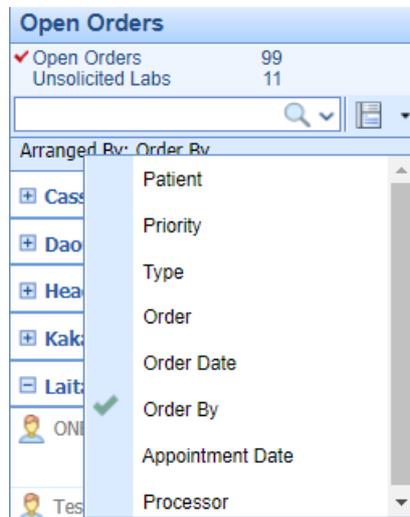


User Settings

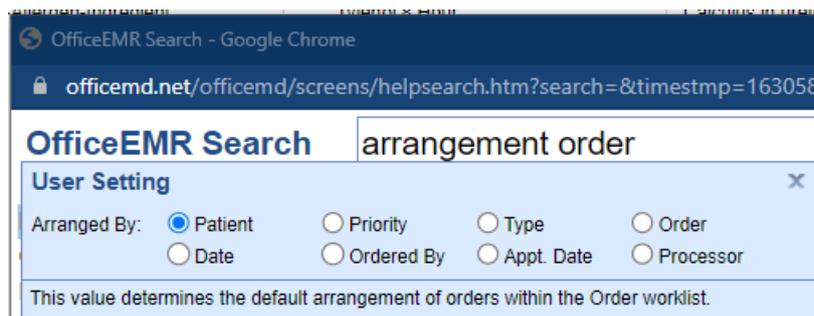
Last Modified on 09/04/2025 10:57 am EDT

User Setting: Arrangement Order (Arrange By in My Task - Orders)

The Arrangement Order setting allows the user to set their default Arrange By value to in the My Tasks - Orders list. Depending on your responsibilities each option can provide its own value. **Search "Arrangement Order"** in user settings to change this value. This change will be reflected in My Tasks - Orders.



Default Value: Patient



Options:

- Patient: Creates groupings (headings) based on the first character of the patient's last name, then sorts

| Open Orders | | | |
|---|--------------------------|----|----------------|
| ✓ Open Orders | | 99 | |
| Unsolicited Labs | | 11 | |
| <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Filter"/> <input type="button" value="User"/> <input type="button" value="Help"/> <input type="button" value="Refresh"/> | | | |
| Arranged By: Patient | | | |
| B | | | |
| C | | | |
| Costanza, George Male Next Appt: N/A Age: 51y 01/05/1970 | | | |
| Labs | Celiac Disease Panel | | 01/14/2021 11: |
| Other | Complete Metabolic Panel | | 01/14/2021 11: |
| Couchpotato, Jackson Male Next Appt: N/A Age: 43y 09/15/1977 | | | |
| Scheduling | Return to office ASAP | | 01/14/2021 9: |
| D | | | |
| Davidson, Clive Male Next Appt: N/A Age: 21y 02/10/2000 | | | |
| Labs | Hemoglobin A1c | | 02/11/2021 10: |

the contents alphabetically.

- **Priority:** Creates groupings based on the Priority in the order, then sorts each group by patient last name alphabetically.

| Arranged By: Priority | | | |
|--|-----------------------------|--|---------------|
| Norm | | | |
| Balding, James (Baldy) Male Next Appt: N/A Age: 21y 04/07/2000 | | | |
| Labs | Basic Metabolic Panel (BMP) | | 04/08/2021 11 |
| Labs | THYROID PANEL | | 04/08/2021 11 |
| Labs | HEALTH FAIR AOE - HPMI | | 04/08/2021 11 |
| Labs | Hemoglobin A1c | | 04/08/2021 11 |
| Basedow, Jake Male Next Appt: N/A Age: 21y 06/07/2000 | | | |
| Labs | Hemoglobin A1c | | 06/08/2021 11 |
| Costanza, George Male Next Appt: N/A Age: 51y 01/05/1970 | | | |
| Labs | Celiac Disease Panel | | 01/14/2021 11 |
| Other | Complete Metabolic Panel | | 01/14/2021 11 |

- **Type:** Each order is assigned a type, when grouping by this value you can see all labs, radiology, surgery, etc. Then the list will sort per patient in each group.

| Arranged By: Type | | | |
|--|---------------------|--|----------------------|
| Other | | | |
| Labs | | | |
| Scheduling | | | |
| Referrals | | | |
| Gumdrop, Billy Male Next Appt: N/A Age: 53y 06/18/1968 | | | |
| Referrals | Cardiology Referral | | 01/20/2021 11:40PM (|
| Referrals | ENT Referral | | 01/20/2021 11:40PM (|
| Referrals | ENT Referral | | 01/20/2021 11:16PM (|
| Referrals | Cardiology Referral | | 01/20/2021 11:16PM (|
| Test, Angie Male Next Appt: N/A Age: 13d 08/20/2021 | | | |
| Referrals | ADHD Referral | | 06/09/2021 5:03PM (E |

- **Order:** This option will group the orders by their individual descriptions. Then will include each patient with an open order alphabetically.

| | |
|---|--|
| ✓ Open Orders | 99 |
| Unsolicited Labs | 11 |
| <input type="text"/> <input type="button" value="Search"/> <input type="button" value="List"/> <input type="button" value="User"/> <input type="button" value="Filter"/> <input type="button" value="Refresh"/> | |
| Arranged By: Order | |
| + 15 minutes | |
| + 20 minutes | |
| [-] Acute Hepatitis Panel (4) | |
| ONE, TESTPATIENT | Female Next Appt: N/A Age: 52y 01/01/1969 |
| Labs | 08/11/2021 11:28AM (EDT) Laitala, David Open |
| [-] ADHD Referral | |
| Test, Angie | Male Next Appt: N/A Age: 13d 08/20/2021 |
| Referrals | 06/09/2021 5:03PM (EDT) Laitala, David Open |
| [-] Alkaline Phosphatase, Serum | |
| Gumdrop, Billy | Male Next Appt: N/A Age: 53y 06/18/1968 |
| Labs | 01/20/2021 11:40PM (EDT) Stevens, Heather Open |
| Labs | 01/20/2021 11:16PM (EDT) Stevens, Heather Open |

- Date: This option will group by the order date, in ranges (see below).

| | |
|------------------------------|--|
| Arranged By: Order Date | |
| + Date: This Week | |
| + Date: Last Week | |
| + Date: Two Weeks ago | |
| [-] Date: Three Weeks ago | |
| ONE, TESTPATIENT | Female Next Appt: N/A Age: 52y 01/01/1969 |
| Labs | Acute Hepatitis Panel (4) 08/11/2021 11:28AM |
| Stranger, Jameson | Male Next Appt: N/A Age: 21y 08/13/2000 |
| Labs | Hemoglobin A1c 08/13/2021 10:30AM |
| Test, Chandler D. (Chandler) | Male Next Appt: 09/02/2021 12:30PM Age: 23y 11/01/1997 |
| Labs | CBC (INCLUDES DIFF/PLT) 08/11/2021 3:49PM |
| + Date: Last Month | |

- Ordered By: The ordered by (which cannot be edited once the order has been placed), will group by that user. Then will include each patient's orders that match that criteria.

| | |
|-----------------------|--|
| Arranged By: Order By | |
| + Cassidy, Wes | |
| + Daoud, Cliff | |
| + Head, Chandler | |
| + Kakasuleff, Carly | |
| [-] Laitala, David | |
| ONE, TESTPATIENT | Female Next Appt: N/A Age: 52y 01/01/1969 |
| Labs | Acute Hepatitis Panel (4) 08/11/2021 11:28AM |
| Test, Angie | Male Next Appt: N/A Age: 13d 08/20/2021 |
| Referrals | ADHD Referral 06/09/2021 5:03PM |

- Appt. Date (Appointment Date): This option, typically used by surgery schedulers, will allow you to sort by and assigned appointment date and time on the order.

| Arranged By: Appointment Date | | |
|--|------------------------------|-----------------------|
| Date: This Week | | |
|  Test, Danielle Female | Next Appt: 02/28/2022 8:00AM | Age: 36y 01/01/1985 |
| Scheduling | Return to office (Months): 6 | 08/30/2021 12: |
| Date: Last Week | | |
|  Test, Charles A. (Tony) Male | Next Appt: N/A | Age: 53y 10/14/1967 |
| Labs | CBC w Diff w/o Plt | 08/26/2021 12: |
| Date: Two Weeks ago | | |
|  Hula, Test Male | Next Appt: N/A | Age: 4.11y 09/19/2016 |
| Labs | CBC w Diff w Plt | 08/17/2021 12: |
| Date: Three Weeks ago | | |

- **Processor:** This will create groups for the assigned processor of the Order Item. Sorted by patient thereafter.

| Arranged By: Processor | | |
|--|------------------------------|---------------------|
| eLabs | | |
| Head, Chandler | | |
| Nurse | | |
| Office Staff | | |
|  Couchpotato, Jackson Male | Next Appt: N/A | Age: 43y 09/15/1977 |
| Scheduling | Return to office ASAP | 01/14/2021 9: |
|  Ford, Harrison (Indy) Male | Next Appt: N/A | Age: 71y 02/25/1950 |
| Scheduling | Return to Office - ASAP | 02/25/2021 10: |
|  Gumdrop, Billy Male | Next Appt: N/A | Age: 53y 06/18/1968 |
| Scheduling | Return to office in 3 months | 01/20/2021 11: |
| Scheduling | Return to office in 3 months | 01/20/2021 11: |

User Setting: Automated Dialysis Letter Template

The setting is used in the Dialysis Visit Note documentation process. For practice's that utilize the integrated electronic fax feature, you may determine which letter is automatically sent out when a Dialysis Visit Note is signed off. This setting allows each user in the practice to have a different default letter that is sent.

A zero value indicates that the automated letter is turned off and the Fax Letter link will not be displayed. Otherwise, set the desire letter ID found in the Letter Setup screen.

Default Value: 0

User Setting: Automated Fax Auto Send

The setting is used to enable or disable the electronic faxing of a letter after a SOAP Note is signed off by a user. This setting is dependent on the My Fax integration being setup for your practice and several other user

settings must be configured correctly.

Default Value: Off

Options:

- Off: letters will not be auto-faxed after sign-off
- On: letter will be auto-faxed after sign-off

User Setting: Claim Search Time Period

The setting is used to determine how far in the past our application searches when adding claims to a deposit in the [Payment Posting Process](#). If you commonly post older claims, update this setting accordingly.

Deposit Detail -- Webpage Dialog

Deposit Actions

| ID | 841 | Check # | 12345 | Deposit | \$25.00 |
|-----------|-----------------|------------|-----------------|-------------|---------|
| Type | EOB | Payer | Medicare Part B | Payments | \$0.00 |
| Status | New | Pay Method | Check | Adjustments | \$0.00 |
| Deposited | 05/03/2020 | Issued | 05/03/2020 | Exclusions | \$0.00 |
| Pay Type | Insurance Check | | | | |

Add Human Readable EOB

Deposit Errors

Deposit Claims

Attach/Find Claim test

| Claim Xref | Claim ID | Charged | Paid | Allowed (B6) | Dec |
|------------|------------|---------|------|---------------|----------|
| 30700 | | | | 9522 Test | Dearborn |
| 30713 | | | | 9464 Blake | Test |
| 30714 | | | | 24977 Austin | Test |
| 30868 | | | | 9392 Ellen | Test |
| 30811 | 01/06/2020 | | | 9464 Blake | Test |
| 30813 | 01/10/2020 | | | 24798 test | hula |
| 30815 | 01/14/2020 | | | 9797 test | ccd-john |
| 30817 | 01/20/2020 | | | 24798 test | hula |
| 30823 | 02/05/2020 | | | 24814 Test | King |
| 30828 | 02/05/2020 | | | 24996 Michell | Test |

No records found

10 of 88 results

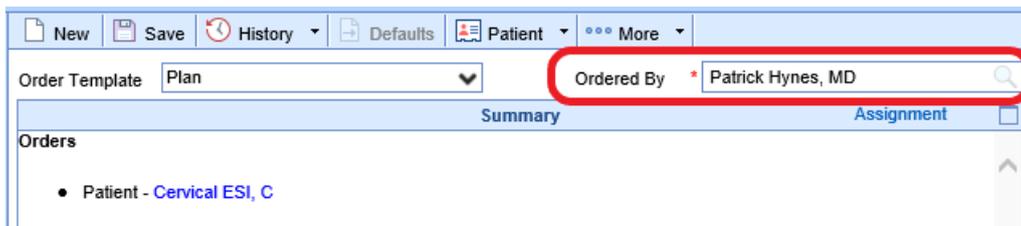
Default Value: 365

Options:

- Number (days)

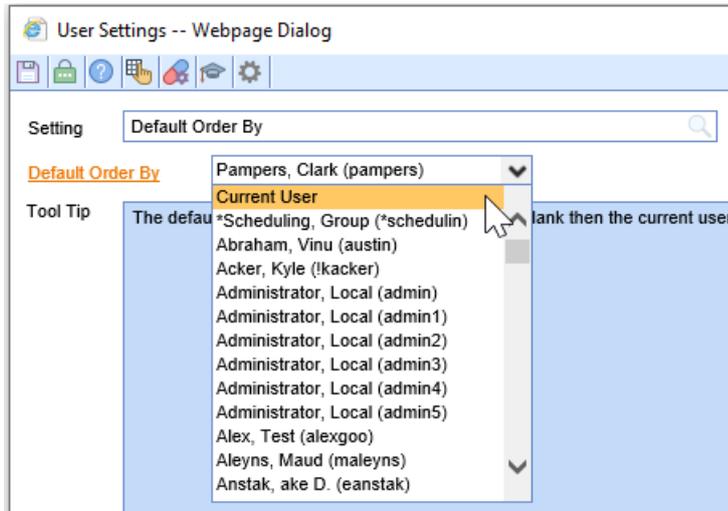
User Setting: Default Order By

This setting will allow ancillary staff to set their **Ordered By** to the provider they work with on a daily basis. This can save staff time and assist in the correct processing for orders awaiting results. For more information on ordered by, [click here](#).



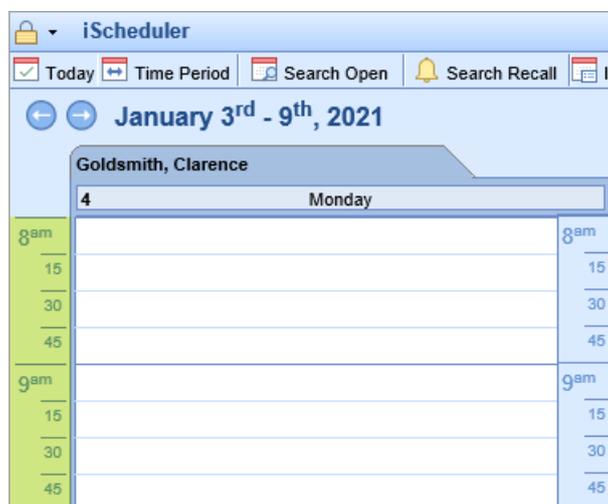
Default Value: Blank (current user will default)

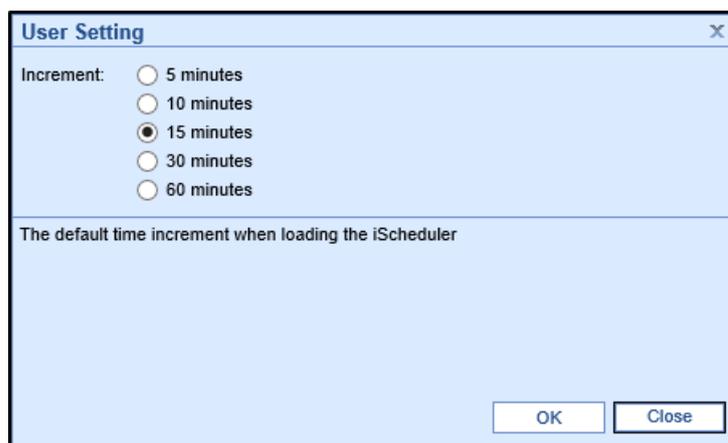
Options: Drop-down of active users



User Setting: Default Time Increment

This sets the default increments in iScheduler for each user.





Changing the Default Time Increment

1. Select the **Binoculars** in the top right corner
2. Filter by **User Settings**
3. Enter the setting name **Default Time Increment**
4. Update the setting and choose **OK** to save.

User Setting: Display Amounts within Superbill

The setting is used to determine if a user can see the dollar amount associated with charges on the Superbill. This setting affects both OfficeEMR Mobile and the desktop.

Default Value: Yes

Options:

- Yes - Charge amounts will be displayed
- No - Charge amounts will not be displayed

User Setting: Display detailed medication information in Summary

The setting is used to determine if the Medication section of the Summary chart tab displays a medications SIG information or if it only displays the drug name and dosage.

When the setting is off, the Summary window will display medication information like this:

Is ▾ Copy Patient ▾ More ▾ ⚠

| Allergies | Medications | History |
|-----------|--|---|
| | Lipitor 10 mg tablet Toprol XL 50 mg tablet,extended release vitamins ORAL | Personal history of ma Elevated PSA Malignant neoplasm o Male stress incontinen History of urinary calculi Urinary frequency |

When the setting is on, the Summary window will display medication information like this:

Details ▾ Copy Patient ▾ More ▾ ⚠

| Allergies | Medications | History |
|-----------|--|---|
| | Lipitor 10 mg tablet <i>TABLET</i> Toprol XL 50 mg tablet,extended release <i>Tablet Sustained Release 24 hr</i> vitamins ORAL | Personal history of m Elevated PSA Malignant neoplasm c Male stress incontine History of urinary calculi Urinary frequency |

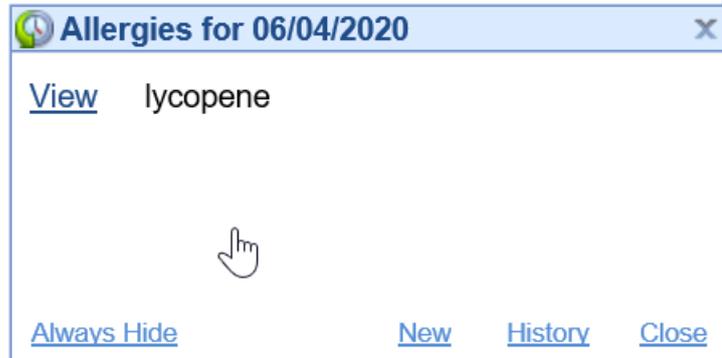
Default Value: Off

User Setting: Display Today's Allergy History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Allergies chart tab if new information has been added for that day.



Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Display Today's Assessment History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Assessments chart tab if new information has been added for that day.

Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Display Today's Chart Share History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Chart Share chart tab if new

information has been added for that day.

Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Display Today's Extension History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Patient Extension chart tab if new information has been added for that day.

Default Value: Off

Options:

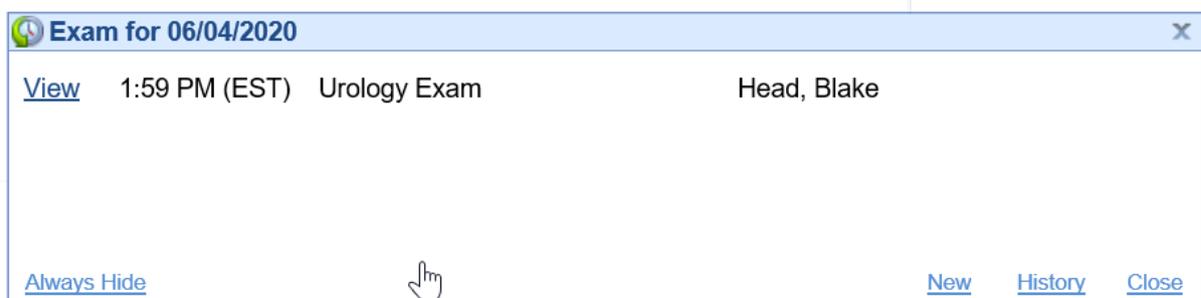
- On (checked) and Off (unchecked)

User Setting: Display Today's Exam History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Exams chart tab if new information has been added for that day.



Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Display Today's Goal History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Goals chart tab if new information has been added for that day.

Default Value: Off

Options:

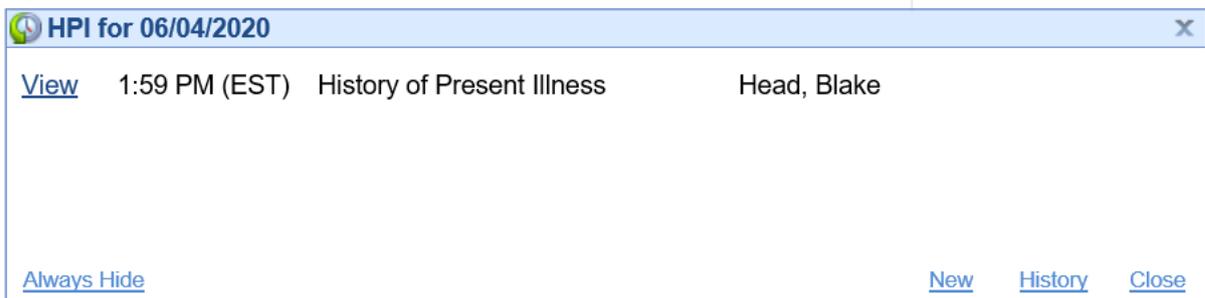
- On (checked) and Off (unchecked)

User Setting: Display Today's History of Present Illness (HPI) History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the History of Present Illness (HPI) chart tab if new information has been added for that day.



Default Value: Off

Options:

- On (checked) and Off (unchecked)
-

User Setting: Display Today's Letter History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded. This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Letters chart tab if new information has been added for that day.

Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Display Today's Order History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded. This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Orders chart tab if new information has been added for that day.

Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Display Today's Patient Education History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded. This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Patient Education chart tab if new information has been added for that day.

Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Display Today's Prescription History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded. This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Prescriptions chart tab if new information has been added for that day.

Default Value: Off

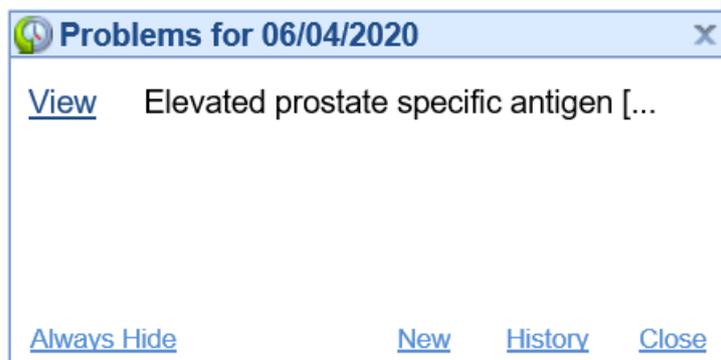
Options:

- On (checked) and Off (unchecked)

User Setting: Display Today's Problem List History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded. This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Problem List chart tab if new information has been added for that day.



Default Value: Off

Options:

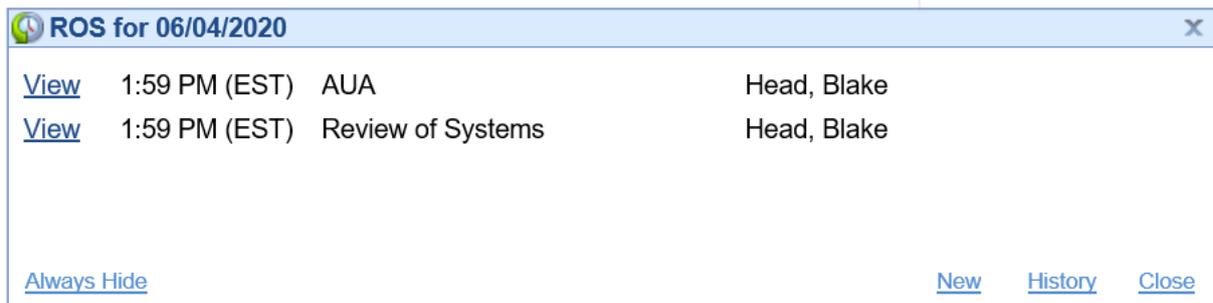
- On (checked) and Off (unchecked)
-

User Setting: Display Today's Review of System (ROS) History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Review of Systems (ROS) chart tab if new information has been added for that day.



Default Value: Off

Options:

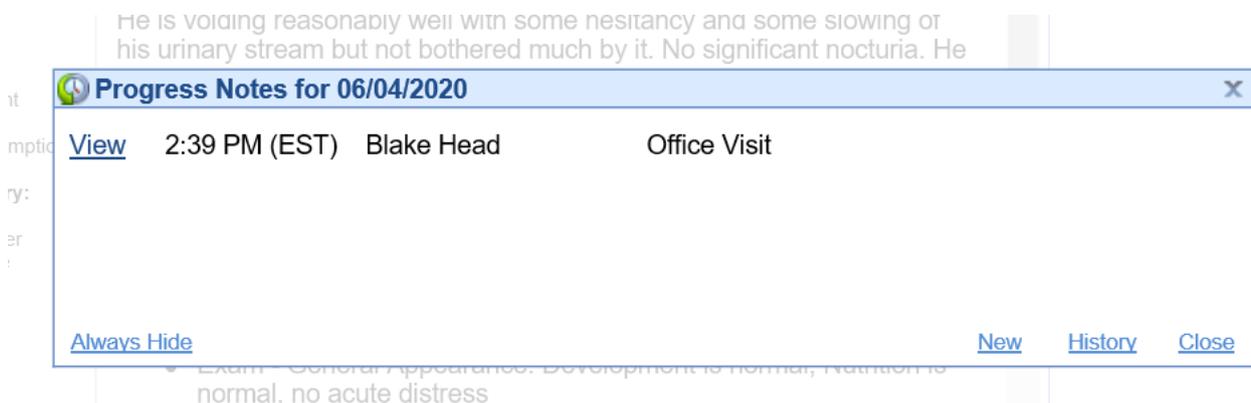
- On (checked) and Off (unchecked)

User Setting: Display Today's SOAP Note History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the SOAP Note chart tab if new information has been added for that day.



Default Value: Off

Options:

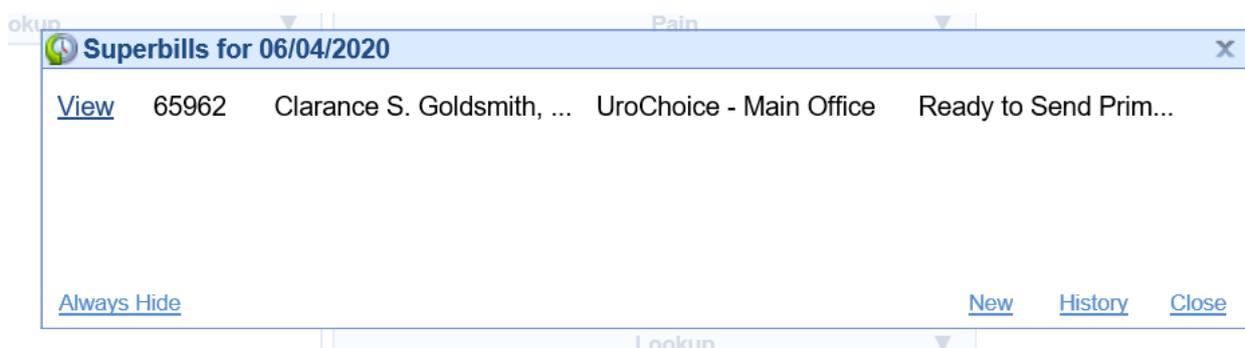
- On (checked) and Off (unchecked)

User Setting: Display Today's Superbill History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Superbill chart tab if new information has been added for that day.



Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Display Today's Treatment Plan History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Treatment Plan chart tab if new information has been added for that day.

Default Value: Off

Options:

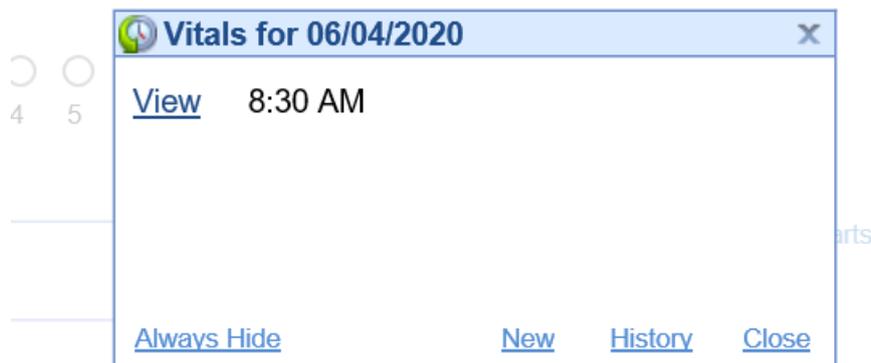
- On (checked) and Off (unchecked)
-

User Setting: Display Today's Vitals History

The setting is used to determine if the 'Display Today's History' pop-up is shown when a chart tab is loaded.

This is a very useful setting to see if someone (including yourself) has already saved data on a chart tab on a given day.

When this setting is active, the pop-up will be displayed when accessing the Vitals chart tab if new information has been added for that day.



Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: EMR Primary Appointment Color (Background)

The 'EMR Primary Appointment Color (Background)' user setting allows a user to control how the list of appointments appear in the EMR schedule. This setting specifically affects the background color of the appointment block. The color can reflect

This feature is helpful for practices that want a visual indication of either the type of appointment that the patient is scheduled for or the room status of the appointment.

PRO TIP:

Check out the User Setting: EMR Secondary Appointment Color (Right Side Bar) for even more control.

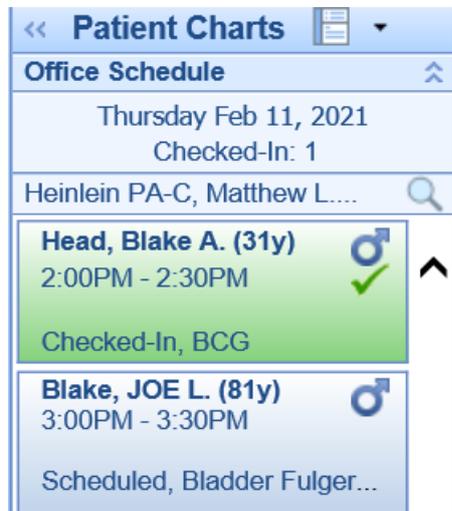
Default Value: 0 - Appointment color background will always be light blue regardless of appointment type or room status.

Options:

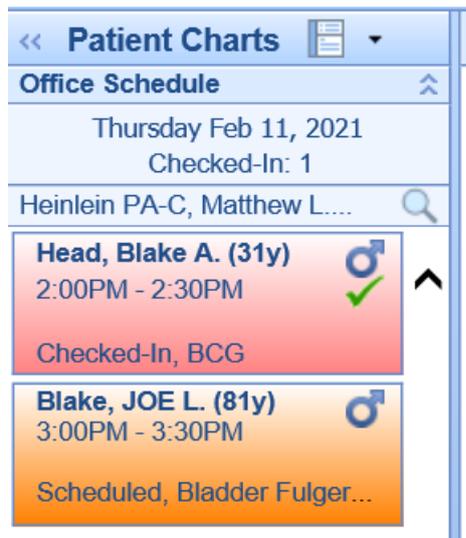
- 0: Appointment color background will always be light blue regardless of appointment type or room status.



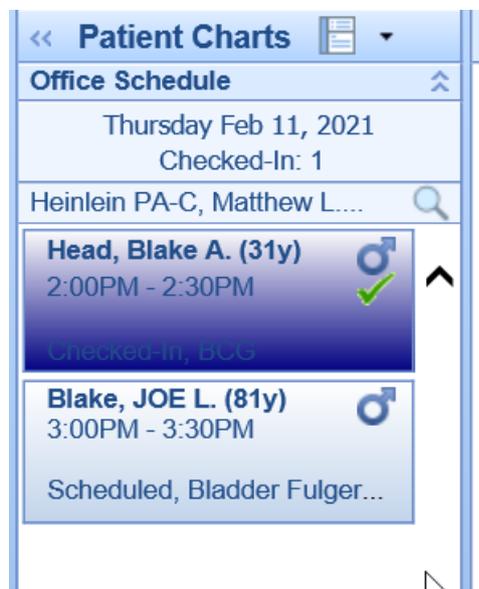
- 1: This option causes the background of the appointment bubble to change based on the Appointment Status. Users can control appointment status colors here: [Appointment Statuses](#)



- 2: This option causes the background of the appointment bubble to change based on the Appointment Type. Users can control appointment types colors here: [Appointment Types](#)



- 3: This option causes background of the appointment bubble to changes based on the Room Status. Users can control room status colors here:



User Setting: EMR Secondary Appointment Color (Right Side Bar)

The 'EMR Secondary Appointment Color (Right Side Bar)' user setting allows a user to control how the list of appointments appear in the EMR schedule. This setting specifically affects the right hand side bar color of the appointment block.

This feature is helpful for practices that want a visual indication of either the type of appointment that the patient is scheduled for or the room status of the appointment.

PRO TIP:

Check out the User Setting: EMR Primary Appointment Color (Background) for even more control.

EMR Primary Appointment Color - Background: 0 - (default) Would not show a color (all appointments same color, light blue), 1 - Appointment Status Color, 2 - Appointment Type Color, 3 - Room Status Color

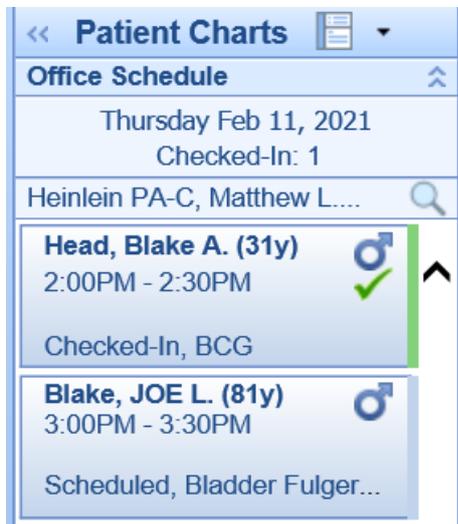
Default Value: 0 - Appointment color background will always be light blue regardless of appointment type or room status.

Options:

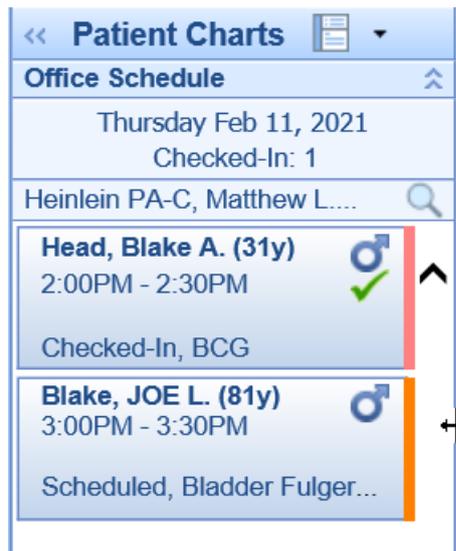
- 0: Appointment color side bar will always be light blue regardless of appointment type or room status.



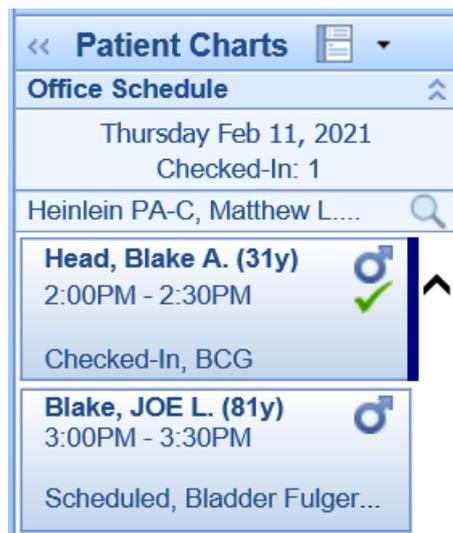
- 1: This option causes the background of the appointment bubble to change based on the Appointment Status. Users can control appointment status colors here: [Appointment Statuses](#)



- 2: This option causes the background of the appointment bubble to change based on the Appointment Type. Users can control appointment types colors here: [Appointment Types](#)



- 3: This option causes background of the appointment bubble to changes based on the Room Status. Users can control room status colors here:



User Setting: EMR Soap Secondary Sign Off Percentage

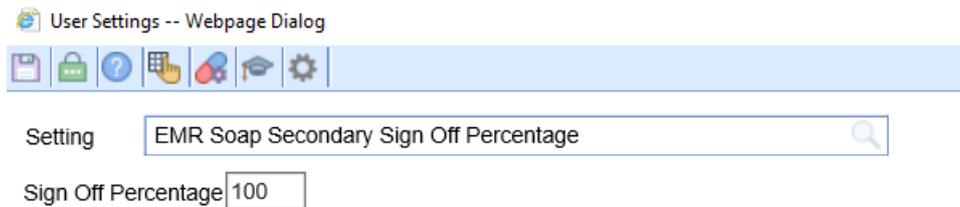
The 'EMR Soap Secondary Sign Off Percentage' is the percentage in which completed SOAP Notes are sent (at random) from the Primary signer to the Secondary signer for additional approval.

This feature is helpful for practices that require certain users to have custom signoff settings for certain note types. For example, if a mid-level provider requires only 5% of their notes to be sent for additional signoff, their Secondary Sign Off Percentage can be adjusted to pull only 5% of their notes to be sent for additional sign off.

PRO TIP:

Check out the [User Sign Off Settings](#) for even more control.

Values should be between 1 and 100. If the secondary sign off percentage for the user is lower than this value then a secondary sign off will be required. If the secondary sign off is greater than this value then randomly a secondary sign off will be required.



Default Value: 100

NOTE:

In order for changes to this setting to apply, the [EMR Soap Secondary Sign Off Percentage Start Date](#) must also be configured.

Your browser does not support HTML5 video.

User Setting: EMR Secondary Sign Off Percentage Start Date

The 'EMR Secondary Sign Off Percentage Start Date' works in coordination with the [EMR Soap Secondary Sign off Percentage](#) in order to calculate when completed Soap Notes will be sent to the Secondary signer.

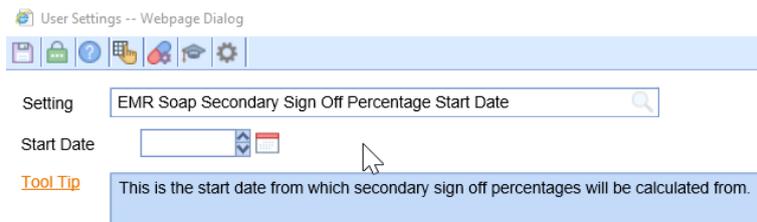
This feature determines the start date from which secondary sign off percentages will be calculated from.

PRO TIP:

Check out the [User Sign Off Settings](#) for even more control.

Default Value: NULL - This field is blank by default.

Options: Date field



Your browser does not support HTML5 video.

User Setting: Finding Narrative (Abnormal)

The setting is used to determine if the Narrative checkbox will be selected by default when using the Abnormal order result findings button on the Order Results Screen. Result findings with the Narrative checkbox selected are part of the Results section in CCDA files generated from the application.

Order Lab Results
✕

Quest

Quest

Requisition ID: DXM6348776 Order #: 1754

| | | | | |
|---|---|--|---|--|
| <small>OfficeEMR Patient Id</small> 23254 | <small>Patient Name</small> Kay, Carly A. (Car) | <small>Sex</small> F | <small>Age</small> 40y | <small>Date Of Birth</small> 07/19/1980 |
| <small>Requisition Number</small> DXM6348776 | <small>Account Number</small> 48894377 | <small>Accession Number/Internal ID</small> NJ6439165 | <small>Date and Time Collected</small> 03/22/2021 2:03pm | <small>Reported Date</small> 03/23/2021 |

| Name | Value | Flag | Range | UOM | Status | Date | Lab |
|--|-------------|----------|-----------------|--------------|----------|-----------------|------------|
| SARS COV 2 AB (IGG) SPIKE, SEMI QN (ASTON C HEINLEIN) | | | | | | | |
| <small>Received:</small> Date: Tue Mar 23 00:43:00 2021 Reported: Tue Mar 23 10:47:00 2021 | | | | | | | |
| SARS COV 2 AB (IGG) SPIKE, SEMI QN | 2.54 | H | <1.00 | index | F | 03/23/21 | QTI |

Reference Range:
INDEX INTERPRETATION
<1.00 Negative
> or = 1.00 Positive

This test is intended to help identify individuals with antibodies to SARS-CoV-2 (COVID-19). The presence of

Result Findings/Activities

Add Result Findings/Activities
📄 ↗

Finding/Activity
Patient COVID AB positive

✔
❗

Ord. Prod Abnormal Results Group

Order Status Closed

Send to MML (Connected)

Comments to Patient

Rsult Processor Result User or Group

Set Result Status to Closed

Finding Narrative

Save

Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Finding Narrative (Normal)

The setting is used to determine if the Narrative checkbox will be selected by default when using the Normal order result findings button on the Order Results Screen. Result findings with the Narrative checkbox selected are part of the Results section in CCDA files generated from the application.

Order Lab Results
Requisition ID: DXM6348776 Order #: 1754

Quest

Quest

| | | | | |
|----------------------------------|--|---|--|-----------------------------|
| OfficeEMR Patient Id 23254 | Patient Name Kay, Carly A. (Car) | Sex F | Age 40y | Date Of Birth 07/19/1980 |
| Requisition Number DXM6348776 | Account Number 48894377 | Accession Number/Internal ID NJ643916S | Date and Time Collected 03/22/2021 2:03pm | Reported Date 03/23/2021 |

| Name | Value | Flag | Range | UOM | Status | Date | Lab |
|---|-------------|----------|-----------------|--------------|----------|-----------------|------------|
| (ASTON C HEINLEIN) ▲ | | | | | | | |
| SARS COV 2 AB (IGG) SPIKE, SEMI QN | | | | | | | |
| Received: Date: Tue Mar 23 00:43:00 2021 Reported: Tue Mar 23 10:47:00 2021 | | | | | | | |
| SARS COV 2 AB (IGG) SPIKE, SEMI QN | 2.54 | H | <1.00 | index | F | 03/23/21 | QTI |

Reference Range:
INDEX INTERPRETATION
<1.00 Negative
> or = 1.00 Positive

This test is intended to help identify individuals with antibodies to SARS-CoV-2 (COVID-19). The results of

Result Findings/Activities

Add Result Findings/Activities

Finding/Activity: Results were within normal range.

!

Ord. Processor:

Order Status:

Send to MML (Connected)

[Comments to Patient](#)

Rsult Processor:

Set Result Status to Closed

Finding Narrative

Default Value: Off

Options:

- On (checked) and Off (unchecked)

User Setting: Hide Order Processor and Status in Result Findings

The setting is used to determine if the Order Processor and Status fields are displayed in the Result Findings/Activities screen. When checked, Company Setting: *Hide Order Processor and Status in Result Findings* will hide the Order Processor and Order Status fields from the Result Findings/Activities screen.

The screenshot shows a window titled "Add Result Findings/Activities". It contains the following elements:

- Finding/Activity:** A text input field.
- Ord. Processor:** A dropdown menu showing "Order User or Group".
- Order Status:** A dropdown menu showing "Order Status".
- Send to MML:** A checkbox labeled "Send to MML (Not Connected)".
- Comments to Patient:** A text area.
- Rslt Processor:** A dropdown menu showing "*Support Nurses".
- Set Result Status to Closed:** A checkbox.
- Finding Narrative:** A checkbox.
- Refresh results list after save:** A checkbox.
- Save:** A button at the bottom right.

Default Value: Off

Options:

- On (checked) and Off (unchecked)
- *Apply to all users* checkbox (enables it for "all users").

User Setting: Maximum claims per deposit page

The setting is used on the Deposit Management window in Billing. A user can set the maximum number of claims displayed in the deposit management window before a new page is created.

Default Value: 10

User Setting: Patient Search Maximum Rows

This setting is used to modify the number of maximum rows returned when searching for a patient in the desktop or mobile applications.

Default Value: 50

Option: Number

Steps

1. Open User Settings ([Accessing User Settings](#))
2. Search "Patient Search Maximum Rows"
3. Type a number into the field
4. Save

NOTE: A large search parameter could cause a slight delay in returning results.

User Setting: Problem List Favorite Search Days

The 'Problem List Favorite Search Days' user setting allows a user to choose how far back in time to look when generating the 'Favorites List' in the [Problem List](#) chart tab. This setting works in conjunction with the [Problem List Favorite Search Type](#) user setting.

The reason this setting exists is so that the favorites list displayed shows relevant and timely data. For example, if no time frame existed, iSalus would build a list of favorites based on all of the data in the system. This becomes problematic when a specific code that was used commonly is no longer an acceptable code. Without this setting, you would have to use the "acceptable" code for several years to surpass the "unacceptable" code by usage. However, when a time frame is added, the "unacceptable" code will be used less in this smaller time frame compared to the "acceptable" code.

Default Value: 365 days

Options:

- **Search Days:** Set this to a number of days in the past to look

User Setting: Problem List Favorite Search Type

The 'Problem List Favorite Search Type' user setting allows a user to choose which data is returned in the 'Favorites List' in the [Problem List](#) chart tab. Users may find it helpful to change this setting so that the list of favorite items returned are either more or less specific based on usage patterns.

Default Value: Company

Options:

- **Company:** This option shows the top most used problem list items across the entire patient population. This setting works in conjunction with the 'Problem List Favorite Search Days' user setting.
- **User:** This option shows the top most used problem list items for the logged in user. This setting works in conjunction with the 'Problem List Favorite Search Days' user setting.
- **Original Search:** This option shows the top most used problem list items across the entire patient population. No time restrictions are applied when using this search.

User Setting: Problem List Favorites Search Max Rows

The 'Problem List Favorite Search Max Rows' user setting allows a user to choose how many items are return in

the 'Favorites List' in the **Problem List** chart tab.

Change this setting in order to limit or expand the number of rows you see in the 'Favorites List'.

Default Value: 100

Options:

- **Max Rows:** This is a numeric value that represent how many rows will be returned

User Setting: Problem List Summary View

The 'Problem List Summary View' user setting allows a user to decide how the list of problems display on the **Problem List** chart tab.

Most users will use the more modern view, however, some users may choose to revert to the older layout of this window.

Default Value: Text

Options:

- **Text:** This option display the data in a more modern, easy to understand format.

| | |
|---|--------------------|
| D291 Benign neoplasm of prostate (disorder) New sx occurred today. Notice odd pain in left leg that was not there before. Will send for MRI and recheck in 3 weeks. | 06/18/2017 |
| 1 | 08/20/2019 5:51PM |
| N401 Benign prostatic hyperplasia (disorder) No Notes | 08/22/2018 |
| 2 | 08/22/2018 11:18AM |
| E1121 Diabetic renal disease (disorder) Being treated by PCP Dr. Joe. Using lantis. | 11/05/2018 |
| 3 | 11/05/2018 1:53PM |
| N200 Kidney stone (disorder) SCHEDULED an ESWL. Will take place next week. Follow-up 4 weeks after. | 11/13/2018 |
| 4 | 07/29/2019 2:21PM |
| N3281 Bladder muscle dysfunction - overactive (disorder) Worse after subdural hematoma. Exhausting wife after bringing him home. Foley for one month and reassess. | 02/12/2019 |
| 5 | 02/12/2019 1:37PM |

- **Table:** This display the data in a grid view. This is the 'older' way of looking at the data.

| Alert | P | Code | Description | Onset | Modified | Note |
|---|---|-------|------------------------------------|------------|--------------------|----------------------------------|
| | 1 | D291 | Benign neoplasm of prostate (...) | 06/18/2017 | 08/20/2019 5:51PM | New sx occurred today. Notice... |
| | 2 | N401 | Benign prostatic hyperplasia (...) | 08/22/2018 | 08/22/2018 11:18AM | |
|  | 3 | E1121 | Diabetic renal disease (disord...) | 11/05/2018 | 11/05/2018 1:53PM | Being treated by PCP Dr. Joe.... |
| | 4 | N200 | Kidney stone (disorder) | 11/13/2018 | 07/29/2019 2:21PM | SCHEDULED an ESWL. Will tak... |
| | 5 | N3281 | Bladder muscle dysfunction - ... | 02/12/2019 | 02/12/2019 1:37PM | Worse after subdural hemato... |

User Setting: Procedure List for Vitals Timeline Wireframe

Summary

The setting is used to identify a list of procedure codes should be added to the Vitals Timeline graph when a user selects the **Procedures** icon. This can be a specific list of codes separated by a comma (i.e. 99213, 99205) or a range of codes (99203-99205).

This setting works in unison with the Company Setting of the same name. If the company setting is set and the user setting is not, the company setting will be applied.

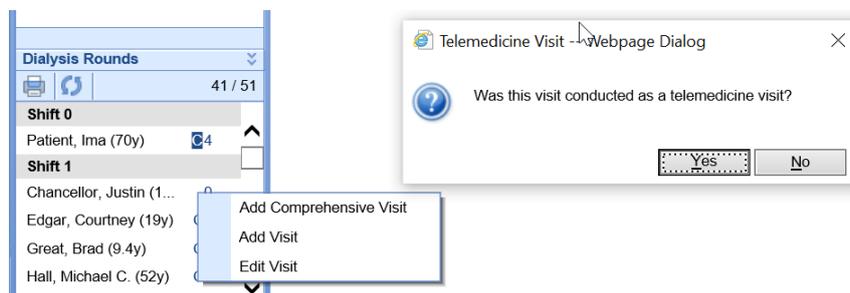
Default Value: blank

Options: A comma separated list of procedure codes and/or a range of cpt codes. Also, 'NONE' can be added to force the procedures off for the user.

User Setting: Prompt for Dialysis Visit delivery mechanism

The setting is used to determine if a user would like to be prompted to indicate how a Dialysis Visit was delivered. The options will be either in-person or via telemedicine.

This setting will affect both the EMR and Mobile devices.



Please note, some practice may have the Company Setting: Open Dialysis Visits Chart Tab when Adding Visits enabled. If this is the case, the user will not receive the prompt. Rather, the user will be expected to use the Dialysis Visits chart tab to indicate if the visit was conducted via Telemedicine.

Dialysis Visits for October 2020

| Visit | Date | Prov. | Modality | Template | Comments |
|---------------|------------|-------|------------------------|----------|----------|
| Visit 1 (C,T) | 10/28/2020 | CJD | In-Center Hemodialysis | | |

Visit * 10/28/2020 Comprehensive Comment Delivered via Telemedicine

Provider * Dietzen M.D., Charles J.

Location * iSALUS Healthcare

Modality * In-Center Hemodialysis

Template

Summary



Default Value: Off

Options:

- Off - Users will not be prompted
- On - Users will be prompted

User Setting: Run Real Time Prescription Benefit Check (RxBC)

The 'Run Real-Time Prescription Benefit Check (RxBC)' user setting allows a user to decide if the Benefit Check box is selected by default on the prescription pad for a user. This option is only available for users who use the CoverMyMeds integration.

Parameters

Checked = 'Benefit Check' checkbox will be checked for each prescription printed/sent/queued

Unchecked = 'Benefit Check' checkbox will need to be selected manually for each prescription to determine price estimates and initiate electronic prior authorizations.

Rx **Newhart MD, George E.**
1234 Test Street Tupelo, MS 38801-4749
Phone: (317) 687-8119 DEA: AM8064228

Prescribe

Patient: Head, Blake A. 03/20/1989(31y) Male **Written:** 04/20/2020
Phone (317) 956-7909

Drug: Test N'Go Test strips

Sig: 2 STRIP UNKNOWN before meals and at bedtime

Dispense: 1 Strip

Refills: **Effective:** **Void:** **Dispense as Written:** Yes

Note:

Pharmacy: KROGER DELTA 471 (662) 840-8

Diagnosis:

Benefit Check [Coverage](#) [Save](#) [Print](#) [Send](#)

[More+](#)

Perform a Real Time Benefit Check before printing or sending a prescription.

User Setting: Search List Type

The 'Search List Type' user setting allows a user to decide which code set the system search against by default in the [Problem List](#) chart tab.

Default Value: SNOMED Problem

Options:

- **ICD:** This option causes the problem list to search against the diagnosis codes that have been added to the system via Setup > Diagnosis Codes.
- **SNOMED Problem:** This option causes the problem list to search against a SNOMED library that are linked to problems. The 'Problem' option means that the SNOMED value can cross-walk into an ICD code.
- **SNOMED Full:** This option causes the problem list to search against a SNOMED library. This option search across all possible SNOMED terms, regardless if it can be linked to an ICD code.

SNOMED is an industry standard codification mechanism that provides "physician friendly" naming schemes and abbreviations.

User Setting: Timezone Zip Code

The setting is used to determine how times in the system are displayed for the individual user that is logged in. This is a very useful setting for practices that have offices in multiple time zones. Users should enter the zip code of where they are physically located and our system will display time zones based on that.

Keep in mind that this setting over rides the default time zone for the practice. The default time zone for the practice is derived from the Company Profile.

Default Value: Blank (this means the Company Profile controls this)

Options:

- Blank - Company Profile zip code will be used
- Zip Code Supplied - Time zone will be based off of this

Changing the Company Profile Time Zone

1. Navigate to **Setup > Company Profile**
2. Select the **Demographics** tab
3. Update the **Zip** field

Setup: Company Profile

Practice Profile

rna
RICHMOND NEPHROLOGY ASSOCIATES

New Save Train

Application

Title * Choice

Demographics

Name * Urologic

NPI 1508886805

Tax ID * 64-0503353

Specialty Urology

Description * Urology Professional Association Db a Urologic

Website http://urologic.ms/

Address

Address 1 * 1234 Test Street

Address 2

City * Oak Ridge

State * TN Country USA Zip * 37830

Summary

Demographics

Contacts

User Setting: User Reported Rx - My Favorites Default Search Settings

The Reported My Favorite Rx Search Settings are the default display options when displaying drug searches and favorites' lists in the patient reported screen. Follow these steps to [access the User Rx Settings](#).

Default Value: Checkboxes not selected

Options:

- Default to Patient Reported - when selected, the prescriptions chart tab will open by default to the patient reported search/favorites screen. This is useful for ancillary medical staff who primarily add patient reported medications.
- Display Route - when selected, this option displays prescriptions at the route level by default when performing a drug search. This is the highest level of a prescription and cannot be used when printing/sending prescriptions. It is useful when documenting patient reported drugs where the patient only knows the name of a medication he/she is currently taking.
 -
- Display Dosage - when selected, this option displays prescriptions at the dosage level by default when performing a drug search. Similar to the Route level, the dosage level cannot be used when printing/sending prescriptions. It is useful when documenting patient reported medications.
 -
- Display Strength - when selected, this option displays the prescriptive level of a medication by default when performing a drug search. This level is required for printed/sent prescriptions.

-
- [Auto Expand](#) - when selected, this option displays all selected levels (route, dosage and/or strength) of drugs when performing a drug search.
- [Max Rows](#) - the maximum number of search results returned when performing a drug search.

User Setting: User Reported Rx - Default Reported Favorites List

This setting selects a user's default Reported Rx Favorites list. The selected Favorites list will display by default for a new patient reported medications instead of the Drug Search. Follow these steps to [access the User Rx Settings](#). Then select the Favorites link.

□

Default Value: Blank

Options:

- Blank - no Rx Favorites list is set for the user. The drug search will load by default for new prescriptions.
- Selected Favorites List - the default Reported Rx Favorites list that will load by default for new reported medications.

□

User Setting: User Rx History - Default Status

This setting selects a user's default Rx History statuses. These are the statuses of drugs that will display by default in the Medication History screen. The normal statuses selected are Current and New. Follow these steps to [access the User Rx Settings](#). Then select the Rx History tab.

□

Default Value: Blank

Options:

- Blank - no drugs are set to display in the Rx History for the user by default.
- Selected Statuses - the default statuses for drugs that will display in the Rx History for the user by default.

□

User Setting: User Rx Pad - Alert Text

This setting stores a user's default prescription alert text. The Alert is a note from the prescriber to the pharmacy. Example Alert Text "Please provide Spanish patient education". Follow these steps to [access the User Rx Settings](#).

Default Value: Blank

Options:

- Blank - Alert text is blank by default for new prescriptions.
- Alert Text Supplied - Alert text is defaulted to the supplied value for new prescriptions.

User Setting: User Rx Pad - Default Dispense as Written to Yes

This setting stores the default new prescription Dispense as Written value. Most prescribers will turn this setting to not selected. Follow these steps to [access the User Rx Settings](#).

Default Value: On

Options:

- On - Dispense as Written is set to "Yes" by default for new prescriptions.
- Off - Dispense as Written is set to "No" by default for new prescriptions.

User Setting: User Rx Pad - Default RxPad Favorites List

This setting selects a user's default Rx Favorites list. The selected Favorites list will display by default for a new prescription instead of the Drug Search. Follow these steps to [access the User Rx Settings](#). Then select the Favorites link.

Default Value: Blank

Options:

- Blank - no Rx Favorites list is set for the user. The drug search will load by default for new prescriptions.
- Selected Favorites List - the default Rx Favorites list that will load by default for new prescriptions.

User Setting: User Rx Pad - My Favorites Default Search Settings

The My Favorite Rx Search Settings are the default display options when displaying drug searches and favorites' lists. Follow these steps to [access the User Rx Settings](#).

Default Value: Checkboxes not selected

Options:

- Display Route - when selected, this option displays prescriptions at the route level by default when performing a drug search. This is the highest level of a prescription and cannot be used when printing/sending prescriptions. It is useful when documenting patient reported drugs where the patient only knows the name of a medication he/she is currently taking.
 -
- Display Dosage - when selected, this option displays prescriptions at the dosage level by default when performing a drug search. Similar to the Route level, the dosage level cannot be used when printing/sending prescriptions. It is useful when documenting patient reported medications.
 -
- Display Strength - when selected, this option displays the prescriptive level of a medication by default when performing a drug search. This level is required for printed/sent prescriptions.
 -
- Auto Expand - when selected, this option displays all selected levels (route, dosage and/or strength) of drugs when performing a drug search.
- Max Rows - the maximum number of search results returned when performing a drug search.

User Setting: User Rx Pad - My Therapeutic Classes Default Search Settings

The My Therapeutic Classes Rx Search Settings are the default display options when displaying drug searches by therapeutic class. Follow these steps to [access the User Rx Settings](#).

Default Value: Checkboxes not selected

Options:

- Display Route - when selected, this option displays prescriptions at the route level by default when performing a drug search. This is the highest level of a prescription and cannot be used when printing/sending prescriptions. It is useful when documenting patient reported drugs where the patient only knows the name of a medication he/she is currently taking.
 -
- Display Dosage - when selected, this option displays prescriptions at the dosage level by default when performing a drug search. Similar to the Route level, the dosage level cannot be used when printing/sending prescriptions. It is useful when documenting patient reported medications.
 -
- Display Strength - when selected, this option displays the prescriptive level of a medication by default when performing a drug search. This level is required for printed/sent prescriptions.
 -
- Auto Expand - when selected, this option displays all selected levels (route, dosage and/or strength) of drugs when performing a drug search.
- Max Rows - the maximum number of search results returned when performing a drug search.

User Setting: User Rx Pad - Default Status



This setting is used to set the default status for a newly saved prescriptions/medications. Most users will set this value to either current for ancillary medical staff or new for prescribers. Follow these steps to [access the User Rx Settings](#).

Default Value: Ineffective

Options:

- Allergic Reaction
- Change
- Completed
- Current
- Discontinue
- Discontinue Financial
- Drug Interaction
- Error
- Expired
- Hold
- Ineffective
- Needs Dr. Approval
- New
- Other
- Overdosed
- Renew
- Side Effects
- Stopped

User Setting: User Rx Pad - Oral Code

This setting stores a prescriber's oral code which is then used for printed/sent prescriptions. Oral codes are a state specific code used in the State of Hawaii. Follow these steps to [access the User Rx Settings](#).

Default Value: Blank

Options:

- Blank - Oral Code is not printed/sent on prescriptions
- Oral Code Supplied - Oral Code will be provided on printed/sent prescriptions

User Setting: User Rx Print Report

This setting stores a user's default prescription print layout. Most users will select the "Rx Custom" option and work with Support/Implementation to create a standard printed prescription layout. Follow these steps to [access the User Rx Settings](#).

Default Value: 1/3 Sheet Prescription Pad

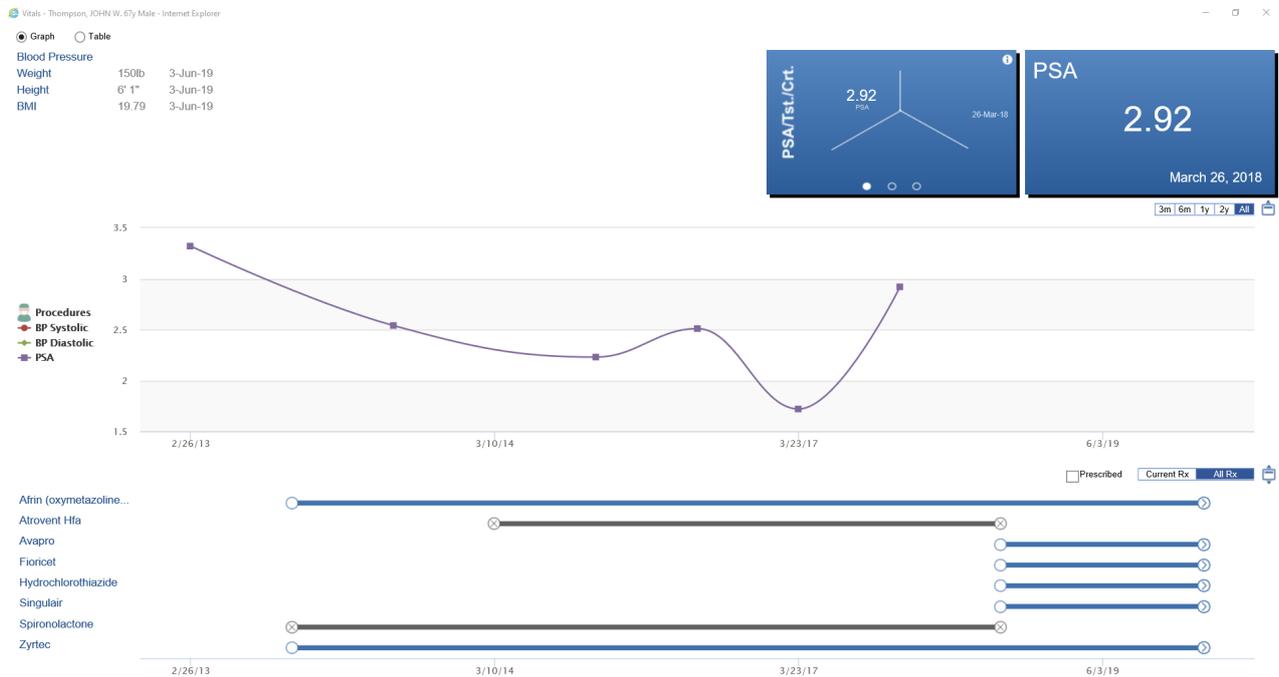
Options:

- 1/3 Sheet Prescription Pad
- Indiana, 1/4 Page w/Sig
- Prescription Label
- Prescription Pad (Custom 1)
- Prescription Pad (Custom 2)
- Prescription Pad (Custom Hawaii)
- Rx Custom
- Thermal Prescription Pad
- Thermal Prescription Pad (Custom Indiana)

User Setting: Vitals Summary Table View

The setting is used to determine if the Table View or the Graph View is displayed when clicking on a Vitals Clinical Marker on the timeline. By default, all users see the Graph View. If the setting is on for you user, you will see the Table View.

When the setting is off, the Graph View will be displayed by default:



When the setting is on, the Table View will be displayed by default:

| Name | 06/03/2019 | 03/26/2018 | 03/23/2017 | 03/21/2016 | 03/16/2015 | 03/03/2014 | 02/26/2013 |
|---------------|------------|------------|------------|------------|------------|------------|------------|
| PSA | | | | | | | |
| PSA | | 2.92 ng/mL | 1.72 ng/mL | 2.51 ng/mL | 2.23 ng/mL | 2.54 ng/mL | 3.32 ng/mL |
| Vitals | | | | | | | |
| BP | | | | | | | |
| Weight | 150lb | | | | | | |
| Height | 6' 1" | | | | | | |
| BMI | 19.79 | | | | | | |

Default Value: Off (graph view)

To set this setting, a user may follow the below steps:

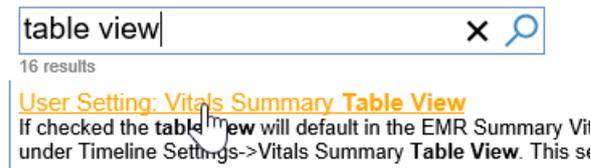
1. Open the **Search** menu from the upper right corner.



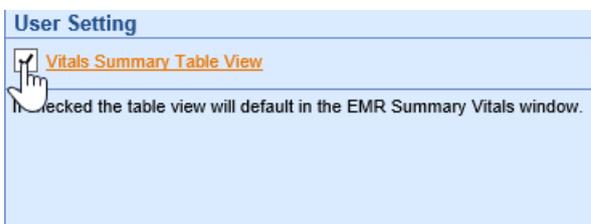
2. Choose **User Settings** from the menu.



3. Search for the **Table View** setting. It will be the first option - click on the **Vitals Summary Table View** setting.



4. Turn on the setting by checking the box.

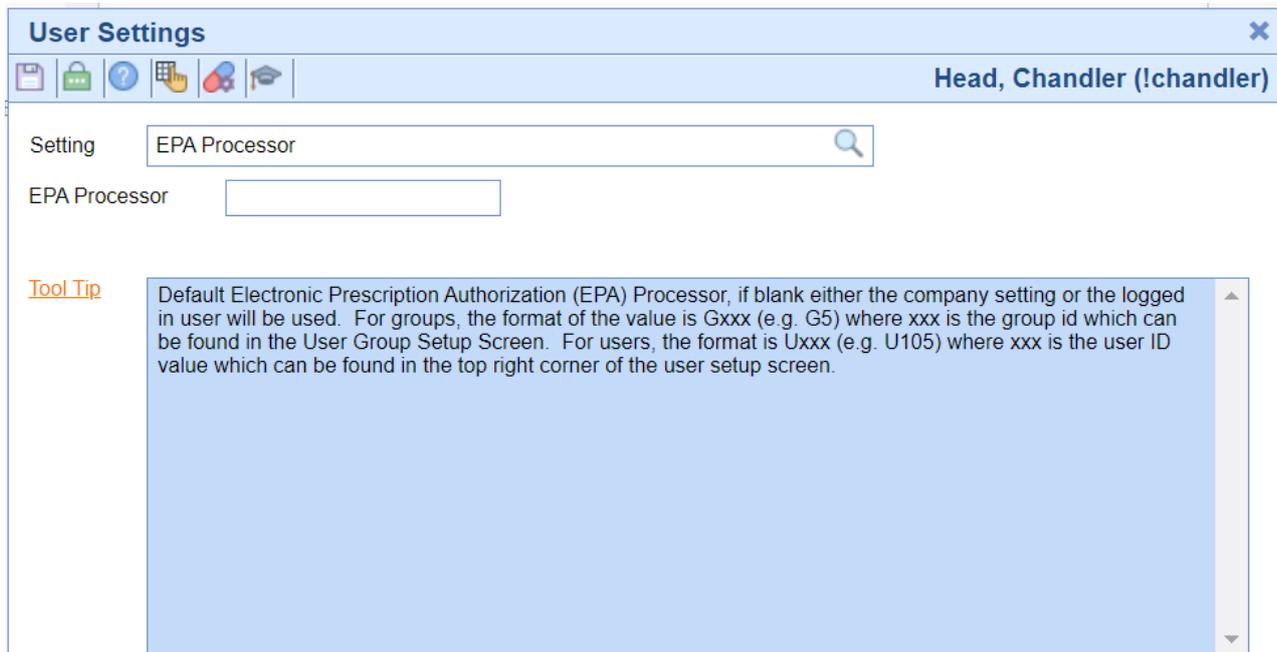


5. Click **OK** to save.



User Setting: EPA Processor

The EPA Processor setting is used in conjunction with the [CoverMyMeds ePA](#) integration. This setting or the Company Setting equivalent can be used to guide the medication prior authorization workflow by dictating the default processor for the ePA task. As described in the below tooltip the value for the setting works slightly differently than others. The IDs for User Groups and Users will be found in the areas described below.



Parameters

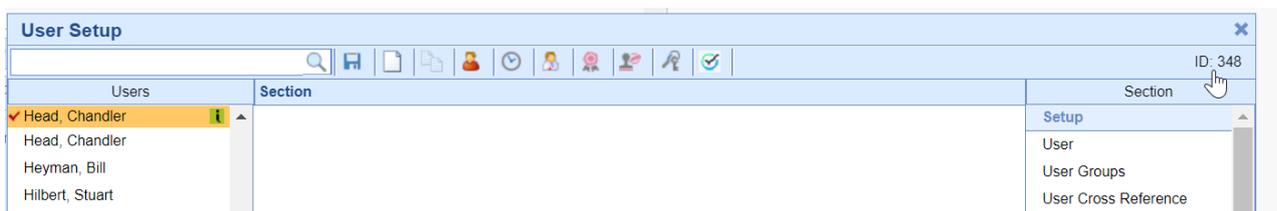
U# = User & User ID

OR

G# = Group & Group ID

Finding User ID

The user ID is a number that is shown within the Setup > User Setup screen:



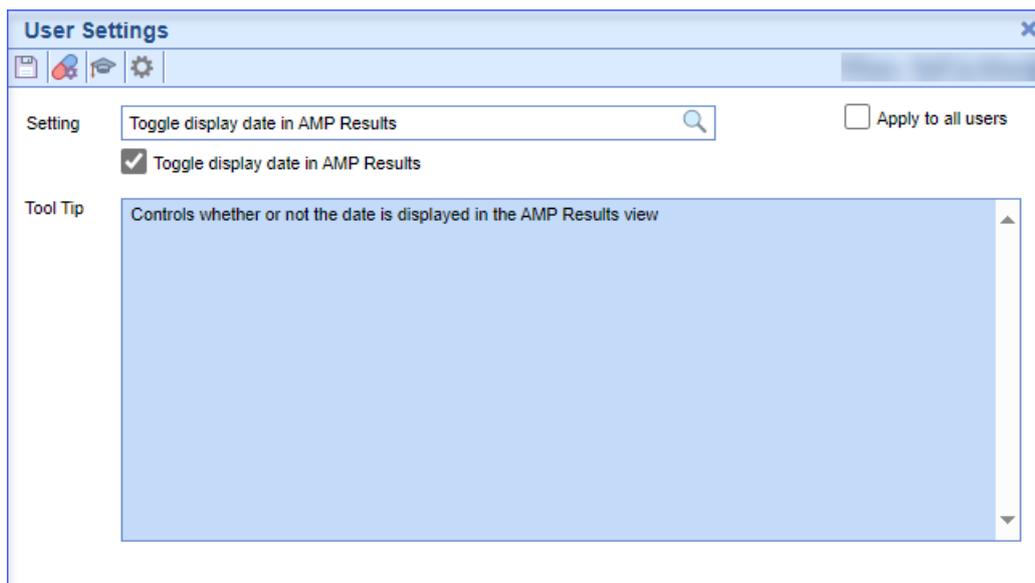
Finding User Group ID

The User Group ID will be found within Setup > User Groups. The first column displays the ID for the group:

| ID | Description |
|----|----------------------|
| 5 | Other |
| 6 | Nurse |
| 7 | Office Staff |
| 8 | Provider - Physician |
| 9 | Technician |
| 10 | Electronic Labs |
| 11 | eLabs |
| 12 | RxRefills |
| 13 | HIE |
| 16 | ype |
| 18 | cccccc |
| 21 | biller |
| 22 | better |
| 23 | Unsolicited Results |
| 24 | QA |
| 25 | EPA Word Doc |
| 26 | ePA Processor |

User Setting: Toggle Display Date in AMP Results

The setting is used to toggle the display of the date column in AMP Results. When checked, User Setting: *Toggle display date in AMP Results* will hide the date from being displayed in the AMP Results view.



Default Value: Off

Options:

- On (checked) and Off (unchecked)
- *Apply to all users* checkbox (enables it for "all users").

User Setting: Unsolicited Results Processor

The setting is used to define the **User** or **User Group** to assign **Unsolicited Results** to if an HL7 ORU file is received that contains a matching NPI to the user's **ID.me Verify Provider Connection**.

This setting works in unison with the Company Setting of the **same name**. If the company setting is set and the user setting is not **OR** if the User is not properly configured **OR** if the value in the HL7 file does not match the **ID.me Verify Provider's NPI**, then the company setting will be applied.

Default Value: blank

Options: User/User Group Search

Additional Considerations & Prerequisites

All of the following must be true for this setting to take effect:

1. User is connected to a provider within the setup of ID.me
Setup > User Setup > ID.me Verify (Toolbar) > Provider
2. Provider's NPI matches the Ordering Provider ID received within the result file
Setup > Providers > Search > Demographics > NPI
3. HL7 ORU (*interfaced result*) contains an NPI for the Ordering Provider ID
Typically contained within the OBR.16.1 segment, but custom mapping can be performed
4. The HL7 interface is configured to digest the Ordering Provider ID from the appropriate segment
This is a mapping value internal to iSalus, but may be customized per HL7 interface via Support

If items 1 & 2 are true, but the setting is still not working as desired, it is likely that either the Lab Vendor is not providing an NPI for the Ordering Provider ID or the value exists in an unexpected or unmapped segment. Please reach out to Support to get help determining if the issue can be resolved by iSalus or may require a change from the lab system.
