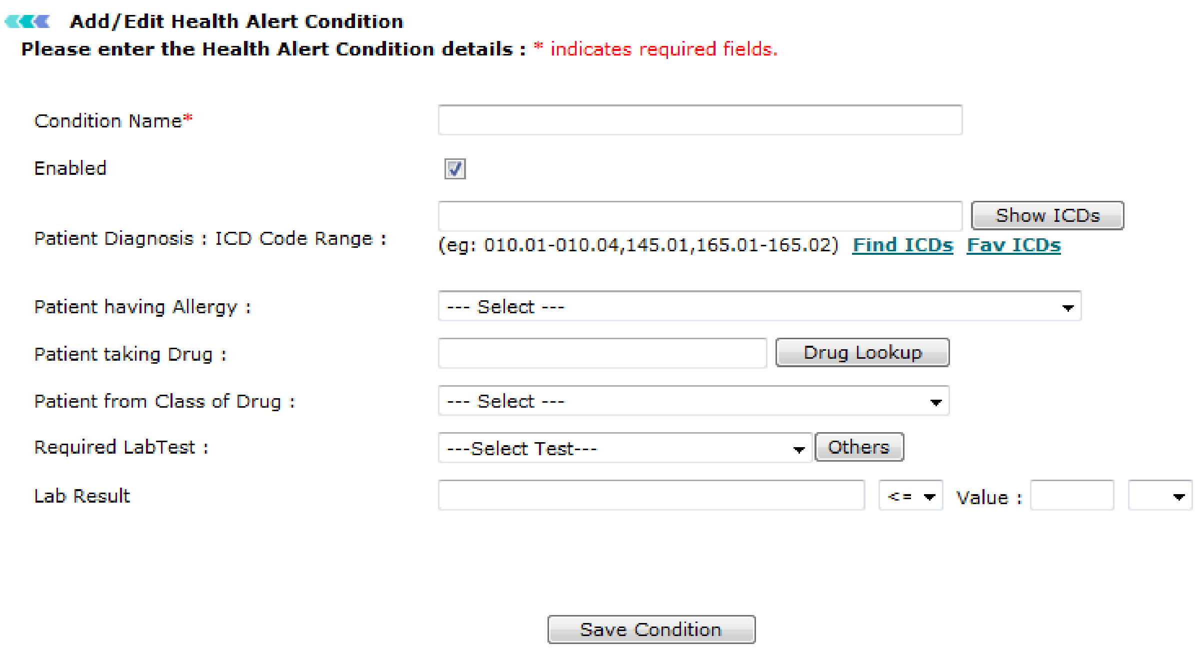
6. From the **Patient from Class of Drug** list, select a class of the drug to attach the condition to the drug class.

7. From the **Required Lab Test** list, select a lab test to attach the condition to the test.

8. In the **Lab Result** box, set a lab result parameter and value range to attach the condition to the result.

9. Click **Save Condition**.

   The new condition for alert is created and added to Health Alert Condition Listing.



Add New Alert Condition

Search Patient Health Alerts

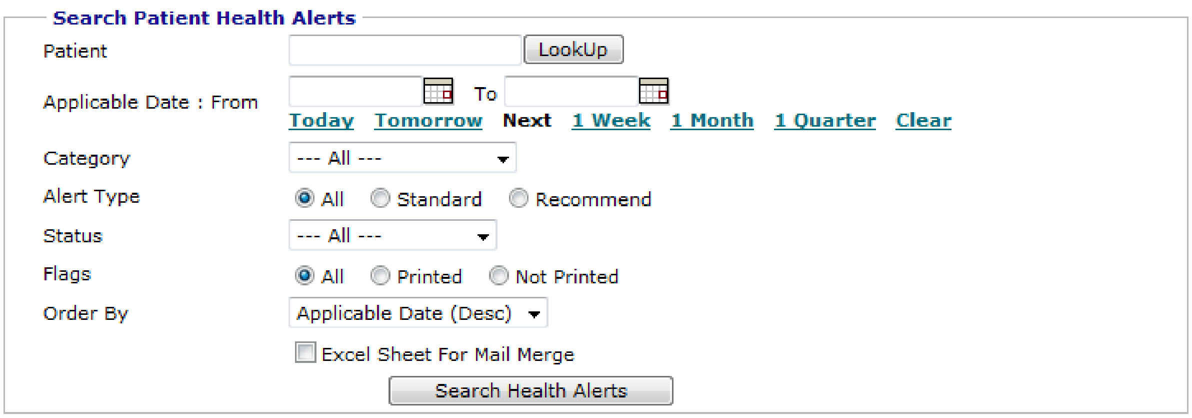
Overdue Patient Health Alerts

Health alerts can be searched by 30 or 60 days overdue, or for the upcoming week.

Overdue Patient Health Alerts

Search Patient Health Alerts

Health alerts can also be searched by the following specific fields: Patient, Dates, Category, Alert Type, Status, Flags, and Order By. You can also create an excel sheet for mail merge.



Search Patient Health Alerts

The result from Overdue Patient Health Alerts and Search Patient Health Alerts displays the following columns:

Patient Health Alerts Listing

Column	Description
Patient	Displays Patient name. Click the patient name to view patient dashboard.
Alert Rule	Displays alert rule. Click the **Click for Details** icon to view **Health Alert Quick View**.
Applicable	Displays the date since when the health alert is applicable. Click the **Previous Alerts** icon to view **Patient Health Alert History**.
Status	Displays status of the alert.
Flags	Displays any flags attached to the alert.
Action	Click **Set Appt** to link the alert to an appointment. Click **Status** to update the alert status.

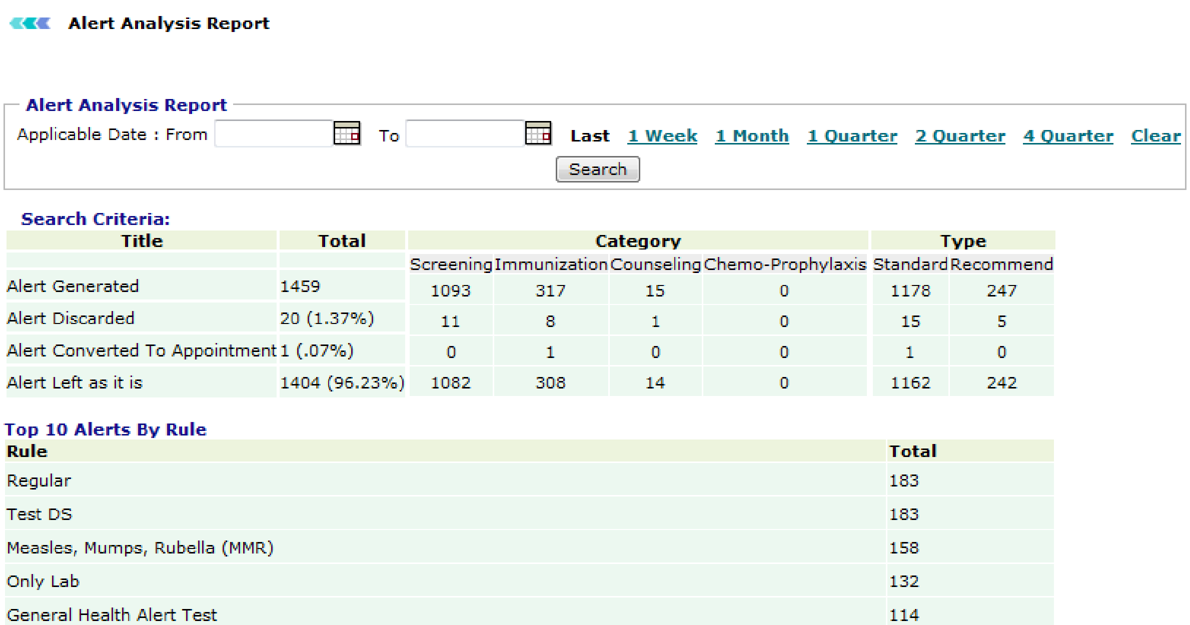
Patient Health Alerts Listing

Alerts Analysis Report

You can search the alert analysis report by a date range or by specific time period such as 1 week, 1 month, 1 quarter, 2 quarter, and 4 quarter.

The report displays total records for the set search criteria. The report also displays top 10 alerts by rule.

Note: By default, the report displays all data on the initial screen.



Title	Total	Category				Type	
		Screening	Immunization	Counseling	Chemo-Prophylaxis	Standard	Recommend
Alert Generated	1459	1093	317	15	0	1178	247
Alert Discarded	20 (1.37%)	11	8	1	0	15	5
Alert Converted To Appointment	1 (.07%)	0	1	0	0	1	0
Alert Left as it is	1404 (96.23%)	1082	308	14	0	1162	242

Rule	Total
Regular	183
Test DS	183
Measles, Mumps, Rubella (MMR)	158
Only Lab	132
General Health Alert Test	114

Alert Analysis Report

Generate Health Alerts

From Generates Health Alerts, you can generate health alerts in real time. However, all health alerts are usually set to run on your server at 12 midnight.

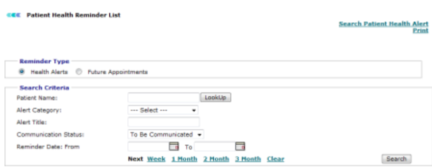
Generate Reminder List

You can generate a reminder list for the following:

- Health Alert Reminder List
- Future Appointments Reminder List

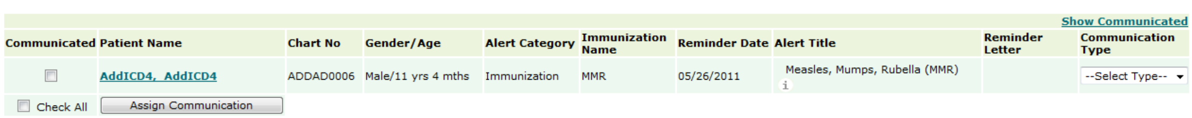
Health Alert Reminder List

Health alert reminder list can be generated by the following search criteria: Patient Name, Alert Category, Alert Title (complete title or first few characters of the alert title), Communication Status, or Reminder Date (date range or specific time period such as week, 1 month, 2 months, or 3 months).



Generate Reminder List by Health Alerts

The health alert reminder result is displayed in a table. To view patient's dashboard, click the name of the patient in **Patient Name** column. To indicated that the patient has been contacted, select the check box in the **Communicated** column, select a mode of communication from the **Communication Type** list, and then click **Assign Communication**.



Show Communicated

Communicated	Patient Name	Chart No	Gender/Age	Alert Category	Immunization Name	Reminder Date	Alert Title	Reminder Letter	Communication Type
☐	AddICD4, AddICD4	ADDAD0006	Male/11 yrs 4 mths	Immunization	MMR	05/26/2011	Measles, Mumps, Rubella (MMR) i		--Select Type--

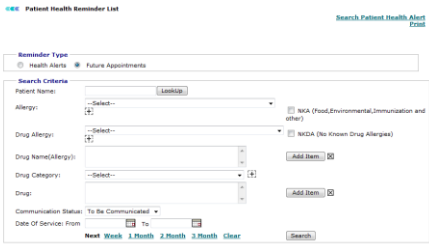
☐ Check All   Assign Communication

Reminder List by Health Alerts

Future Appointment Reminder List

Future appointment alert reminder list can be generated by the following search criteria: Patient Name, Allergy, Drug Allergy, Drug Name (Allergy), Drug Category, Drug, Communication Status, and Date of Service (date range or specific time period such as week, 1 month, 2 month, or 3 months).

Note: To add multiple items, click the add icon or the **Add Item** button.



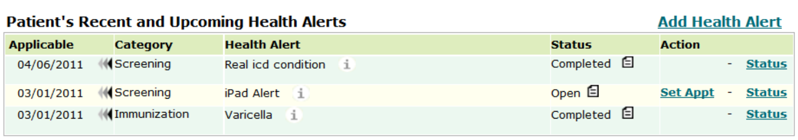
Generate Reminder List by Future Appointment

The future appointments reminder result is displayed in a table. To view patient's dashboard, click the name of the patient in **Patient Name** column. To indicated that the patient has been contacted, select the check box in the **Communicated** column, select a mode of communication from the **Communication Type** list, and then click **Assign Communication**.

Reminder List by Future Appointments

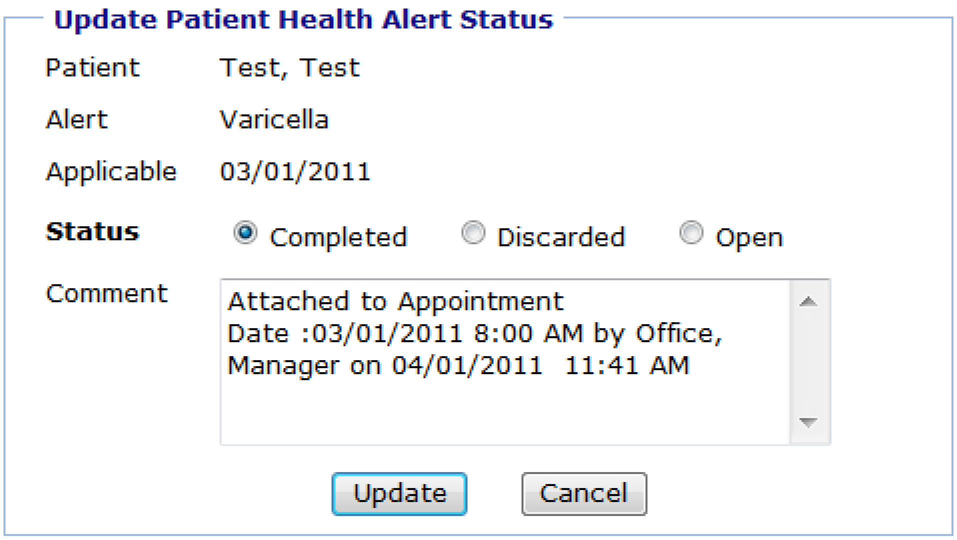
Patient's Recent and Upcoming Health Alerts

The Patient's Recent and Upcoming Health Alerts section shows all the alerts related to the patient.

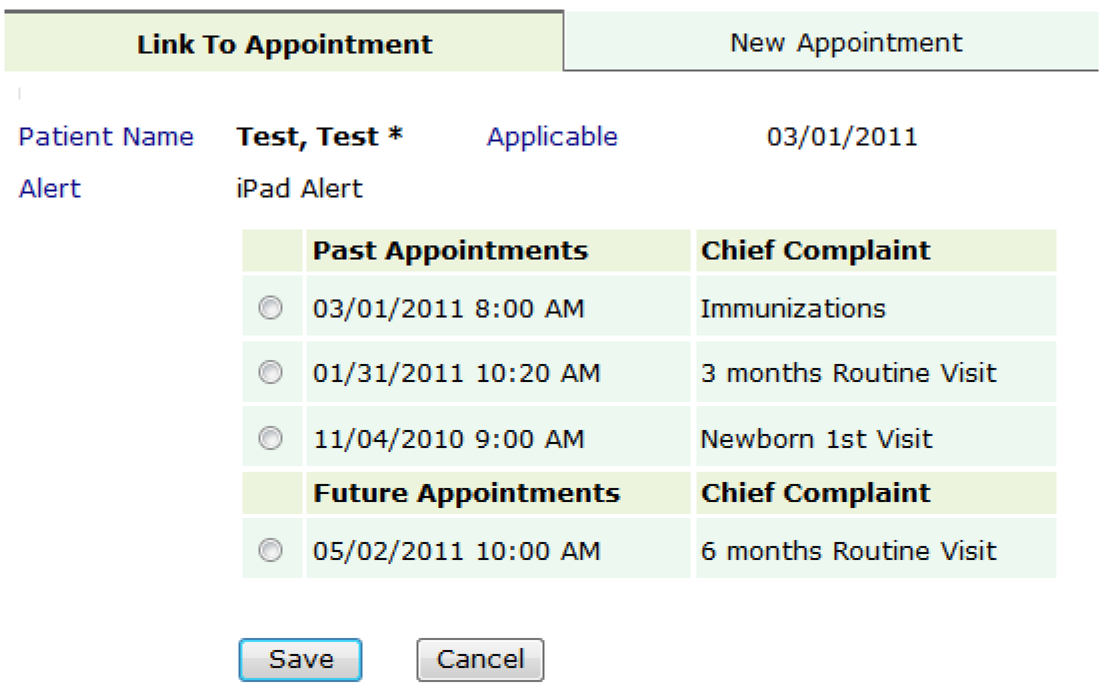


Patient's Recent and Upcoming Health Alerts

Moreover, you may set appointment as well check on the status by clicking the **Status** link.



Alert Status Completed



Set Appointment

Health Alerts Settings

From the Health Alerts settings, you can:

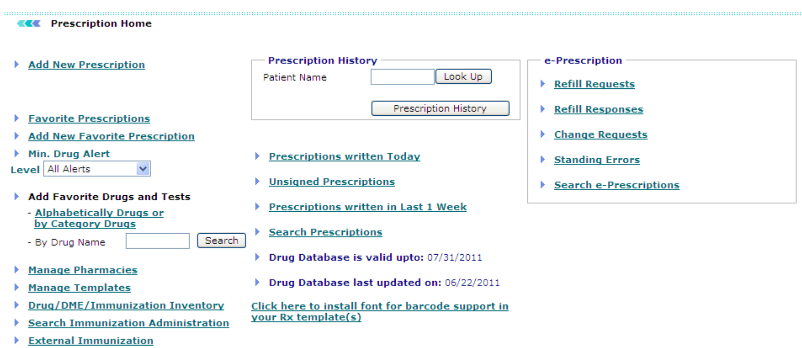
- Generate Health Alerts
- Generate Reminder List

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.

Doctors diagnose and prescribe their patients on the basis of the symptoms. The formal prescriptions are then prepared which are used to fax the pharmacies or they are given the patients in a printed format.

Click the **Prescription** link to view the **Prescription Home**. You can add new prescriptions, view prescription history, add favorite drugs, manage pharmacies, templates, immunization and e-prescription from Prescription Home.



Prescription Home

From the Prescription section, you can see:

E-prescription

Prescription History

Add Favorite Drugs and Tests

Manage Pharmacies

Manage Templates

Drug / DME / Immunization Inventory

External Immunization

Add New Prescription

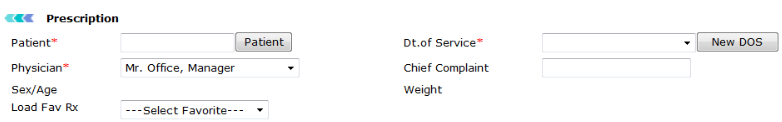
Patient Details

To add new prescriptions based on what doctors suggest, follow these steps:

1. From the **Prescriptions** menu, select **Add New Prescription**.

   Alternatively, click the **Add New Prescription** link available on Prescription home page.

   The **Prescription page** is displayed.



Prescription

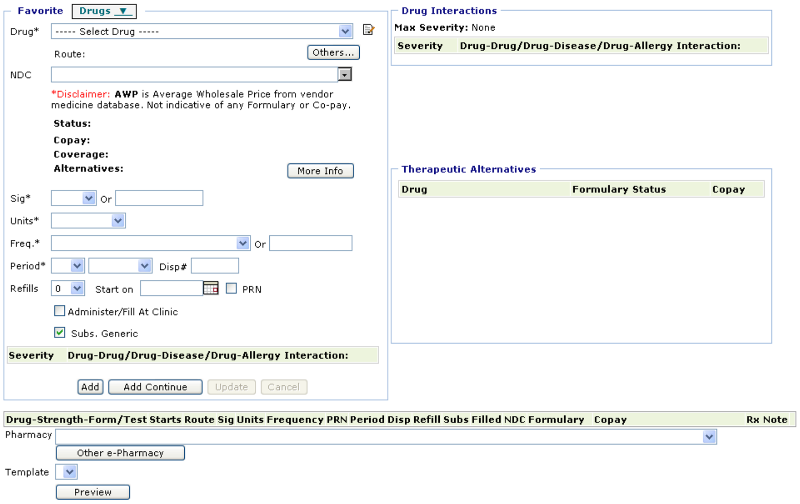
Field	Description
Patient Name	Click the Patient button to select the patient name.
Physician	Select the name of the physician.
Load Favorite Rx	Select the favorite prescription from list of chief complaints for which you want to write prescription.
Dt of Service	Click the New DOS button to select the date at which the patient was given prescription.
Chief Complaint	Select the primary reason of medication, if you have not selected favorite Rx.
Drug Eligibility	Select the drug and click Drug Eligibility to check whether the selected drug is eligible for prescription. For more information, see Drug Eligibility.

Note: You can view the summary of patient's current medications and allergies using **Current Meds & Allergies**.

Note: You can view the patient's problems list using **Active Problem List**

Add Drugs

2. Specify the drug values for the prescription.



Add New Prescription

Add New Prescription Fields

Field	Description
Drug/Test	Select the drug or test that you are recommending to patient. If the drug/test is not available within the list, click the **Others** button to locate new drug/test. The **Drug Search** dialog box opens. Select the drug type that you want to search and select the appropriate search parameters. After typing a full or partial drug name in the **Starts with** field, click **Search**. You can select the drug from the list of drugs as per your search. list as per you search, click the one you want. This gets listed in Drug/Test field. Click the  icon to view the drug's medical details in a new window. **Note: Controlled Drugs** are the drugs that are identified as restricted by the government and thus they cannot be sent using e-prescriptions.
Drug Formulary	If the patient has got insurance for particular drugs, his details appear automatically in the following formulary fields: • **Status** The status displays the detail whether the patient has insurance coverage for medications or not. • **Copay** The Copay demonstrates the percentage of the actual amount that the patient has to pay to the pharmacy irrespective of his insurance coverage plan. • **Coverage** The Coverage displays the status of the coverage. • **Alternative** The Alternative displays the number of alternative drugs available for the drug that is selected. To know more about

alternative drugs, see Therapeutic Alternatives.

NDC	Select the National Drug Code (NDC) for the drug/test that is selected. The NDC gives you the option of selecting a particular package and brand of the drug. A drug can be developed by more than one brands. So, using the unique NDC code, you can select the brand which you want to recommend to the patient.
Sig	Select the number of drugs to be taken at one point of time. Alternately, type the value in the **OR** field.
PRN	Select the PRN if you want the patient to take the medicine as and when needed.
Units	Select the units in which you are recommending the drug.
Freq.	Select how many times drug has to be taken. Alternately, type the value in the **OR** field.
Period	Select the number of Days, Weeks, Months, or Years for which you are recommending the drug. The period can be any time between 1 day to 90 years.
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. This will not get calculated if PRN.
Refills	Select the number of refills that you are allowing the patient.
Starts	Click the Calendar icon to select the date from which refill should begin.
Administer / Filled At Clinic	Select this option if prescription is filled at clinic. If patient's prescription was filled at pharmacy, this option should not be selected.
Subs. Generic	Select this option, if you want to recommend a generic drug. Recommending a generic drug means that the patient can use the drug of any alternative brand in case the recommended drug of same brand is unavailable.
Interaction Note	Select the impact of the drug when the patient took this drug earlier. This field is only available in case of specific drugs. For information on Drug Interactions, see Drug Interactions.

3. Click **Add**.

Note: If you want to add more drugs, select the drug and click the **Add Continue** button.

4. To modify medication details, select the added drug.
5. Make changes in the drug details and click **Update** button.

Note: To delete medication, select the added drug and click the **Delete** button.

6. Type your observations in **Note** section.
7. Select the patient's Pharmacy.

This list gets generated automatically if a pharmacy has been selected in the patient's demographics. **E-pharmacies** are highlighted with blue color.

8. Select the template on which this prescription is to be printed.
9. Check the option **Send fax** if you want to send fax to pharmacy.
10. Click Preview to view the snapshot of the prescription. You can either edit the details or save the prescription.
11. Click Save to save and view the drug details.

The View Prescription page is displayed. From this page, you can do the following:

- **Edit:** Allows you to change the pharmacy and template.
- **Copy:** Copies the drug, sig & frequency into a new script.
- **Print:** Opens the Rx in Word for custom printing.
- **Leaflets:** Opens printable Patient Education for the drug.

12. If all the details are as per your requirements, click **Signoff & Send**. As per your selection, the pharmacy will receive an **e-prescription** or **fax**. If you want to give the prescription the patient, select **Print** option.

Therapeutic Alternatives

Therapeutic Alternatives is the list of alternative drugs that can be given to the patients in case the prescribed drug is not available.

Field	Description
Drug/Test	This field displays a list of all the alternative drugs that can be given to the patients based on the copay and the formulary status.
Formulary Status	Drug Formulary status displays the tiers based on the insurance policy of the patient.
Copay	Copay is the amount that the patients pay to the pharmacy as a fixed amount irrespective of their insurance policy.

You can choose an alternative drug based on the above details where the patient gets the benefit of their insurance policies.

Also See:

Drug Eligibility

Drug Interactions

Patient Dashboard

Visit Summary

Add Favorite Drug

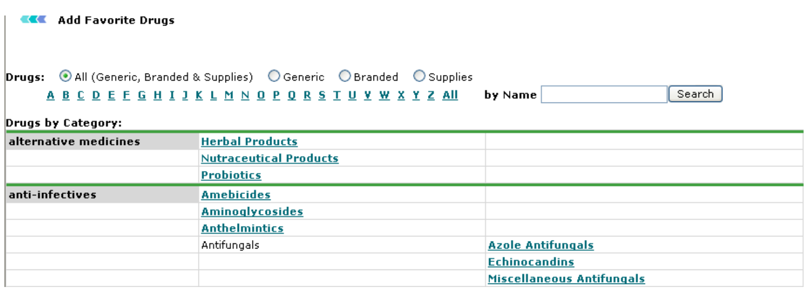
In this section, you can add all drugs that you generally recommend your patients.

Add drugs in favorites list

1. On the **Prescription** menu, click **Add New Favorite Drug**.

   Alternatively, click the **Add New Favorite Drug** link available on Prescription home page.

   The Add Favorite Drug page is displayed. You can search a drug by name or by category.



Add New Favorite Drug

2. Do one of the following:
   - Click the letter with which the drug name starts.

     A list of all the drugs starting with selected letter is displayed.
   - Click the category to which the drug belongs.

     A list of all the drugs available under the selected category are displayed.
3. Select check box corresponding to the drug you want to add to your favorite list.
4. Click **Submit**.

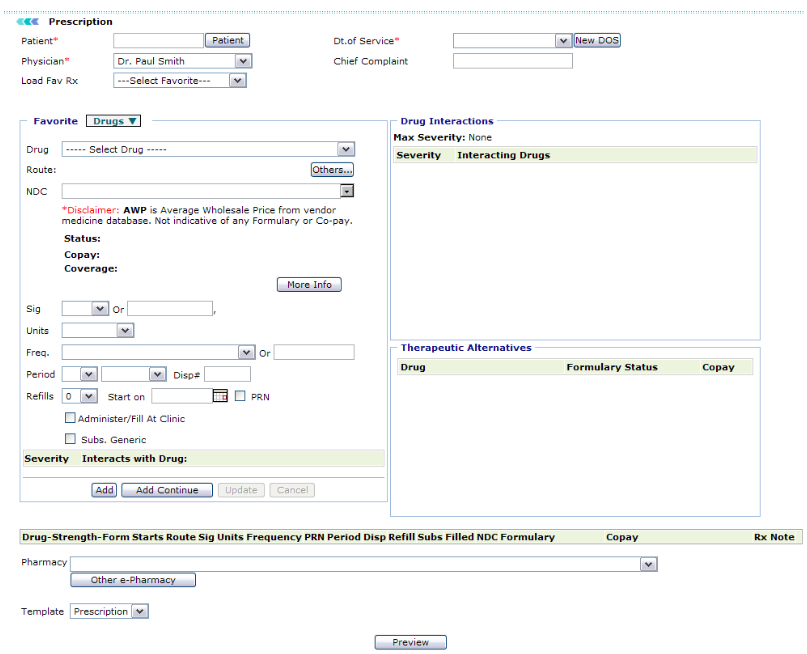
   The confirmation page displays a message indicating the drug is successfully added to the favorite list.

Add New Favorite Prescription

1. On the **Prescription** menu, select **Add New Favorite Prescriptions**.

   Alternatively, click the **Add New Favorite Prescriptions** link on the Prescriptions home page.

   The Favorite Prescription page is displayed.



Add Favorite Prescription

2. Specify values for the favorite prescriptions:

Favorite Prescriptions Fields

Field	Description
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 the **Others** button to locate new drug/test. This will open another window, type first few letters of drug/test in **Start with** field. Click **Search**. This will display list as per search, click on the one you want. This will then 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 available in Sig drop down.
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 available in Freq. drop down.
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 on	Click the Calendar icon to select the date from which refill should begin.
Filled At Clinic	Check this option if prescription is filled at clinic.

3. Click **Add**.

Note: If you want to add more drugs, click **Add Continue**.

To modify prescription, select the added drug, make the required changes, and click **Update**.

To delete a drug from prescription, select the drug, and click **Delete**.

4. Enter observations in the **Notes** section.
5. Select the **Pharmacy** from which you are recommending to take drug.
6. Select the **Template** on which this prescription is to be printed.
7. Check the option **Send fax** if you want to send fax to pharmacy.
8. Click **Submit**.

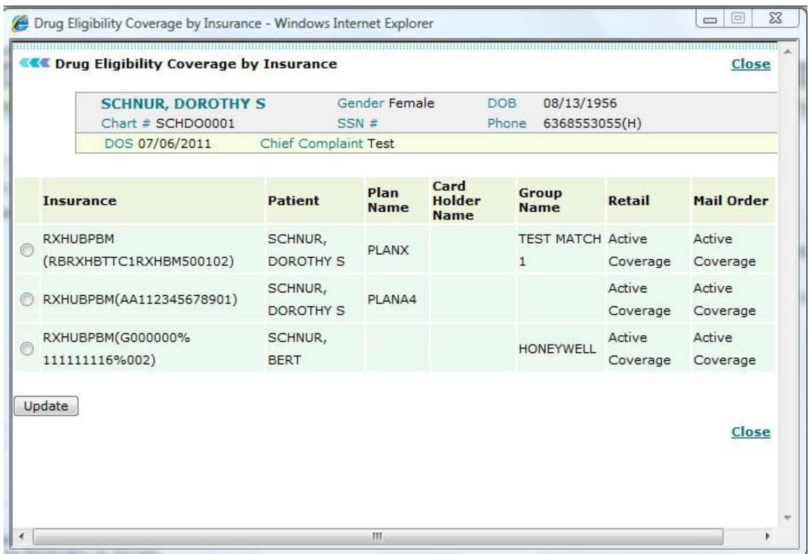
This prescription is added to the Favorite Prescriptions list.

Drug Eligibility

Drug Eligibility is used to check the patient's eligibility to claim insurance for a particular drug. When you prescribe a particular drug to the patient, drug eligibility helps you to check whether the patient's insurance plan covers the purchase that drug.

You can check for drug availability on Add New Prescription page. On the **Prescriptions** home page, click **Add New Prescription**. Select the drug you want to prescribe to the patient and click **Drug Eligibility**.

The **Drug Eligibility** page is displayed.



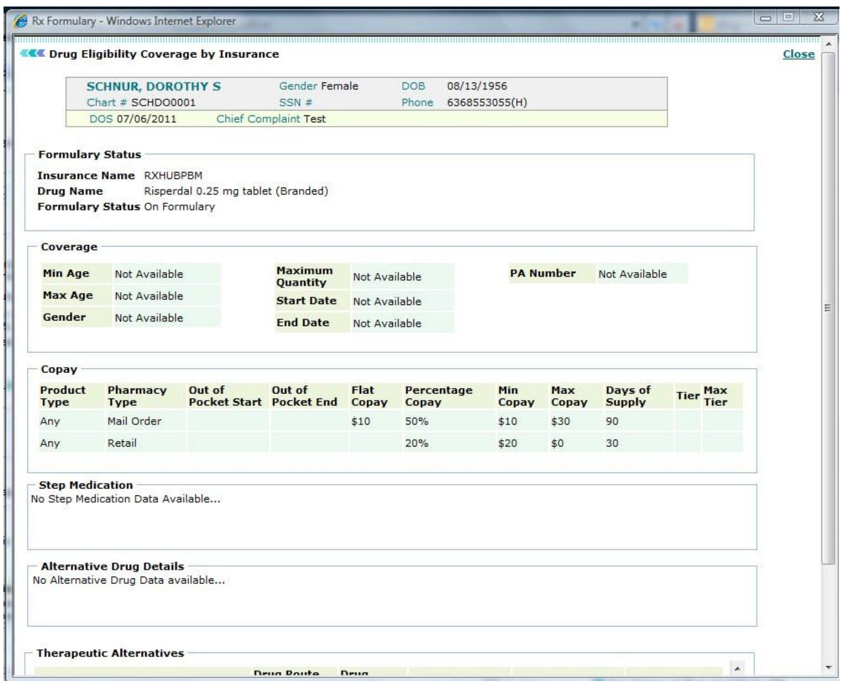
Drug Eligibility Coverage by Insurance

Field	Description
Insurance	Select the active Insurance plan of the patient.
Patient Details	Patient name, Date of Birth and Gender is displayed.
Dependent name	Patient's dependent as per the insurance policy is displayed.
Plan Name	Insurance plan name is displayed.
Address	Address of the patient is displayed.
Card Holder Name	Card holder's name is displayed.
Group Name	If the patient belongs to a particular group, group name of patient is also displayed.
Retail Pharmacy	The status of the insurance coverage for retail pharmacy. The two options are: • Active Coverage • Inactive Coverage
Mail Order	The status of the insurance coverage for mail order pharmacy. The two

Pharmacy	options are: • Active Coverage • Inactive Coverage

Out of the multiple options available for drug eligibility, you can select the plan as per patients choice. Click **Update** to select the plan.

Once you select the plan, the details about the plan are displayed on the **Drug Eligibility Coverage by Insurance** page.



On the basis of the plan that you have selected the patient's **insurance coverage, drug formulary status, copay, step medication, alternative drug details** and **therapeutic alternatives** are displayed. Based on these values, the patient has to pay the relevant amount to the pharmacy.

Drug Interactions

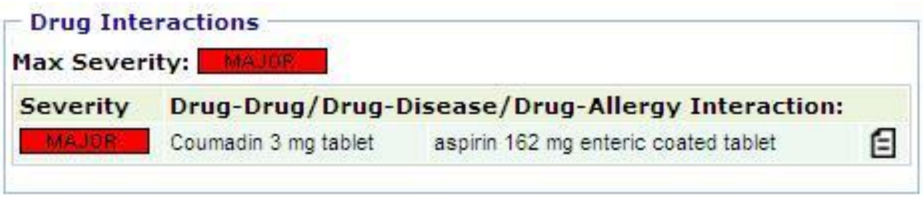
In case, you are prescribing drugs that may cause harm to the patient directly or indirectly, **Drug Interactions** shows the severity of impact on the patient.

Drug Interactions show the impact that the drug might have on the patient. Drug Interactions also display the reason due to which the drug should not be prescribed to the patient. There are three different reasons due to which a drug should not be prescribed to the patient.

- Drug - Drug Interactions
- Drug - Disease Interactions
- Drug - Allergy Interactions

Drug - Drug Interactions

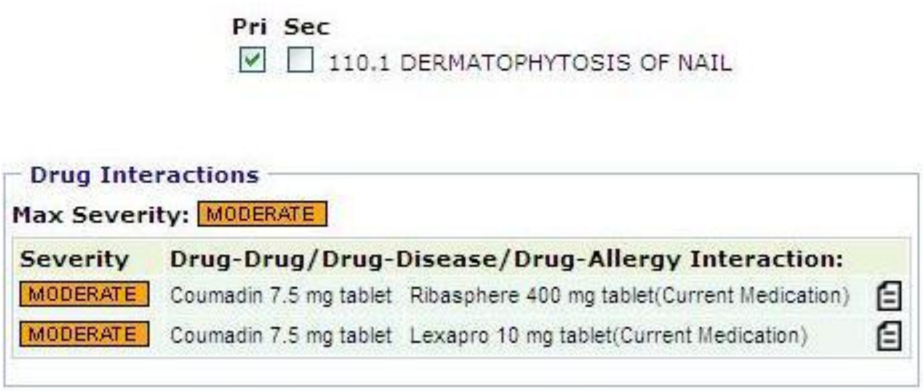
If a patient is already taking a medication currently, he should not be prescribed another medicine that may chemically react and cause problems to the patient. Thus, OmniMD checks for such a situation through its database and cautions you before prescribing such drugs to the patient.



Drug - Drug Interactions

Drug - Disease Interactions

If a patient is being treated currently for one disease and he catches another disease, you should take care that he is not prescribed a medicine that may cause health issues for the disease he is being treated earlier. Thus, OmniMD checks for such a situation through its database and cautions you before prescribing such drugs to the patient.



Drug - Disease Interactions

Note: Drug - Disease Interactions are only checked by OmniMD when the patient disease is selected from the list of diseases.

Drug - Allergy Interactions

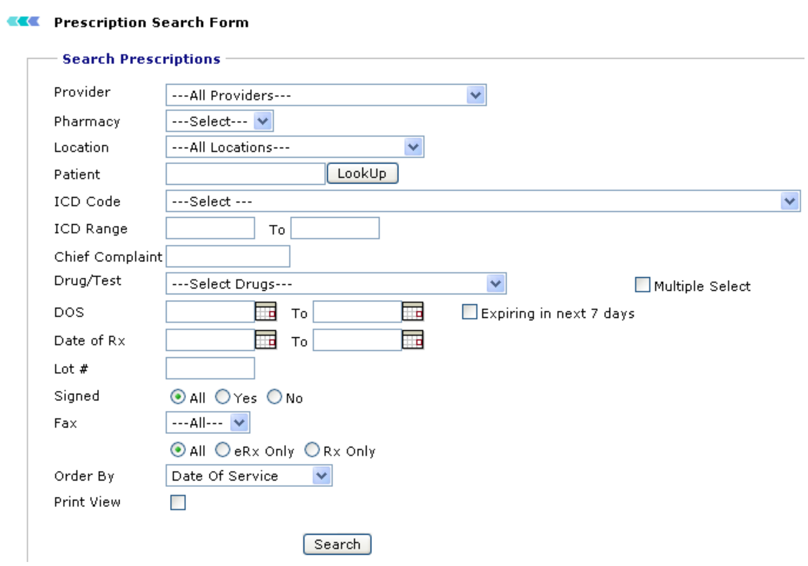
If the patient has supplied any information about allergy on the Add Patients page, OmniMD checks for this information before prescribing the patients. In case, a patient is allergic to some drugs, you should not prescribe those drugs to the patient.

Search Prescriptions

1. On the **Prescription** menu, select **Search Prescriptions**.

   Alternatively, click the **Search Prescriptions** link on the Prescriptions home page.

   The Prescription Search Form page is displayed.



Prescription Search Form

2. Specify the search criteria:

Prescription Search Form Fields

Field	Description
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 **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 the option by 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. Click **Search**.

   The list of prescriptions based on the search parameters is displayed.

Prescriptions Written Today

- From the **Prescription** menu, select **Prescriptions Written Today**.

  Alternatively, click the **Prescriptions Written Today** link on the Prescriptions home page.

  The list of all the prescriptions written by the provider on current date is displayed.

DOS	Patient Name	Prescriptions/Drug list	Action
03/18/2011	Wiseman,Steve	Prescribed by: Dr. Paul Smith Chief Complaint: Chest Pain	Copy
SIGNED		Pharmacy : CVS Pharmacy # 136 (908-925-3498)	Print
e-Rx		Drug Disp Start End Refill Subst Trace Status Action	Leaflets
		Procardia XL 90 mg 1 ERT QD-Once a day 30 03/18-04/16/2011 (Active) Trace Sent	ReFax
03/18/2011	Bartel,Otto	Prescribed by: Dr. Paul Smith Chief Complaint: Knee Pain	Copy
SIGNED		Pharmacy : CVS Pharmacy # 136 (908-925-3498)	Print
e-Rx		Drug Disp Start End Refill Subst Trace Status Action	Leaflets
		Celebrex 400 mg 1 CAP BID-2 times a day 60 03/18-04/16/2011 (Active) Trace Sent	ReFax
03/15/2011	Wiseman,Steve	Prescribed by: Dr. Paul Smith Chief Complaint: Chest Pain	Edit Copy
Sign Off		Pharmacy : Wenbar Pharmacy Inc. (212-456-7259)	Print
Fax : Requested		Drug Disp Start End Refill Subst	Leaflets
		Procardia XL 90 mg 1 ERT QD-Once a day 30 03/15- 04/13/2011 (Active)	ReFax

Prescriptions Written Today

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

Prescriptions Written in Last Week

- On the **Prescription** menu, select **Prescriptions Written in Last Week**.

  Alternatively, click the **Prescriptions Written in Last 1 Week** link on the Prescriptions home page.

  The list of all the unsigned prescriptions written in the last week by the provider is displayed.

Prescription List

Prescriptions written in Last 1 Week   Add New Prescription   Search Prescriptions

Prescribed by: Dr. Paul Smith

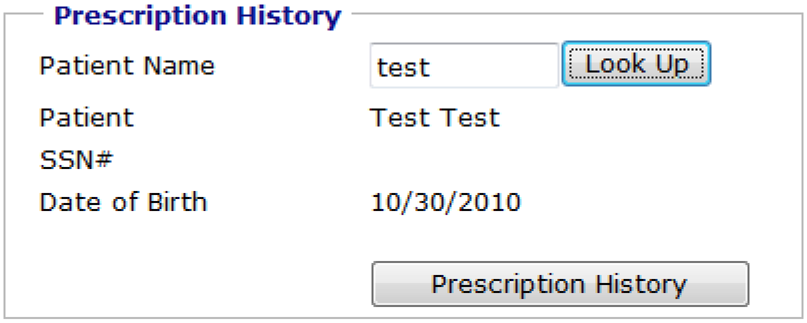
DOS	Patient Name	Prescriptions/Drug list	Action
03/18/2011	Wiseman,Steve	Prescribed by: Dr. Paul Smith Chief Complaint: Chest Pain	Copy
SIGNED		Pharmacy : CVS Pharmacy # 136 (908-925-3498)	Print
e-Rx		Drug Disp Start End Refill Subst Trace Status Action	Leaflets
		Procardia XL 90 mg 1 ERT QD-Once a day 30 03/18-04/16/2011 (Active) Trace Sent	ReFax
03/18/2011	Bartel,Otto	Prescribed by: Dr. Paul Smith Chief Complaint: Knee Pain	Copy
SIGNED		Pharmacy : CVS Pharmacy # 136 (908-925-3498)	Print
e-Rx		Drug Disp Start End Refill Subst Trace Status Action	Leaflets
		Celebrex 400 mg 1 CAP BID-2 times a day 60 03/18-04/16/2011 (Active) Trace Sent	ReFax
03/15/2011	Wiseman,Steve	Prescribed by: Dr. Paul Smith Chief Complaint: Chest Pain	Edit Copy
Sign Off		Pharmacy : Wenbar Pharmacy Inc. (212-456-7259)	Print
Fax : Requested		Drug Disp Start End Refill Subst	Leaflets
		Procardia XL 90 mg 1 ERT QD-Once a day 30 03/15- 04/13/2011 (Active)	ReFax
03/14/2011	Cooper,Mary	Prescribed by: Dr. Paul Smith Chief Complaint: High Fever	Edit Copy
Sign Off		Pharmacy : Cambridge Chemists (212-734-9869)	Print
Fax : Requested		Drug Disp Start End Refill Subst	Leaflets
		albuterol 200 mcg 150 CAP QID-4 times a day 18000 03/14- 04/12/2011 (Active)	ReFax
03/13/2011	Boop,Betty	Prescribed by: Dr. Paul Smith Chief Complaint: headache	Edit Copy
Sign Off		Pharmacy : Athena's Pharmacy (718-315-7896)	Print
Fax : Requested		Drug Disp Start End Refill Subst	Leaflets
		albuterol CFC free 90 mcg/inh 1 AERA QID-4 times a day 1 03/13-04/11/2011 (Active)	ReFax
Select All			

Prescriptions Written in Last Week Image

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

Prescription History

1. On the **Prescriptions** home page, under **Prescription History**, in the **Patient Name** box, type the name of the patient.



Prescription History

2. Click **Look Up** to select the patient name.

You can select patient from Today's list, Last 2 days Patient, search patient or add a new patient. Once a patient is selected, his name, SSN# and Date of Birth appears on the screen.

3. Click **Prescription History**.

The prescription history list for the selected patient is displayed.

Prescription History for Selected Patient

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

Unsigned Prescriptions

- On the **Prescription** menu, select **Unsigned Prescriptions**.

Alternatively, click the **Unsigned Prescriptions** link on the Prescriptions home page.

The list of all the unsigned prescriptions written by the provider is displayed.

Unsigned Prescriptions

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

Favorite Prescriptions

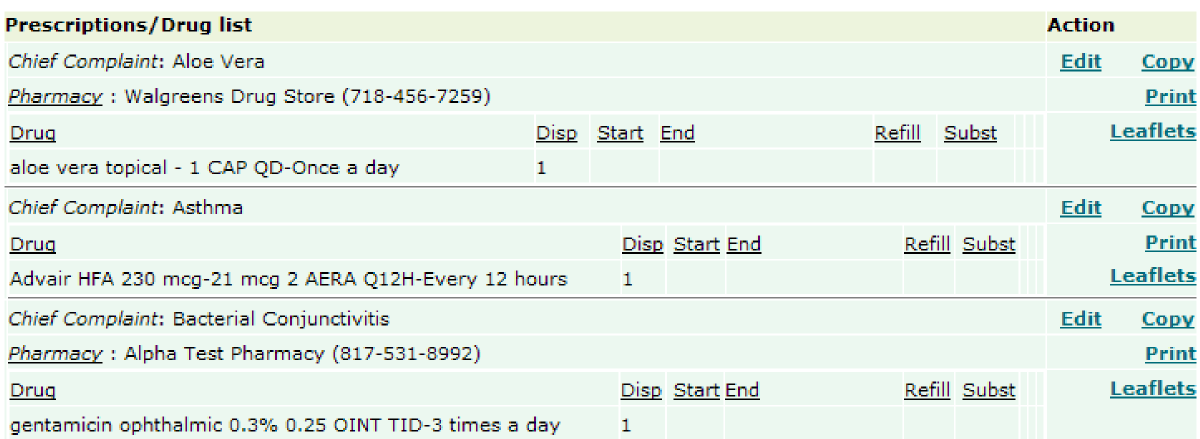
Providers can set their prescriptions as per their requirements. OmniMD provides them facility of storing their prescriptions as favorites.

View favorite prescriptions

- On the **Prescription** menu, select **Favorite Prescriptions**.

  Alternatively, click the **Favorite Prescriptions** link on the Prescriptions home page.

  The list of all the prescriptions listed as favorite is displayed.



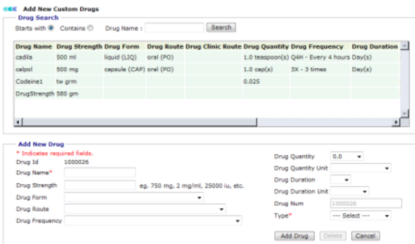
Favorite Prescriptions

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

Add New Custom Drugs

Custom drugs are the drugs that you can add into OmniMD. You can add these drugs in prescription.

From the **Add New Custom Drugs** page, you can search custom drugs or add new custom drugs. The custom drug list displays the following information: Drug Name, Drug Strength, Drug Form, Drug Route, Drug Clinic Route, Drug Quantity, Drug Frequency, Drug Duration, Function Type, Created Date - (created) By, and Modified Date - (modified) By.



Add New Custom Drug

Note: Only the **Doctor Administrator** has the rights to add and manage custom drugs.

Add New Drug

1. Under **Add New Drug**, in the **Drug Name** box, type a name of the drug.

   Note: You cannot edit the **Drug ID** number, which is a system-generated number.

2. In the **Drug Strength** box, type a strength for the drug. For example, 750 mg, 2 mg/ml, and 25000 IU.

3. From the **Drug Form** list, select a form in which the drug is available in the market.

4. From the **Drug Route** list, select a route through which the drug is administered in body.

5. From the **Drug Frequency** list, select a frequency for the administration of the drug.

6. From the **Drug Quantity** list, select a quantity of the drug to be administered each time.

7. From the **Drug Quantity Unit**, select a unit for the drug quantity.

8. From the **Drug Duration** list, select a value for the duration for which the drug is to be administered.

9. From the **Drug Duration Unit** list, select a unit for the drug duration.

   Note: You cannot edit **Drug Num**, which is a system-generated number.

10. From the **Type** list, select a type for the drug.

    The options include **Generic**, **Branded**, and **Medical Supplies**.

11. Click **Add Drug**.

    The drug is added to the drug list.

Manage Pharmacies

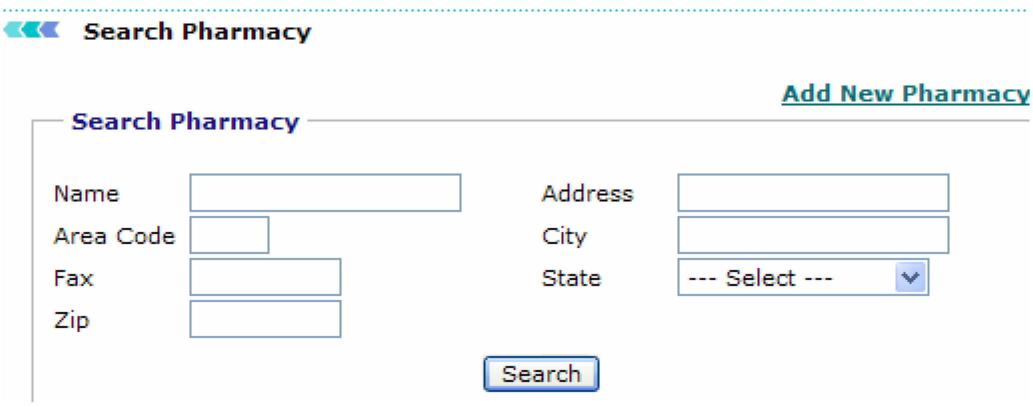
Under this section, you can add new pharmacy or search for existing pharmacies.

Search pharmacy

1. On the **Prescription** menu, select **Manage Pharmacies**.

   Alternatively, click the **Manage Pharmacies** link on the Prescription home page.

   The Search Pharmacy page is displayed.



Search Pharmacy

2. Specify the search parameters.
3. Click **Search**.

   A list of pharmacy for the specified search parameters is displayed.

Add new pharmacy

1. On the **Prescription** menu, select **Manage Pharmacies**.

   Alternatively, click the **Manage Pharmacies** link on the Prescription home page.

2. On the Search Pharmacy page, click the **Add New Pharmacy** link.

   The Add Pharmacy page is displayed.

Add Pharmacy

3. Fill the required values.
4. Click **Submit**.

The pharmacy is added to the system.

Manage Templates

- On the **Prescription** menu, select **Manage Templates**.

Alternatively, click the **Manage Templates** link on the Prescription home page.

The Template Listing page displays a list of existing prescription templates.

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

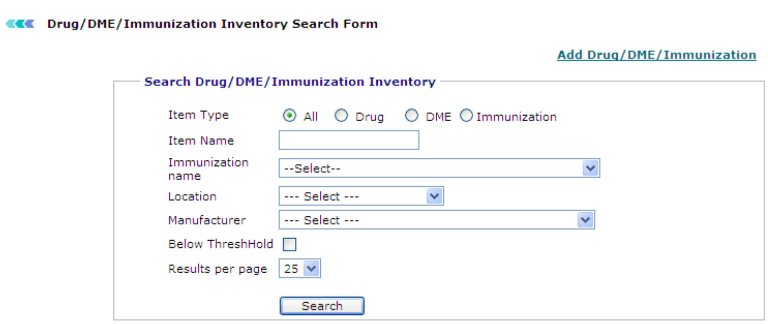
Template List

Search Drug / DME / Immunization Inventory

You can search for a specific **Drug, Durable Medical Equipment (DME) or Immunization** using this page. This page helps you to add and maintain your inventory through OmniMD.

1. On the **Prescriptions Home** page, click **Drug/DME/Immunization Inventory**.

   The **Drug/DME/Immunization Inventory Search Form** is displayed.



Search Drug/DME/Immunization Inventory

2. Type the **Item name**.
3. Select **Immunization name**, in case of immunization.
4. Select the Location for which you want to search details.

5. From the **Manufacturer** list, select a drug, DME or immunization manufacturer.

6. Select the **Below Threshold** check box, if you want to search only those items which are below a given threshold value.

7. From the **Results per page**, select the number of items that you want to see per page.

8. Click **Search**.

The **Drug/DME/Immunization Inventory List** is displayed.


Drug/DME/Immunization Inventory List

Search Drug/DME/Immunizati

Search Criteria: Item Type=Immunization , Item Name:hep

Type	Immunization Name	Drug Name	Location	Manufacturer	NDC	Unit	Quantity	Expi Date
Immunization	Hep A, adult	hepatitis A adult vaccine	OMNIMD HEALTH C...	GlaxoSmithKline	58160082632	ml	1.00	12/2
Immunization	Hep B, adult	hepatitis B adult vaccine	OMNIMD HEALTH C...	Merck & Company Inc	00006409406	ml	999.00	12/2

Drug/DME/Immunization Inventory Search Result

Also See:

[Add New Inventory]

Add New Drug / DME / Immunization Inventory

You can add new Drug / DME / Immunization Inventory using this page. The items added through this page are automatically added to existing inventory and the quantity is updated automatically.

1. From the **Drug/DME/Immunization Inventory Search Form** , click **Add Drug / DME / Immunization**.

The **Add Drug/DME/Immunization Inventory Info** page is displayed**.**

2. From the **item type**, select a item you want to add.

3. Click **Add Item** to add the name of the item.

4. From the **Location** list, select a location at which you want to add the item.

5. Type the name of the **Manufacturer**.

5. Type the **NDC** code of the drug, DME or immunization.

6. Type the **units** and **quantity** of the drug, DME or immunization.

7. Select the **package type** and the **number of packages** that you want to add to the inventory.

8. Select the **lot number** in which you want to order the drug, DME or immunization.

9. Select the **expiration date** of the drug, DME or immunization.

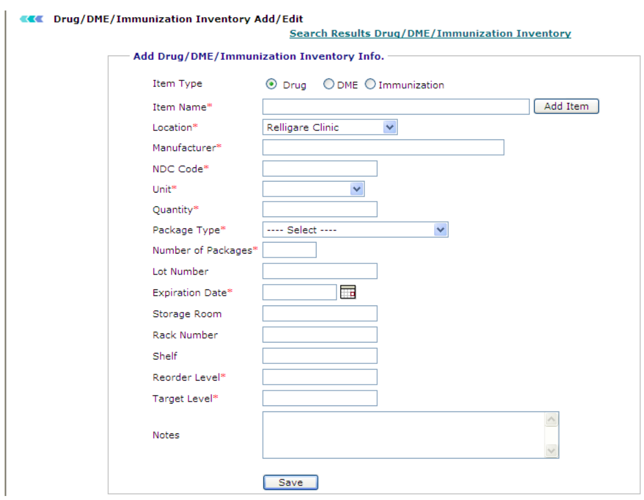
10. Select the **room, rack number** and **shelf** for storage.

11. Select the **Reorder level** and **Target level** for maintaining a threshold value in the inventory.

12. Click **Save**.

The drug, DME or immunization details are saved.

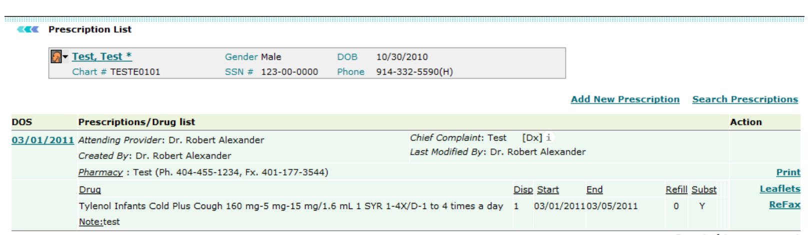
Note: You can edit the Inventory details using the **Edit Drug/DME/Immunization Inventory** form which contains similar details.



Add Drug/DME/Immunization Inventory

Omni Rx History

Click the **Omni Rx History** link to view prescriptions which were prescribed from OmniMD.

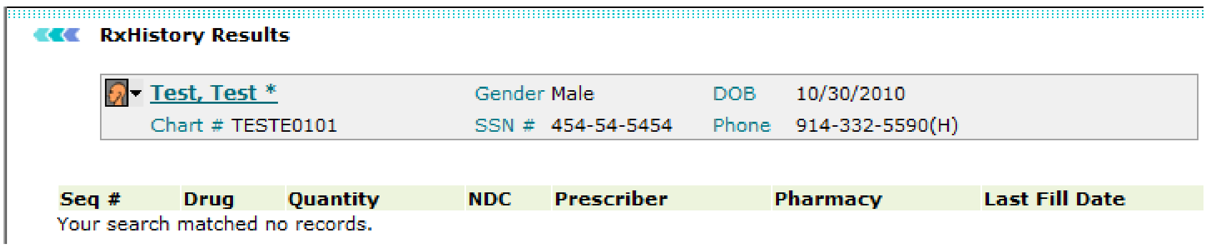


Omni Rx History

All Rx History

To view prescription details, click the **All Rx History** link. You can modify particular prescription, view online, and print the prescription. It shows all Rx history until today. If the patient was seen by an outside e-prescribing provider, it will also be included in the Rx History.

The information available on the All Rx History page is from **Sure Scripts** and it will only be available to the providers who have opted for e-Prescription for their patients.

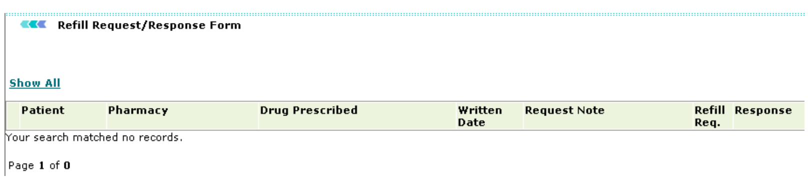


All Rx History

Disclaimer: Certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medications, low cost prescriptions, prescriptions paid for by the patient or non-participating sources, or errors in insurance claims information. The provider should independently verify medication history with the patient.

Rx Refills

Click the **Rx Refills** link to see all of the requests from pharmacies.



Refill Request/Response Form

e-Prescription

e-Prescription are the electronic prescriptions which you can send directly to the pharmacies. There are multiple ways through which you can send prescriptions to the pharmacies directly i.e. through **emails** and through **fax**. While adding new prescriptions, you have the option to select a normal pharmacy or e-pharmacy. If you select e-pharmacy, only then you have the option of sending e-prescription via. **email** or **fax**. In case, of normal prescription only **print** option is available to you.

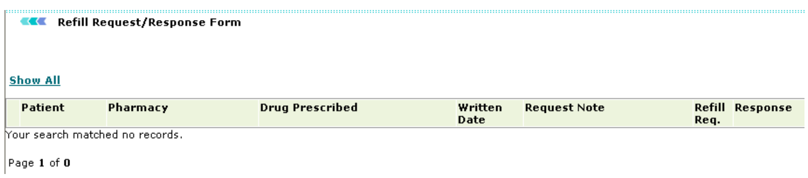
Note: Please note that you cannot create e-prescriptions for the patients if you have not selected an e-pharmacy from the list of pharmacies.

E-prescription refill requests

E-prescription refill requests are the requests that pharmacies may generate when the patients have taken the medicines for the given time period and the next prescription time period is about to begin. For example, if you have prescribed a patient for one month with four weekly refills, the pharmacies will send you a refill request at the end of every week asking for a confirmation whether to refill the medicines or there is any change in the prescription.

1. On the **Prescriptions** home page, under **e-Prescription**, click **Refill Requests**.

   The **Refill Request/Response Form** page is displayed.



Refill Request/Response Form

2. Click the **Response** that you want to send to the pharmacy. The three response options are:

- **Approve:** Approve the refill request. The patient needs to continue medication.
- **Deny:** Deny the refill request. The patient may have recovered and there is no need for further medications. You can mention the reason in the Refill Response form.
- **Denied, New Rx to follow:** The patient may not be recovering with the current medications. He might need alternative medicines.

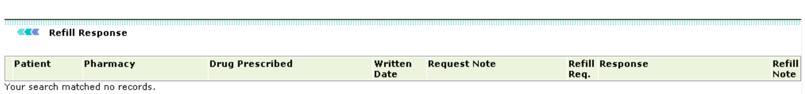
3. When you click any of the three options, a corresponding **Refill Response** form opens.
4. Make the required changes and click **OK** to send the response.

E-prescription refill responses

You can see the refill responses that you sent to the pharmacies using the e-prescription refill response page.

- On the **Prescriptions** home page, under **e-Prescription**, click **Refill Responses**.

  The **Refill Response** page is displayed.



Refill Response

Note: You cannot make any changes to the refill responses once they are sent.

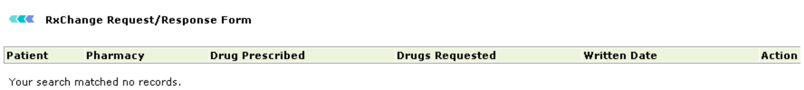
E-prescription change requests

A pharmacy can send change requests for the prescribed medicines if a particular drug is not available in their repository.

Note: The pharmacies can also give alternative drugs to the patients directly, if the e-prescription has an option called Subs Generic. For more information, see Subs Generic.

1. On the **Prescriptions** home page, under **e-Prescription**, click **Change Requests**.

   The **RxChange Request/Response** Form page is displayed.



Rx Change Request/Response Form

2. Click the **Action** that you want the pharmacy to take. The three options are:

- **Approve:** Approve the change request. The patient can take alternative medication.
- **Change:** Change the drug if required.
- **Deny:** Deny the change request. You can mention the reason in the RxChange Response form.

3. When you click any of the three options, a corresponding **RxChange Response** form opens.
4. Make the required changes and click **OK** to send the response.

E-prescription change responses

A pharmacy can send change responses for the requests that the pharmacies have send when a particular drug is not available in their repository. You can either prescribe an alternative drug or you can suggest to wait till the drug is available.

1. When you click any of the three options on the RxChange Request form, a **RxChange Response** form opens.
2. Fill in the details on the RxChange response form.
3. Click **OK** to send the response.

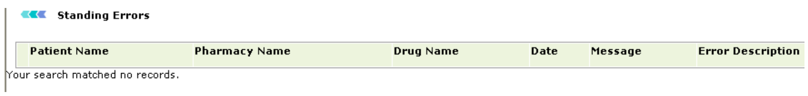
A response is sent to the pharmacy providing details about the changes that they need to be make to the prescription.

E-prescription standing errors

Some of the e-prescriptions cannot be sent across to pharmacies due to technical difficulties. All such technical issues are logged in e-prescription standing errors. When you have a look at this page, you will be able to understand that which pharmacies have not yet received the prescription.

On the **Prescriptions** home page, under **e-Prescription**, click **Standing errors**.

The **Standing Errors** page is displayed.



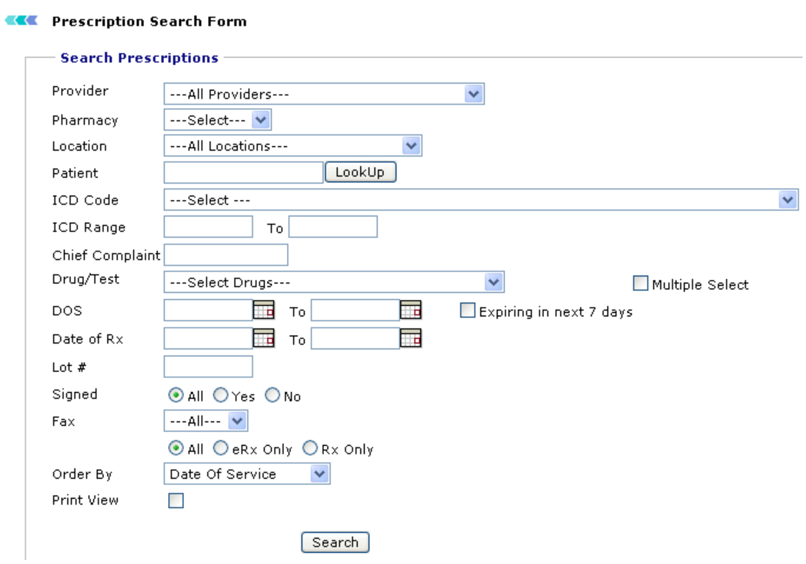
Standing Errors

Search E-prescriptions

Using **search e-prescriptions** page, you can search for all the e-prescriptions that all the providers have sent till now.

1. On the **Prescriptions** home page, under **e-Prescription**, click **Search e-Prescriptions**.

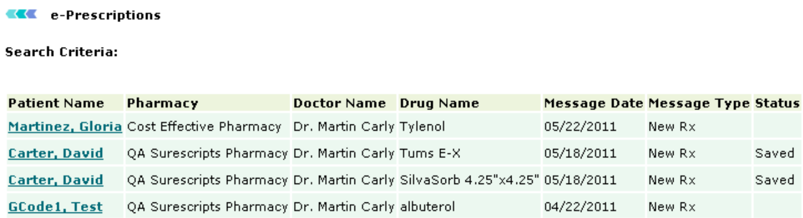
   The **e-Prescription Search Form** is displayed.



Prescription Search Form

2. Fill the values, and click **Search**.

   The list of e-Prescriptions for the specified search parameters is displayed.



Patient Name	Pharmacy	Doctor Name	Drug Name	Message Date	Message Type	Status
Martinez, Gloria	Cost Effective Pharmacy	Dr. Martin Carly	Tylenol	05/22/2011	New Rx	
Carter, David	QA Surescripts Pharmacy	Dr. Martin Carly	Tums E-X	05/18/2011	New Rx	Saved
Carter, David	QA Surescripts Pharmacy	Dr. Martin Carly	SilvaSorb 4.25"x4.25"	05/18/2011	New Rx	Saved
GCode1, Test	QA Surescripts Pharmacy	Dr. Martin Carly	albuterol	04/22/2011	New Rx	

ePrescription Search List

Search Drug

You can search a drug by filling values on **Prescription home** page. Fill in the drug name that you want to search and click **Search**. The list of drugs is displayed as per the search parameters.

Search Drug

External Immunization

You can view a list of external immunizations for all the patients using this page. The external immunization information helps you decide what immunization to prescribe. For example, if a patient is already immunized for **Hep A** before he should not be immunized again.

On the **Prescriptions Home** page, click **External Immunization**.

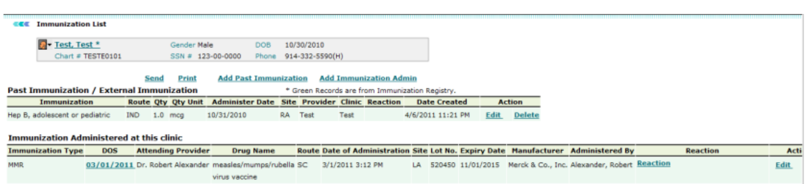
The **External Immunization** page is displayed.

List of External Immunizations

Note: For more information about external immunizations, see [Immunizations]() on the Patient Dashboard.

Immunizations

Click the **Immunizations** link to view current and past immunizations records, as well as add new details.



Immunizations

G-codes

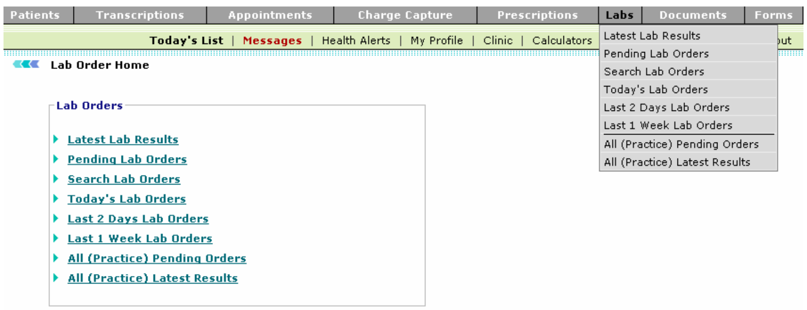
G-codes are the codes that you need to enter if you cannot send e-prescriptions. According to the latest laws by the government, the providers are advised to choose e-prescriptions over normal prescriptions.

As an exception, the government has allowed specific relaxations for locations where the pharmacies cannot receive e-prescriptions. G-codes are the codes that the providers should enter when they are sending out prescriptions. These codes indicate that the pharmacy does not have enough capacity to receive e-prescriptions.

For example, **G8455** is a code which suggests that the pharmacy cannot receive e-prescriptions.

Lab Order

Using Lab Order module, you can access, update, and track all the lab orders for your patients.

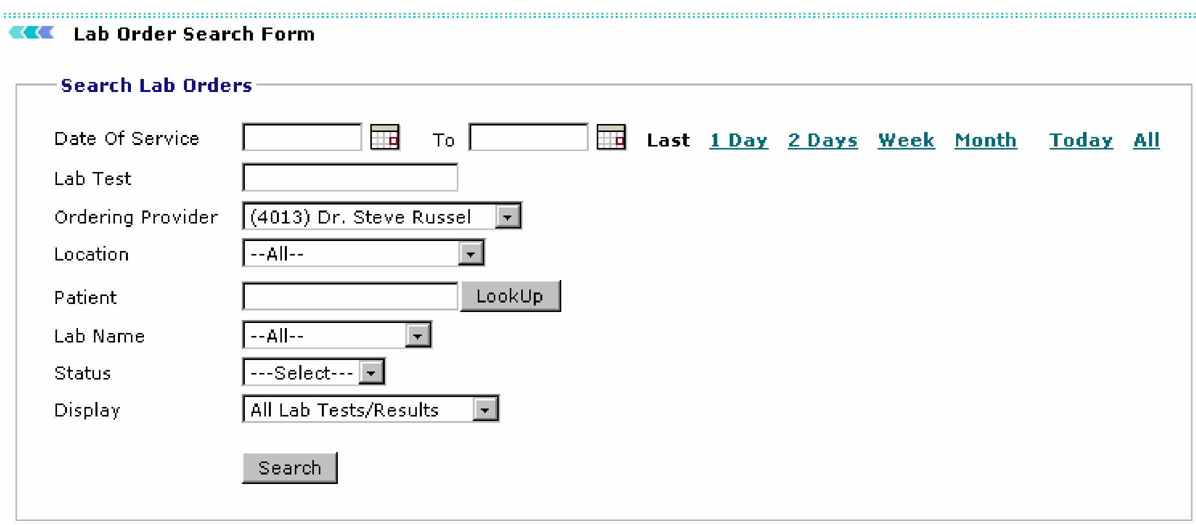


Lab Order

Search Lab Orders

- From the **Labs** menu, select **Search Lab Orders**.

The Lab Order Search Form page is displayed.

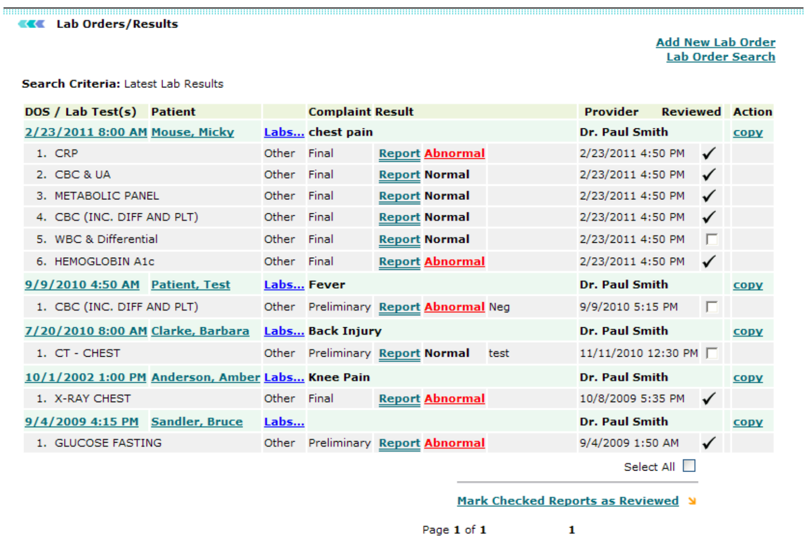


Lab Order Search Form

Latest Lab Results

1. From the **Labs** menu, select **Latest Lab Results**.

   A list of latest lab results is displayed.



Lab Orders/Results

Add New Lab Order
Lab Order Search

Search Criteria: Latest Lab Results

DOS / Lab Test(s)	Patient		Complaint	Result		Provider	Reviewed	Action
2/23/2011 8:00 AM	Mouse, Micky	Labs...	chest pain			Dr. Paul Smith		copy
1. CRP		Other	Final	Report Abnormal		2/23/2011 4:50 PM	✓	
2. CBC & UA		Other	Final	Report Normal		2/23/2011 4:50 PM	✓	
3. METABOLIC PANEL		Other	Final	Report Normal		2/23/2011 4:50 PM	✓	
4. CBC (INC. DIFF AND PLT)		Other	Final	Report Normal		2/23/2011 4:50 PM	✓	
5. WBC & Differential		Other	Final	Report Normal		2/23/2011 4:50 PM	☐	
6. HEMOGLOBIN A1c		Other	Final	Report Abnormal		2/23/2011 4:50 PM	✓	
9/9/2010 4:50 AM	Patient, Test	Labs...	Fever			Dr. Paul Smith		copy
1. CBC (INC. DIFF AND PLT)		Other	Preliminary	Report Abnormal	Neg	9/9/2010 5:15 PM	☐	
7/20/2010 8:00 AM	Clarke, Barbara	Labs...	Back Injury			Dr. Paul Smith		copy
1. CT - CHEST		Other	Preliminary	Report Normal	test	11/11/2010 12:30 PM	☐	
10/1/2002 1:00 PM	Anderson, Amber	Labs...	Knee Pain			Dr. Paul Smith		copy
1. X-RAY CHEST		Other	Final	Report Abnormal		10/8/2009 5:35 PM	✓	
9/4/2009 4:15 PM	Sandler, Bruce	Labs...				Dr. Paul Smith		copy
1. GLUCOSE FASTING		Other	Preliminary	Report Abnormal		9/4/2009 1:50 AM	✓	

Select All ☐

Mark Checked Reports as Reviewed

Page 1 of 1 1

Latest Lab Results

2. To mark reports as reviewed, select the check boxes corresponding to the reports you want to mark as reviewed, and click **Mark Checked Reports as Reviewed**.

3. To view single lab result, click **View** corresponding to the lab result you want to review.

> **Note:** The ✓ icon indicates the corresponding lab result has been reviewed.

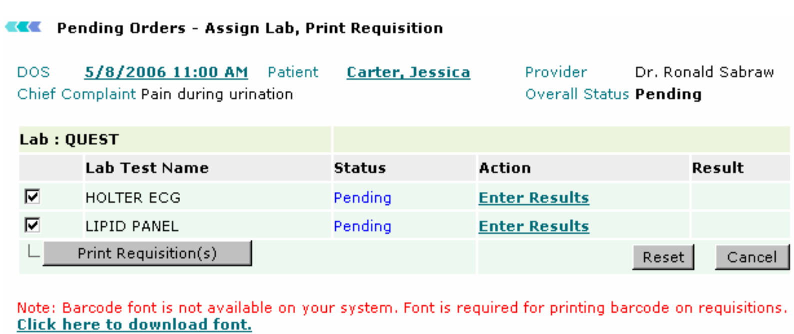
Pending Lab Orders

1. From the **Labs** menu, select **Pending Lab Orders**.

   A list of pending lab orders is displayed.

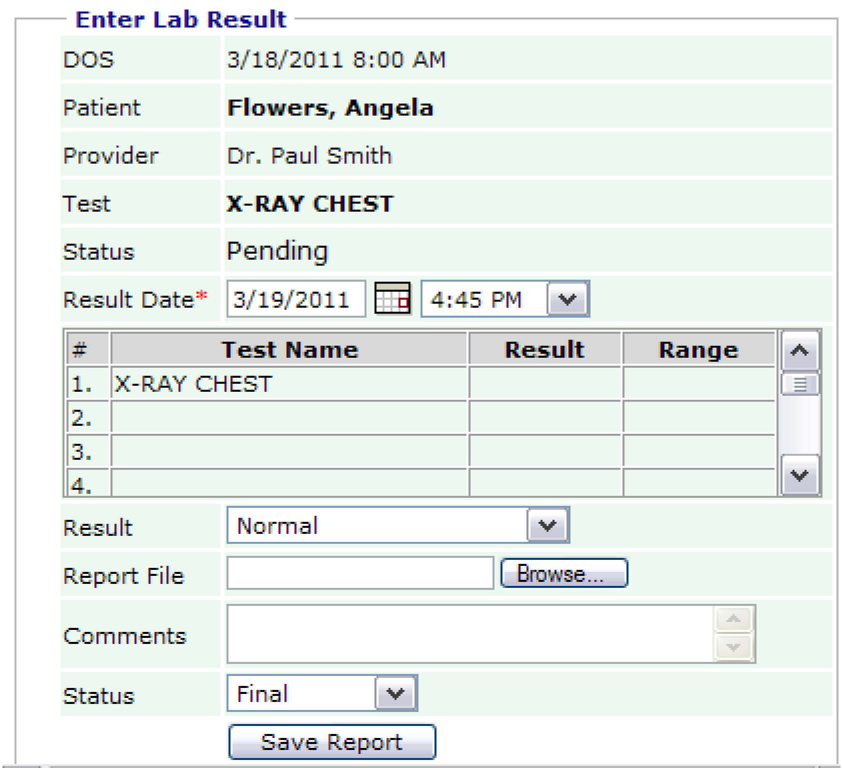
Pending Lab Orders

2. Click **Order** to print requisition.



Print Requisition

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



Enter Lab Results

Note: All inputs, including normal or abnormal result, have to be manually updated. Please use the suggested format for entering result data.

Today's Lab Orders

- From the **Labs** menu, select **Today's Lab Orders**.

The a list of lab Orders for the current date is displayed.

Lab Orders Listing

Lab Order Search

Search Criteria: Today's Lab Orders

DOS / Lab Test(s)	Patient	Chief Complaint			Result	Provider	Review
5/3/2006 6:55 PM	Fontanez, Maria	Physical				Dr. Ronald Sabraw	
1. THYROID PANEL			Pending	Order			
5/3/2006 6:30 PM	Sample, John	Ankle sprain (Rt)				Dr. Ronald Sabraw	
1. CBC (INCLUDES DIFF/PLT)		Other	Preliminary	View	Normal	2/14/2006 1:50 PM	✓
2. HEMOGLOBIN A1C WITH MBG		Other	Pending	Order			
5/3/2006 4:10 PM	Rivera, Nancy	Mild Fever				Dr. Ronald Sabraw	
1. PHYSICAL THERAPY		Quest	Pending	Order			
5/3/2006 4:00 PM	Johnson, Barbara	Graves' Disease				Dr. Ronald Sabraw	
1. THYROID PANEL		Other	Preliminary	View	Abnormal	3/10/2006 3:15 PM	✓
5/3/2006 3:35 PM	Tyska, James					Dr. Ronald Sabraw	
1. LUMBAR MRI WITH CONTRAST		Other	Final	View	Normal	1/13/2006 10:35 AM	✓
2. ECG		Other	Final	View	Abnormal	1/13/2006 10:30 AM	✓

Today's Lab Orders

Note: There are similar pages for the following other search criteria: **Last 2 days**, **Last 1 week**, **All (Practice) Pending**,and **All (Practice) Latest** Lab Orders.

Manage Drug Lots

1. Click the **Manage Drug Lots** link.

   The Drug Lot page is displayed.

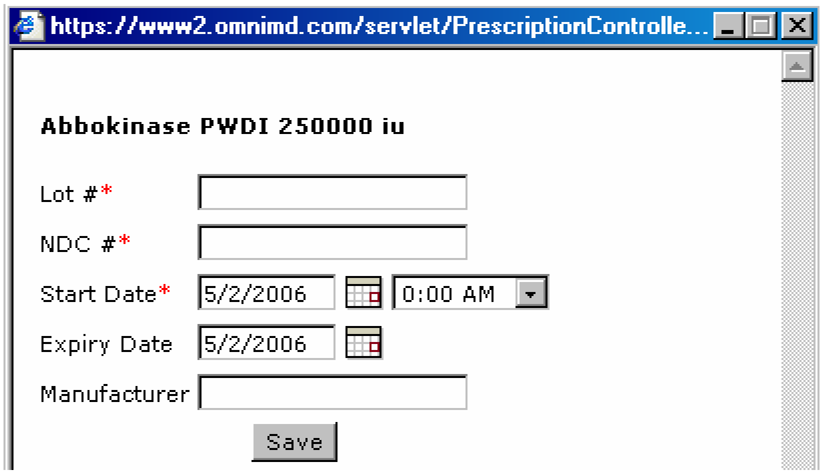
Drug Lot

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

Drug Lot

2. Click the **Add** link to update drug lot details.



Drug Lot Details

3. Fill the required information.
4. Click **Save**.

The updated drug lot information is saved.

Transcription

The Transcription module lets you monitor all the transcriptions dictated by a provider. Click the Transcriptions link to view a list of transcriptions of the logged in provider. The list includes only those dictations that have been transcribed by OmniMD and sent back to the provider for review. By default, their status is 'Under Review'.

Transcription Search Result

Note: You can also view this page by clicking **Transcriptions** - > **"Under Review" Listing**.

The Transcription Search Results page displays 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.

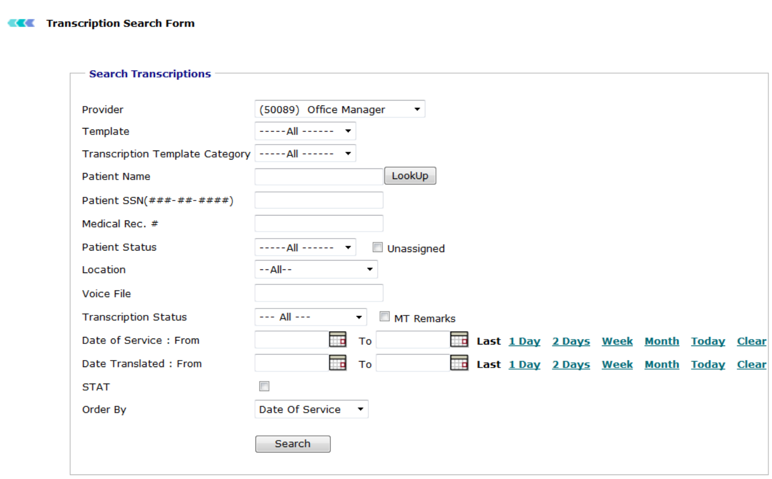
Two links, View and Options are displayed in the last column of every search result. Click on View to view a transcription. Click on Options to perform actions such as Sign-off Transcriptions, Request Corrections, and Re-assign a transcription to a patient.

Search Transcriptions

1. On the **Transcriptions** menu, select **Search Transcriptions**.

   Alternately, click the Search All Transcriptions link on the Transcriptions home page.

   This Search Transcription page is displayed.



Search Transcription Form Image

2. Fill in the fields as applicable:

Transcription Search Form Fields

Field	Description
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.
Template	Select the template from the drop-down menu. The search result will display transcriptions based on the selected template.
Transcription Template Category	From the drop-down menu, select the template category of the transcriptions you want to search.
Patient Name	Enter the name of the patient for whom you wish to search transcriptions.
Patient SSN	Enter the Social Security Number of the patient related to the transcriptions being searched.
Patient Status	Select the status of the patient as old or new from the drop-down menu. Alternately, click the Unassigned check box if a status is yet to be assigned to the patient related to the transcriptions being searched.
Location	From the drop-down menu, select the location of the clinic where the dictations were recorded.
Voice File	Enter the name of the voice file whose transcription you wish to search.
Transcription Status	Select the status of the transcriptions you want to view, from the drop-down menu.
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.
Date of Translation	Select the range of the date of translation for the transcriptions you wish to search, from the Month, Day and Year drop-down menus.
Order By	From the drop-down menu, select the option on the basis of which you want to sort the searched list of transcriptions.

Note: To search for transcriptions of one day before the current date, click the **Last One Day Records** link. The transcription recorded on the previous day are displayed.

3. Click **Search**.

The list of all the transcriptions for the selected criteria is displayed.

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

My Templates

1. On the **Transcriptions** menu, select **Manage Templates**.

   Alternately, click the **My Templates** link available on the **Transcription Search Results** page.

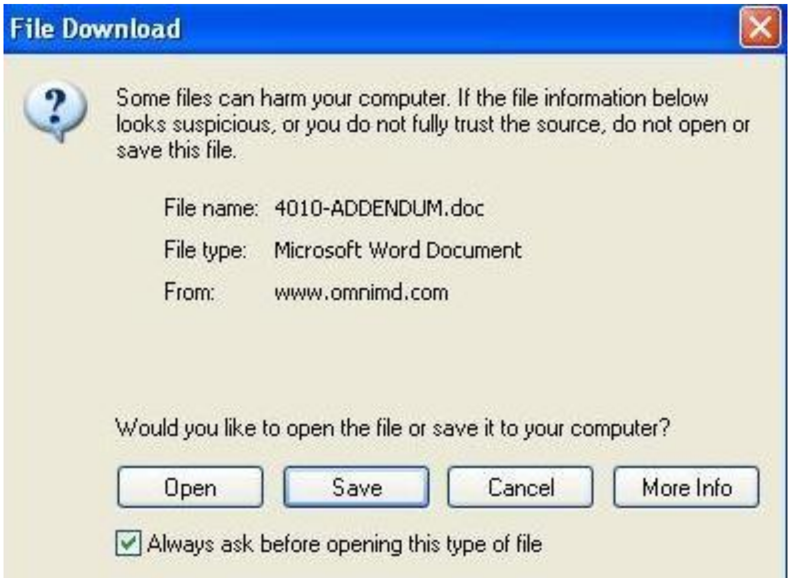
   The Template Search Results page displays a list of templates used by the provider.

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

Template Search Result

2. Click the **View/Download** link to view or save a template.

   The **File Download** dialog box is displayed.



Save Template

3. Click **Open** to view the file.

The file is displayed, but not saved.

Note: Click **Save** to save the file. Select the location where you want to save the file, and click **Save**.

Sign Off Transcriptions

1. Click the **Sign-Off Transcription** link on the Transcription Details page.

The list of transcriptions is displayed.

Alternately, this list can be displayed on the Home Page of Transcriptions or any search result.

2. Click the check boxes corresponding to the transcriptions you want to confirm as signed off.

You can select all the transcriptions displayed on a page by selecting the 'Select All' check box.

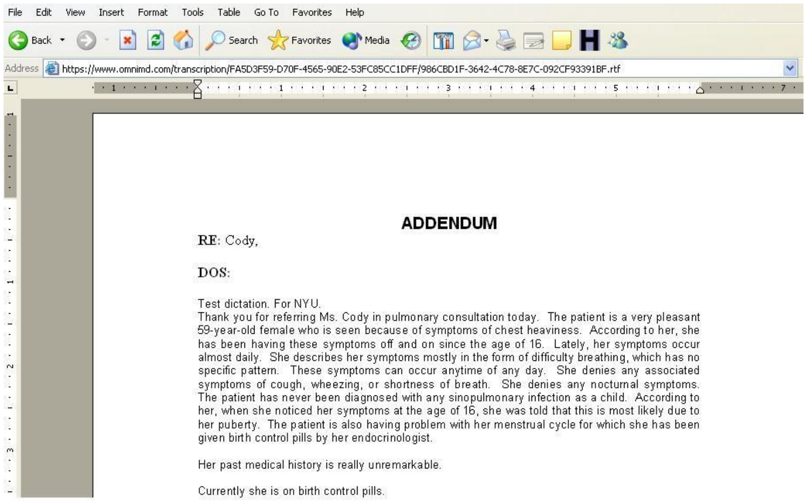
Note: You can sign off only those transcriptions whose status is "Under Review".

3. Click the **Sign-Off all Checked Transcriptions** link.

The selected transcriptions are signed off.

View 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. The provider can also view more than one transcription in a MS Word document as a single document.



Transcription in MS Word

While reviewing the transcription, if the providers find any correction to be made, then they can either correct the transcription themselves, or send it back to OmniMD for corrections.

Correct transcription yourself

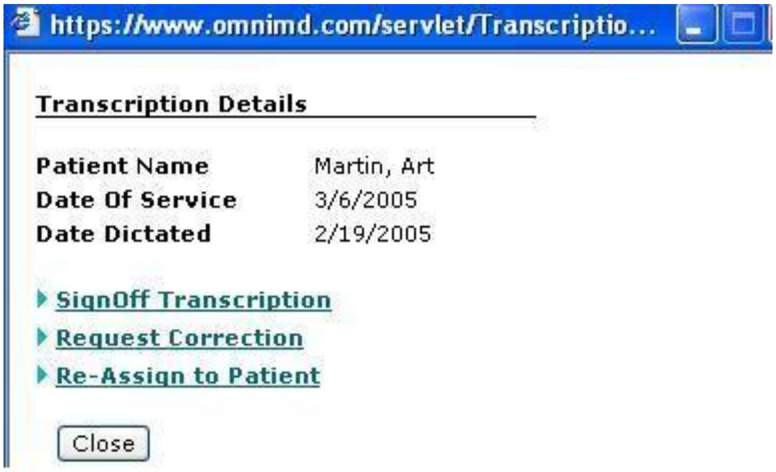
1. Save the transcription in MS-Word without corrections in a Rich Text Format (RTF).
2. Open the transcription RTF file and make the corrections.
3. Save the transcription.
4. Click the **Re-import Transcriptions Using File Upload** link on the transcription search results page.

This uploads the revised transcription with corrections on the OmniMD website.

Get transcription corrected by OmniMD

- Click the **Options** link in the last column on the transcription search results page.

The Transcription Details page is displayed.



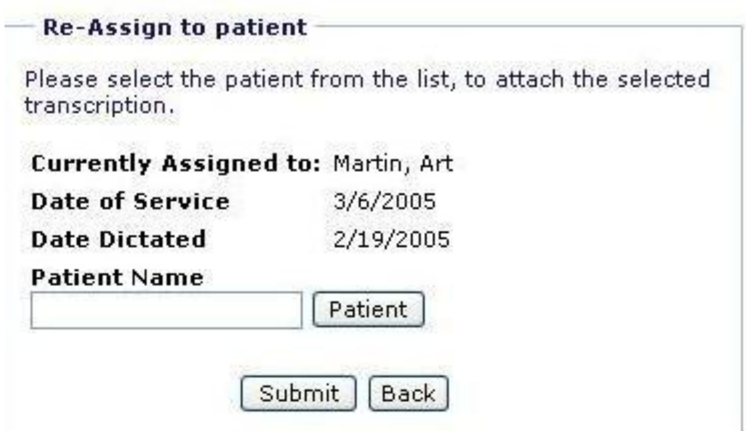
Transcription Details

From this page, a provider can sign-off a transcription, request for corrections in the transcription, and re-assign a transcription to a patient.

Reassign Transcription to a Patient

1. Click the **Re-Assign to Patient** link on the Transcription Details page.

The Re-Assign to Patient page is displayed.



Reassign To Patient

2. Click the **Patient** button and select patient from the dialog box.

You can select patient from the tabs marked Today's Patient or Last 2 days patients. You can also search patient and add a new patient.

3. Click **Submit**.

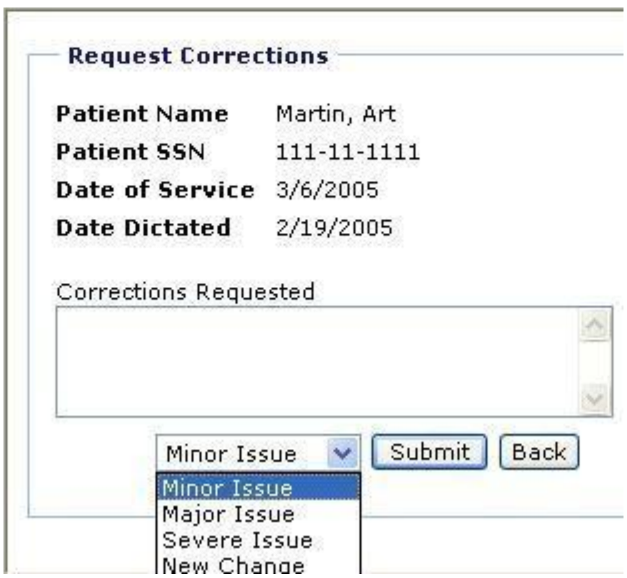
The transcription is assigned back to the patient.

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

Request Corrections

1. Click the **Request Correction** link on the Transcription Details page to request for corrections in the transcription.

The Request Corrections page is displayed.



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.

Once you have entered this information, the status of transcriptions in this stage is referred to as "Under Correction".

3. Click **Submit.**

The updated transcription details page is displayed.

Transcriptions Recorded in the Last Two Days

- Click the **Last 2 Days** link on the **Transcription Search Results** page.

  The list of dictations recorded by the provider two days before the current date are displayed.

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

Transcription for Last 2 Days

Transcriptions Recorded Today

- Click the **Today** link on the **Transcription Search Results** page.

  The list of dictations recorded by the provider on the current date are displayed.

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

Transcription Search Results

Search Criteria:
Doctor : Ronald Sabraw   Date of Service: From 3/5/2005   To 3/5/2005

Search All Transcriptions
Today   Yesterday   Last 2 days
My Templates   View Fax Status

Dt.of Service Dt. Dictated Dt.Translated	Doctor	Patient	Status	Template	# Lines # Pages
S: 3/5/2005 **D:** 3/5/2005	Ronald Sabraw Code: 4010	[NEW] SSN:	Pending	EYE CHECK Playback 4010P110415726.wav	
S: 3/5/2005 **D:** 3/5/2005	Ronald Sabraw Code: 4010	[NEW] SSN:	Pending	4010-CYSTOSC_REP_NOR(M) Playback 4010P118178884.wav	
S: 3/5/2005 **D:** 3/5/2005	Ronald Sabraw Code: 4010	[NEW] SSN:	Pending	4010-CYSTOSCOPY_REPORT(F) Playback 4010P114626903.wav	

Transcriptions for Today

Transcriptions Recorded Yesterday

- Click the **Yesterday** link on the **Transcription Search Results** page.

The list of dictations recorded by the provider one day before the current date are displayed.

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

Transcription Search Results

Search Criteria:
Doctor : Ronald Sabraw   Date of Service: From 3/5/2005   To 3/5/2005

Search All Transcriptions
Today   Yesterday   Last 2 days
My Templates   View Fax Status

Dt.of Service Dt. Dictated Dt.Translated	Doctor	Patient	Status	Template	# Lines # Pages
S: 3/5/2005 **D:** 3/5/2005	Ronald Sabraw Code: 4010	[NEW] SSN:	Pending	EYE CHECK Playback 4010P110415726.wav	
S: 3/5/2005 **D:** 3/5/2005	Ronald Sabraw Code: 4010	[NEW] SSN:	Pending	4010-CYSTOSC_REP_NOR(M) Playback 4010P118178884.wav	
S: 3/5/2005 **D:** 3/5/2005	Ronald Sabraw Code: 4010	[NEW] SSN:	Pending	4010-CYSTOSCOPY_REPORT(F) Playback 4010P114626903.wav	

Transcriptions for Yesterday

Re-Import Transcriptions

1. On the **Transcriptions** menu, select **Re-Import Transcriptions**.

   Alternately, click the **Re-Import Transcriptions using File Upload** link available on the Transcriptions Search Results page.

   The Re-Import Transcription page is displayed.

Re-import Transcriptions

2. Browse to locate and select the file you want to re-import.

   You can re-import maximum five files in a single attempt.

   Note: Only RTF files can be re-imported.

3. Click **ReImport**.

   All the selected files are re-imported and the message “Transcription file re-imported successfully. You can re-import another edited file below” is displayed.

View Multiple Transcriptions in One Document

1. From the list of transcriptions, select the check boxes corresponding to the transcriptions you want to view in a single MS Word document.

Select Transcriptions

Note: Select the **Select All** check box at the bottom of the list to select all the transcriptions in the list.

2. Click the **View Checked Transcriptions as a Single MS Word Document** link.

The File Download dialog box is displayed.

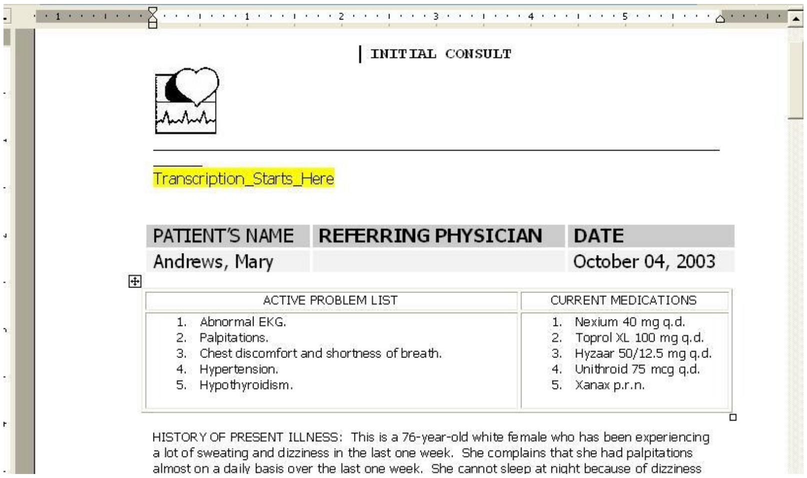
Document File Download

3. Click **Open** to view the file.

This will just opens the file but does not save.

4. To save the file, click **Save** button.
5. Select the location where you want to save the file, and click **Save**.
6. Double-click the file to open.

All the selected transcriptions are displayed in one single MS Word document.



INITIAL CONSULT

Transcription_Starts_Here

PATIENT'S NAME	REFERRING PHYSICIAN	DATE
Andrews, Mary		October 04, 2003

ACTIVE PROBLEM LIST	CURRENT MEDICATIONS
1. Abnormal EKG. 2. Palpitations. 3. Chest discomfort and shortness of breath. 4. Hypertension. 5. Hypothyroidism.	1. Nexium 40 mg q.d. 2. Toprol XL 100 mg q.d. 3. Hyzaar 50/12.5 mg q.d. 4. Unithroid 75 mcg q.d. 5. Xanax p.r.n.

HISTORY OF PRESENT ILLNESS: This is a 76-year-old white female who has been experiencing a lot of sweating and dizziness in the last one week. She complains that she had palpitations almost on a daily basis over the last one week. She cannot sleep at night because of dizziness

Transcriptions in a Single Document

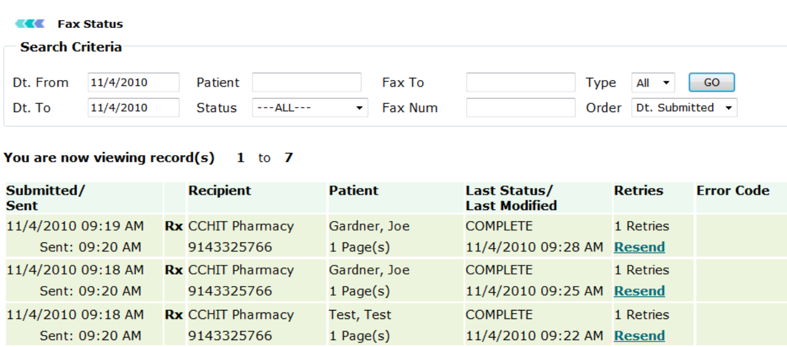
View Fax Status

Providers can fax transcriptions to other providers related to the case. They can also monitor the fax status for those documents.

View fax status

1. Click the **View Fax Status** link available on the **Transcriptions Search Result** screen.

   The Fax Status page is displayed.



Fax Status

Search Criteria

Dt. From 11/4/2010 Patient Fax To Type All GO

Dt. To 11/4/2010 Status ---ALL--- Fax Num Order Dt. Submitted

You are now viewing record(s) 1 to 7

Submitted/ Sent		Recipient	Patient	Last Status/ Last Modified	Retries	Error Code
11/4/2010 09:19 AM Sent: 09:20 AM	Rx	CCHIT Pharmacy 9143325766	Gardner, Joe 1 Page(s)	COMPLETE 11/4/2010 09:28 AM	1 Retries Resend	
11/4/2010 09:18 AM Sent: 09:20 AM	Rx	CCHIT Pharmacy 9143325766	Gardner, Joe 1 Page(s)	COMPLETE 11/4/2010 09:25 AM	1 Retries Resend	
11/4/2010 09:18 AM Sent: 09:20 AM	Rx	CCHIT Pharmacy 9143325766	Test, Test 1 Page(s)	COMPLETE 11/4/2010 09:22 AM	1 Retries Resend	

Fax Status

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

Fax Search Form Fields

Field	Description
Dt From	Enter the date period from which you want to view the fax status of documents.
Dt. To	Enter the date period till which you want to view the fax status of documents.
Patient	Enter the name of the patient whose fax status you wish to view.
Status	Select the fax status of the documents as Unsent or Successful.
Fax To	Enter the name of the person to whom the fax was sent.
Fax Num	Enter the fax number to which the documents were faxed.
Type	Select the type of documents that were faxed, as Tx, Rx or Rf from the drop-down menu.
Order	Select the order by which you want to sort the search, as Date Submitted, Recipient or Patient, from the drop-down menu.

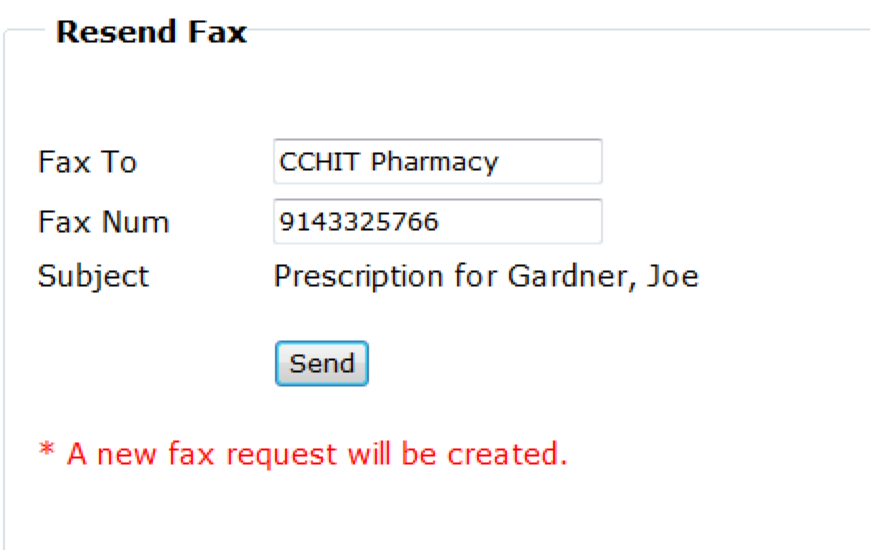
3. Click **Go**.

The list of all the faxes is displayed based on the search parameters.

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

4. To send the fax again, click **Resend** in the **Retries** column to try sending the fax again.

The Resend Fax dialog box is displayed.



Resend Fax

5. Click **Send** to try sending the fax again.

The confirmation message is displayed indicating a new fax request is sent.

Templates

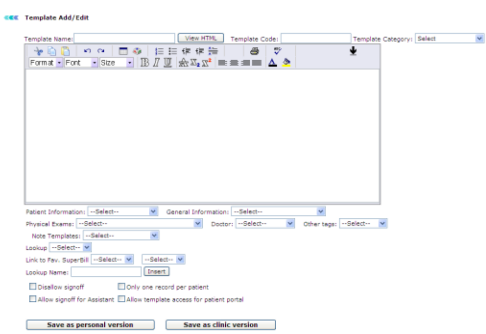
EMR Settings

From the EMR Settings section, perform the following settings:

- Note Template Designer
- Other Document Template Designer
- Case Report Template Designer
- Patient Level Template Designer

Patient Level Template Designer

1. Click **Add New Template** link on the Template List page, which displays list of existing note templates.
2. From the different lists, select the fields you wish to include in the new note template.
3. Do one of the following:
    - Click **Save as personal version** to save the template only for your self.
    - Click **Save as clinic version** to save the template for all providers within the clinic.

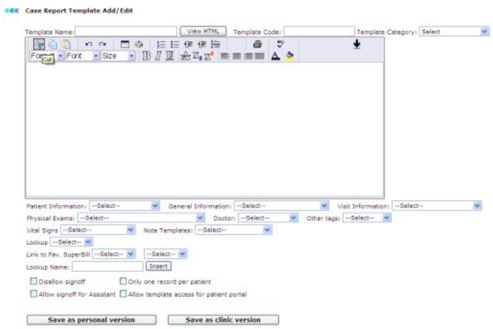


Patient Level Template Designer

Case Report Template Designer

1. Click **Add New Template** link on the Template List page, which displays list of existing note templates.

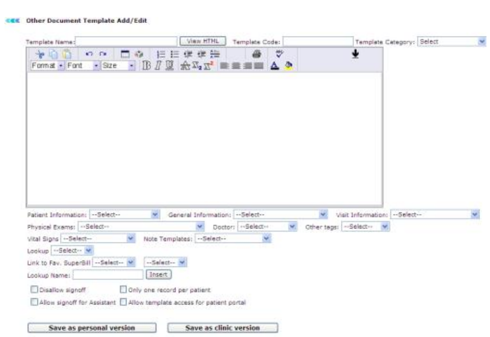
2. From the different lists, select the fields you wish to include in the new note template.
3. Do one of the following:
   - Click **Save as personal version** to save the template only for your self.
   - Click **Save as clinic version** to save the template for all providers within the clinic.



Case Report Template Designer

Other Document Template Designer

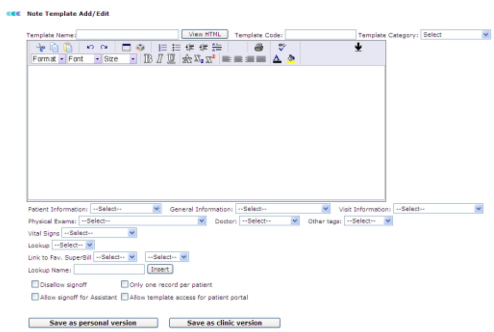
1. Click **Add New Template** link on the Template List page, which displays list of existing note templates.
2. From the different lists, select the fields you wish to include in the new note template.
3. Do one of the following:
   - Click **Save as personal version** to save the template only for your self.
   - Click **Save as clinic version** to save the template for all providers within the clinic.



Other Document Template Designer

Note Template Designer

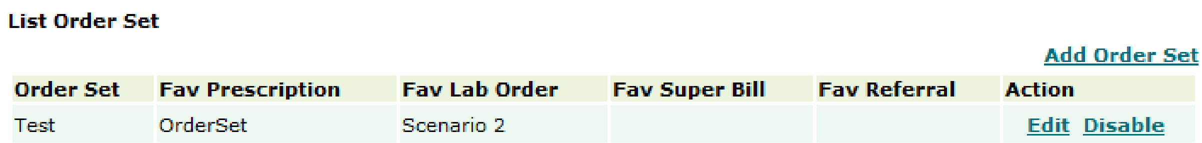
1. Click **Add New Template** link on the Template List page, which displays list of existing note templates.
2. From the different lists, select the fields you wish to include in the new note template.
3. Do one of the following:
    - Click **Save as personal version** to save the template only for your self.
    - Click **Save as clinic version** to save the template for all providers within the clinic.



Note Template Designer

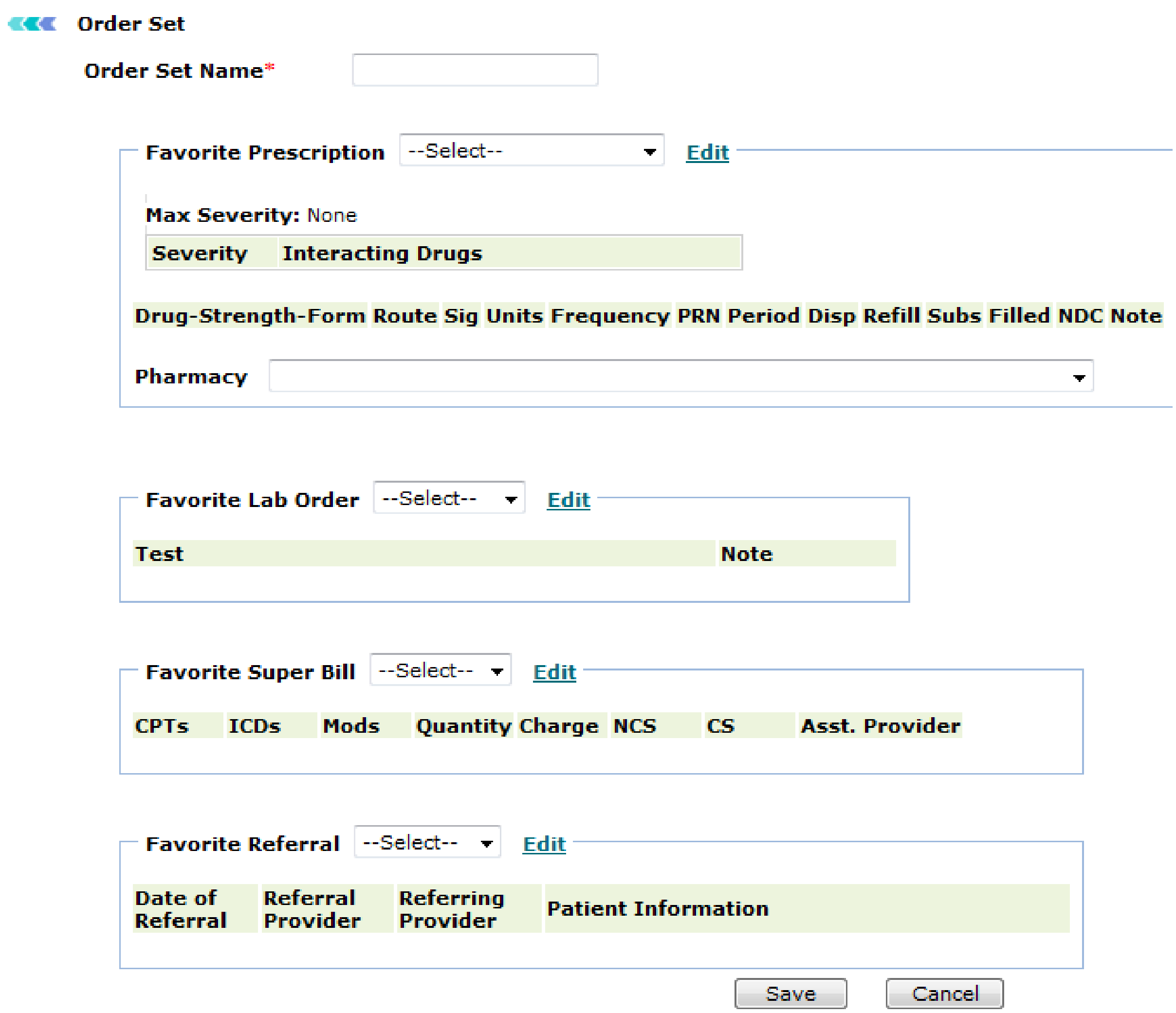
Order Sets

From the Order Sets page, you can set up common prescriptions, lab orders, super bill, and referral for various ailments.



Order Set List

Add prescriptions, lab orders, super bills and referrals as they apply to the ideal workflow for the ailment.



Order Set

Insurance Payer Setup

Insurance Payer Setup

From the Insurance Payer Setup section, you can:

Add Payer

Search Payers

List/Add New Insurance Payers

Set Master Payer Provider Info

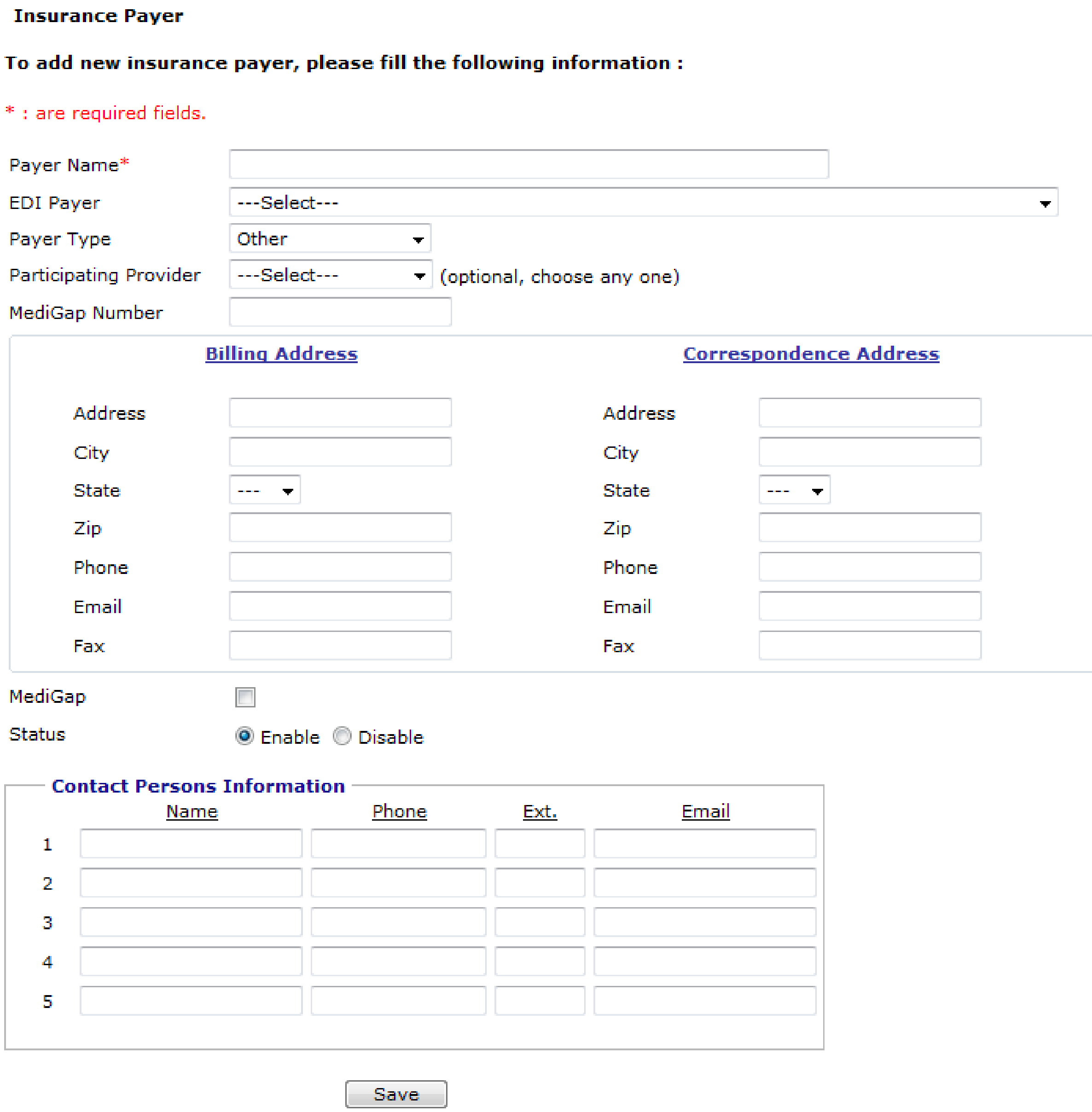
Add Payer

1. Click the **Add Payer** link available above the upper-right corner of the Insurance Payers List.

   The Insurance Payer form is displayed.

2. In the **Payer Name** box, type the name of the insurance payer.
3. From the **EDI Payer** list, select an EDI payer.
4. From the **Payer Type** list, select a type for the payer.
5. From the **Balance on Secondary Claim** list, select an option.
6. In the **MediGap Number** box, type the MediGap number.
7. In the **Billing Address** and **Correspondence Address** sections, specify **Address**, **City**, **State**, **Zip**, **Phone**, **Email**, and **Fax**.
8. Select the **MedGap** check box to mark the payer as MEdGap payer.
9. To specify **Status**, select an option from **Enabled** or **Disabled**.
10. Under **Contact Persons Information**, specify the **Name**, **Phone**, **Ext.**, and **Email** details for the contact persons.
11. Click **Save**.

    The payer details are added in the Insurance Payers List.



Add Insurance Payer

Search Payers

1. Click the **Search Payer** link available above the upper-right corner of the Insurance Payers List.

   The Insurance Carrier Search Form is displayed.

2. In the **Payer Name** box, type the name of the payer or few characters of the name of the payer.

3. From the **EDI Payer** list, select an option.

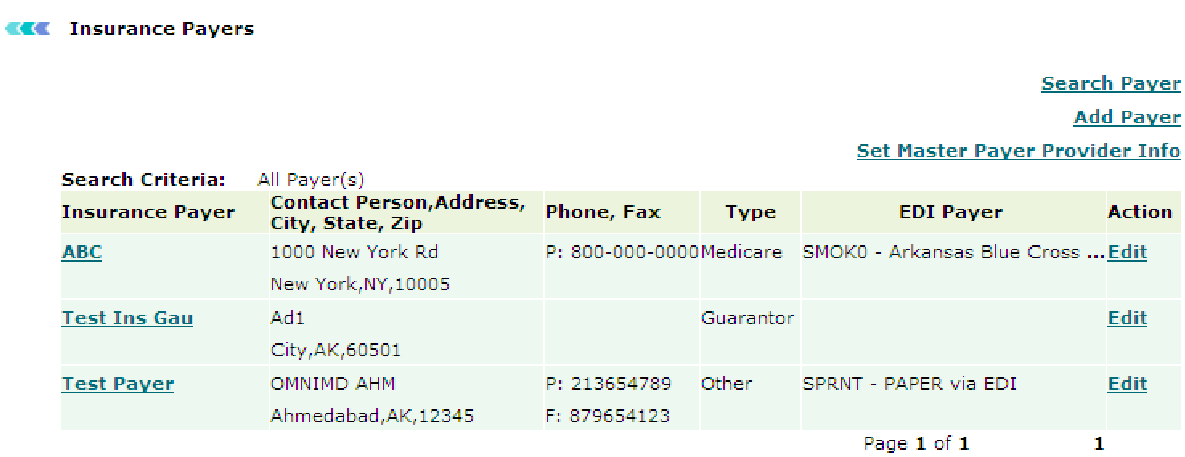
4. From the **Payer Type** list, select a type of the payer.
5. From the **Participating Provider** list, select a provider.
6. In the **City** box, type exact name of the city.
7. From the **Status** list, select a status of the payer.
8. Click **Search**.

   Based on the search parameters, the Insurance Payers List displays a list of payers.

Insurance Carrier Search Form

List/Add New Insurance Payers

From the List/Add New Insurance Payers link you can view a list of existing insurance payers with the following information about the payers: Insurance Payer name, Contact person with Address, Telephone/Fax numbers, Payer Type, and EDI Payer.



Insurance Payers

Search Payer
Add Payer
Set Master Payer Provider Info

Search Criteria: All Payer(s)

Insurance Payer	Contact Person,Address, City, State, Zip	Phone, Fax	Type	EDI Payer	Action
ABC	1000 New York Rd New York,NY,10005	P: 800-000-0000	Medicare	SMOKO - Arkansas Blue Cross ...	Edit
Test Ins Gau	Ad1 City,AK,60501		Guarantor		Edit
Test Payer	OMNIMD AHM Ahmedabad,AK,12345	P: 213654789 F: 879654123	Other	SPRNT - PAPER via EDI	Edit

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

Insurance Payers List

Set Master Payer Provider Info

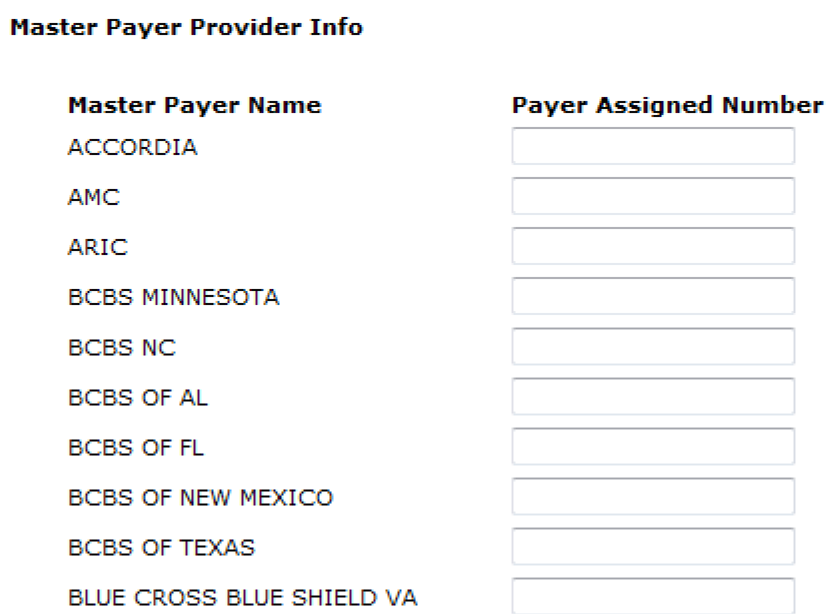
1. Click the **Set Master Payer Provider Info** link available above the upper-right corner of the Insurance Payers List.

   The Master Payer Provider Info form displays a list of all the payers.

2. In the box corresponding to the name of the payer you want to set as master payer for the clinic, type the Payer Assigned Number.

3. Click **Save**.

   The master payer information is saved.



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	

Master Payer Provider Info

CCD Documents

CCD Documents

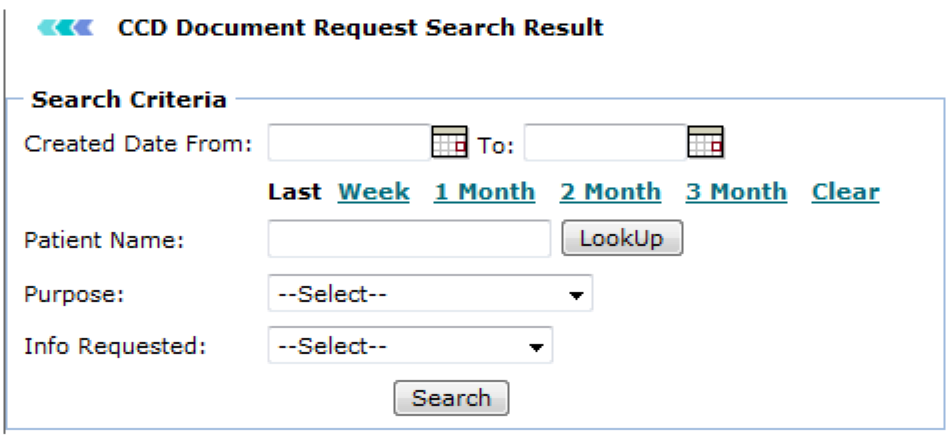
From the CCD Documents section, you can:

[CCD Document Request]

[Search CCD Document]

CCD Document Request

- On the **Patient** menu, click **CCD Document Request**.



CCD Document Request Search

The **CCD Document Request Search Result** page automatically populates the most recent requests.

CCD Document Request List

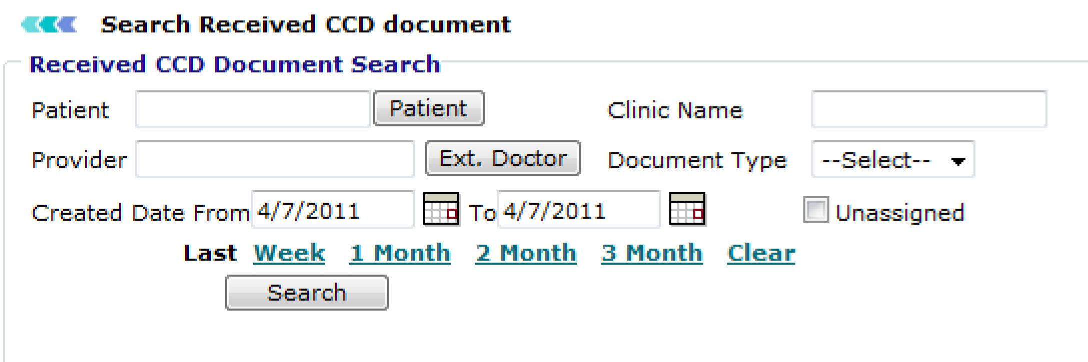
You can use the **Search Criteria** to filter the search CCD Document Request list.

Search CCD Document

1. From the **Appointments** menu, click **Search CCD Document**.

Search CCD Document

The Search Received CCD Document page is displayed.



Search Received CCD document

2. In the **Patient** box, type name of the patient.

You can also click the **Patient** button to search a patient.

3. In the **Clinic Name** box, type the name of the clinic.
4. In the **Provider** box, type the name of the provider.

You can also click the **Ext. Doctor** button to search a provider.

5. From the **Document Type** list, select a type of the document.
6. Specify the **Created Date** range.

You can also select specific time period from last **Week**, **1 Month**, **2 Month**, and **3 Month**.

7. Select the **Unassigned** check box if you want to search only unassigned documents.
8. Click **Search**.

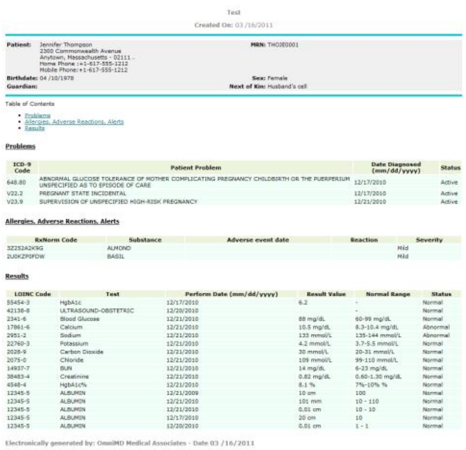
The search result displays a list CCD documents filtered by the search parameters.

Search Criteria:
Start Date :-3/7/2011 End Date :-4/7/2011

Patient Name	Provider	Clinic Name	Document Type	Created Date	Action
Thompson, Jennifer	Dr. Robert Alexander	OmniMD Medical Associates	CCD	3/16/2011 12:25 PM	View

CCD Search Result

9. Click **View** corresponding to a patient to view the CCD document.


Test
Created On: 03 /16/2011

Patient: Jennifer Thompson
2300 Commonwealth Avenue
Anytown, Massachusetts - 02111 .
Home Phone :+1-617-555-1212
Mobile Phone:+1-617-555-1212
MRN: THOJE0001
Birthdate: 04 /10/1978
Sex: Female
Guardian:
Next of Kin: Husband's cell

Table of Contents

- Problems
- Allergies, Adverse Reactions, Alerts
- Results

Problems

ICD-9 Code	Patient Problem	Date Diagnosed (mm/dd/yyyy)	Status
648.80	ABNORMAL GLUCOSE TOLERANCE OF MOTHER COMPLICATING PREGNANCY CHILDBIRTH OR THE PUERPERIUM UNSPECIFIED AS TO EPISODE OF CARE	12/17/2010	Active
V22.2	PREGNANT STATE INCIDENTAL	12/17/2010	Active
V23.9	SUPERVISION OF UNSPECIFIED HIGH-RISK PREGNANCY	12/21/2010	Active

Allergies, Adverse Reactions, Alerts

RxNorm Code	Substance	Adverse event date	Reaction	Severity
3Z252A2K9G	ALMOND			Mild
2U0KZP0FDW	BASIL			Mild

Results

LOINC Code	Test	Perform Date (mm/dd/yyyy)	Result Value	Normal Range	Status
55454-3	HgbA1c	12/17/2010	6.2	-	Normal
42138-8	ULTRASOUND-OBSTETRIC	12/20/2010		-	Normal
2341-6	Blood Glucose	12/21/2010	88 mg/dL	60-99 mg/dL	Normal
17861-6	Calcium	12/21/2010	10.5 mg/dL	8.3-10.4 mg/dL	Abnormal
2951-2	Sodium	12/21/2010	133 mmol/L	135-144 mmol/L	Abnormal
22760-3	Potassium	12/21/2010	4.2 mmol/L	3.7-5.5 mmol/L	Normal
2028-9	Carbon Dioxide	12/21/2010	30 mmol/L	20-31 mmol/L	Normal
2075-0	Chloride	12/21/2010	109 mmol/L	99-110 mmol/L	Normal
14937-7	BUN	12/21/2010	14 mg/dL	6-23 mg/dL	Normal
38483-4	Creatinine	12/21/2010	0.82 mg/dL	0.60-1.30 mg/dL	Normal
4548-4	HgbA1c%	12/21/2010	8.1 %	7%-10% %	Normal
12345-5	ALBUMIN	12/21/2009	10 cm	100	Normal
12345-5	ALBUMIN	12/21/2010	101 mm	10 - 110	Normal
12345-5	ALBUMIN	12/21/2010	0.01 cm	10 - 10	Normal
12345-5	ALBUMIN	12/17/2010	20 cm	10	Normal
12345-5	ALBUMIN	12/20/2010	0.01 cm	1 - 1	Normal

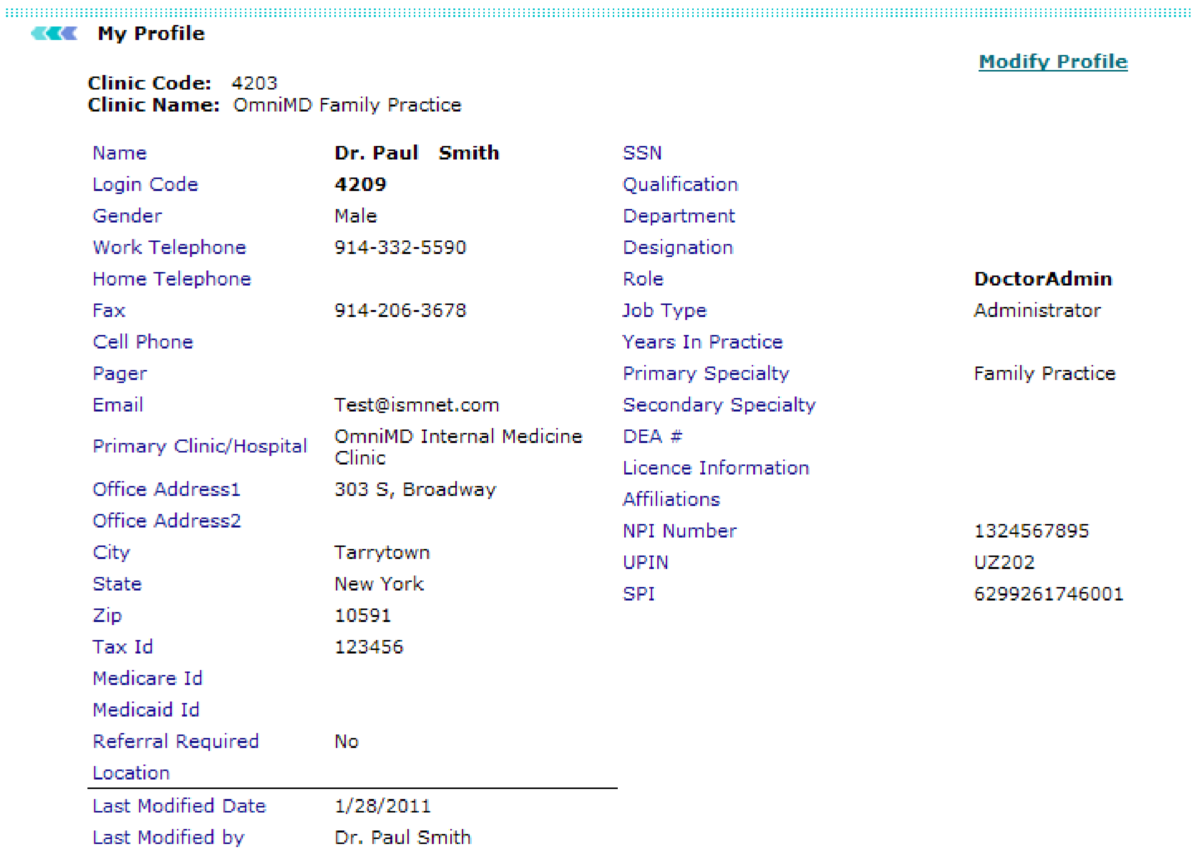
Electronically generated by: OmniMD Medical Associates - Date 03 /16/2011

CCD Details

My Profile

From the My Profile page, OmniMD users can view their profile. Based on the role assigned to the user account, some of the fields are displayed only for viewing purpose (read-only). The users can modify their profile and make changes such as change password and fax number.

To modify, click the Modify Profile link available on the upper-right corner. After making required changes, click **Submit**.



My Profile

Clinic

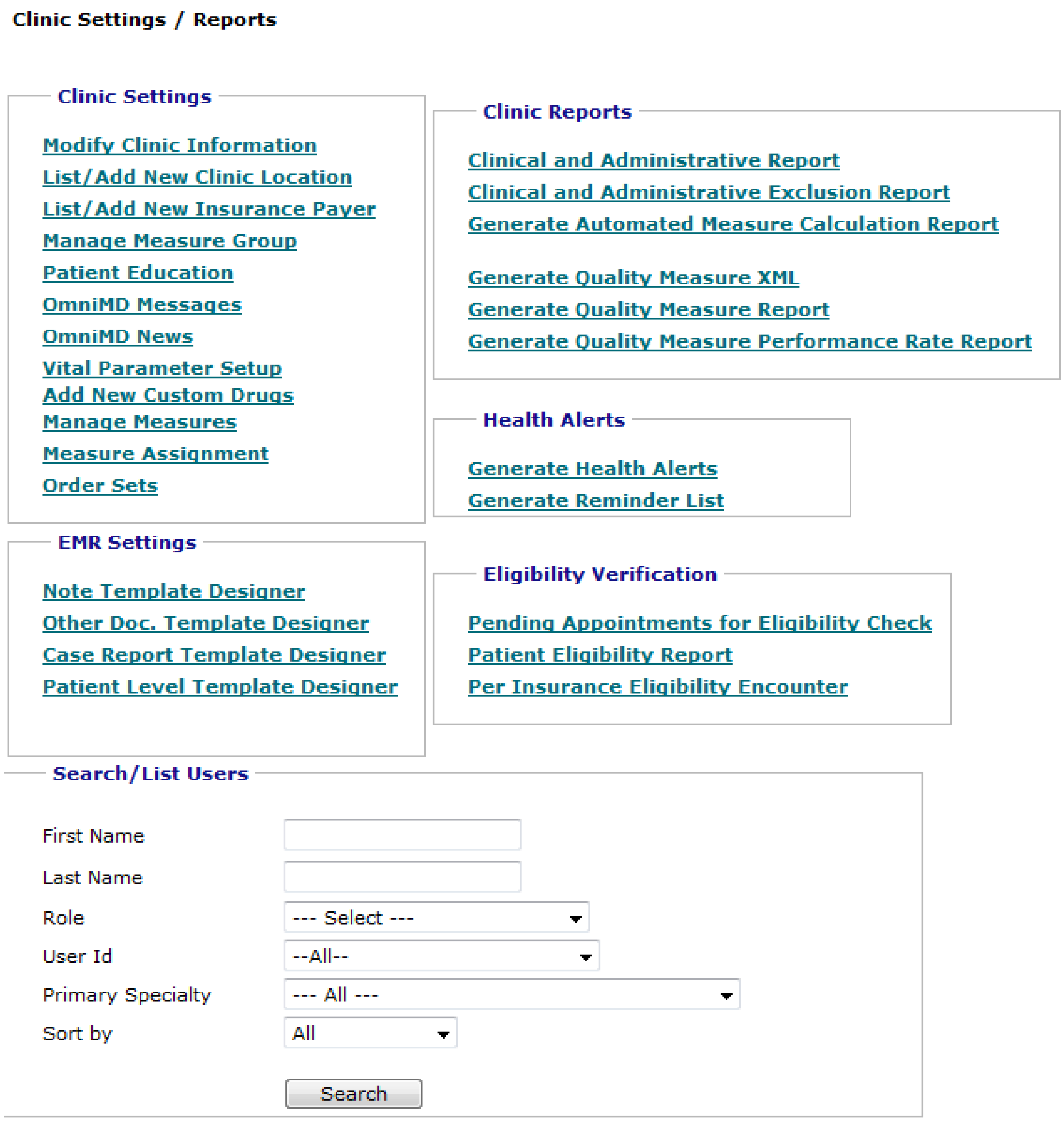
Clinic

Based on the role assigned to the OmniMD users, they can view or modify clinic settings and EMR settings.

View or modify clinic settings

- Click the **Clinic** link.

  The **Clinic Settings/Reports** page is displayed. You can view or modify clinic settings, clinic reports, and EMR settings from this page.



Clinic Settings/Reports

Modify Clinic Information

The Modify Clinic Information page displays the following information about the clinic:

Clinic Information

Field	Description

Clinic Name	Name of the clinic
Clinic Code	Code of the clinic
Home Page	Default page displayed after logon
Address (Address 1, Address 2, City, State, and Zip)	Complete address of the clinic
Work Phone	Phone number of the clinic, on which you are reachable
Fax	Fax number of the clinic
Clinic NPI	NPI (National Provider Identifier) number of the clinic
Clinic TaxID	Tax identification number of the clinic
PDA Sharing	Whether PDA sharing is enabled or not
Document Settings	Local and Web path to access document repositories

Modify Clinic Information

1. Click the **Modify Clinic Info** link.

   The clinic information is displayed in editable mode.

2. Make the required changes, and click **Submit**.

   The Clinic Info page displays updated information.

Note: The fields marked with an asterisk (*) are mandatory fields.

Clinic Name	OmniMD Medical Associates
Clinic Code	5008
Home Page	Today's List
Address1	303 S Broadway
Address2	
City	Tarrytown
State	New York
Zip	10591
Work Phone	914-332-5590
Fax	
Clinic NPI	
Clinic TaxId	
PDA Sharing	No
Document Settings	
Local Path	Z:
Web Path	

Modify Clinic Info List/Add New Clinic Locations Allow IP

Clinic Information

List/Add New Clinic Location

From the List/Add New Clinic Location link you can view a list of existing clinic location with the following information about the clinic: Location Name with address, Location Type, Telephone/Fax, Email, and Doctor Codes.


Clinic Locations List

Clinic Name: OmniMD Clinic

Add Clinic Location

Location Name	Location Type	Address	Telphone/Fax	Email	Doctor Codes
Bellnorth Center	Clinic	44 Northern Blvd Suite 112 Croton, New York USA	Tel: Fax:		
OmniMD Clinic	Clinic	303,South Broadway Suite 101 Tarrytown, New York-10591 USA	Tel: 914-332-5590 Fax: 914-332-5766		

Clinic Locations List

Add Clinic Location

1. On the **Clinic Locations List** page, click the **Add New Location** link available above the upper-right corner of the list.

   The **Add Clinic Location** page is displayed.

2. In the **Location Name** box, type the location name of the clinic. This is a mandatory field.

   Note: The **Clinic Code** displays the code of the clinic for viewing purpose only (read-only).

3. In the **Location Code** box, type the name for the location.

4. Specify the address of the clinic in the **Address 1**, **Address 2**, **City**, **State**, **Zip**, and **Country** fields.

5. Specify different modes of communication in the **Phone**, **Fax**, and **Email** fields.

6. In the **Location NPI** box, type the NPI (National Provider Identifier) number of the clinic.

7. From the **Type** list, select the location type.

   The options include **Clinic** and **External**.

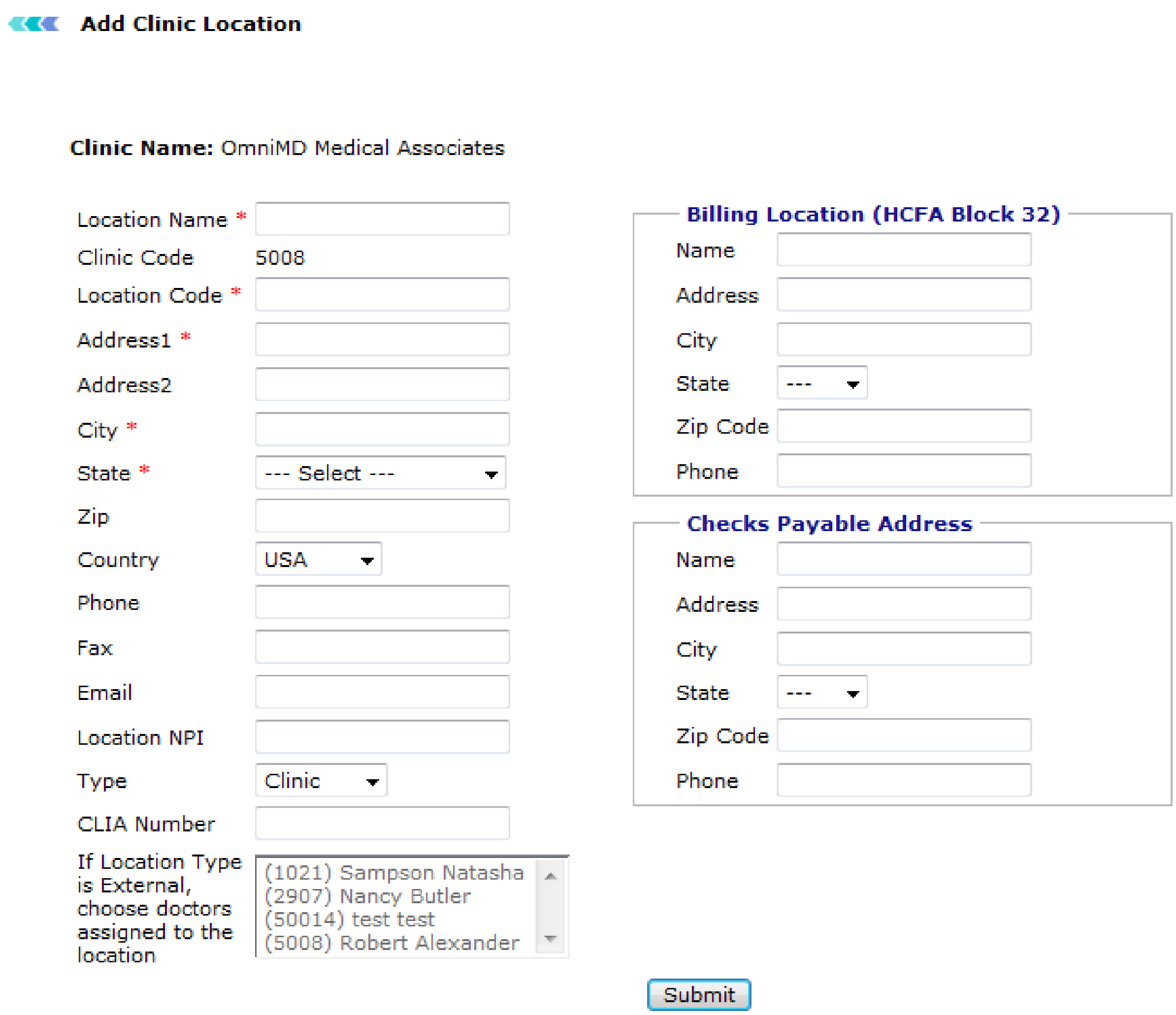
   Note: If the location type is selected as External, you need to specify the doctors assigned to the location.

8. In the **CLIA Number** box, type the CLIA (Clinical Laboratory Improvement Amendment) number of the clinic.

9. Under **Billing Location (HCFA Block 32)** and **Checks Payable Address**, specify Name, **Address**, **City**, **State**, **Zip**, and **Phone**.

10. Click **Submit**.

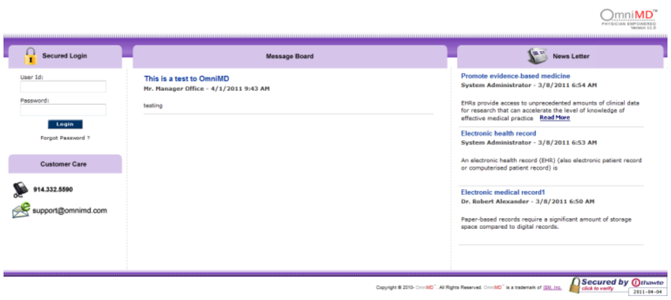
The new location is added to Clinic Locations List.



Add Clinic Location

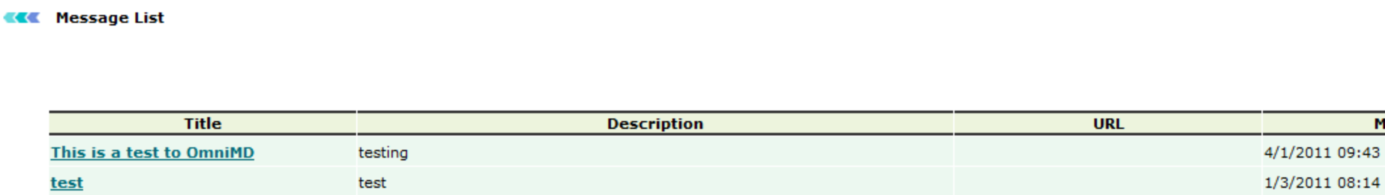
OmniMD Messages

From the OmniMD Messages page, you can view messages that are posted on the Message Board section on the logon page.



Message Board

The Message List displays the following information about each message: Title, Description (message content), Message Date, and Status.



Message List

Title	Description	URL	M
This is a test to OmniMD	testing		4/1/2011 09:43
test	test		1/3/2011 08:14

Board Message List

Post Message

1. Click the **Post Message** link available above the upper-right corner of the Message List.

   The OmniMD Messages form is displayed.

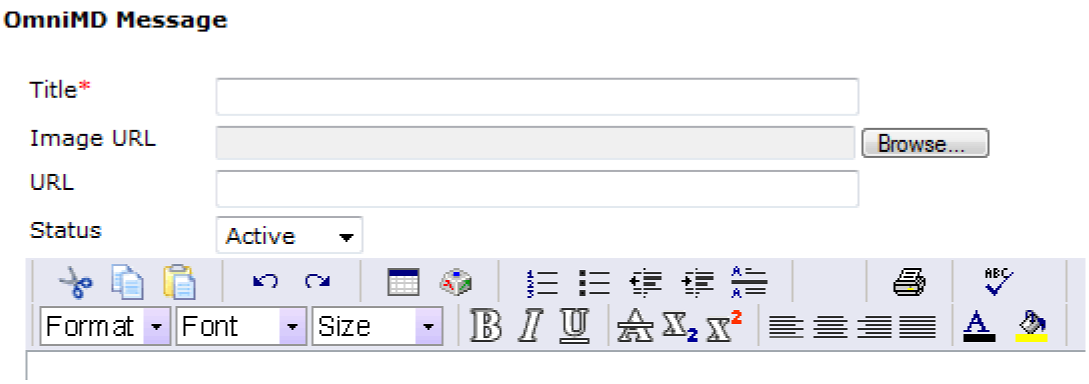
2. In the **Title** box, type a title for the message.
3. Do one of the following:
   - In the **Image URL** box, type path to the image you want to post as a message.

     You can also click the **Browse** button browse and locate the file.

   - In the **URL** box, type the URL you want to post as a message.
   - In the rich text format editor, type and format the text content you want to display as a message.
4. From the **Status** list, select an option.
5. Click **Submit**.

   The messages is added to Message List.

   Note: To display the message on Message Board, the status of the message needs to be set to Active.



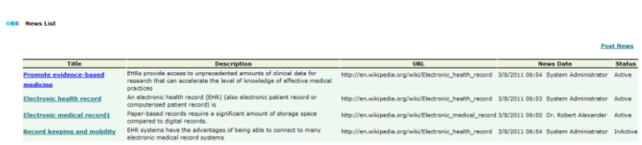
Add Message

OmniMD News

From the OmniMD News page, you can view news that is posted on the News Letter section on the logon page.

Message Board

The News List displays the following information about each news item: Title, Description, URL, News Date, and Status.



News List

Post Message

1. Click the **Post News** link available above the upper-right corner of the News List.

   The OmniMD News form is displayed.

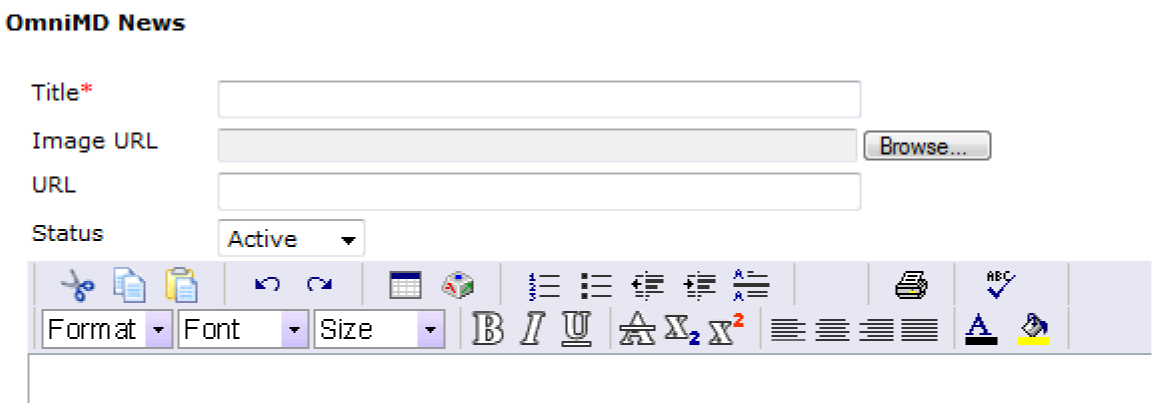
2. In the **Title** box, type a title for the news letter.

3. Do one of the following:
   - In the **Image URL** box, type path to the image you want to post as a news.

     You can also click the **Browse** button browse and locate the file.
   - In the **URL** box, type the URL you want to post as a news.
   - In the rich text format editor, type and format the text content you want to display as a news.
4. From the **Status** list, select an option.
5. Click **Submit**.

   The news item is added to the News List.

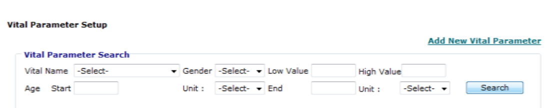
   Note: To display the news item on News Letter, the status of the news item needs to be set to Active.



Add News

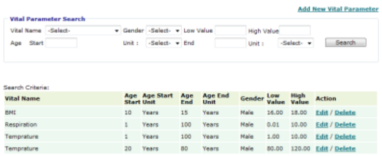
Vital Parameter Setup

From the Vital Parameter Setup page, you can search vital parameters by the following: Vital Name, Gender, Low Value, High Value, and Age Start and Age End.



Vital Parameter Search

The Vital Parameter list displays the following information: Vital Name, Age Start, Age Start Unit, Age End, Age End Unit, Gender, Low Value, and High Value. You can also edit or delete a parameter from the list.



Vital Parameter List

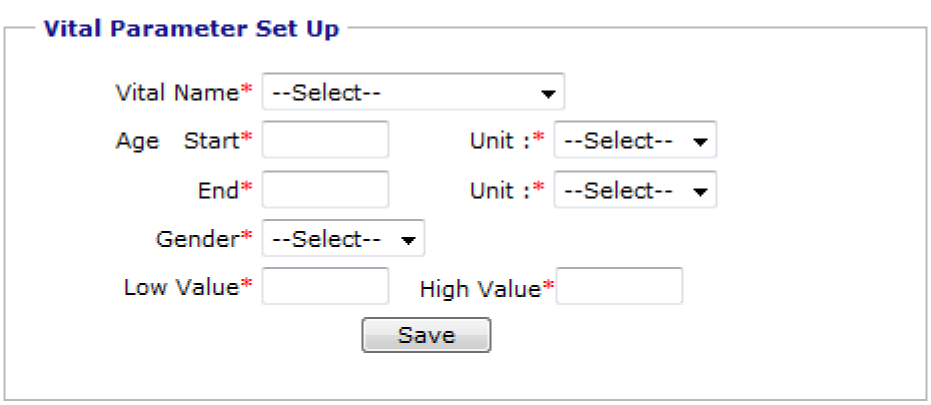
Add New Vital Parameter

1. Click the **Add New Vital Parameter** link available above the upper-right corner of the Vital Search Parameter area.

   The Vital Parameter Setup form is displayed.

2. From the **Vital Name** list, select a name of the vital you want to set parameter for.
3. Specify the **Age Start** and **Age End** with **Units**.
4. From the **Gender** list, select an option for the vital parameter.
5. In the **Low Value** and **High Value** boxes, specify the low and high cutoff values for the parameter.
6. Click **Save**.

   The vital parameter is displayed in the Vital Parameter List when you perform parameter search using relevant search criteria.



Add Vital Parameter

Clinic Settings

From the Clinic Settings section, you can perform the following settings:

- Modify Clinic Information
- List/Add New Clinic Location
- List/Add New Insurance Payers

- [Patient Education]
- [OmniMD Messages]
- [OmniMD News]
- [Vital Parameter Setup]
- [Measure Assignment]
- [Order Sets]

Reports

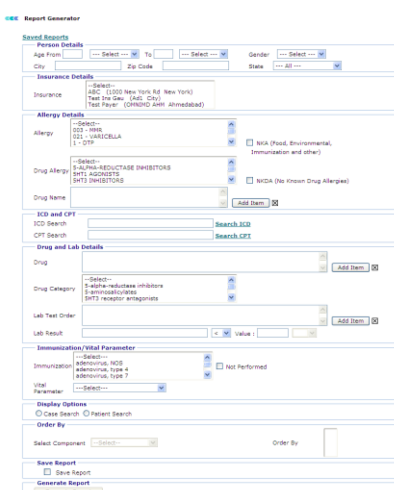
Clinic Reports

From the Clinic Reports section, you can view the following reports:

- Clinical and Administrative Report
- Clinical and Administrative Exclusion Report
- Generate Automated Measure Calculation Report
- Generate Quality Measure XML
- Generate Quality Measure Report
- Generate Quality Measure Performance Rate Report

Clinical and Administrative Report

The Clinical and Administrative Report is the "positive" report. It returns existing data. From the Clinical and Administrative Report page, you can generate report from existing data. Fill in the appropriate data and generate report.



Clinical and Administrative Report Generator

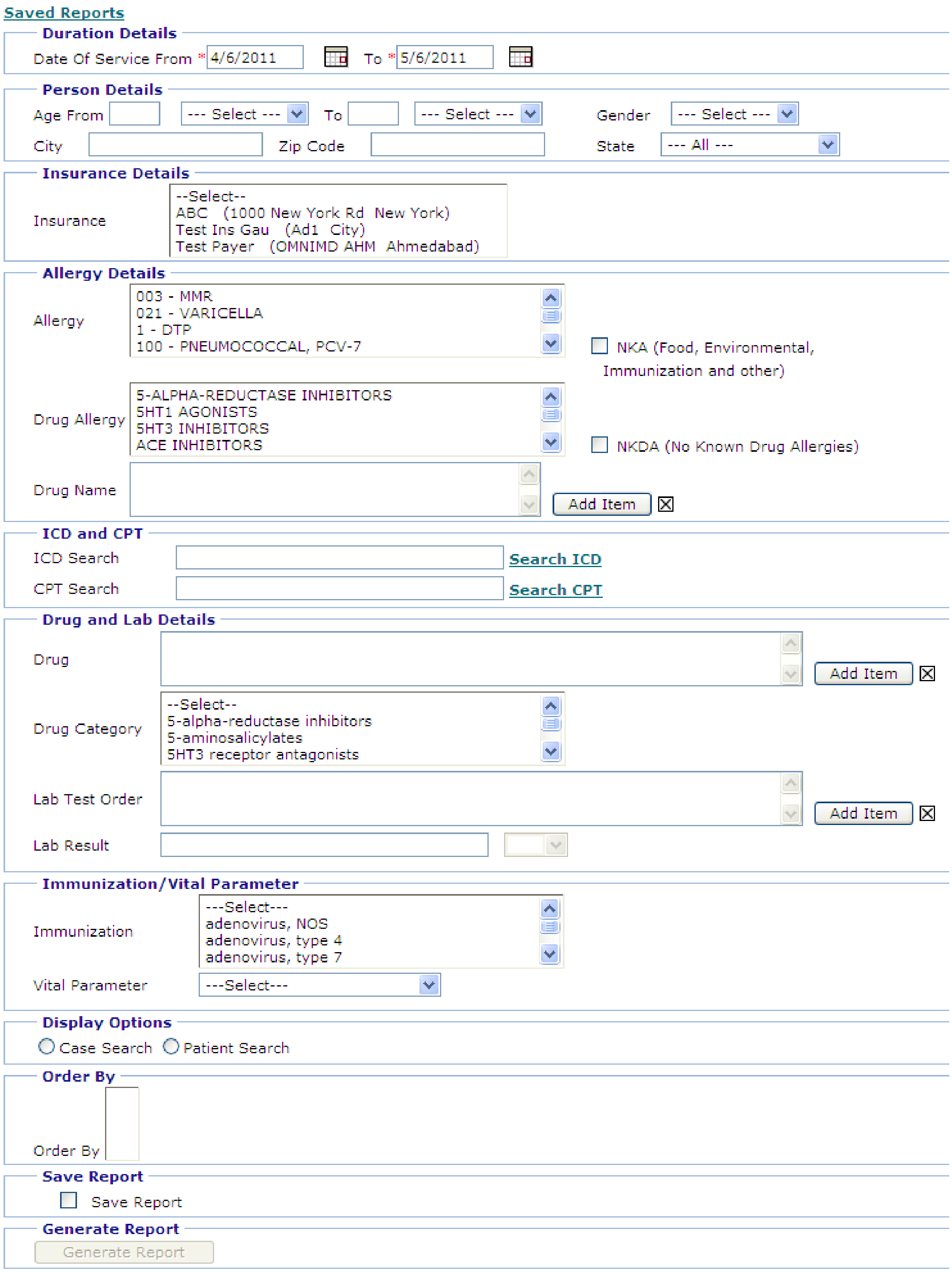
You can also select the Save Report check box to save the same report in future.

Report Name	Level	Date Created	View	Edit	Delete
CHKCLINICCASE	Clinic	10/05/2010	View	Edit	Delete
CLINITEST	Clinic	10/04/2010	View	Edit	Delete
clinitest	Clinic	10/18/2010	View	Edit	Delete
Patient List Below Age 20 Yrs	Clinic	10/17/2010	View	Edit	Delete
test by Done 1 by Naresh	Clinic	12/08/2010	View	Edit	Delete

Saved Report Image

Clinical and Administrative Exclusion Report

The Clinical and Administrative Exclusion Report is the "missing" report. The report searches data by excluding the entered search features.

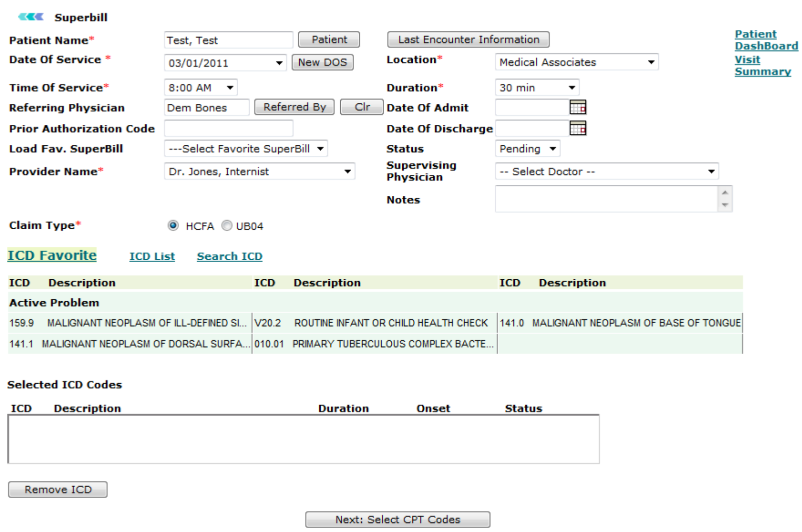


Clinical and Administrative Exclusion Report Generator

Billing

Charge Capture

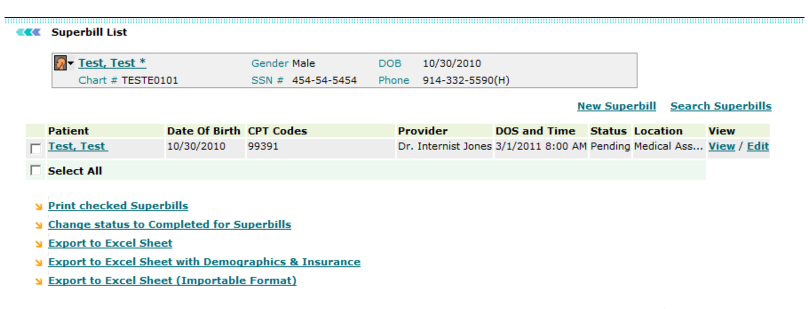
Under Charge Capture you can Create Super Bill, Search Super Bill, Add New Favorite, Favorite Super Bills, Add Patient Payment, and Setup CPT/ICD Code Favorites Lists.



Charge Setup

Super Bills

Click the **Super Bills** link to view/edit and add all/new super bills for the selected patient. From the Super Bills page, you can **Print checked Superbills**, **Change Status to Completed** (only if current user authorized), and **Export to Excel Sheet**.



Superbills List

CPT Setup

Add CPT to Favorite

1. Click the **Add/Edit CPT Favorites** link.

   The Add/Edit CPT Favorites page is displayed.

Add/Edit CPT Favorites

2. Choose from existing category or create and name new category.

3. In the **Add New CPT Codes** box, type the new CPT codes separated by a comma (,), or select from **Add CPT codes from Your Specialty CPT Tree/Add CPT codes from All Specialties CPT Tree**.

4. Click **Submit**.

   The new CPT code is added to the category.

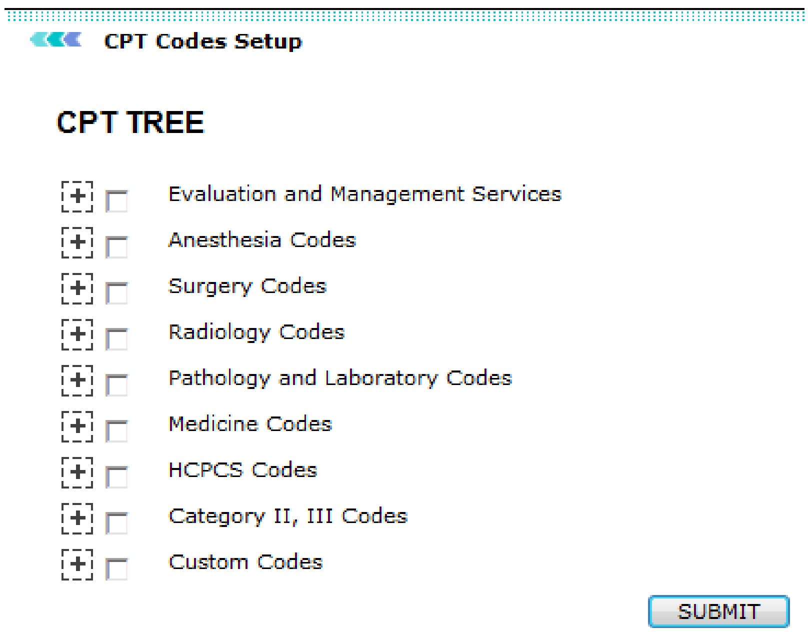
Add CPT Code from Your Specialty Tree

1. Click the **Add CPT code from Your Specialty CPT Tree** link available on Add/Edit CPT Favorites page.
2. Select the CPT code, and then click **Submit**.

CPT Code from Your Specialty CPT Tree

Add CPT Code from All Specialties Tree

1. Click the **Add CPT code from All Specialties CPT Tree** link available on Add/Edit CPT Favorites page.
2. Select the CPT code, and then click **Submit**.



CPT Code from All Specialties Tree

Edit and Modify CPT Codes

1. Click the **Add/Edit CPT Favorites** link.

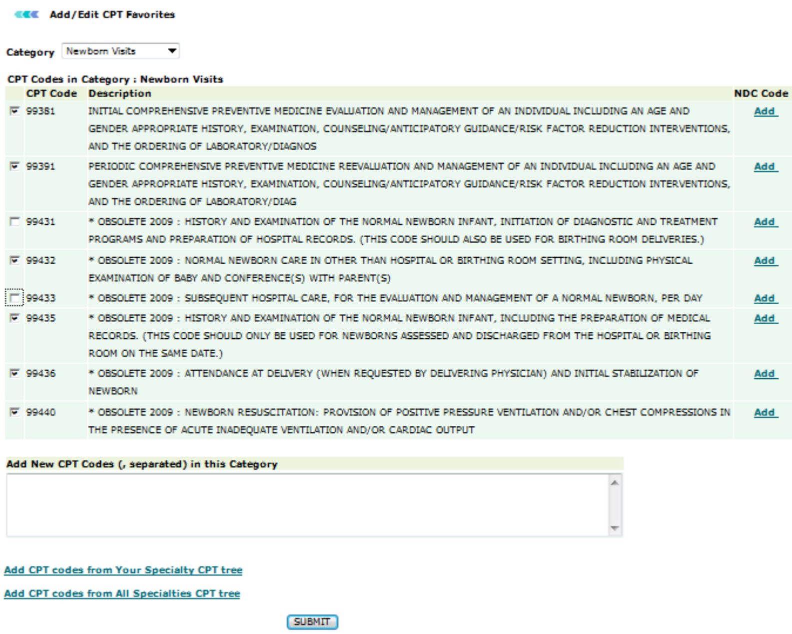
   The Add/Edit CPT Favorites page is displayed.

2. Select the category that you wish to modify.

   The CPT codes in the selected category are displayed.

3. Clear the check boxes corresponding to the CPT codes that you want to remove from the category.
4. Click **Submit**.

   The CPT codes are removed form the list.



Edit CPT Favorites

ICD Setup

Add ICD Favorites

1. Click the **Add/Edit Favorite ICDs** link.

   The Add/Edit ICD Favorites page is displayed.

Add/Edit ICD Favorites

2. Choose from existing category or create and name new category.

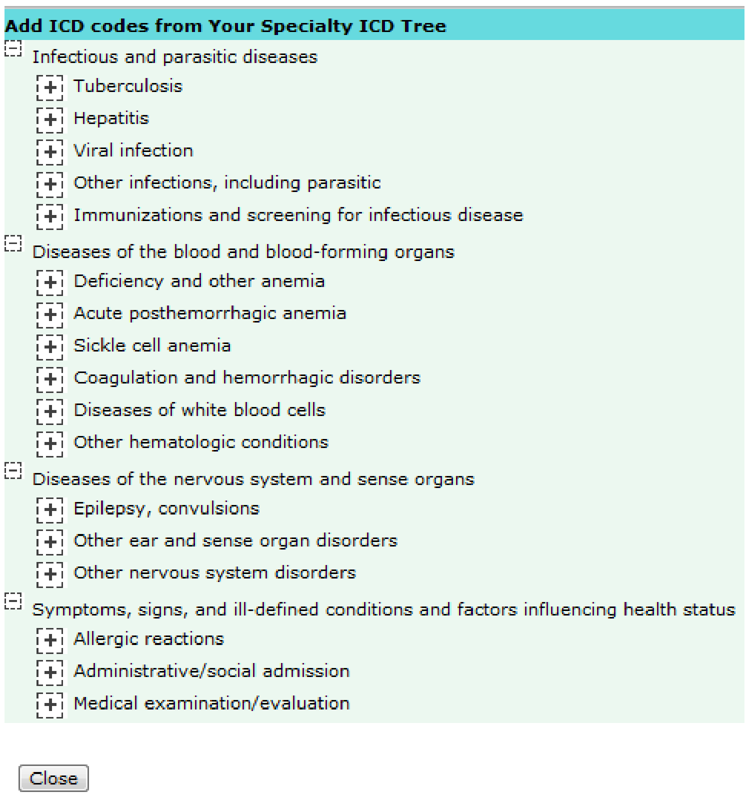
3. In the **Add New ICD Codes** box, type the new ICD codes separated by a comma (,), or select from **Add ICD codes from Your Specialty ICD Tree/Add ICD codes from All Specialties ICD Tree**.

4. Click **Submit**.

The new ICD code is added to the category.

Add ICD code from Your Specialty Tree

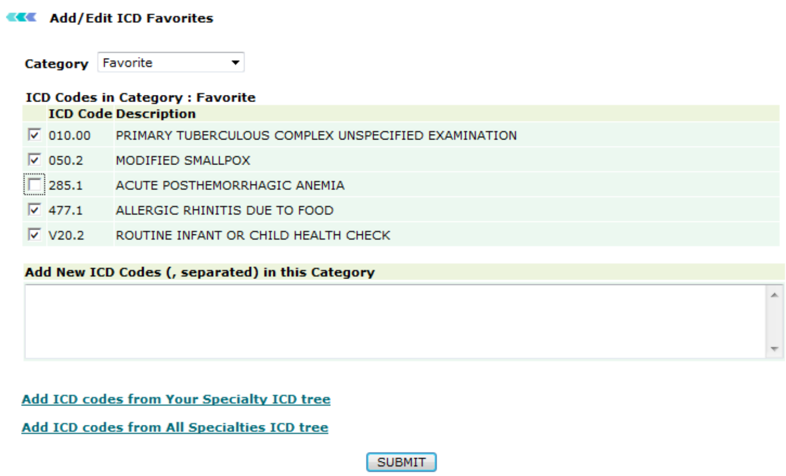
1. Click the **Add ICD code from Your Specialty ICD Tree** link available on Add/Edit ICD Favorites page.
2. Select the ICD code, and then click **Submit**.



Add ICD code from Your Specialty ICD Tree

Add ICD Code from All Specialties Tree

1. Click the **Add ICD code from All Specialties ICD Tree** link available on Add/Edit ICD Favorites page.
2. Select the ICD code, and then click **Submit**.

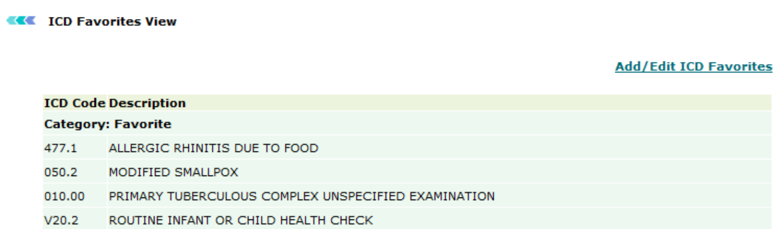


Add ICD Code from All Specialties Tree

View ICD Favorites

- Click the **View ICD Favorites** link available on Charge Capture page.

Note: Click the **Add/Edit ICD Favorites** link to add or edit ICD codes.



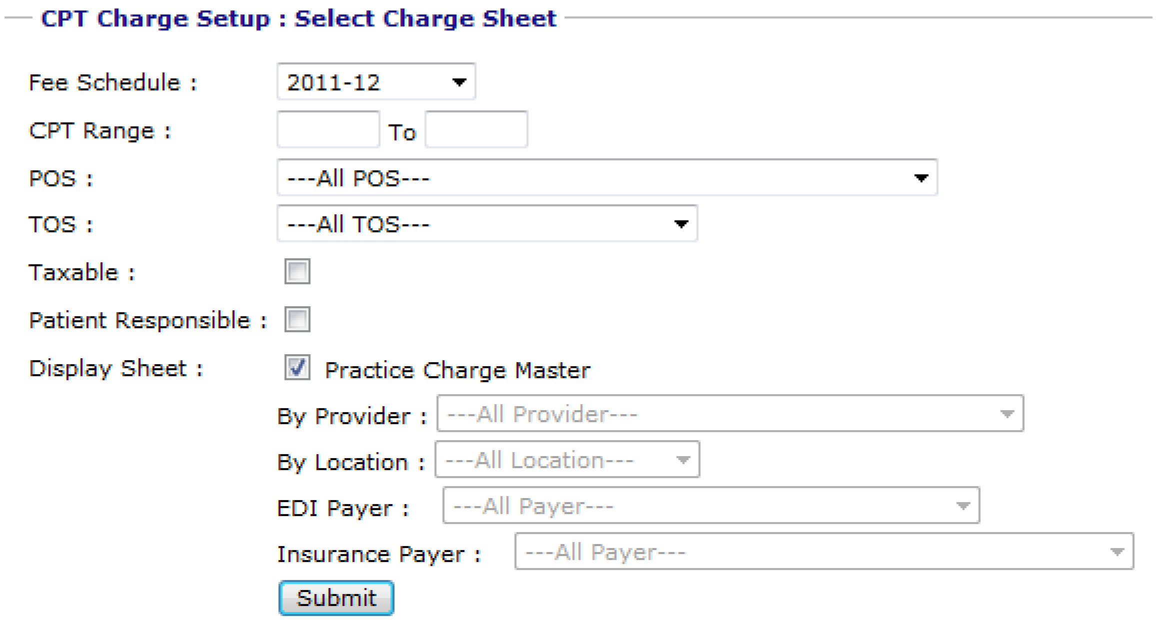
ICD Favorites View

CPT Charge Setup

The standard amount is required for the delivery of the service associated with each CPT code. OmniMD provides flexibility to setup charges at clinic level, for particular location, provider or payers. User can setup this charges for various combinations.

Setup CPT charge

- On the **Charge Capture** page, click the **CPT Charge Setup** to apply your charge preferences.



CPT Charge Setup

Clinic level charge should be setup for all the CPT codes. This can be done by using practice charge master. Clinic Level charge will be applied against the Superbill if no other charge is there for that particular provider, location, or EDI payer.

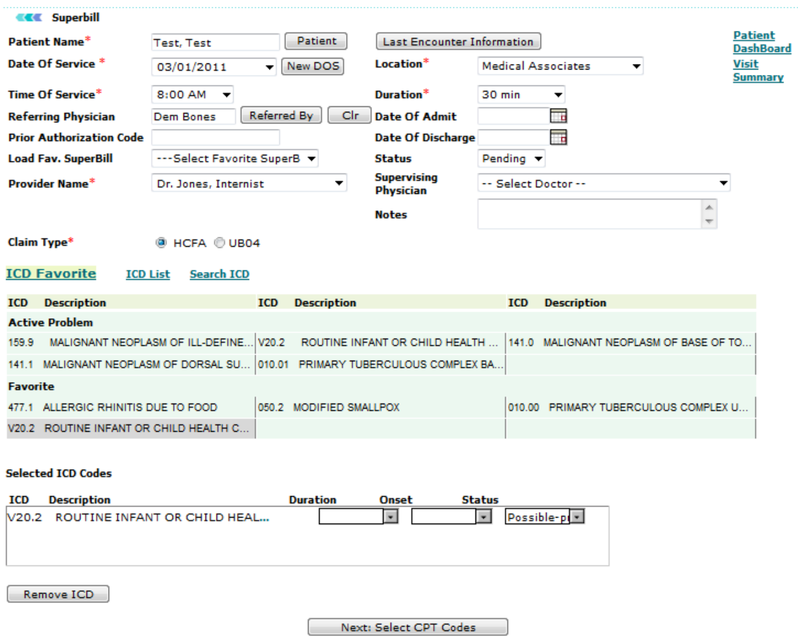
For example, the user wants to setup Clinic level charges for CPT codes ranging from 00100 to 00218. For clinic level charges 'Practice Charge Master' should be selected (default). List of CPT codes within that range are displayed in the list. Enter Charge, allowed amount, and validity information in the corresponding fields, and then click Submit to apply changes.

Create Superbill

1. From the **Charge Capture** menu, select **Create Super Bill**.

   Alternatively, click the **Create Super Bill** link available on the Charge Capture page.

   The Superbill page is displayed.



Create Superbill

2. Fill in the fields as applicable.

Create Superbill Fields

Field	Description
Patient Name	Click **Patient** to select a 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 is displayed to add information of earlier super bill. Click Yes if you want to create the same type of super bill.
Date of Service	Click on New DOS to select date of service. This is the date on which patient visited Provider for treatment.
Time of Service	The time at which Provider consulted patient should be filled in this field.
Date of Admit	In case patient was admitted, enter month, date and year on which he/she was admitted.
Duration	Enter the duration of the visit.

Location	Enter location of hospital in which appointment was carried.
Referring Doctor	In case other Provider referred patient, click on Referred By button to select his name.
Referral Authorization Code	Enter authorization code provided by Provider.
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.
Status	While creating super bill, status will be pending, this will become completed when Provider receive his fees from insurance company.

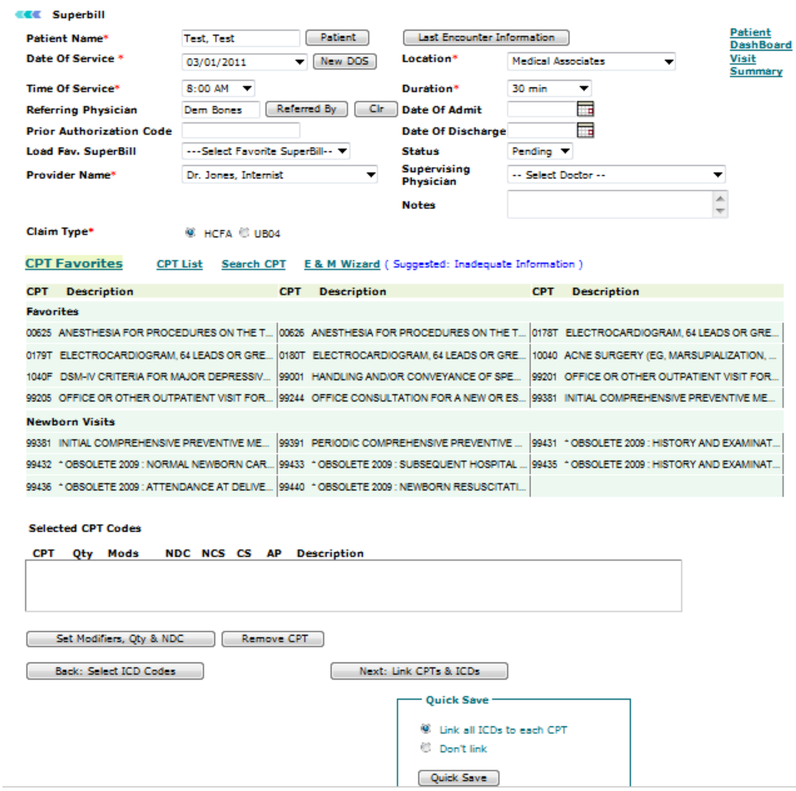
Note: Once the Superbill is created, the provider should not change the status of the bill. He/she should leave it as default. The status will be updated by the billing team once their job is completed.

3. Add CPT codes from one of the three options:

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

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

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



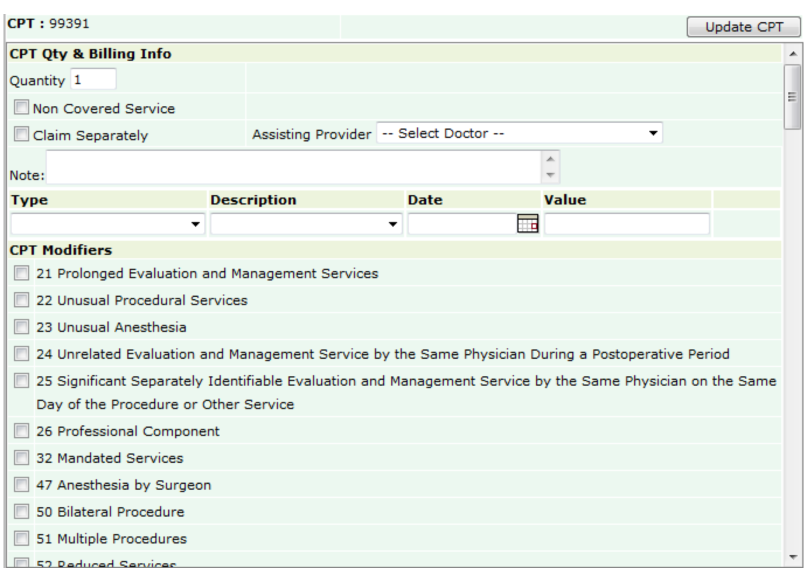
CPT List

4. Select the check boxes corresponding to the CPT that you want to add and click **Add**.

The selected CPT codes are added to the list.

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

6. If any visit that included Modifiers, click the **Modifiers and Quantity** link to add them and click **Update CPT**.



Modifiers & Quantity

7. Click **Next**.

8. Add ICD codes from one of three options:

a. **ICD Favorites**: Click the ICD Favorites link to display ICD Codes added in favorite's list. Click 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 the Search ICD link if you do not find any ICD Code listed. Enter ICD Code or Text that you want to search and click Submit. This will list ICD as per search criteria.

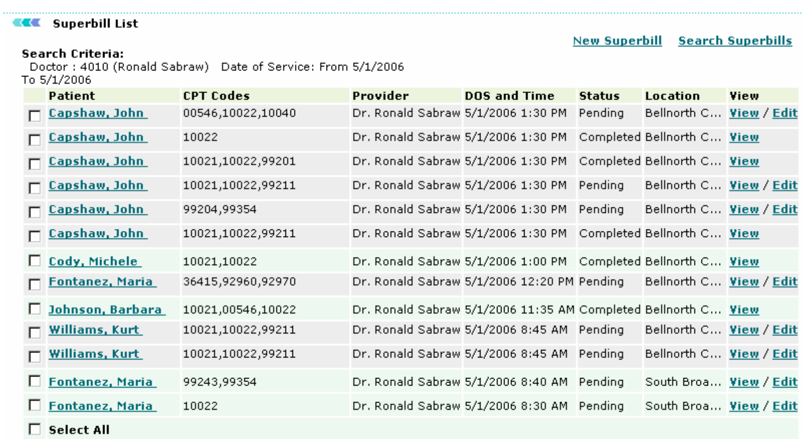
9. Select the check boxes corresponding to the ICD codes that you want to add and click **Link ICDs with Selected CPT**.

10. Click **Save Super Bill**.

The Superbill is created.

Edit Super Bills

1. Search the super bill that you want to edit.



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						

Edit Super Bill

2. From the displayed list, click the **Edit** link corresponding to the super bill you want to edit.

The Superbill page is displayed.

3. Make the required changes in the modifications in the bill.

4. Click **Save Super Bill**.

The superbill is updated.

Note: You can edit super bills with status as 'Pending' only.

Favorite Super Bills

1. From the **Charge Capture** menu, select **Favorite Super Bills**.

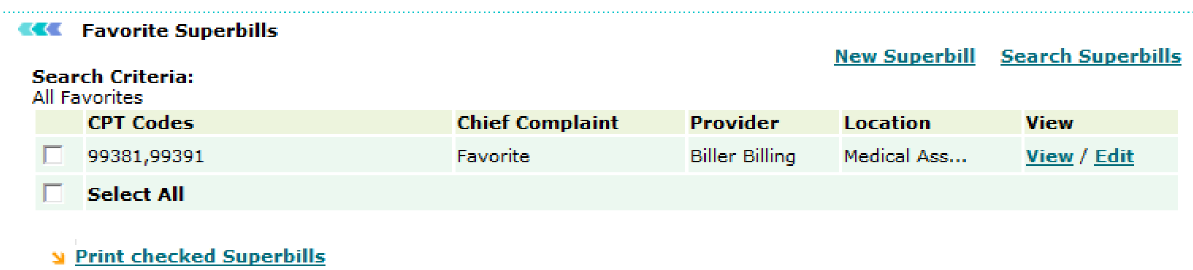
   The Favorite Super Bills page is displayed.

2. To view a single Super Bill, click the **View/Edit** link corresponding to the superbill in the **View** column.

3. To print superbills, select the check boxes corresponding to the superbills you want to print.

4. Click the **Print checked superbills** link.

   The selected super bills are printed.



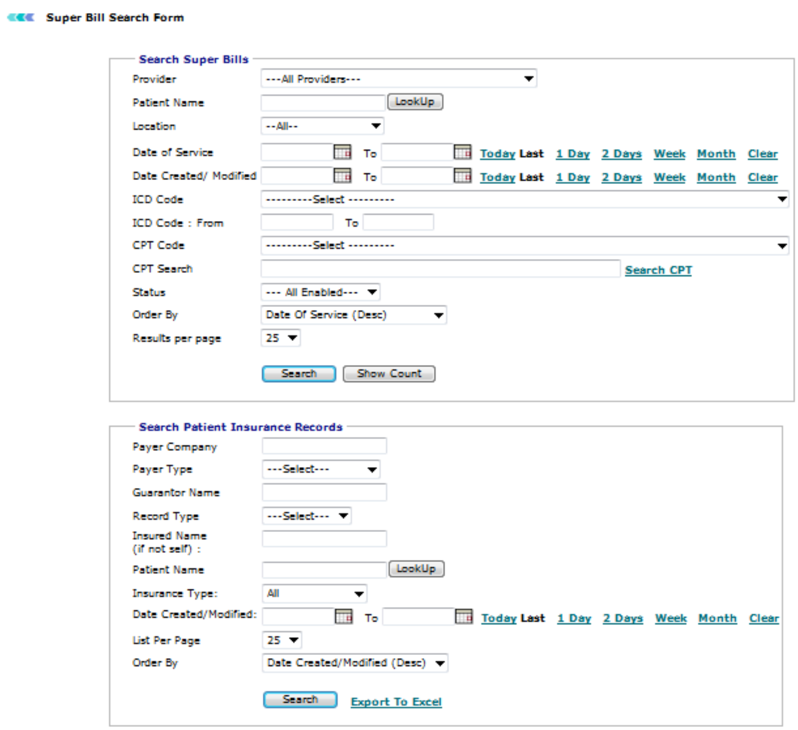
Favorite Superbill

Note: From Favorite Superbills page, you can create and search superbills.

Search Super Bill

1. From the **Charge Capture** menu, select **Search Super Bill**.

   The Super Bill Search Form is displayed. 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.



Super Bill Search Form

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

Search Criteria

Parameter	Description
Doctor	Select the name of the Provider, from the drop-down menu.
Patient Name	Click **Lookup** to select name of patient for whom super bill was created.
Location	Select the location where bill was created, from the drop-down menu.
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.
Date Created/Modified	Enter the date range when the super bills that you wish to search, were created or modified.
Status	Select the status of super bill from the drop-down menu. See the screen below for various status of super bill.
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 **Search**.

   The Super Bill List displays the search result 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:

   Search Criteria

Parameter	Description
Doctor	Select the name of the Provider, from the drop-down menu.
Patient Name	Click **Lookup** to select name of patient for whom super bill was created.
Location	Select the location where bill was created, from the drop- down menu.
Date of Payment	Enter the period of the payments that you wish to search.
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.
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 **Search**.

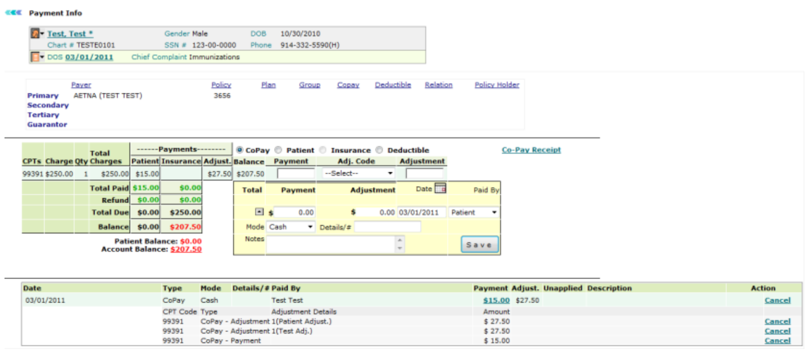
   This will display payments made by the selected patient based on the entered search criteria.

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

Add Patient Payment

1. On the superbill detail page, click the **Patient Payment** link.

   The Payment Info page is displayed.



Patient Payment Info

2. Fill the payment details.

3. Click **Save** to save payment details.

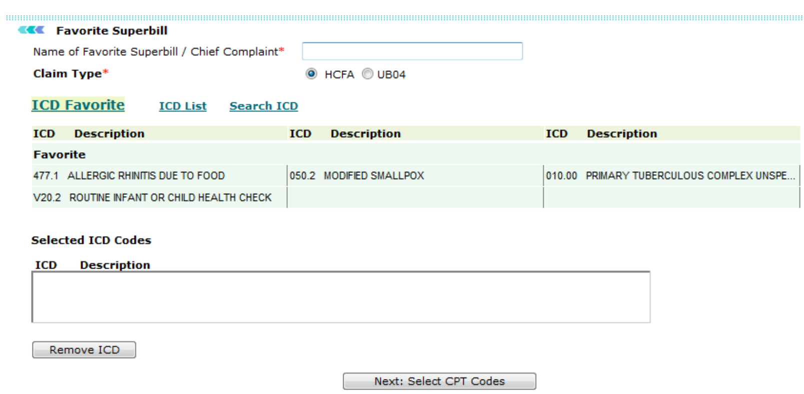
Add New Favorite Super Bill

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.

Add new favorite

1. From the **Charge Capture** menu, select **Add New Favorite**.

   The Favorite Superbill page is displayed.

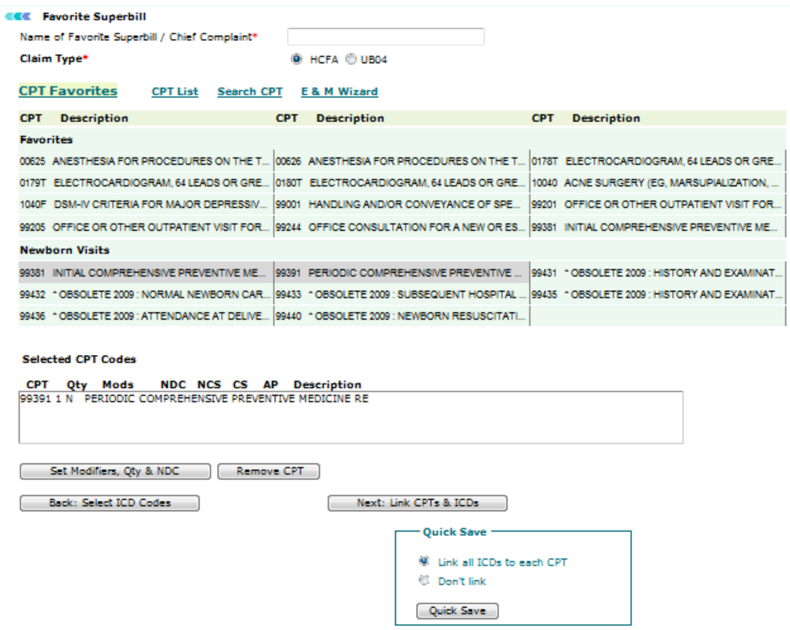


Favorite Superbill

2. In the **Chief Complaint** box, type the chief complaint for which you want to create template.

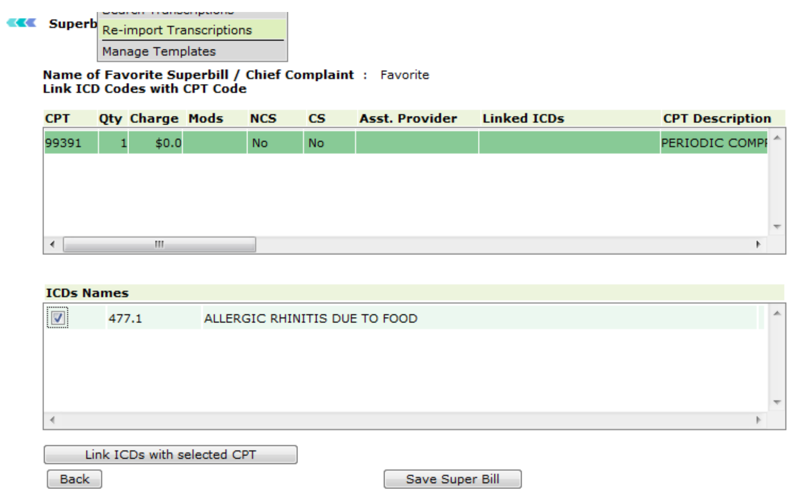
3. Click the ICD to get selected in Selected ICD Codes.

4. Click **Next: Select CPT Codes**.



Select CPT Codes

5. Click on CPT to select it.
6. Set Modifiers if necessary.
7. Click **Next: Link ICDs & CPTs**.



Link ICDs with CPTs

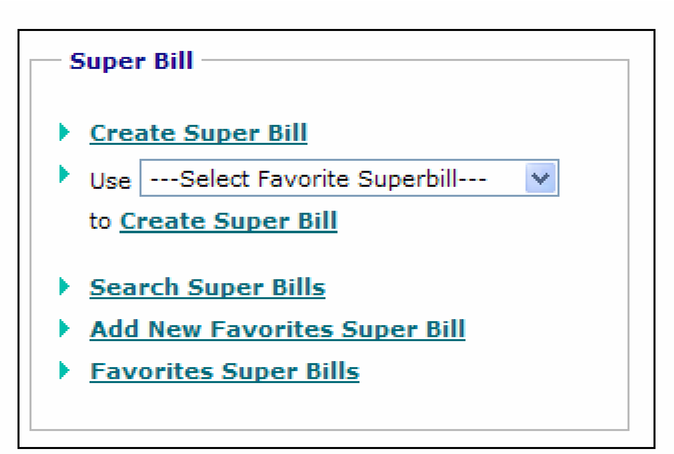
8. Select **Link ICDs with selected CPT**.
9. Click **Save Super Bill**.

Create Favorite Super Bill

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

Create super bill through favorite super bill

1. On the Charge Capture page, from the **Use** list, select a favorite super bill.



Create Super Bill From Favorite Super Bills

2. Once template is selected, click the **Create Super Bill** link.

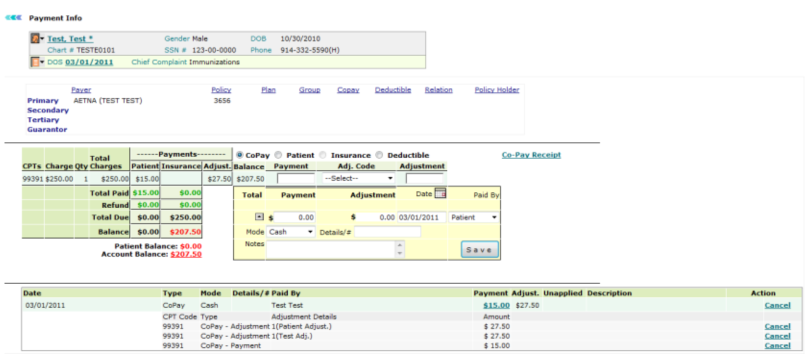
   The Super Bill page is displayed.

3. Fill in the fields as applicable. For more information fields, refer to Create Superbill.

Collect Co-Pay

1. On the **Visit Summary** page, click the **Collect Co-Pay** link.

   The Payment Info page displays DOS for which patient is paying co-pay as well as lists all active insurance policies of patient.



Payment Information

2. Enter the co-pay amount in **Payment** field (yellow window) and mention any note related to co-pay, add mode (ex Cash, Check, etc.).

3. If the payment is collected for any past visit on current date, select the collect co-pay action button of that visit from the dashboard.

> **Note:** This information should be added for the past visit only and not to the current visit.

4. Click **Save** button to save the details.

The Co-pay icon appears in progress column against particular date for which it is collected.

Date	Type	Mode	Details/#	Paid By	Payment	Adjust.	Unapplied	Description	Action
03/01/2011	CoPay	Cash		Test Test	$15.00	$0.00			Cancel
	CPT Code	Type		Adjustment Details	Amount				
	99391	CoPay - Payment			$ 15.00				Cancel

Payment Details

Measures/PQRS

Measures/PQRS

From the Measures/PQRS section, you can:

[Measure Assignment]

[Generate Automated Measure Calculation Report]

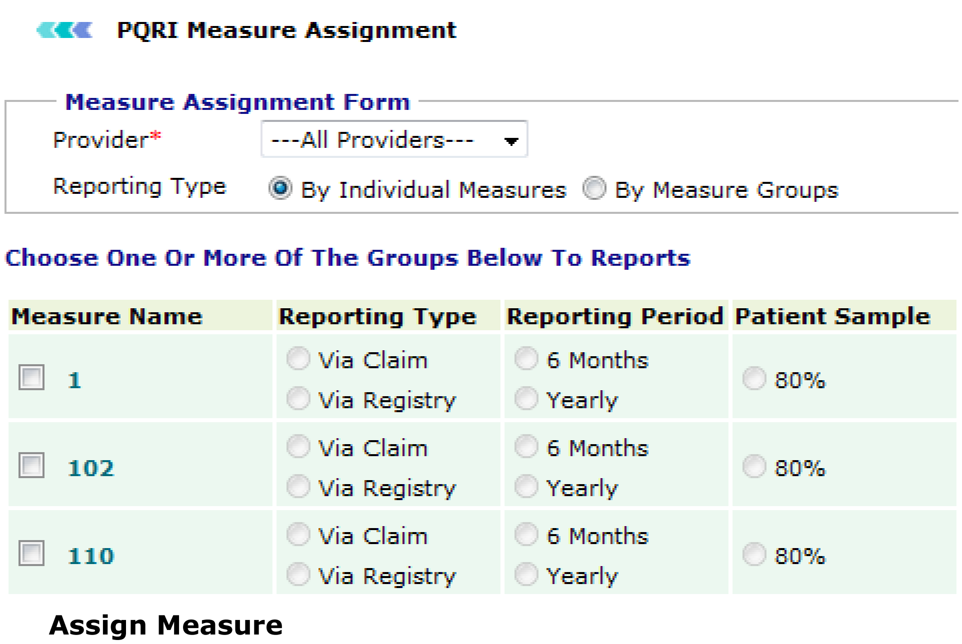
[Generate Quality Measure XML]

[Generate Quality Measure Report]

[Generate Quality Measure Performance Rate Report]

Measure Assignment

From the Measure Assignment page, you can run measures by specific providers or all providers.



Assign Measures

1. From the **Provider** list, select a provider to assign measure to the specific provider.

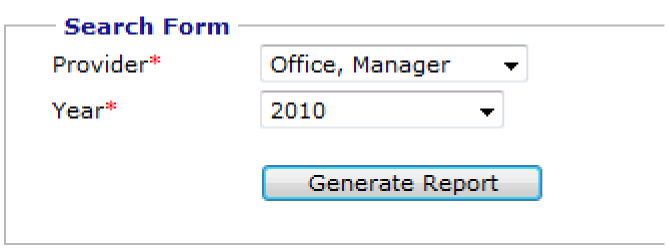
Note: You can select All Providers to set assign measures to all providers.

2. Specify the **Reporting Type** as **By Individual Measures** or **By Measure Groups**.
3. Select the check boxes corresponding to the measures you want to assign.
4. For the selected measures, specify the following:
    - Specify **Reporting Type** as **Via Claim** or **Via Registry**.
    - Specify **Reporting Period** as **6 Months** or **Yearly**.
    - Specify **Patient Sample** as **30 Unique Patients** or **80%**.
5. Click **Save**.

   The measures are assigned.

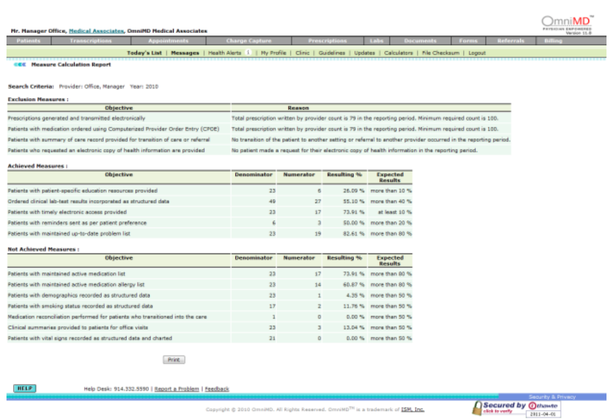
Generate Automated Measure Calculation Report

Select a Provider and a Year to generate measured calculation report.



Measured Calculation Report Search

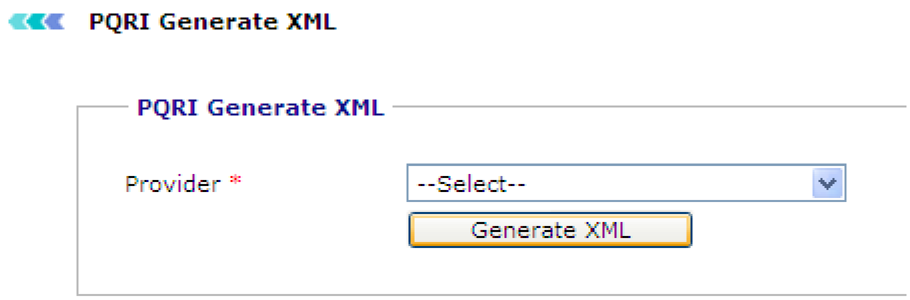
The report is used to keep the providers on track for measure calculations.



Measure Calculation Report

Generate Quality Measure XML

From Generate Quality Measure XML, you can generate the *PQRI* report for Quality Measures.

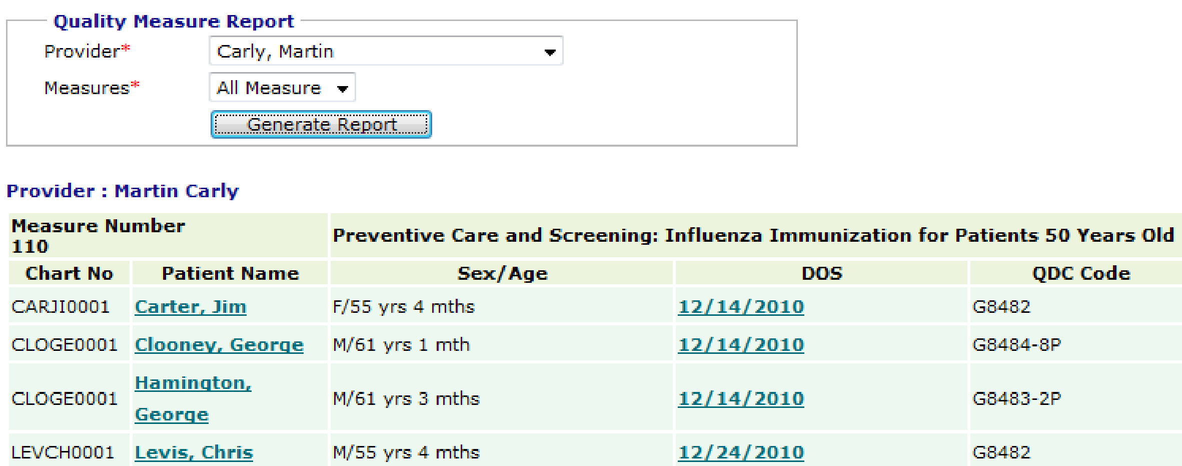


Generate Quality Measure XML

Generate Quality Measure Report

The Generate Quality Measure Report displays the *QDC* codes by patient and measure.

- Click the name of the patient to view patient dashboard.
- Click the DOS to view summary of the visit.

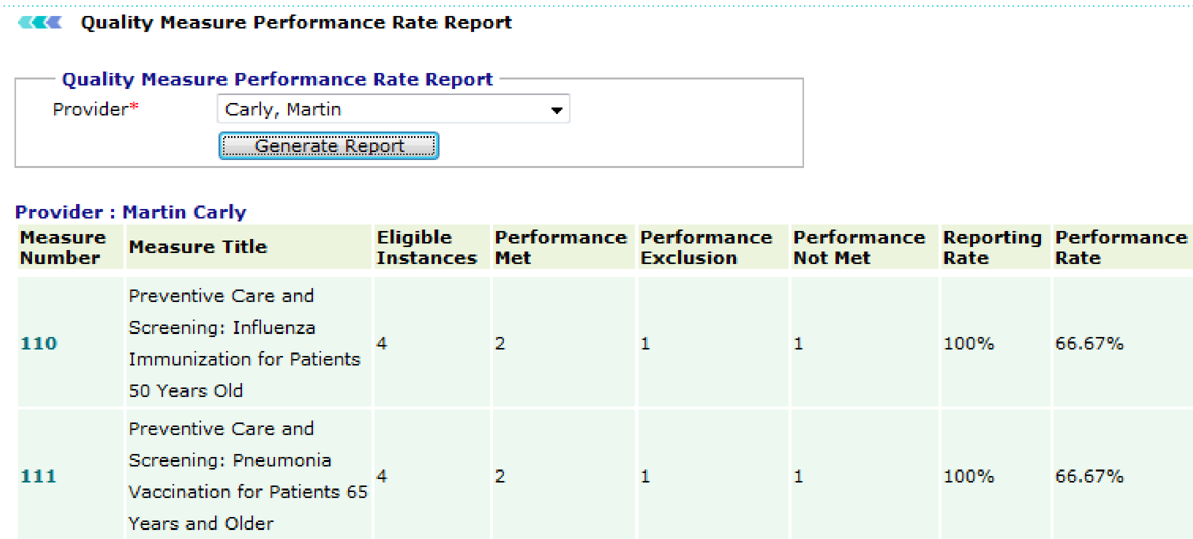


Measure Number 110		Preventive Care and Screening: Influenza Immunization for Patients 50 Years Old		
Chart No	**Patient Name**	**Sex/Age**	**DOS**	**QDC Code**
CARJI0001	Carter, Jim	F/55 yrs 4 mths	12/14/2010	G8482
CLOGE0001	Clooney, George	M/61 yrs 1 mth	12/14/2010	G8484-8P
CLOGE0001	Hamington, George	M/61 yrs 3 mths	12/14/2010	G8483-2P
LEVCH0001	Levis, Chris	M/55 yrs 4 mths	12/24/2010	G8482

Quality Measure Report

Generate Quality Measure Performance Rate Report

The Generate Quality Measure Performance Rate Report displays how well a particular provider is at reaching their measure goals. This report is best used with the Quality Measure Report, as that report displays each of the "Eligible Instances" noted in the Quality Measure Performance Rate Report.



Quality Measure Performance Rate Report

Quality Measure Performance Rate Report

Provider* Carly, Martin

Generate Report

Provider : Martin Carly

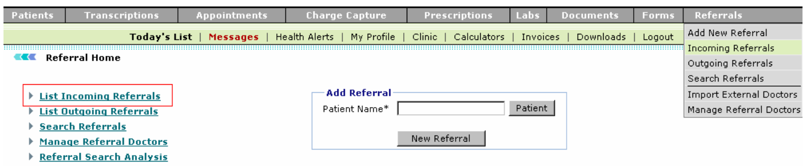
Measure Number	Measure Title	Eligible Instances	Performance Met	Performance Exclusion	Performance Not Met	Reporting Rate	Performance Rate
110	Preventive Care and Screening: Influenza Immunization for Patients 50 Years Old	4	2	1	1	100%	66.67%
111	Preventive Care and Screening: Pneumonia Vaccination for Patients 65 Years and Older	4	2	1	1	100%	66.67%

Quality Measure Performance Rate Report

Referrals

Referral Management

The Referral Management module of OmniMD streamlines the process of communication between multiple physicians. OmniMD maintains coordination between current provider and referring physicians. Through OmniMD, physicians can always refer a case to a specialist. They can also view a list of all incoming referrals that are made to them and outgoing referrals that they have assigned to other providers. They can also set the list of providers that they prefers to refer, through the Manage Referral Providers link.



Referral Management

Search Referrals

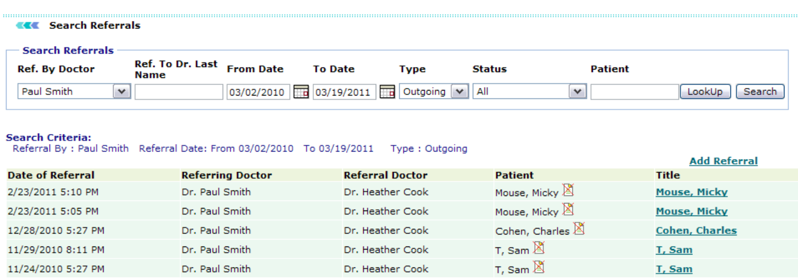
1. On the **Referrals** menu, select **Search Referrals**.

   Alternatively, click the **Search Referrals** link on the Referrals home page.

   The Search Referrals page is displayed.

2. Specify the search parameters.
3. Click **Search**.

   A list of referrals is displayed based on the specified search parameters.



Search Referrals

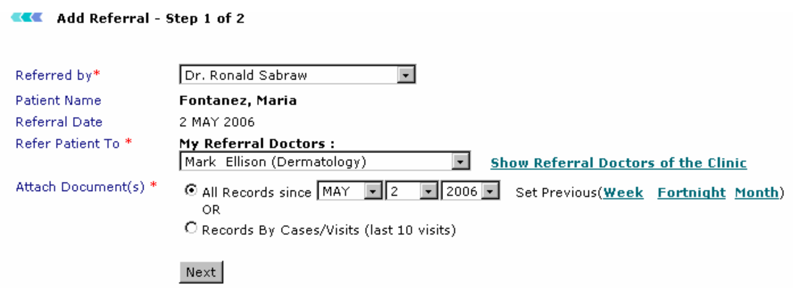
Add New Referral

1. Under **Add Referral**, in the **Patient Name** box, type the name of the patient.

   You can also click the **Patient** button to select patient from dialog box.

   This patient’s name is added as referral. Once patient is added, the patient's name, SSN #, and date of birth are displayed.

2. Click **New Referral**.



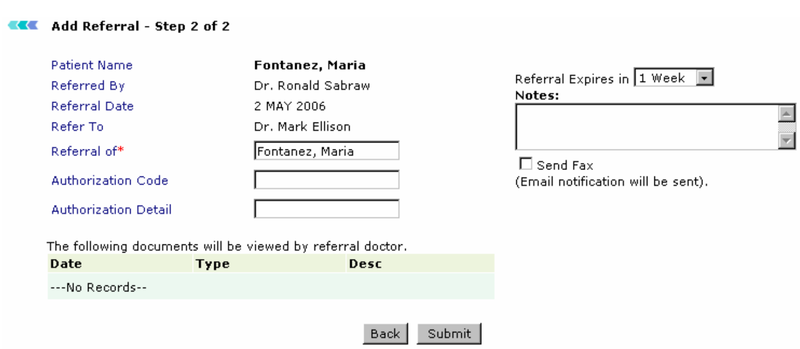
Add Referral Step 1 of 2

3. Specify the referral values.
   - **Patient Name and Referral Date:** These are read-only fields that were filled in the first step.
   - **Refer Patient To:** Select the referral provider from drop-down list.
   - **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.

4. Select the option to view all records of your patient or only your consultation records.

5. Click **Next** button.

   At this step, you need to enter authorization code and authorization details.



Add Referral Step 2 of 2

6. Check the option of Insurance records if you wish to show to referral provider.
7. Select the time period for referral during which they can refer the records of patient.

   Once the referral time expires, the referral becomes deactivated

8. Check the option of displaying new records till referral expires.
9. Under **Notes**, enter your observations or comments that would help referral provider in understanding the case better.
10. Check the option to **Send Fax Notification**.

    This sends fax to the provider. An email notification is also sent.

11. Click **Save**.

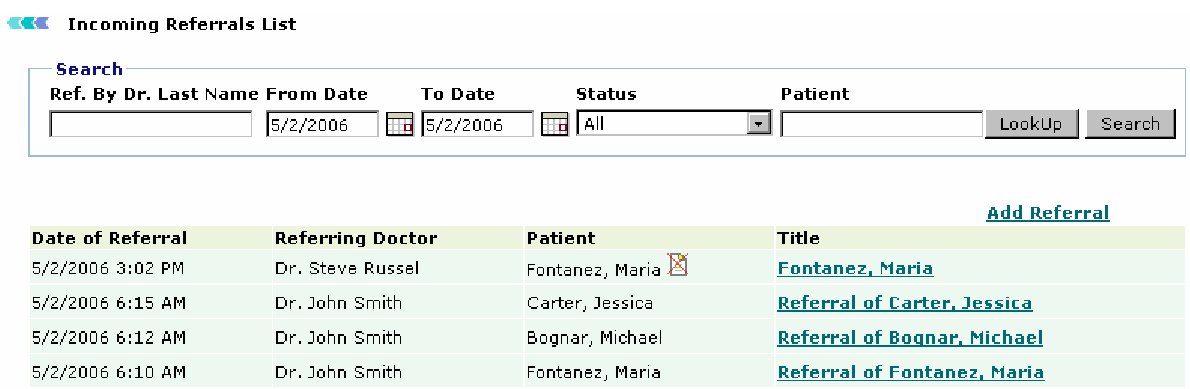
    The referral is added.

List Incoming Referrals

- On the **Referrals** menu, select **List Incoming Referrals**.

  Alternatively, click the **List Incoming Referrals** link on the Referrals home page.

  The list of all the incoming referrals is displayed. You can also add a new referral or search for a specific referral.



Incoming Referrals List

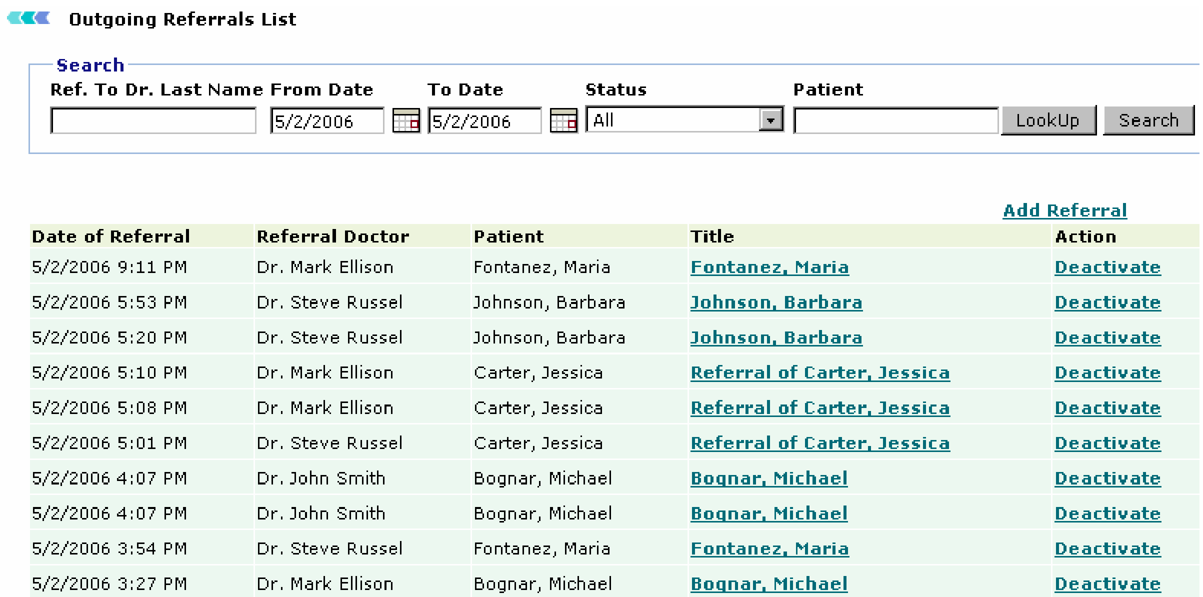
Note: Referrals with icon are active referrals. Referrals with icon are expired referrals.

List Outgoing Referrals

- On the **Referrals** menu, select **List Outgoing Referrals**.

Alternatively, click the **List Outgoing Referrals** link on the Referrals home page.

The list of all the outgoing referrals is displayed. You can also add a new referral or search for a specific referral.



Date of Referral	Referral Doctor	Patient	Title	Action
5/2/2006 9:11 PM	Dr. Mark Ellison	Fontanez, Maria	Fontanez, Maria	Deactivate
5/2/2006 5:53 PM	Dr. Steve Russel	Johnson, Barbara	Johnson, Barbara	Deactivate
5/2/2006 5:20 PM	Dr. Steve Russel	Johnson, Barbara	Johnson, Barbara	Deactivate
5/2/2006 5:10 PM	Dr. Mark Ellison	Carter, Jessica	Referral of Carter, Jessica	Deactivate
5/2/2006 5:08 PM	Dr. Mark Ellison	Carter, Jessica	Referral of Carter, Jessica	Deactivate
5/2/2006 5:01 PM	Dr. Steve Russel	Carter, Jessica	Referral of Carter, Jessica	Deactivate
5/2/2006 4:07 PM	Dr. John Smith	Bognar, Michael	Bognar, Michael	Deactivate
5/2/2006 4:07 PM	Dr. John Smith	Bognar, Michael	Bognar, Michael	Deactivate
5/2/2006 3:54 PM	Dr. Steve Russel	Fontanez, Maria	Fontanez, Maria	Deactivate
5/2/2006 3:27 PM	Dr. Mark Ellison	Bognar, Michael	Bognar, Michael	Deactivate

Outgoing Referrals List

Manage Referral Doctors

1. On the **Referrals** menu, select **Manage Referral Doctors**.

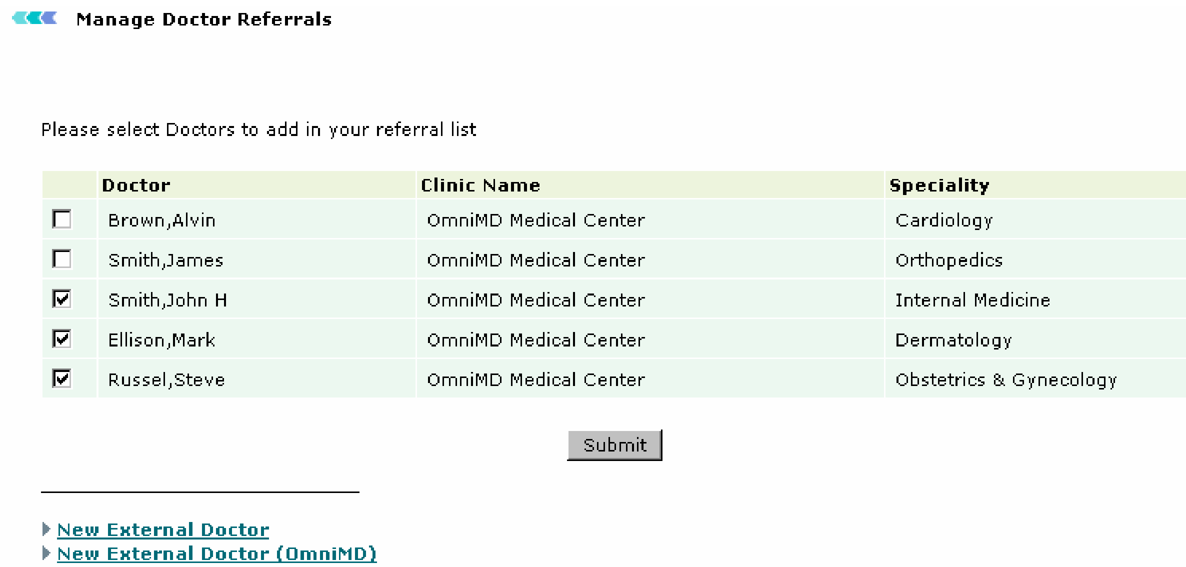
   Alternatively, click the **Manage Referral Doctors** link on the Referrals home page.

   The Manage Provider Referrals page displays a list of existing referral doctors.

2. Select the check box corresponding to the name of the doctor that you want to add in the referral list.

3. Click **Submit**.

   The selected doctor is added to your referrals list.



Manage Doctor Referrals

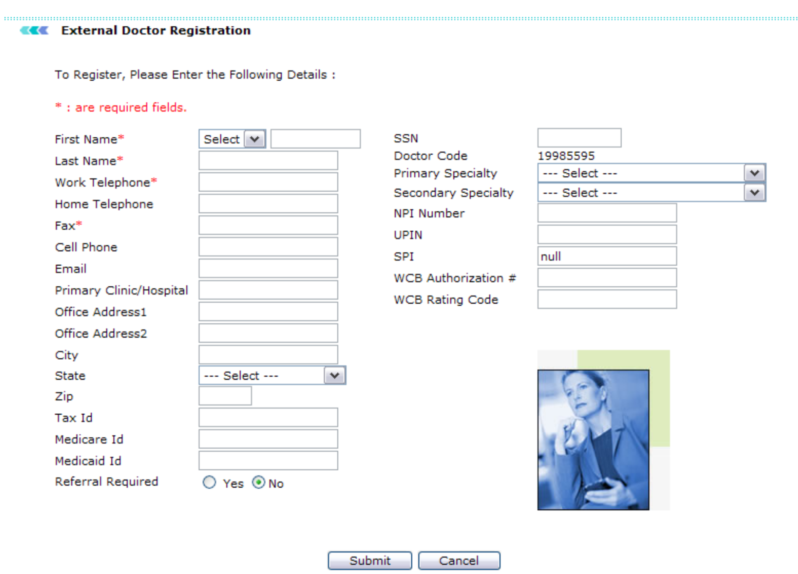
Refer New External Doctors

External doctors refers to those providers who are not using OmniMD. Though they can be referred using OmniMD.

Refer external doctor

1. On the **Referrals** home page, click **New External Doctor** link.

   The External Doctor Registration page is displayed.



External Doctor Registration

2. Specify the values required to add new provider's information.
3. Click **Submit**.

A notification email and fax is sent to the referred provider specifying the temporary user id and password to access OmniMD for viewing details of patients. The referred providers can access the link, user id, and password to view details and analyze patient's case.

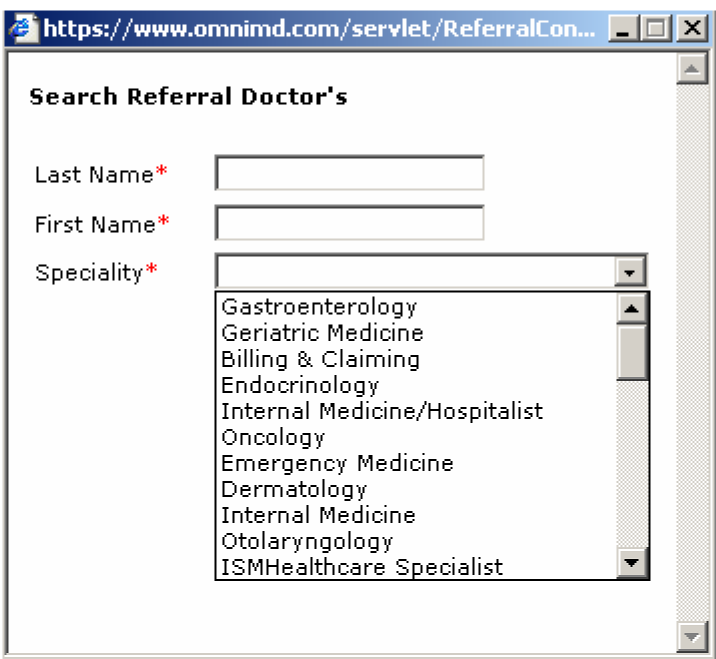
Refer New External Doctors (OmniMD)

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

Refer external doctor

1. Click **New External Doctor (OmniMD)** link.

The Search Referral Doctors page is displayed in a new window.



Search Referral Doctors

2. Specify the Last Name, First Name, and Specialty values.
3. Click **Search**.

A list of all the providers matching the specified criteria is displayed.

4. Click **Add**.

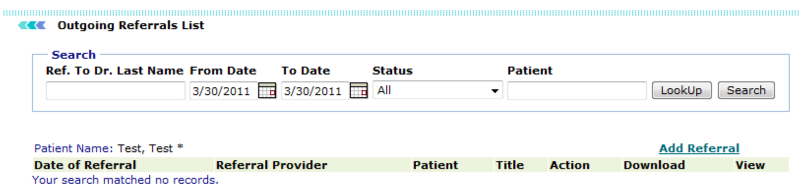
The provider is added to Manage Providers Referral list.

5. Select the provider, and click **Submit**.

Referrals

1. Click the **Referrals** link to view details of current and past referrals.

The Outgoing Referrals list is displayed.

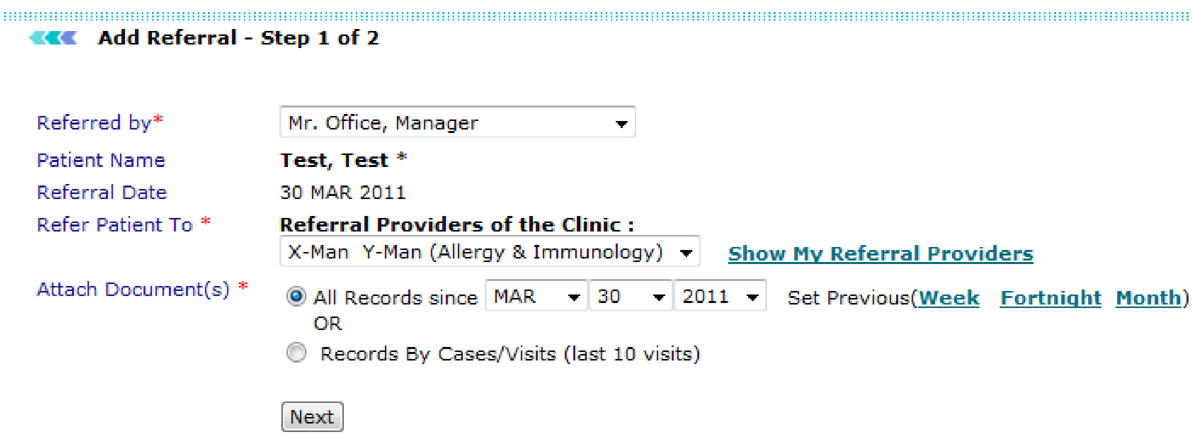


Outgoing Referrals List

2. Click the **Add Referral** link to create a new referral.

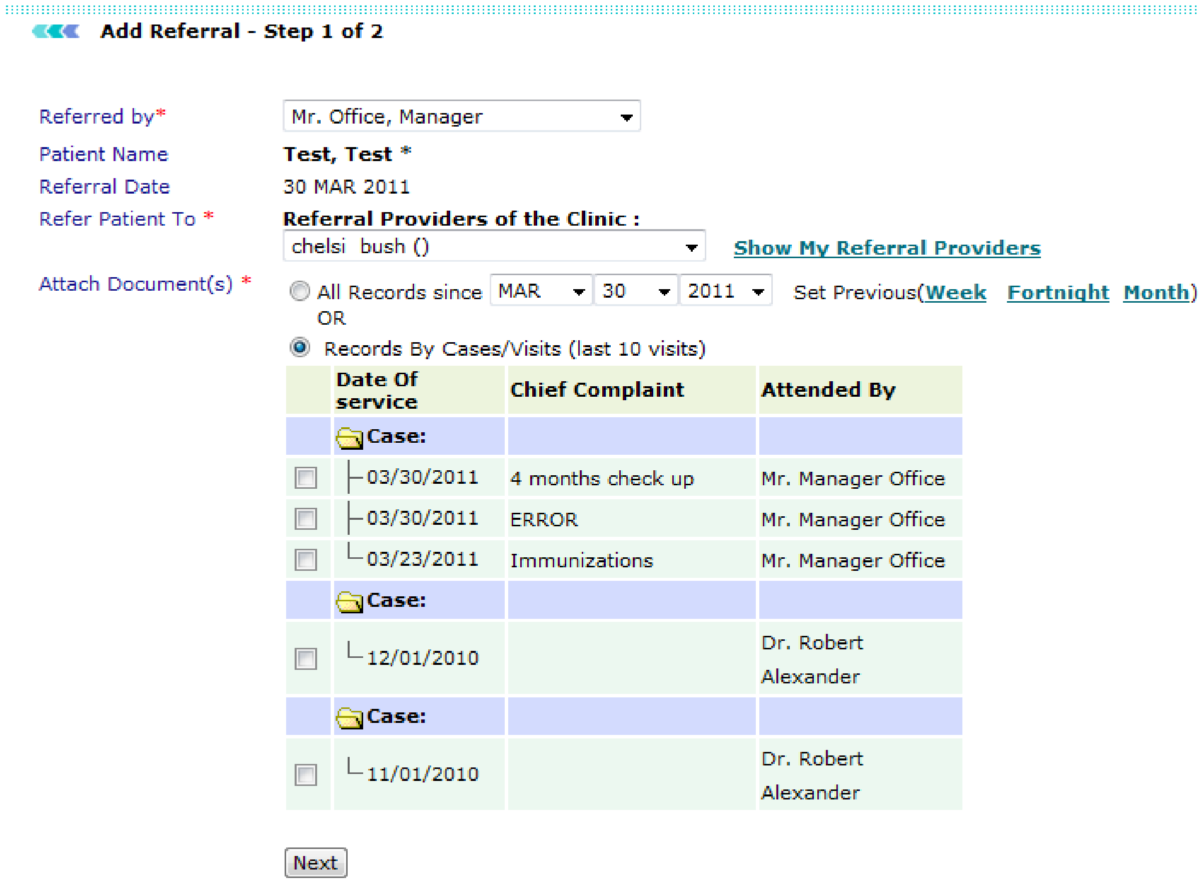
3. In the **Add Referral - Step 1 of 2** page, fill the required information.

a. You may choose to **Attach Documents** to All Records from specific date.



Add Referral (All Records) Image

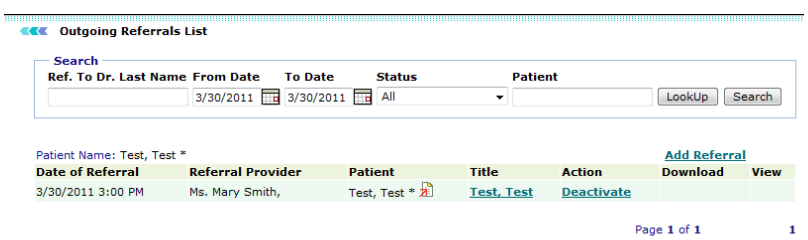
b. You may also choose to **Add Documents** by previous Cases/Visits.



Add Referral (by Case/Visits)

4. Click **Next.**
5. In the **Add Referral - Step 2 of 2** page, fill the required information.
6. Click **Save** to save the referral.

Note: Click **Save & Print** to save and print the referral details.

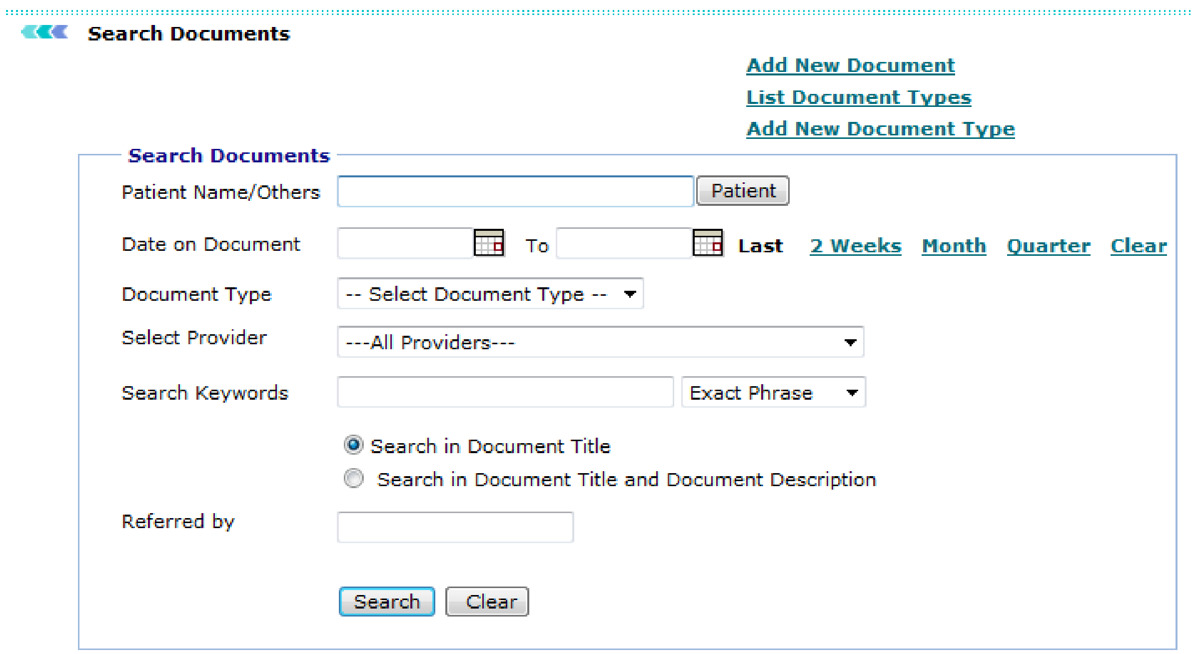


New Referral Added to List

Document Management

Document Management

The Document Manager allows the clinic to store vital patient documents such as X-rays, paper reports, and lab reports securely within the OmniMD suite. It is a simple but powerful way to have access to all vital documents right at one place from various locations over the Internet.



Document Management

List Document Types

1. From the **Documents** menu, select **List Document Types**.

   The Search Document Type page displays the list of all the document types available in the Document Management module.

Document Type	Edit
Insurance Report	Edit
X-Ray	Edit
growth chart	Edit
Greetings....Bill...Pic	Edit
EKG	Edit
Documents	Edit
Lab Report - Images	Edit
Physical Exam	Edit
Manual Reports	Edit
x ray	Edit
Reports	Edit

Search Document Type

2. Click the **Edit** button corresponding to document type that you wish to edit.
3. Make required changes.
4. Click **Submit**.

Add New Document Type

1. From the **Documents** menu, select **Add New Document Type**.

   The Documents page is displayed.

Add Document Type

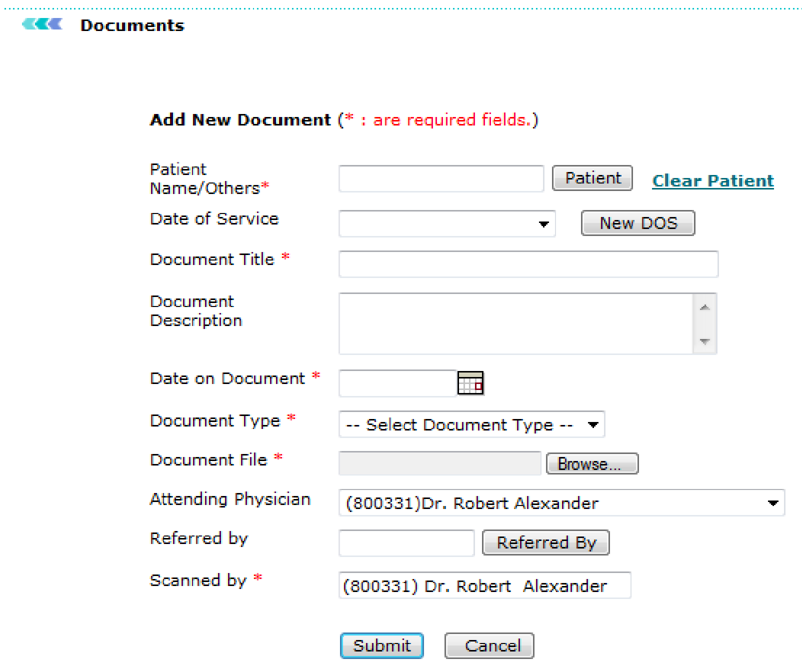
2. In the **Document Type Name** box, type the name of the document type.
3. Click **Submit**.

   The document type is added to the document type list.

Add New Document

1. From the **Documents** menu, select **Add New Document**.

   The Add New Document page is displayed.



Add New Document

2. Fill in the fields as applicable:

Add New Document Fields

Field	Description
Patient Name/Others	Click the **Patient** button and select patient from the dialog box. You can select a patient from Today's Patient list or Last 2 days patient list. You can also search patient and add a new patient.
Date of Service	Click the **New DOS** button to select date of service.
Document Title	Enter title for document.
Document Description	Enter details of the document.
Date on Document	The date on which document was created.
Document Type	From drop-down list, select document type.

File Name(s) *(At least one required)	You need to select at least one file to add in document. Click the **Browse** to locate and attach the document.
Doctor Name	Select Provider's name from drop-down list.
Referred by	Select provider name if provider refers this document.
Scanned By	Enter name of the person who have scanned the documents.

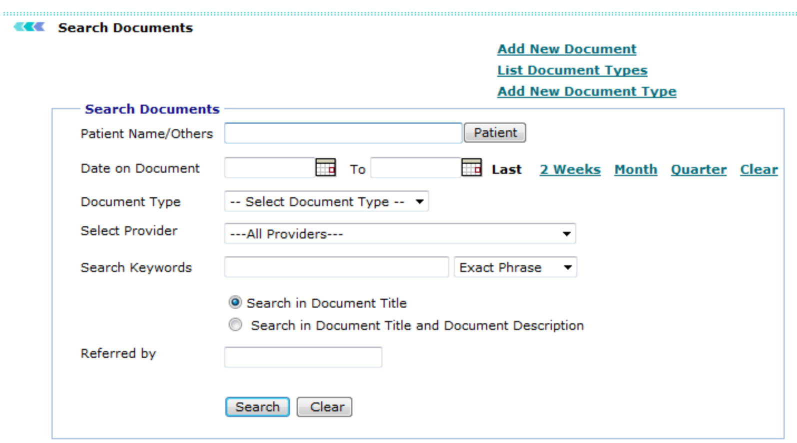
3. Click **Submit**.

The document is added to the documents list.

Search Documents

1. From the **Documents** menu, select **Search Documents**.

The Search Documents page is displayed.



Search Documents

2. Fill in the fields as applicable:

Add New Document Fields

Field	Description
Patient Name/Others	Click the **Patient** button and select patient from the dialog box. You can select a patient from Today's Patient list or Last 2 days patient list. You can also search patient and add a new patient.
Date of Document	Select the starting date from the **From** field and end date

	from the **To** field. You can select Last 2 weeks dates, Last Month, or Last Quarter dates from the links associated with the field.
Document Type	Select the kind of document type you want to search.
Select Doctor	From drop-down menu, select the Provider whose document you want to search.
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.
Referred by	If the search is required to include any referred Provider, type the name of Provider in this field.

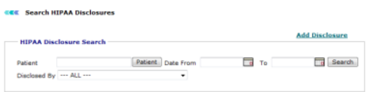
3. Click **Search**.

The documents list is displayed based on search parameters.

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

HIPAA Disclosure

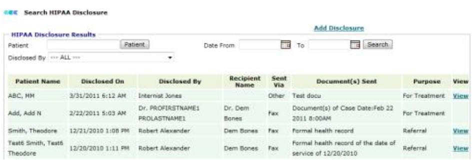
1. On the **Patient** menu, click **HIPAA Disclosure**.
2. On the **Search HIPAA Disclosure** page, specify the search criteria.



HIPAA Disclosure Search

3. Click **Search**.

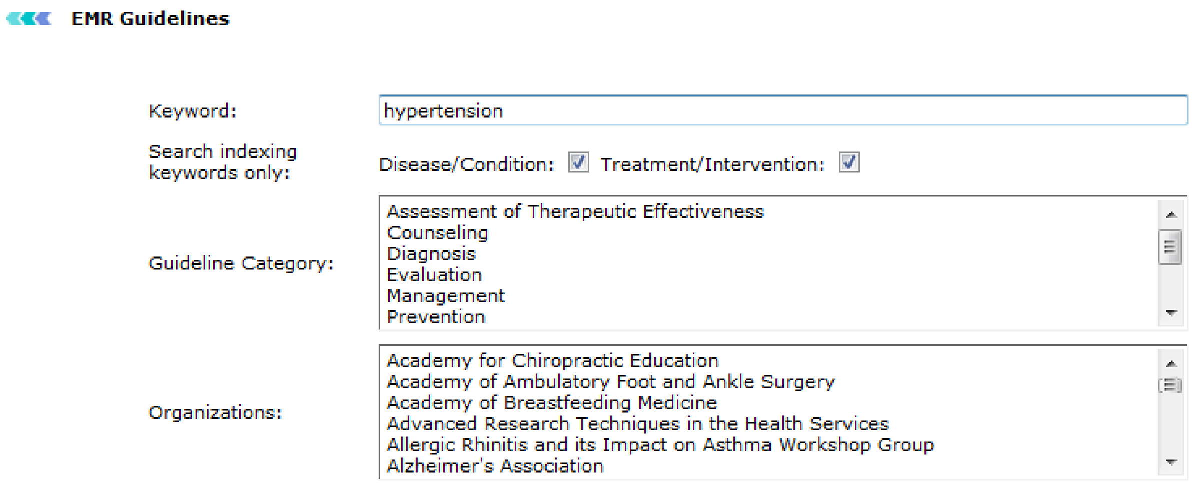
The search result displays patient's name, disclosed date, who sent the information and to whom it was sent, the transmission method, and which documents were sent and for what purpose, as well as a view of what was sent (by clicking on the **View** link).



HIPAA Disclosure Results

Guidelines

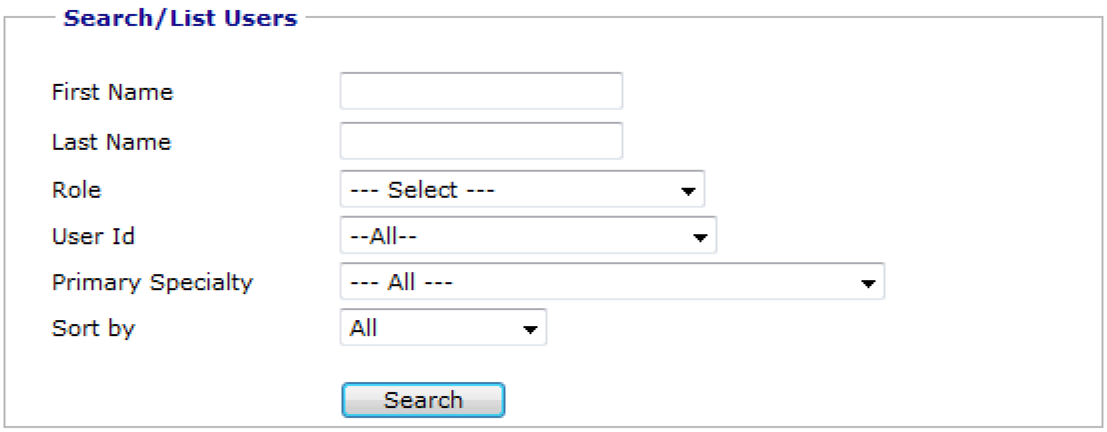
From Guidelines, you can search the *AHRQ* Guidelines online.



Guidelines

Search/List Users

From Search/List Users, you can search and view users of OmniMD.



Search/List Users

List Users

- To list all users, leave all the fields empty, and click **Search**.

  The list displays all the users of OmniMD.

Search Users

1. In the **First Name** box, type the name of the user.
2. In the **Last Name** box, type the last name of the user.
3. From the **Role** list, select a role of the user.
4. From the **User Id** list, select a user ID of the user.
5. From the **Primary Specialty** list, select the primary specialty for the user.
6. From the **Sort by** list, select an option to sort the search result.
7. Click **Search**.

   The Doctors Search Results page displays the following information about users: Doctor name, Code, Role, Work Phone number, Cell Phone number, Fax number, Primary Specialty, and State.

Note: It is not mandatory to fill all the fields to search users.

Eligibility

Eligibility

From the Eligibility section, you can see:

- Eligibility Information
- Eligibility Verification
- Patient Eligibility Report
- Per Insurance Eligibility Encounter

Eligibility Information

Click the **Eligibility Info** link to view current and past eligibility details.

Eligibility Data

Eligibility Check Date	Appointment Date (DOS)	Provider	Status
	Your search matched no records.		

Eligibility Info

Eligibility Verification

From the Eligibility Verification section, you can perform the following:

- Pending Appointments for Eligibility Check
- Patient Eligibility Report
- Per Insurance Eligibility Encounter

Patient Eligibility Report

1. From the **Doctor** list, select the name of the doctor, for whom you want to generate patient eligibility report.
2. From the **Payers** list, select the name of the payer.
3. In the **Patient** box, type the name of the patient.

Note: You can also click the **Patient** button to search and add the patient name.

4. Specify the **Appointment Date** range or select specific period from **Today**, **Last One Day**, **Last Two Days**, **Last One Week**, and **Last One Month**.

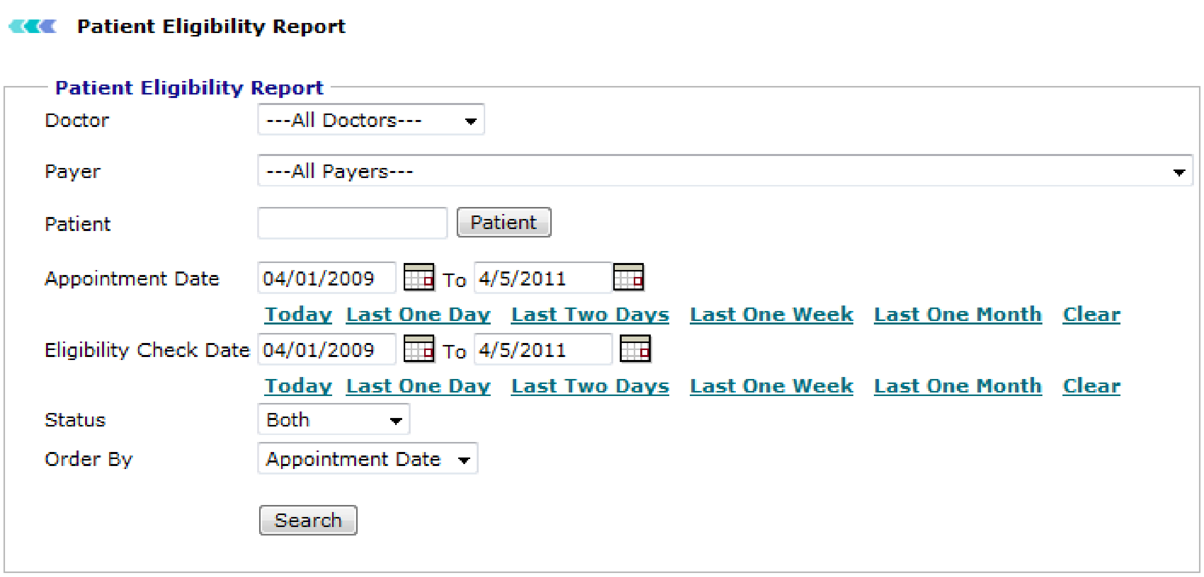
5. Specify the **Eligibility Check Date** range or select specific period from **Today**, **Last One Day**, **Last Two Days**, **Last One Week**, and **Last One Month**.

6. From the **Status** list, select an option from **Both**, **Eligible**, or **Not Eligible**.

7. From the **Order By** list, select an option to sort the search result.

8. Click **Search**.

The patient eligibility report for the selected criteria is displayed.



Patient Eligibility Report

Per Insurance Eligibility Encounter

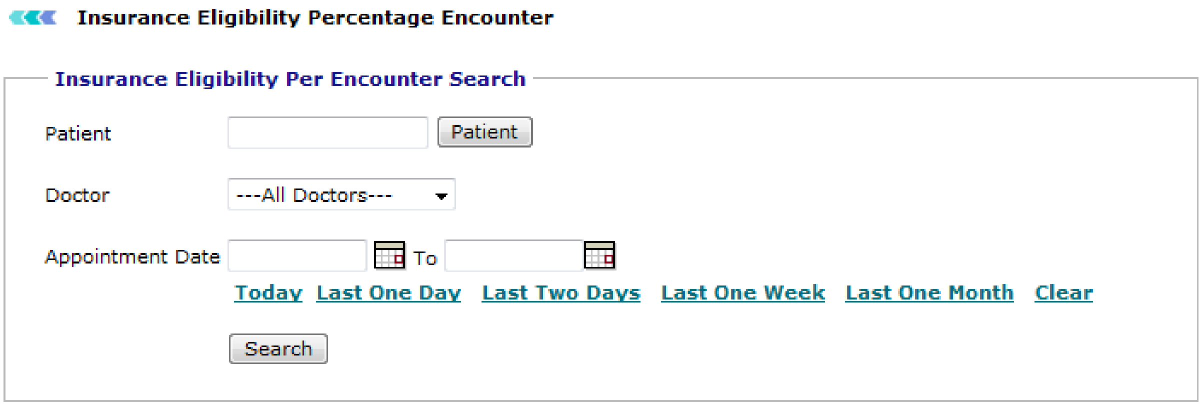
1. In the **Patient** box, type the name of the patient.

Note: You can also click the **Patient** button to search and add the patient name.

2. From the **Doctor** list, select the name of the doctor, for whom you want to generate patient eligibility report.

3. Specify the **Appointment Date** range or select specific period from **Today**, **Last One Day**, **Last Two Days**, **Last One Week**, and **Last One Month**.

4. Click **Search**.



Insurance Eligibility Percentage Encounter

The verification report displays the percent checked eligibility by patient, provider, date range, or any combination. Under development.

Insurance Eligibility Percentage Encounter

Insurance Eligibility Encounter Search

Patient Name: All

Provider: All

Appointment Date From: to

Provider	Total Encounter	Eligibility confirmed	Percentage
CCHIT Doctor	1	0	0.0%
Ellen Thompson	20	0	0.0%
Internist Butler	101	0	0.0%
Internist Jones	10	0	0.0%
John Mathew	10	0	0.0%
Manager Office	102	0	0.0%

Insurance Eligibility Encounter Search Result

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