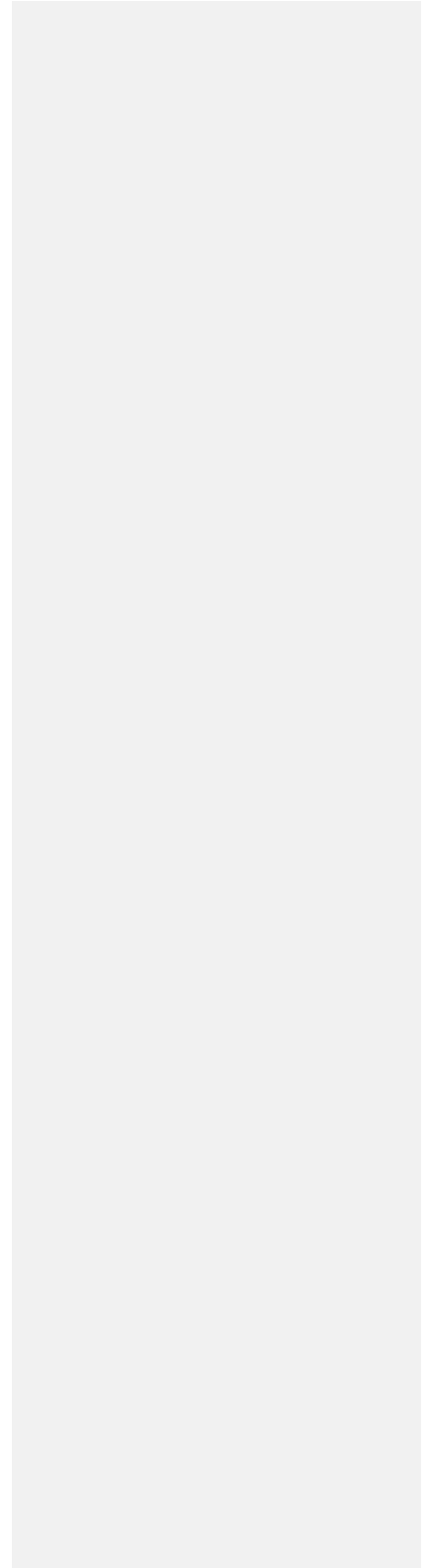


PatientOS, Inc

**Software Configuration Guide
PatientOS EMR**

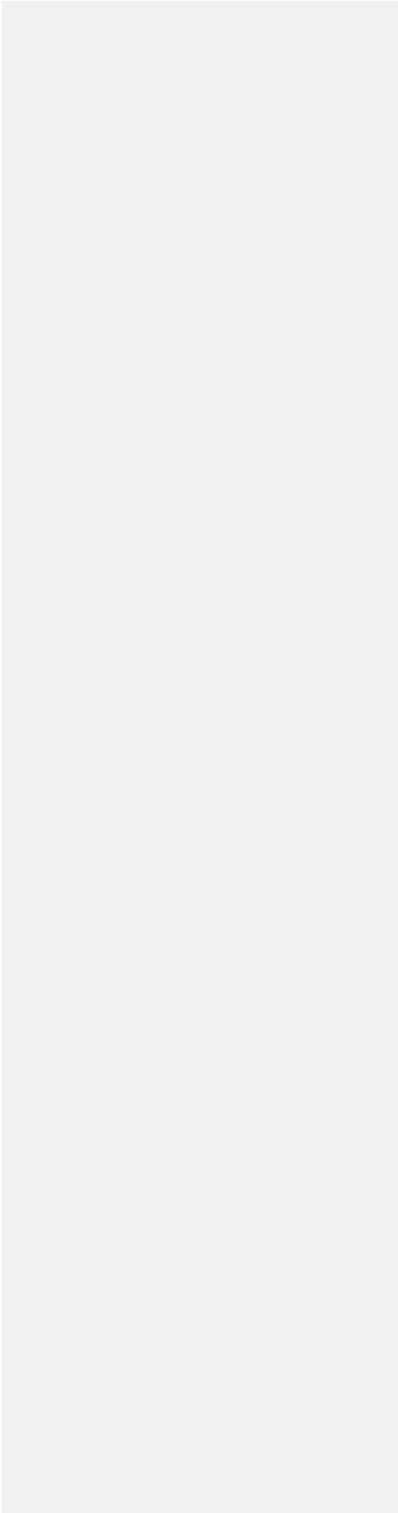
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Revision History

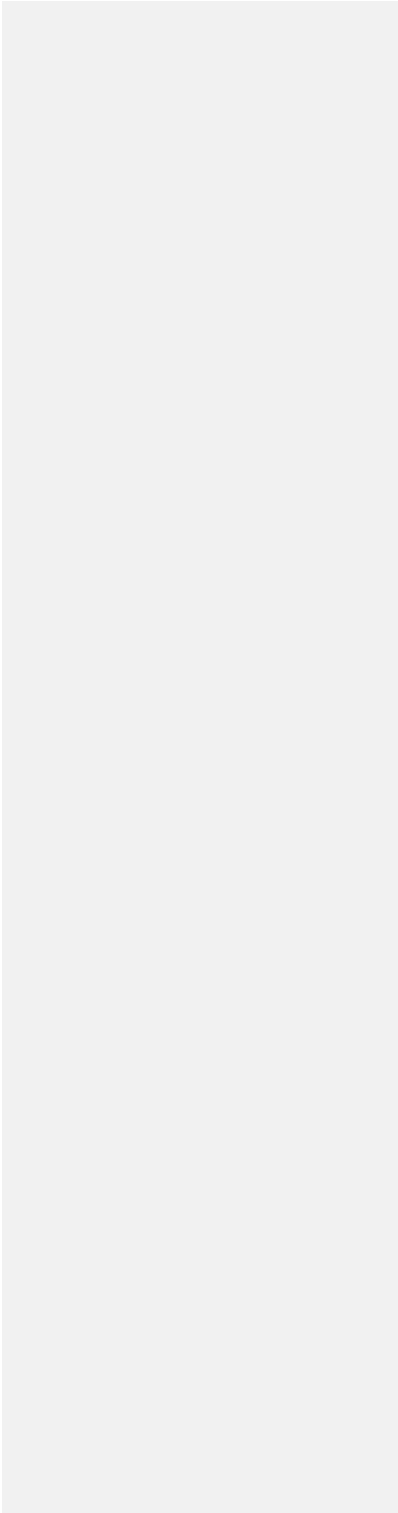
Date	Version	Description	Author
01/18/2008	0.90	Initial	Greg Caulton
01/29/2009	0.90	Revisions to incorporate new Reference Form	Suzanne Hoff



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Forms Configuration Manual PatientOS

1. Introduction

1.0 Audience

The audience for this document is analysts, developers and system administrators interested in creating custom forms for a health care facility.

1.1 Layout

This manual is divided into 3 sections.

1) Process

The process section describes the steps from beginning to end to design and build forms. It is assumed the user is already familiar with application login, can login as admin and can locate and click on the required links to each of the build tools.

2) Reference

The reference section is a technical guide to each build tool and all the toolbars, menus and options to interact with each tool.

3) Appendix

The appendix provides additional information on segments within the Process.

1.2 Definitions

POS



Refers to the PatientOS software as a system.
Known issues with 0.90

Comment [AGC1]: What's the bug icon for?

Comment [AGC2]: I think we should remove POS as an acronym everywhere. As Suzanne said it's not a good one!!

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2. Process

2.0 Form Organization

First the documents need to be organized with a new database containing system folders. All forms are categorized under a system folder.

2.0.1 Using the reference tools the organization name is added as a new reference item to the reference groups FormFolder, RecordItemDomain and TermCategory.

2.0.2 Now in each tool subfolders and categories are added as needed. The organization of the forms can mimic how the source spreadsheets/forms were organized.

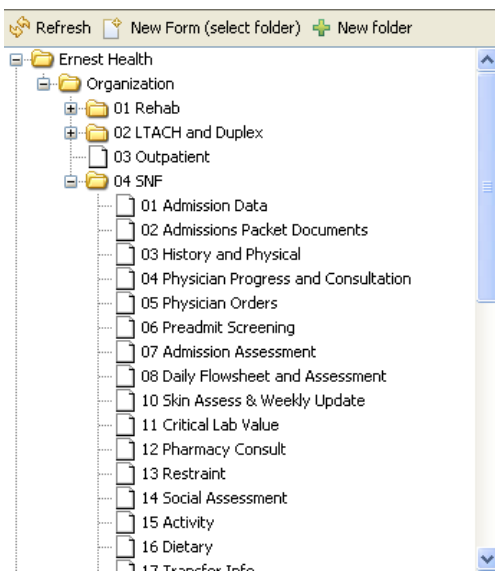
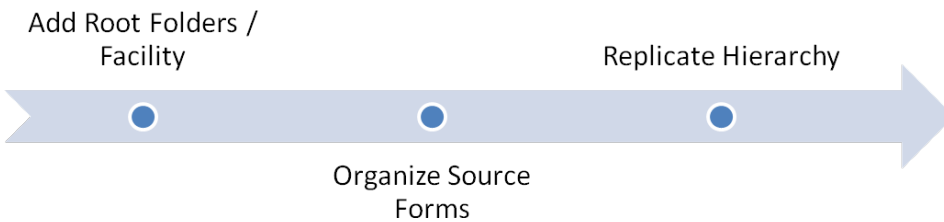


Figure 2 Clinical Forms Hierarchy

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2.1 Build Reference Form

A reference form is an online spreadsheet used to list and define the controls on a formatted form. It allows an analyst to quickly populate a form with the desired fields.

2.1.1 From the reference tools menu select "Reference Forms". A list of existing reference forms will be display.

2.1.2 Select the "New form" icon from the tool bar and enter an appropriate name.

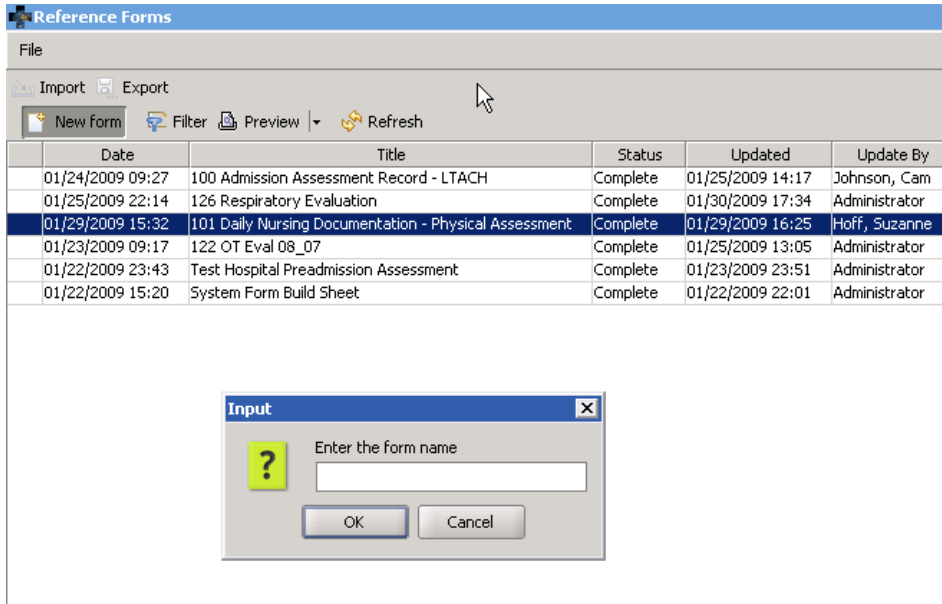


Figure 2 New Reference Form

2.1.3 The following is an example form:

PREADMISSION SCREEN	Patient Name: _____
	Date: _____ Time: _____
	Referring Facility: _____ Room # _____
	Referral Source Name/Occupation: _____
	Referring Physician: _____
	Attending Physician: _____
	Primary Care Physician: _____
	Consulting Physician: _____
Anticipated admission date: _____	Case Manager - D/C Planner: _____

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Figure 3 PreAdmission Form

2.1.4 Select "New Control" to begin adding items to the reference form. One or many fields can be added in the list provided with each one on its own line. Click "OK".

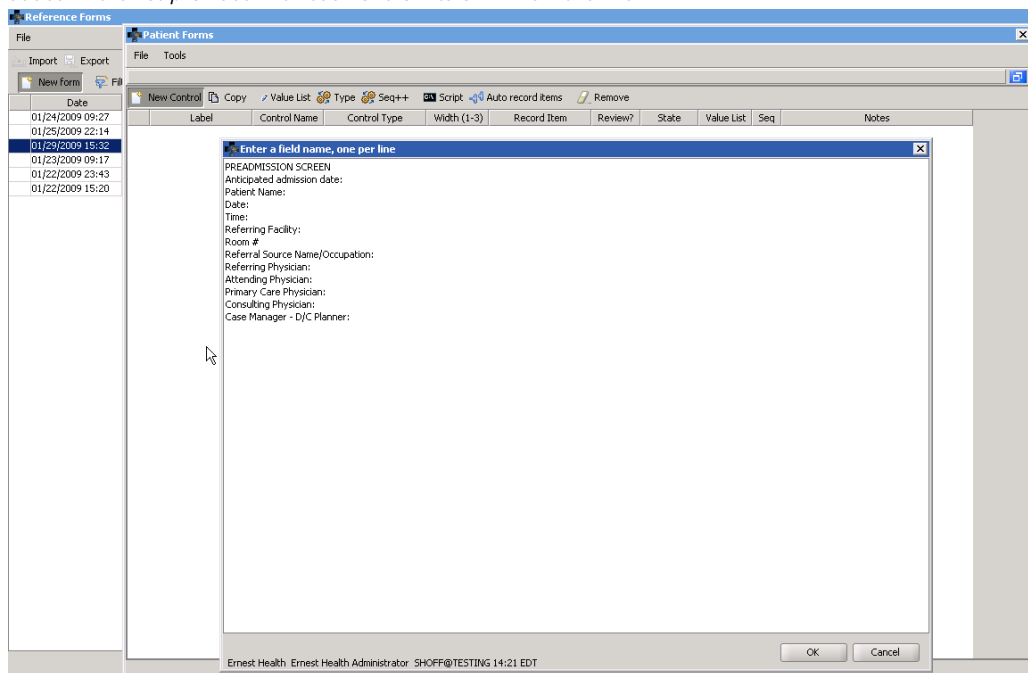


Figure 4 Reference Form Data Entry

2.1.5 A spreadsheet view of the data is created. Each column is defined below and can be adjusted accordingly.

Spreadsheet Column Definitions:

1) Label

The label is generated from the "New Control" function and will be used purely for display purposes.

2) Control Name

The name of the control on the form.

3) Control Type

Analysis of the source form is required to distinguish individual data elements and determine the type of control which should be used to model the data. See **Appendix A** for a typical set of control types.

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4) Width (1-3)

Width of the control as displayed on the form. Imagine a piece of paper divided into 3 columns. If a control has a width of 1 it would cover the first column, a width of 2 would cover the first 2 columns, and a width of 3 would cover all three columns.



Figure 5 Width Definition

5) Record Item

The record items are either selected, if already built, or assigned with the unique name entered here. The record item name must be unique; however, the name is generated when the form is built using the record item name with a suffix of the current folder (ex: Preadmission Date (Facility 01 Rehab 01 Preadmission Preadmission Screen)).

5) Review?

Reference field used to denote whether a particular control needs further information.

6) State

This represents the status of the control – Available choices are Submitted, Approved, or Rejected. Field can be used as a tracking mechanism for analyst.

7) Value List

The value list contains the list of values, separated with semi-colons that will be available for the given control.

8) Seq

Sequence of the control on the form when it is created. This can easily be manipulated or changed on the form as well.

9) Notes

Notes section for the analyst.

Label	Control Name	Control Type	Width (1-3)	Record Item	Review?	State	Value List	Seq
PREADMISSION SCREEN	PREADMISSION SCREEN	Separator	3		<input type="checkbox"/>	Submitted		1
Anticipated admission date:	Anticipated admission date:	Date	0		<input type="checkbox"/>	Submitted		2
Patient Name:	Patient Name:	Text One Line	3		<input type="checkbox"/>	Submitted		3
Date/Time:	Date/Time:	Date Time	1		<input type="checkbox"/>	Submitted		4
Room #	Room #	Text One Line	1		<input type="checkbox"/>	Submitted		5
Referring Facility:	Referring Facility:	Text One Line	2		<input type="checkbox"/>	Submitted		6
Referral Source Name/Occupation:	Referral Source Name/Occupation:	Text One Line	1		<input type="checkbox"/>	Submitted		7
Referring Physician:	Referring Physician:	Text One Line	1		<input type="checkbox"/>	Submitted		8
Attending Physician:	Attending Physician:	Text One Line	1		<input type="checkbox"/>	Submitted		9
Primary Care Physician:	Primary Care Physician:	Text One Line	1		<input type="checkbox"/>	Submitted		10
Consulting Physician:	Consulting Physician:	Text One Line	1		<input type="checkbox"/>	Submitted		11
Case Manager - D/C Planner:	Case Manager - D/C Planner:	Text One Line	1		<input type="checkbox"/>	Submitted		12

Figure 6 Reference Form Spreadsheet

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2.2 Build Clinical Form

After the reference form is created this data is used to generate the clinical form.

2.2.1 From the reference tools, select "All Form Types" from the Forms Section.

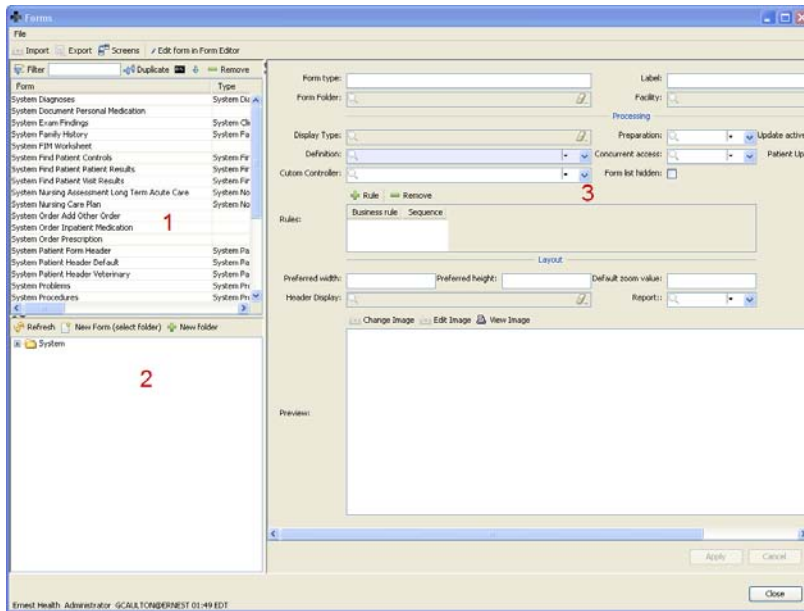


Figure 7 Forms Tool

The view is divided into 3 sections:

1. The default list of form types when the tool is first opened (up to a maximum of number) or the list of form types in the folder (or child folder) when a folder in the tree is selected.
2. The tree hierarchy of all form folders.
3. The details of the selected form type.

2.2.2 Adding sub folders to the folder tree hierarchy.

- To add one or more sub folders to the hierarchy
1. Select the parent folder in the hierarchy.
 2. Right click and choose 'Add new child category to ...'

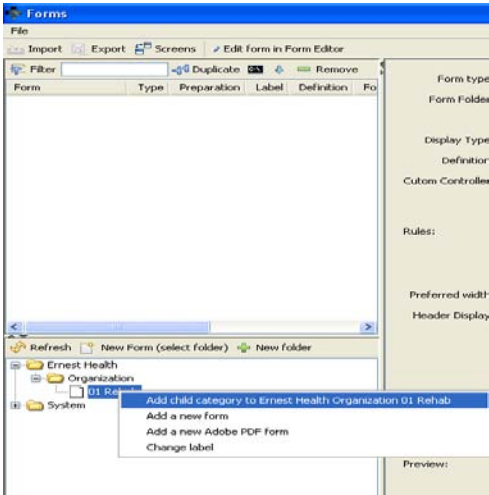


Figure 8 Adding to Form Folder Hierarchy

3. Add one sub folder name per line
4. Press OK to save the new folders

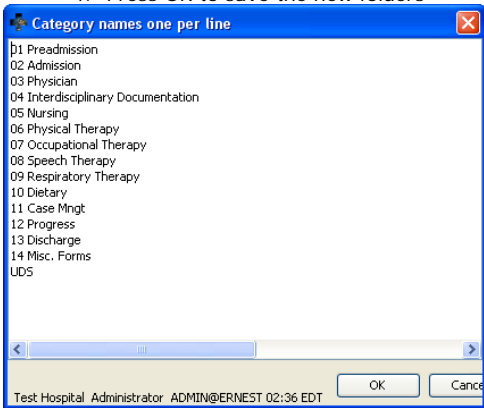


Figure 9 Adding child folders

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2.2.3 In the lower left hand pane select the location where you would like the form to reside and click on "New Form". Create a name for your form; this can be similar or the same as your reference form name. Click "OK".

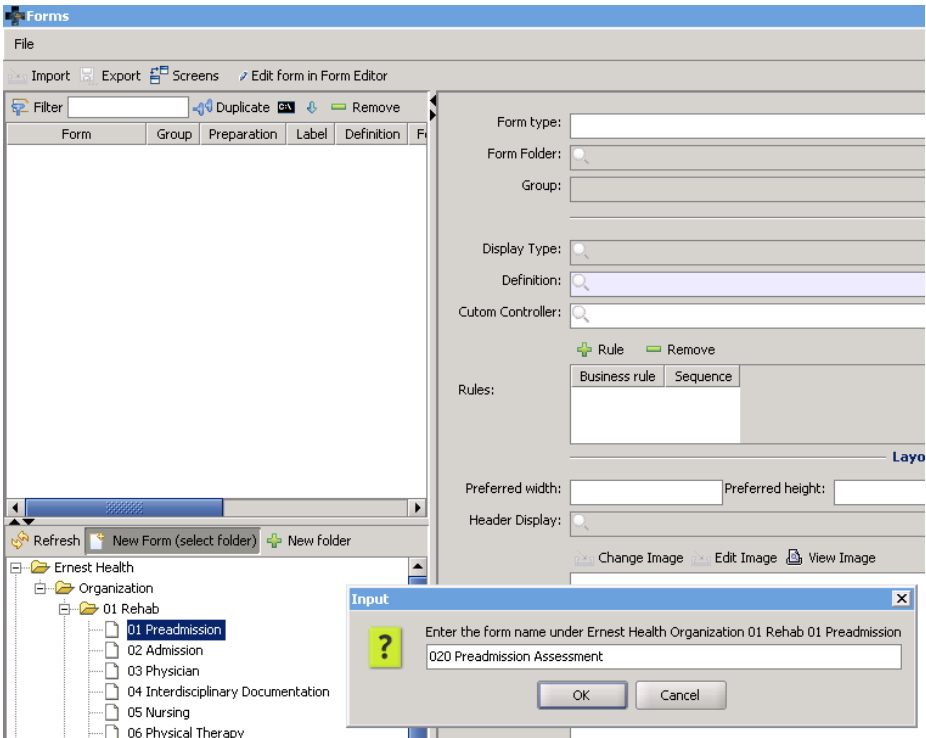


Figure 10 Adding New Form

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2.2.4 Select "Clinical Forms" for the Form Group.

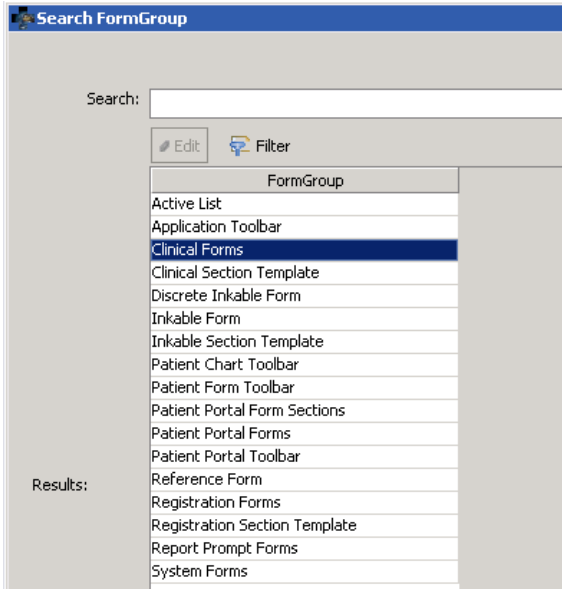


Figure 11 Form Type

2.2.5 Go back and open your Reference Form. Highlight all of the rows and select "Copy" from the toolbar. Return to your new Clinical Form and select the paste icon from the toolbar. Your controls should now be listed in your form.

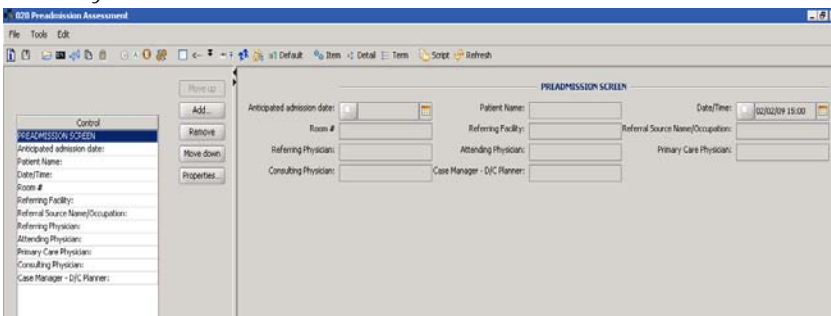


Figure 12 Generate Form

2.2.6 To manipulate any of the controls, highlight the control in the list and select Properties.

Appendix A

2.2.6.1 Text Field

Free text fields should be kept to a minimum however may be combined with a lookup pick list to enter common values.

Comments:							
------------------	--	--	--	--	--	--	--

2.2.7 Date Field

Date fields should be clarified whether the time component should be included or not.

Date of Onset of Current Hospitalization:							
---	--	--	--	--	--	--	--

2.2.8 Separator

Separators are used to visually divide the form into sections and typically are section titles.

SOCIAL HISTORY

2.2.9 Checkbox Panel

The checkbox panel is used to display a relatively small number of checkbox options, any of which can be selected together.

NEUROLOGICAL STATUS			
Oriented:	Commands:	Fall History at hospital:	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Awake	<input type="checkbox"/> Complex	Aphasia:	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Alert	<input type="checkbox"/> Simple		Restraints: <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Lethargic	<input type="checkbox"/> None		Type:
<input type="checkbox"/> Person			Sitter: <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Place			
<input type="checkbox"/> Time			

Each item will be a 'Term' and optionally the user may add their own free text or favorite terms to the list

2.2.10 Business

Business is used as an advance control to track an organization (employer, location etc). It has its own (custom if needed) form where the name, address, phone etc is entered.

Referring Facility: _____
 Referral Source Name/Occupation: _____

2.2.11 Provider

External providers may be added to the provider database or alternatively tracked as a business. The provider control provides a lookup across all providers.

Referring Physician: _____
 Attending Physician: _____
 Primary Care Physician: _____
 Consulting Physician: _____

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2.2.12 User

Any users being tracked on the form can do so using the user control.

Case Manager - D/C Planner: _____

2.2.13 Drop Down List (Reference)

There are two types of drop down lists. A 'reference' drop down list which displays a system defined reference group such as Gender, City, State, Language. etc.

Primary Language _____

2.2.14 Drop Down List (Terms)

There is a drop down list of terms which is a custom set of values defined (and possibly coded). Options on the control can control if the user can setup a My Favorites, add free text terms, etc.

Organ Donation: _____

2.2.15 Contacts

People defined with a relationship to the patient can be added with a customizable form to record the name, address, phone etc.

AUTHORIZED REPRESENTATIVE			
Name:	_____		
Address:	_____		
City:	State:	Zip:	
Home Phone:	_____		
Work/Cell Phone:	_____		
Relationship:	_____		
Additional Family Contacts:	_____	_____	_____

2.2.16 Tables

Diagnoses, medical conditions, allergies, home meds, test results are all tables. Essentially a table is used when a single record (e.g. result) has multiple entries and multiple values to track (test name, date, result etc).

LABORATORY						
Lab	Date	Results	Date	Results	Date	Results
WBC*						
RBC						
HGB						
HCT						

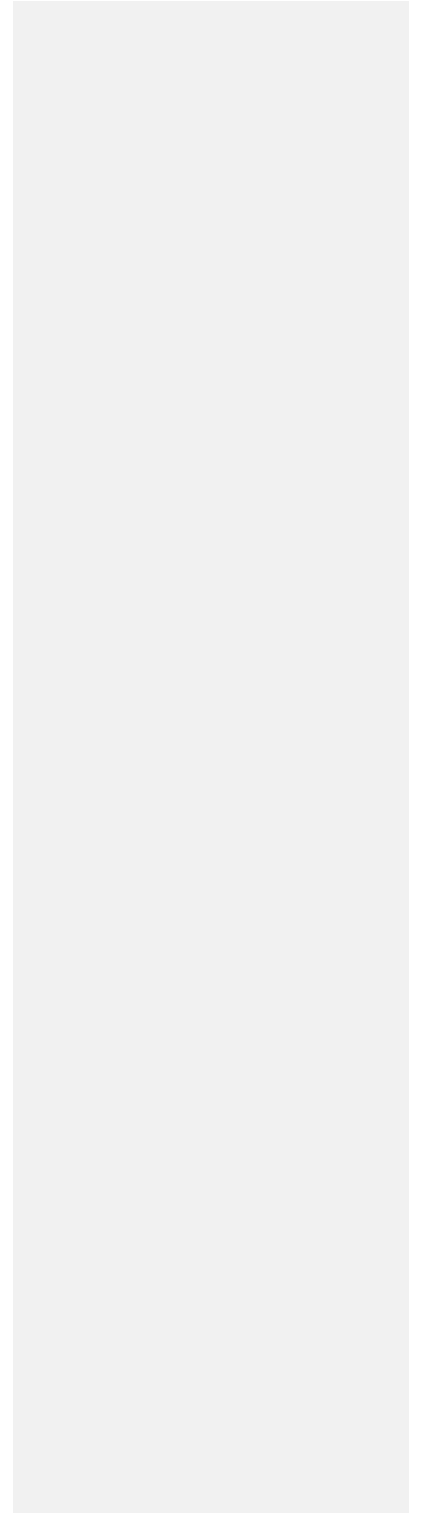
2.2.17 Radio Panel

Radio buttons are used when the choices are mutually exclusive and checkboxes are inappropriate. If you need a Yes or No but do not want to default No (as a single

Is patient currently on dialysis? Yes No

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checkbox would) you might use a radio
buttons with Yes, No and Not Specified



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2.2.18 Multi-Term Pick List

If multiple terms can be selected for a single data element but only the selection of the term is important (no other properties tracked) and a table was not desired then a multi-term pick list can be used.

Medical Conditions:	
<input type="checkbox"/> Abscesses	<input type="checkbox"/> Cerebral vascular disease
<input type="checkbox"/> Acute renal failure	<input type="checkbox"/> Choking, foreign body in the larynx
<input type="checkbox"/> Acute respiratory failure	<input type="checkbox"/> Clostridium Difficile
<input type="checkbox"/> Anoxic Brain Injury	<input type="checkbox"/> Congestive Heart Failure

2.2.19 Checkbox

A single checkbox can be used for a boolean condition however the main disadvantage is the inability to distinguish between the user selecting Unchecked versus skipping the field. Alternatively there are 3-state checkboxes used for that purpose.

Is this a re-admission: Yes No

2.2.20 Editor

An Editor is used for multi-line paragraphs. The default is plain text however a toolbar can be installed to allow easy access to templated text. Also an HTML Editor can be used for styled content.

Narrative of Current Patient Status:									

2.2.21 Insurance Policy

The insurance policy information is a special control used to record the insurance(s) for the visit.

FUNDING	
Payor:	
Group / ID#:	
Secondary Payor:	
Group / ID#:	
Payor Phone #	
Subscriber Info:	
Phone:	