NAVVIS



User Guide



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Real Life

Life Changing

Changing Healthcare

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NAVVIS Coreo View user's guide release 1.00.

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Preface

Welcome to the release of the NAVVIS Coreo View user’s guide.

Purpose of this document

This guide is the primary source of information about Navvis Coreo View. It contains overviews, processes, and procedure to use the Coreo View application effectively.

Intended audience

1. Coreo View administrator users who are assigned the task of managing the regular users of the Coreo View application
2. The regular users of the application who include the following personnel:

* Clinical staff and hospital administrators
* Employees, consultants, contractors or agents of the clinicians or patients who have been invited by the clinician or patient to access and use the service to participate in the care of the patient.
* Any other person or entity involved in the care of the patient including patient's care providers, patient's insurer or payer, or a social worker, or government agencies.

Organization of the document

This document contains the following modules:

* Exhibit A: Coreo View Administrative Function
  + Module 1, “Coreo View Administrator Tasks”
  + Module 2, “Settings to manage Coreo View regular users”
  + Module 3, “Automation events”
  + Module 4, “Administrative reports”
* Exhibit B: Coreo View User Function
  + Module 1, “User on boarding”
  + Module 2, “Screen layout and navigation”
  + Module 3, “Filters and Themes”
  + Module 4, “Bed view features”
  + Module 5, “Prioritized view features”
  + Module 6, “Goo-map view features”
  + Module 7, “Switching the navigation between views”
  + Module 8, “Patient summary”
  + Module 9, “Search feature”
  + Module 10, “Flagging patient records”
  + Module 11, “General reports”

Conventions

This document uses the following conventions:

| Convention | Item |
| --- | --- |
| **boldface** font | **Menu** items, **Tab** names, **Text** **box** names, **List** **box** names, **Button** names and **Navigation** paths |
| Text in blue | Hyperlinks |
| Note icon.png | Note: Notes contain helpful suggestions. A note will inform the reader about any deviation in the sequence of instructions or helps the reader save time in understanding why something is not working. |
| Tip icon.png | Tip: The information will help the user solve a problem faster, or to perform an action in a different way. |
|  | Caution alerts the reader to avoid doing something that could result in loss of data or any other damage. |

About Navvis Coreo View

NAVVIS Coreo View is a software platform which empowers the users to manage the status and the flow of patients through Acute Care (AC), Post-Acute Care (PAC) and home networks.

Coreo View is HIPAA (Health Insurance Portability and Accountability Act) compliant and is available as a SaaS (Software-as-a-Service) cloud solution enabling management of patients with real-time data. Coreo View is part of the Coreo ecosystem which allows cross-continuum care coordination and ensures seamless care transition.

Browsers versions for CoreoView

The Coreo View application is available on desktops, laptops, IOS devices and android tablets.

| Browser | Version |
| --- | --- |
| Google Chrome | 74 |
| MS Internet Explorer | 11 |
| Macbook - Safari | 12.1.1 |
| Samsung Tab – Google Chrome | 7.0.0 |
| IPad IOS - Safari | 12.1 |

About Navvis & Company

Navvis & Company provides counsel to health systems, hospitals and physician groups on the development of innovative, market-linked strategies to build future-ready health systems, cultivate tomorrow’s leaders and strengthen strategic performance.

Exhibit A: Coreo View Administrative Function

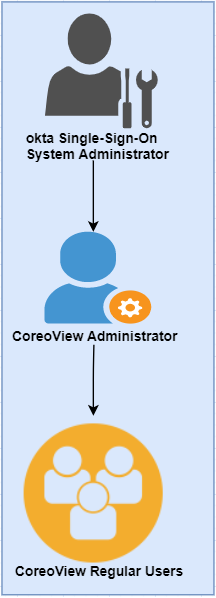


# Coreo View Administrator Tasks

The okta Single Sign-On system administrator has the super user privileges and creates the Coreo View administrator role. okta provides a single secure home page to use the Coreo View application.

The Coreo View administrator manages the users and all the related administrative functions, which include the following:

* Creates user accounts for regular users of the Coreo View application.
* Adds or removes regular users from the user groups.



1. Administrator Role Hirearchy

## Navvis account activation for the Coreo View administrator user

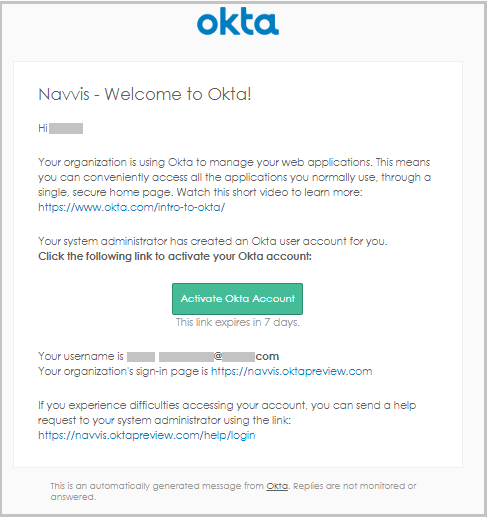
The okta system administrator will register a user in okta and assigns the administrative privilege and access to the Coreo View application. The Coreo View administrator user manages the Coreo View regular users.

The okta system administrator sends an email notification to the Coreo View administrator user to initiate the account activation process.

|  |  |
| --- | --- |
| Note icon.png | okta sytem administrator can create multiple Navvis administrator accounts for the Coreo View application. However, the Coreo View administrator can only assign the administrator role to another user in Coreo view. |

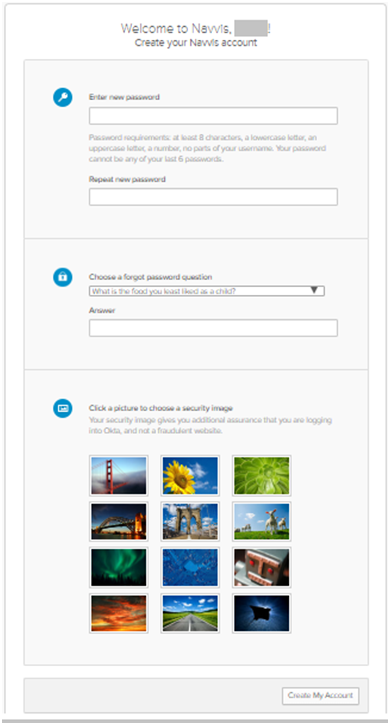
Follow these steps to activate the Okta account:

1. Open the email link sent to your email inbox by the Okta administrator.



1. Email Notification

2. Select the ActivateAccLinkGreenBox.png link. The **Create your Navvis account** screen opens.



1. Create Your Navvis Account Screen
2. Enter the new password in **Enter new password**. The password must be at least 8 characters long and a maximum of 25 characters.

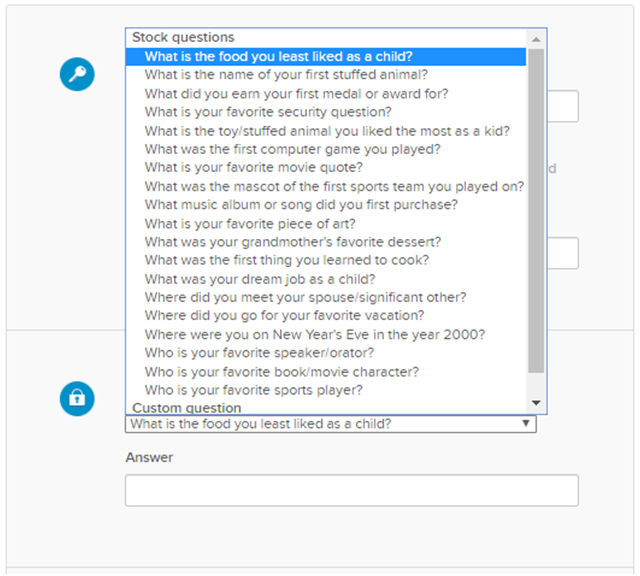
The password must be a combination of these following characters:

| Description | Characters |
| --- | --- |
| Upper case characters | A - Z |
| Lower case characters | a - z |
| Digits | 0 - 9 |
| Special characters | ~ ! @ # $ % ^ & \* \_ - + = ` | \ () {} [] : ; " ' < > , . ? / |

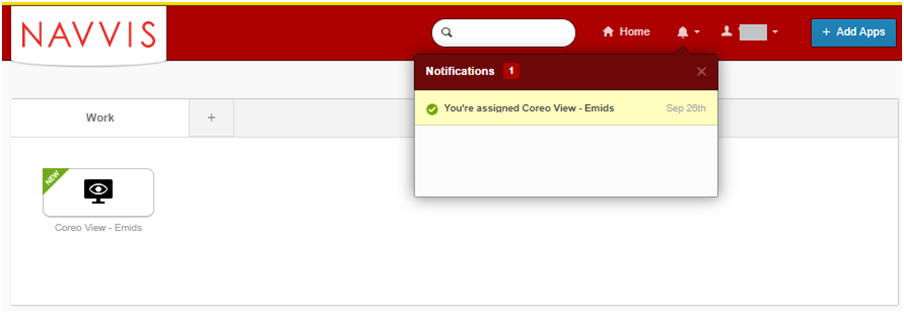
1. System Accepted Password Characters
2. Reenter the password in the **Repeat new password** box.

The user must add a security question to reset a new password in the event of the user forgetting the password during the future use.

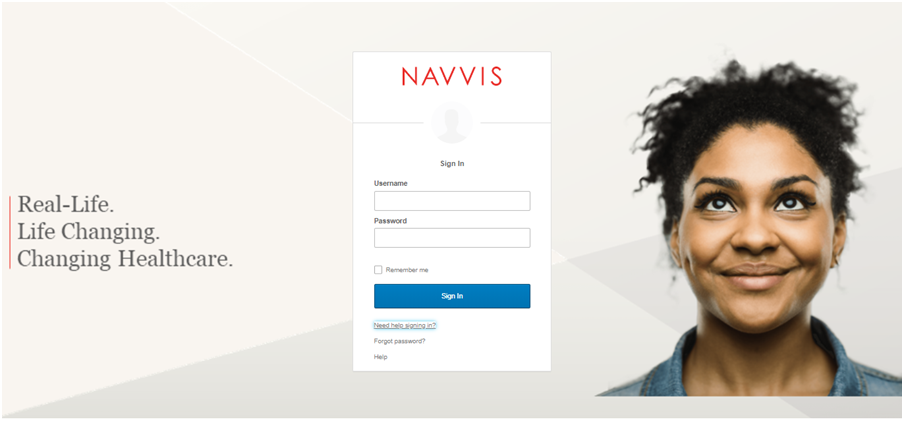
1. Under **Choose a forgot password** question, select the arrow to view the questions.



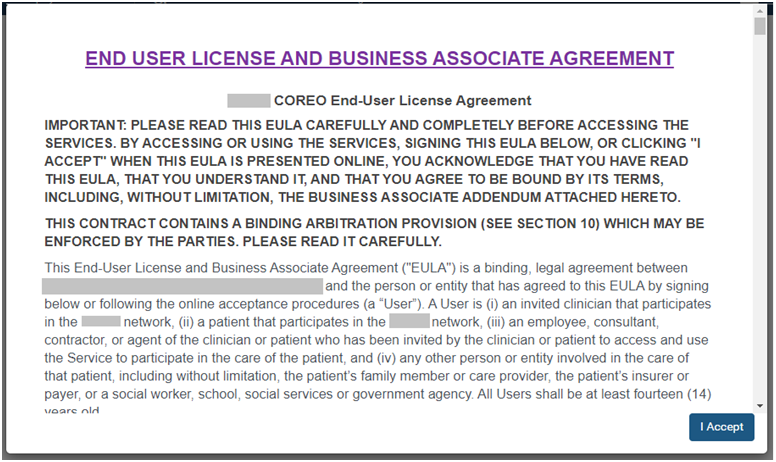
1. Choose A Forgot Password Question
2. Choose a security question from the list.
3. In the **Answer** box, enter the answer. You must remember this answer because it is used at a later date to reset a forgotten or expired password.
4. Choose a picture as a security image in the **Create your Navvis account** screen and then select **Create My Account**. The **Navvis** landing screen opens.



1. NAVVIS Landing Screen
2. Select the **Coreo View - Emids** icon on the landing screen.
3. The **NAVVIS Sign in** screen opens.



1. NAVVIS Sign In Screen
2. Enter the user ID in the **Username** box on the.
3. Enter the password in the **Password** box. The [password](#PasswordCharacters) must be at least 8 characters long and a maximum of 25 characters.
4. Select **Sign In**.
5. The EULA screen displays for a first-time user of Coreo View. A first-time user of Coreo View is required to accept the EULA (End User License and Business Associate Agreement) before accessing the Coreo View application.



1. EULA PAGE
2. Read the terms and conditions and select the **I Accept** button. Your Navvis account is activated successfully and the NAVVIS home page opens.

## Manage locked Navvis administrator account

The Navvis account locks for the following reasons:

* The user exceeds five failed login attempts within 24 hours. The login attempts fail when the user enters an incorrect password.

To unlock the Navvis account immediately after the five failed login attempts, contact the okta system administrator.

|  |  |
| --- | --- |
| Note icon.png | The locked account resets after 24 hours and the user can log in to the account after 24 hours. |

* The okta system administrator can lock the Navvis account as per the company lock account policy.

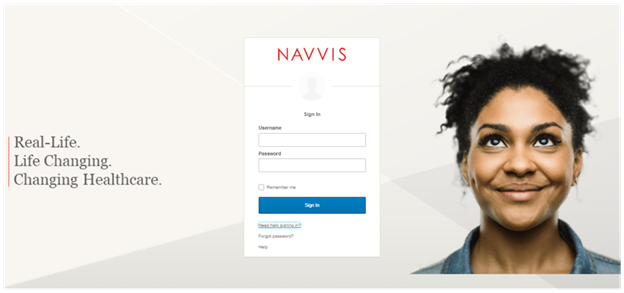
## Reset a forgotten or expired administrator password

The okta Single Sign-On password policy specifies that the password expires after 60 days, and the user must reset the password periodically.

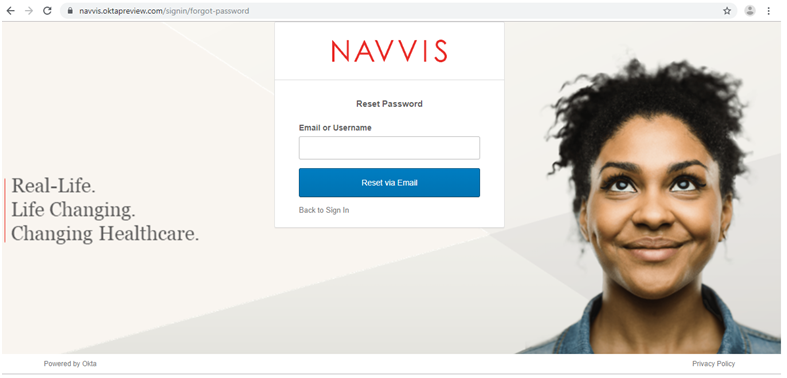
Also, if the user forgets the password, Coreo View gives the option to reset the password.

Follow these steps to reset the password:

1. Go to www.navvis.oktapreview.com to open the **Navvis Sign in** screen.



1. NAVVIS Sign In Screen - Forgot password? Option
2. Select the **Need help signing in?** drop-down list.
3. Select the **Forgot password?** option to open the **Reset Password** screen.



1. Reset Password Screen
2. Enter the e-mail or the user name in the **Email or Username** box.
3. Select **Reset via E-mail**. The user can reset the password using the verification link sent to the user’s email address.
4. Reset the password with the following considerations:

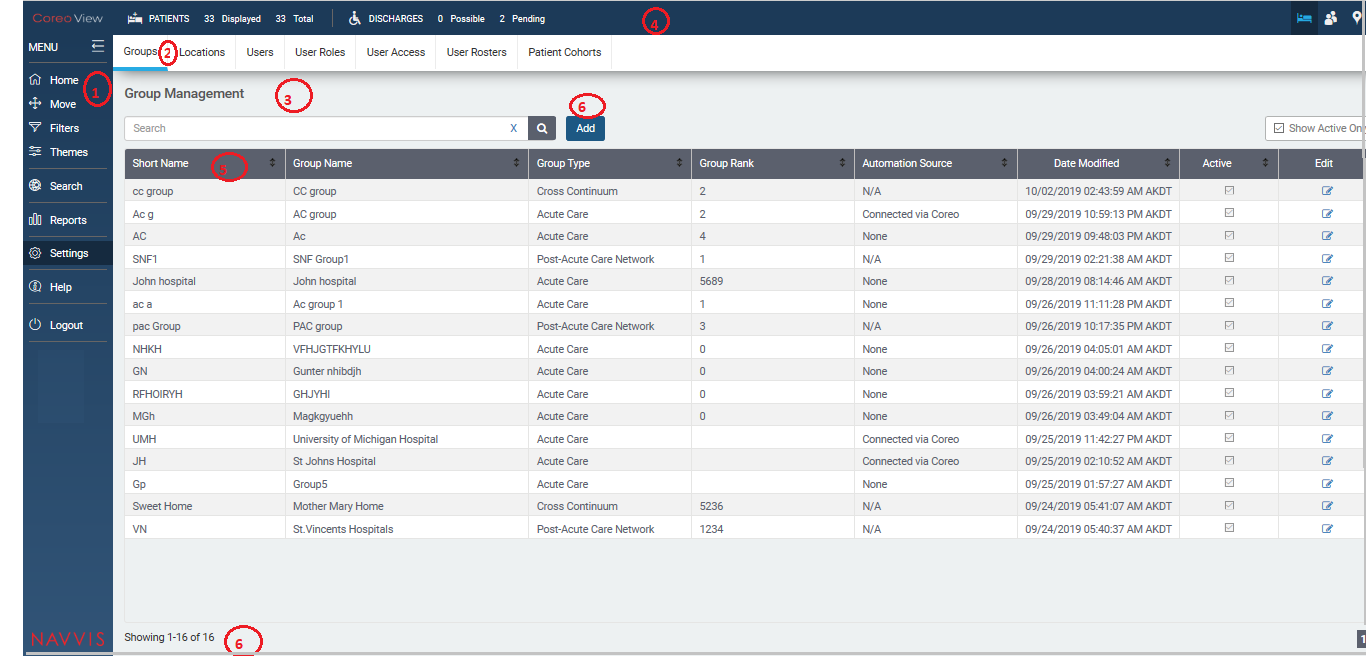
* The new password cannot be among the previous six passwords.
* The password expires after 60 days and the user must reset the password periodically.
* The user will be locked out of the application after five failed login attempts. The login attempts fail when the user enters an incorrect password. Contact the okta administrator to reset the password.

On the successful resetting of the password, the new password is reset for the Navvis account.

Settings to manage Coreo View regular users

## Settings page layout

Each screen in Coreo View has the same structure; however, few user interface elements are different depending on the user’s role.



1. Settings Page Layout

## Create groups

## Manage user access

## Set up locations

## Manage patient cohorts

## Manage user rosters

## Create user roles

## Create users

# Automation Events

## Discharging ED patients automatically and moving to CC after a configurable time

## Moving the low risk patient automatically from ADT to cc after a configurable time

## SIGNAL R –keeping the screen updated automatically

Administrative Reports

## Automation reports

## Automation action

Exhibit B: Coreo View User Function



# User On boarding

## Okta single sign-on (SSO)

## Log into Coreo View - First time user

## Log into Coreo View - Existing users

# Screen layout and navigation

## The Home Page Layout

Header tool bar elements

|  |  |  |
| --- | --- | --- |
| Icon | Element name | Description |
|  |  |  |
|  |  |  |
|  |  |  |

1. Header Tool Bar Elements

Menu items

|  |  |  |
| --- | --- | --- |
| Icon | Element name | Description |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## The Bed View Layout

| Icon | Element name | Description |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

## The Prioritized View Layout

|  |  |  |
| --- | --- | --- |
| Icon | Element name | Description |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## The Geo-Map View Layout

|  |  |  |
| --- | --- | --- |
| Icon | Element name | Description |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Filters and themes

## Screen layout

## Filters

## Themes

## Normal view and Stacked view

## All, Available and Patient views

# Bed view features

## Create bed

## Assign patient

## Move patients based on ADT (Admit Discharge Transfer) events

Request move

Quick move

Move within a location

Moving to another location

# Prioritized view features

## Card view

## Sorting

## Application of the date filters

## Filters and themes

# Geo-mapping view features

## Geo-map view

## Toggle views

## Search functionality

## Geo-map view plotting

## Display settings

## Drill down view

## Pop up views

Acute Care

Post-Acute Care

Community resources

# Switching the navigation between views

## Toggle views

# Patient summary

Layout and description of different tabs

View patient summary

Patient summary based on bed information

Patient summary based on length of stay (LOS)

Patient summary based on patient information

Length of stay (LOS)

Activities & attributes

Patient disposition

Bed attributes

Coreo face sheet

# Search feature

Global search

Coreo summary

Flagged summary

Bed summary

Displayed search (Bed view search?)

Flagging patient records

Flag a patient record

Patient summary (Give reference to topic 8 above)

Global search

Prioritized view

Geo-map view

Bed view

Applying Filters and saving theme for flagged patients

Flagged Summary Pop Up Elaboration

General reports

Appendices

Credits

[www.bloomberg.com/profile/company/3553499Z:US](http://www.bloomberg.com/profile/company/3553499Z:US)

[www.navvishealthcare.com/](http://www.navvishealthcare.com/)

[www.linkedin.com/company/navvishealthcare](http://www.linkedin.com/company/navvishealthcare)

[www.pitchbook.com/profiles/company/88126-75](http://www.pitchbook.com/profiles/company/88126-75)

[www.crunchbase.com/organization/navvis-company](http://www.crunchbase.com/organization/navvis-company)

[www.healthcareitnews.com/blog/defining-population-health](http://www.healthcareitnews.com/blog/defining-population-health)

www.shareicon.net

Glossary

[Glossary term – Description]

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[Glossary term – Description]

……………………..

Index

[Depending on the size or complexity of the final document, insert an index to assist the user in locating specific information. Index entries correspond to tags or categories, and are useful in navigating long books.]

[Index term – *page number*]

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