KAPIOS

I/O Surg

User Manual

Version 1.4

Table of Contents

Changelog

Features

Version 1.1

- Reference Notes functionality added; administrative users are now able to write in custom notes per individual codes
- New Notes section created to collect all codes with custom notes in them
- Old References switched to Bulletin Board
- Flag was implemented to indicate codes with status changes
- When searching, partial numbers are treated only as starting digits
- Frequently searched/clicked codes are indexed to appear at the top of search results

Version 1.2

- Keywords available on Codes

Version 1.3

- Dashboard allows access to recent codes, recent posts and quick search
- Changes to user role permissions

Version 1.4

- Addition of client types, Individual and Team
- Bulletin board is only accessible by a Team client
- Keywords management section added for Admins only (Teams client)
- Team and Individual keywords in code result dialogs
- Team and Individual notes in code result dialogs
- Multiple notes allowed on each code result
- Notes icon shows in ‘Recently Viewed Codes’

Version 1.4.1

- Prevent duplicates codes and keywords

Welcome!

Congratulations on your purchase of I/O Surg, a 2-click search engine with built-in procedural codes to allow users to quickly and accurately identify the appropriate CMS [based on addendum E]/CPT© inpatient/outpatient status. This solution ensures the appropriate billing code and patient status are correctly communicated throughout the entire system to minimize costly errors in pre-op patient scheduling. This manual will guide you in using the solution to:

- Search CPT codes by number and description
- Determine current and previous CMS status of CPT codes
- Create/manage users for I/O Surg
- Post reference material to a bulletin board
- Add/remove custom notes on code results to inform users

Signing In

To sign in, go to the URL which was given to you as an I/O Surg client. A username and password box should appear (Figure 2). Enter your username and password and click "Sign In." By default, you should be taken to the Dashboard screen.

EULA

If you have not previously signed in, you will be asked to agree to an End-user License Agreement (Figure 3). If you agree, then you will be signed in. If you cancel, you will be taken back to the previous Sign In screen. You must agree to the End-user License Agreement in order to use the I/O Surg solution.

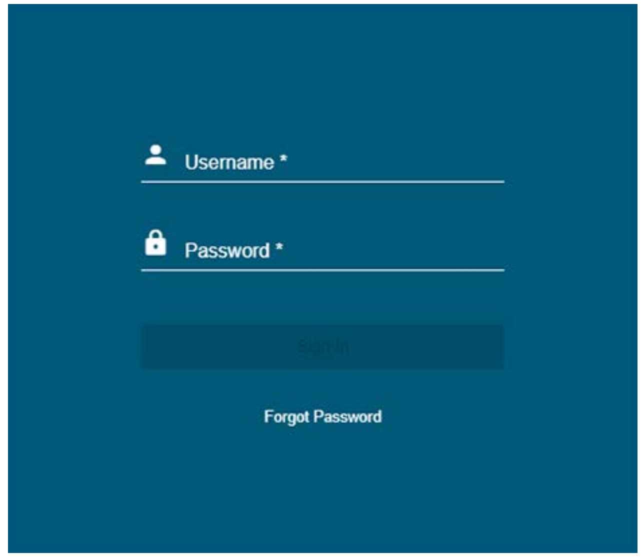


Figure 2

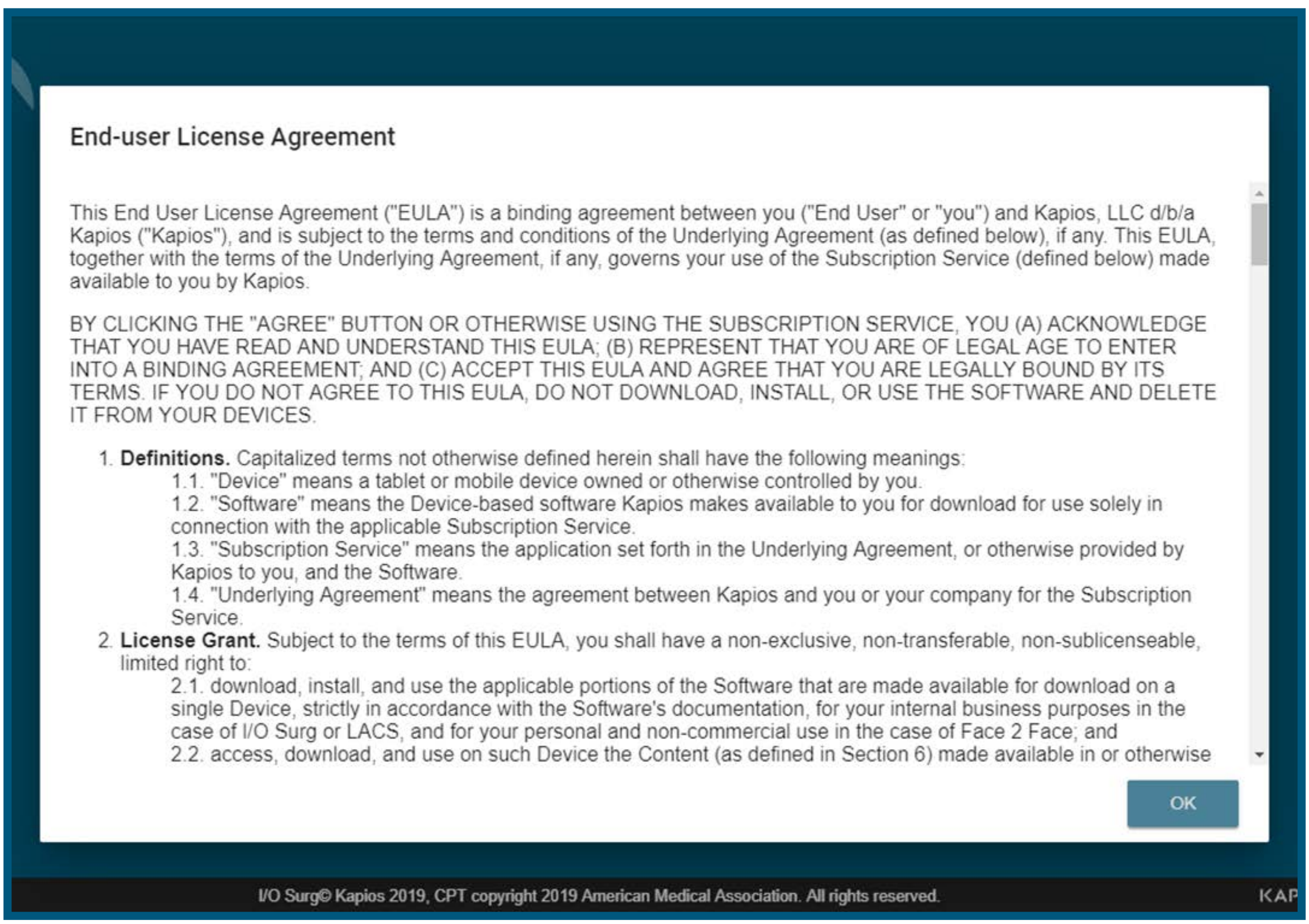


Figure 3

Lockouts

If you supply the wrong username or password at the Sign In, you will receive an error stating the number of attempts remaining (Figure 4). If a user fails all attempts, that user will be locked out and receive a lockout error on-screen. If that happens, an Administrator must be contacted to unlock the user from the Users section. A locked Administrator account can only be unlocked by the Support Team. See the section “Unlock User” in this manual for more information.

Forgot Password

An active/unlocked user who has forgotten their password can request a password reset by clicking “Forgot Password” on the Sign In screen. A dialog will open, where the user can provide their email address and click “Submit” (Figure 5).

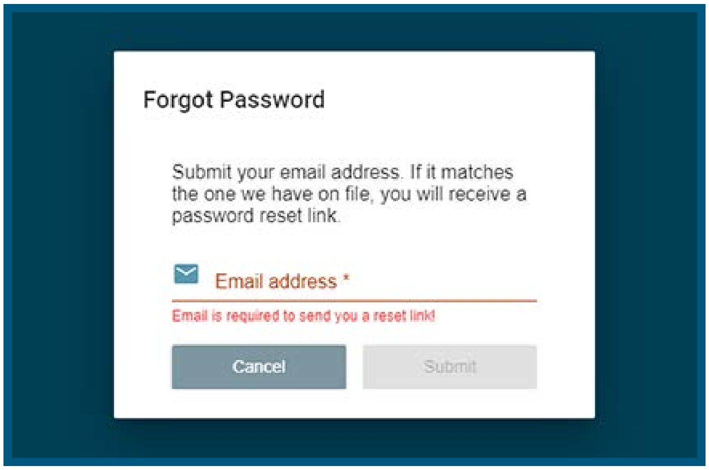


Figure 5

An email will be sent to the address registered to that user (this may take a few minutes). Clicking the link in the email will guide the user to a page where they can reset their password.

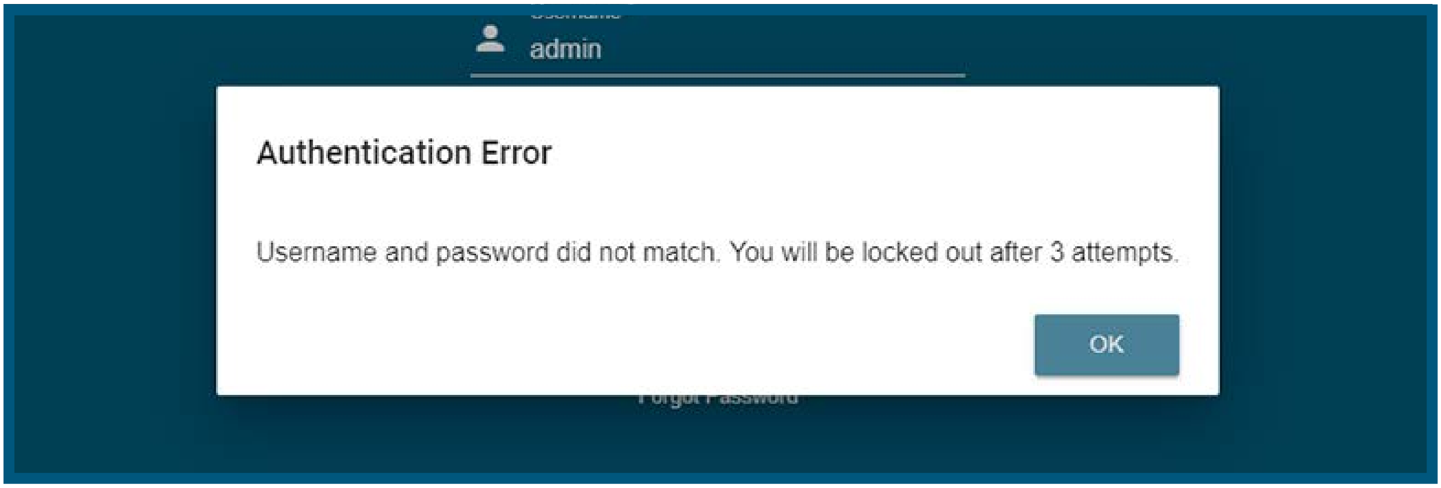


Figure 4

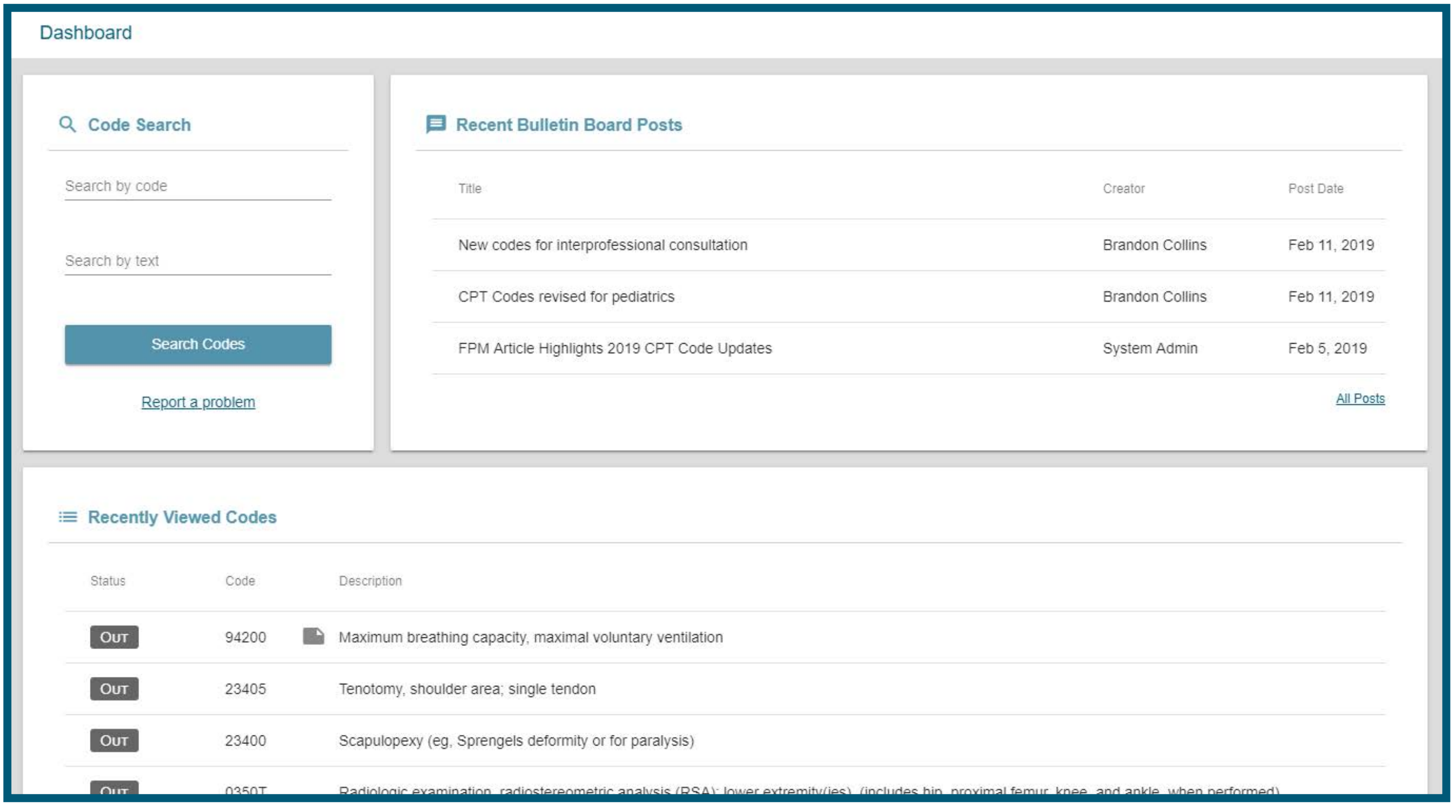


Figure 1

Dashboard

The dashboard (Figure 1) is where you will land as soon as you sign in. Here, you will be able to do one of three things. Shortcut search allows you to immediately search by code or text. see Recent bulletin board posts are available, as well as a list of recently viewed codes.

Code Search

You may start searching for a particular procedure by code or text. Once you've hit the Search Codes button, you will be jumped to the Search Codes section with the results of your search. For more information, please refer to Search Codes section of this document.

Recent Bulletin Board Posts

This section will always display the most recent posts from the Bulletin Board section. It is designed to give a quick-view of important information or announcements to all users. The Bulletin Board widget will only be available for Team type clients. For more information, please refer to Bulletin Board section of this document.

Recently Viewed Codes

In this section, you will be able to see the most recently accessed procedures listed out in reverse-chronologic order. It is a dynamic field, where the list will always be updated any time your browser is refreshed. Note that this list represents collected data from all users in your organization. A code will show up in the recent list only if it has been viewed.

Search Codes

Choosing a Year

By default, I/O Surg presents search results based on the current calendar year. At the top left, a previous year can be chosen, (Figure 6) which will result in a warning (Figure 7).

Figure 6

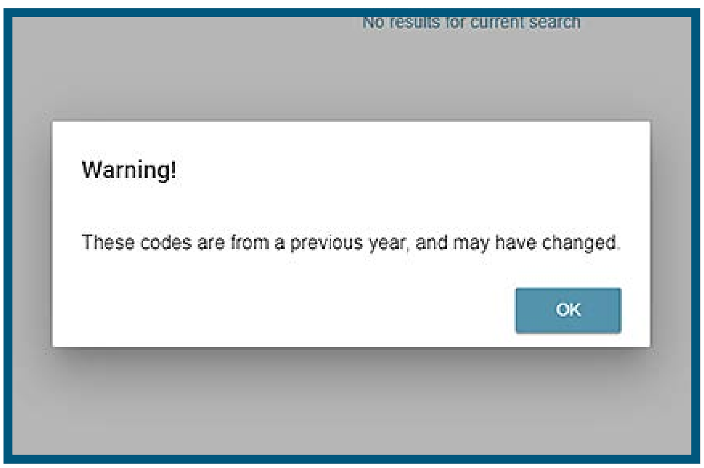


Figure 7

Searching Codes

CPT codes can be searched by number, or by text. Searching by number will show the top 30 results based upon the code. Searching by text will match results based upon Long Description, or Keywords.

Status

The status of a code (Inpatient/ Outpatient) is shown in grey for 'Outpatient', and blue for 'Inpatient'. If a status has changed from a previous year, a flag will show next to the status, with the opposing color.

Example: if this year's status for a code is 'Outpatient', but last year it was 'Inpatient', the status will be grey and the flag next to it will be blue.

Favorites

Codes can be saved as favorites by clicking the star next to it. A gold star shows that the code is a favorite (Figure 8). Any favorite set by a user can only be seen by that user. A complete list will be available under 'Favorites' in the menu.

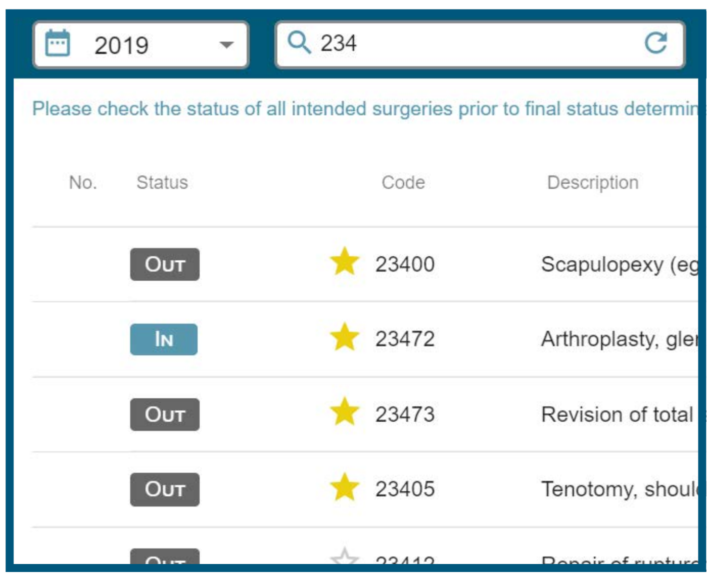


Figure 8

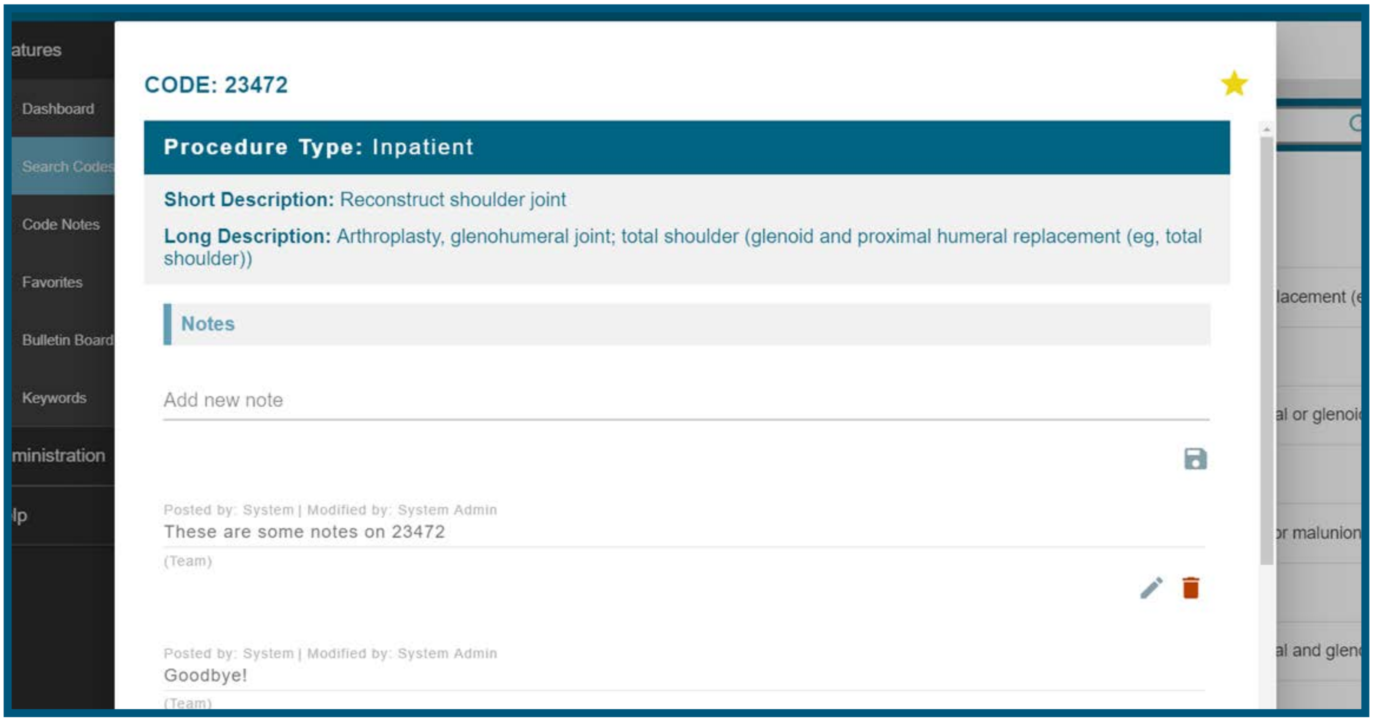


Figure 9

View Details

Clicking or tapping on a code result will show its details in a dialog. The dialog will show, in full, 'Procedure Type', 'Short Description', 'Long Description', 'Notes' and 'Keywords' (Figure 9). If the status has changed from a previous year, a message will show. Likewise, if the user is currently viewing results from a previous year, a warning message will show in the detail dialog.

Add/Edit Notes

A note icon displays next to a search result if that result already has a note on it. A code result can have one or more custom notes left on it. Notes can be Team level notes left by Administrators, or Individual notes left by Standard Users. Any notes left by Administrators are Team notes and any notes left by Standard users are Individual (private).

Administrators can see and modify Team notes left by themselves and other Administrators. Standard users can see Team notes, but cannot modify them. Standard users cannot see or modify the notes of other Standard users.

If a user has permission to modify a note, that user can click the pencil icon below the note. The note will go into edit mode. After retyping the note, the user can click the save icon to save the changes. Clicking the cancel icon will cancel the changes.

When a user has permission to delete a note, a trash icon will appear beneath it. Clicking the trash icon will open a 'Delete | Cancel' choice next to it, where the deletion can be confirmed.

Keywords

Keywords added to a search code enhance the ability to search for that code by text. Admins can create client-wide Team keywords, while Standard users can create Individual keywords for themselves. Team keywords will be blue, while Individual keywords will be gray.

To add a keyword to a code, type a term into the Keywords line and hit Enter on the keyboard (Figure 10). The new keyword will appear as a tag. Tags the user is allowed to delete can be removed by clicking the X on that tag. No save step is needed, as the changes are auto-saved.

Filter Notes

A full list of Notes is available to Administrators. This list can be accessed by clicking 'Notes' in the side menu. The list of notes can be filtered by typing keywords into the search box at the top of the 'Notes' page (Figure 11). Notes can be edited and accessed by clicking, just like in the search results.

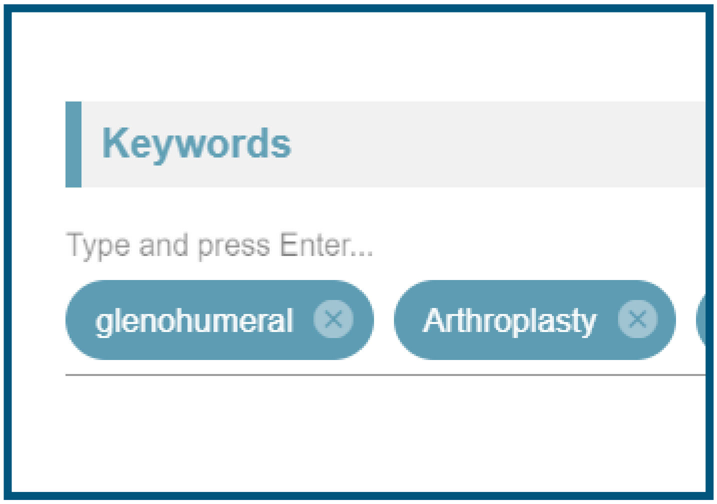


Figure 10

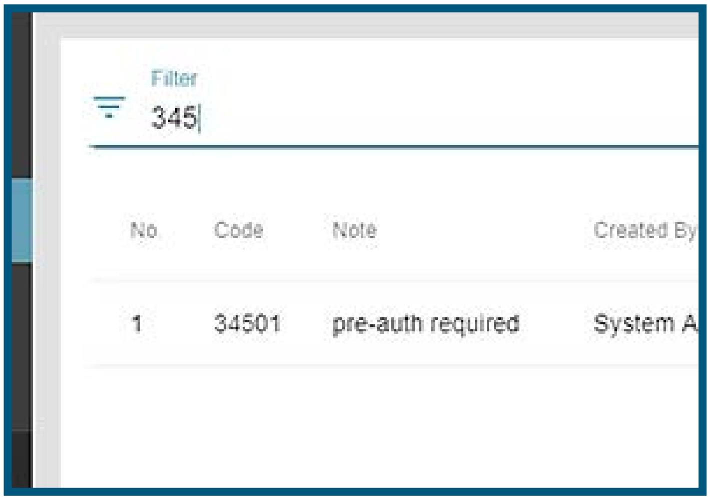


Figure 11

Bulletin Board

View a Post

The bulletin board is used to provide links to web references for the users and can be accessed from the side menu. Each board post will have a title, reference URL and text content. Like notes, the posts can be viewed by anyone, but only Administrators can make and edit posts.

Add a Reference

Only an Admin can create a new post for the bulletin board by clicking the blue plus-sign icon at the top-right of the Bulletin Board page (Figure 12). The title, URL and content fields are required for each post. Be sure to use a valid URL format by including **http://** or **https://** protocol. The title will appear at the top of the post, whereas the content will appear as the body. Posts can be marked as News or Resource, allowing for posts to be filtered by each type at the top right of the feed.

Newer posts will appear at the top of the feed. A reference can be viewed by clicking the post, then clicking the 'Open Reference' link on the post. The URL will open in a separate window.

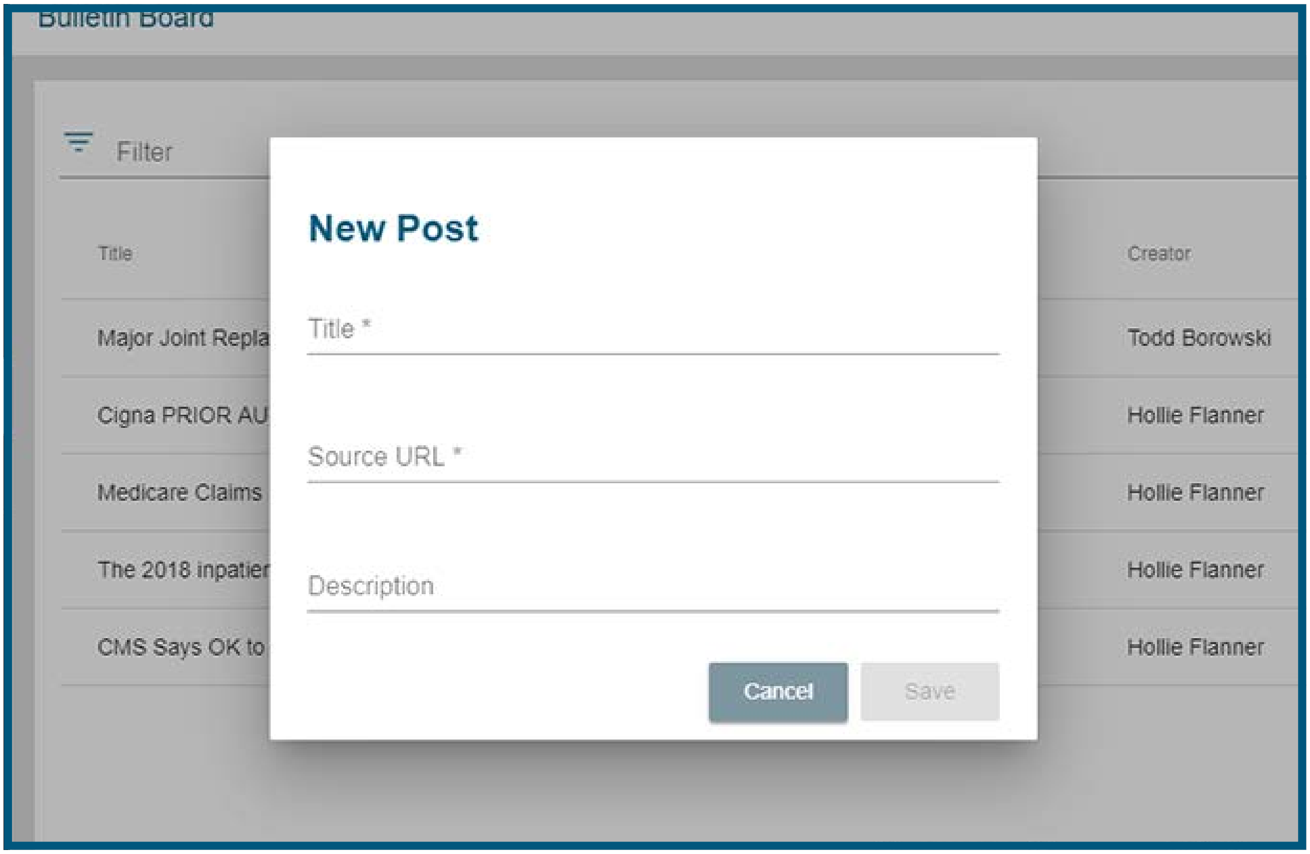


Figure 12

Figure 13

Edit/Delete a Post

Only an Admin can edit a post by enabling the Edit Mode switch at the right-hand side of the post dialog (Figure 13). After changing the details of the reference, click save to submit the changes. A post in the Bulletin Board list can be deleted by clicking the red trash icon at the right of a post. A confirmation box will appear and 'Delete' can be chosen from there.

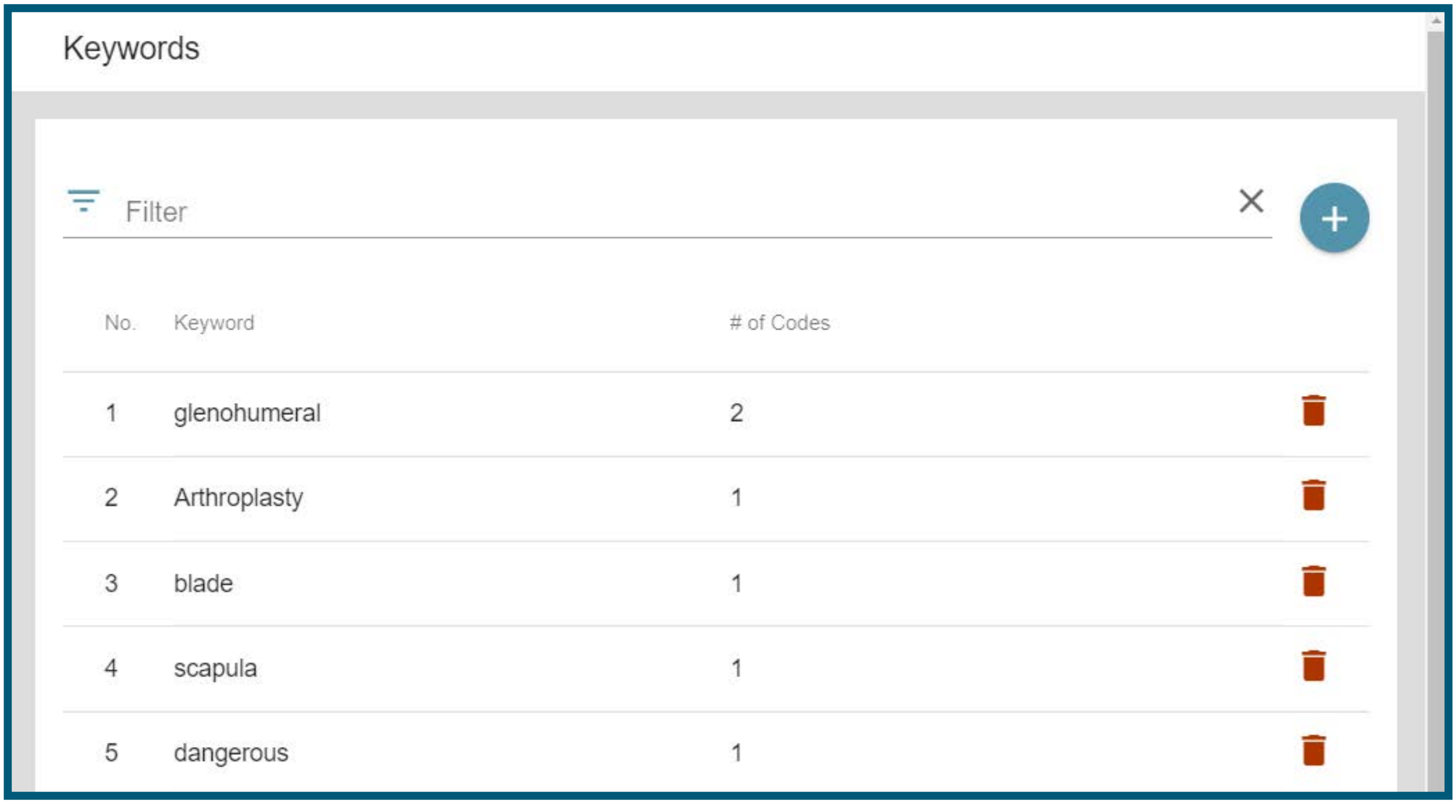


Figure 1

Keywords

The Keywords list, accessible from the side menu, is a list of the keywords which have been applied to codes (Figure 1). It also displays the number of codes to which the keyword has been applied. A keyword can also be removed from all its codes from this section.

Managing keywords is only allowed for Admin users. Controlling how keywords are associated with codes affects search results based on that keyword.

Adding Keywords to Codes

Keywords can be generated for one code from the code result dialog. However, they can also be generated from the keywords section. The difference is that, from the keywords section, a keyword can be bulk referenced to multiple codes.

Clicking the plus sign at the top-right of the Keywords screen will open a 'New Keyword' form (Figure 2). The 'Label' field on the form is the keyword itself.

However, to associate a keyword with codes, the plus sign at the top-right of the 'New Kewords' screen must be clicked. This

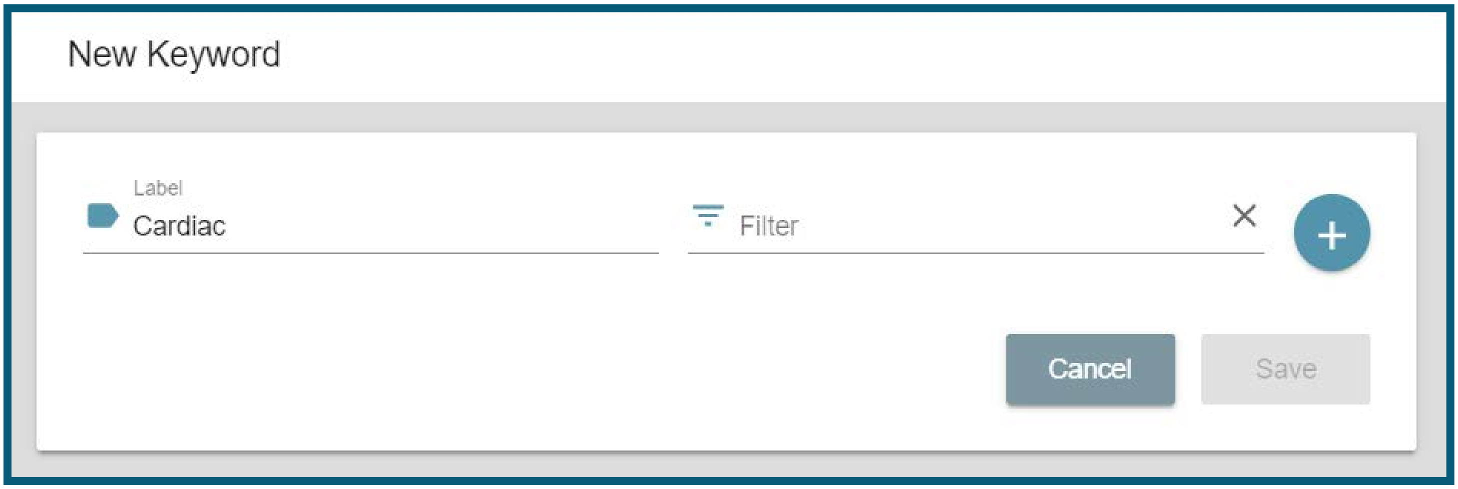


Figure 2

will open a dialog where the codes can be seached by Code or Description (Figure 3).

Search for the desired code(s) by typing into the 'Search' bar. Choose the type of search (Code/Description) using the 'Search By' dropdown menu. Check one or more codes and click Save on this dialog to add them. Any code you have previously applied will be disabled. To complete the process, the Save button on the 'New Keyword' screen must be clicked. If the keyword already exists you will recieve a duplicate keyword error.

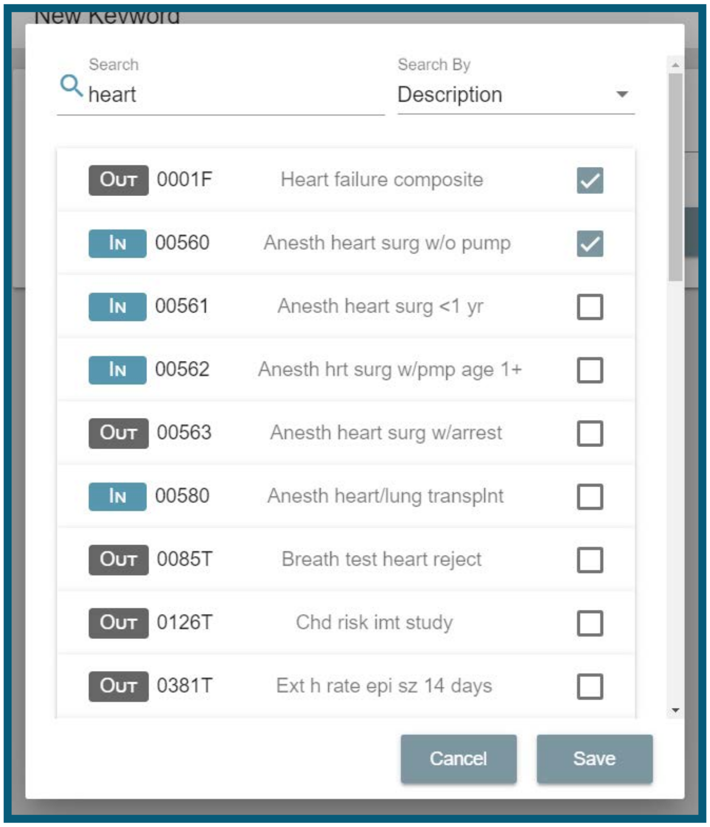


Figure 3

Editing Keyword Relationships

In the Keywords list, edit which codes are referenced by a keyword by clicking the note. Each code will show its status and short description, but clicking the code will display its long description.

Use the plus icon to add new codes using the code search dialog. After clicking save, codes to add will be marked in green (Figure 4). You must still click Save on the 'Edit Note' screen to commit your changes.

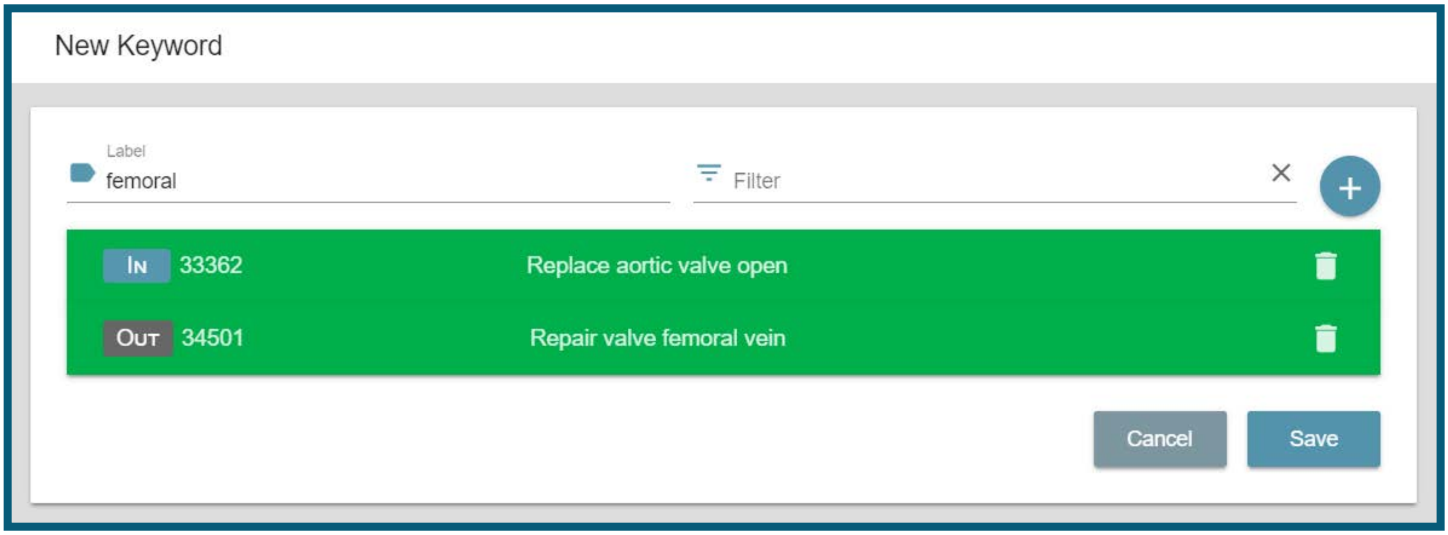


Figure 4

Removing Keywords

A code can be disassociated from a keyword by clicking the trashcan icon next to the code. The line will turn red (Figure 5), showing that the code is set to be removed. However, the code will not actually be removed until the 'Save' button is clicked. To undo removing a code, click the Undo icon on a red line before saving.

To entirely remove a keyword from all codes, navigate to the main 'Keywords' list. Click the trashcan icon next to a keyword to open the delete confirmation dialog. Click the 'Delete' button on the dialog to confirm.

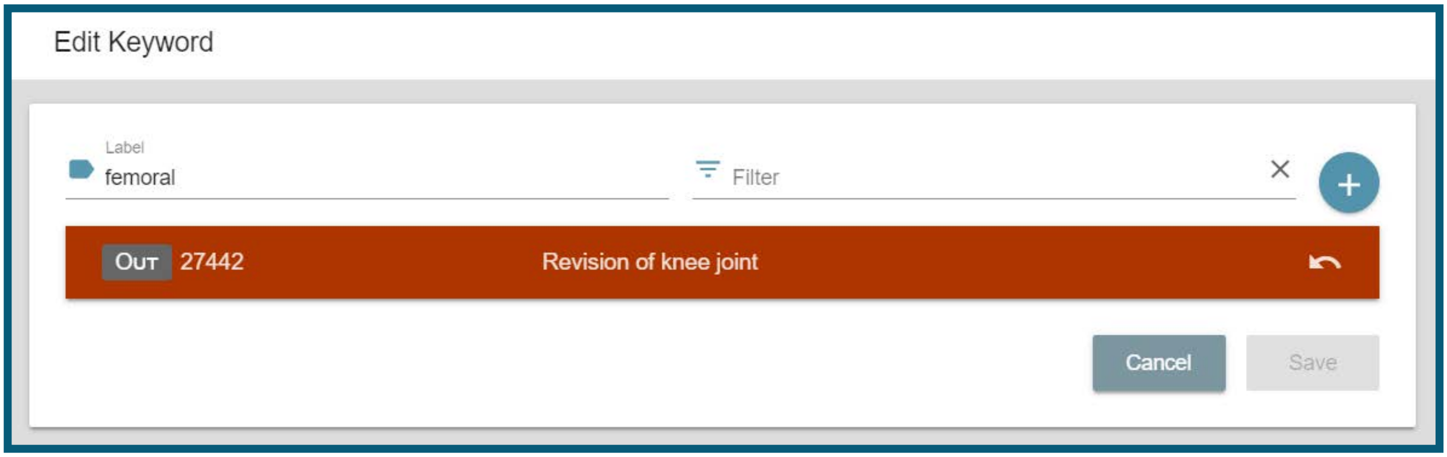


Figure 5

Figure 1

Bulk Notes

The Code Notes list, accessible from the side menu, is a list of the notes which have been applied to codes (Figure 1). It also displays the number of codes to which each note has been applied. A note can also be removed from all its codes from this section. Managing notes is only allowed for Admin users.

Adding Notes to Codes

A note can be generated for one code from the code result dialog. However, they can also be generated from the Code Notes section. The difference is that, from the Code Notes section, a note can be bulk referenced to multiple codes.

Clicking the plus sign at the top-right of the Code Notes screen will open a 'New Note' form (Figure 2). The 'Label' field on the form is the note itself.

However, to associate a note with codes, the plus sign at the top-right of the 'New Note' screen must be clicked. This will

Figure 2

open a dialog where the codes can be seached by Code or Description (Figure 3).

Search for the desired code(s) by typing into the 'Search' bar. Choose the type of search (Code/Description) using the 'Search By' dropdown menu. Check one or more codes and click Save on this dialog to add them. Any code you have previously applied will be disabled. To complete the process, the Save button on the 'New Note' screen must be clicked. Attempting to add

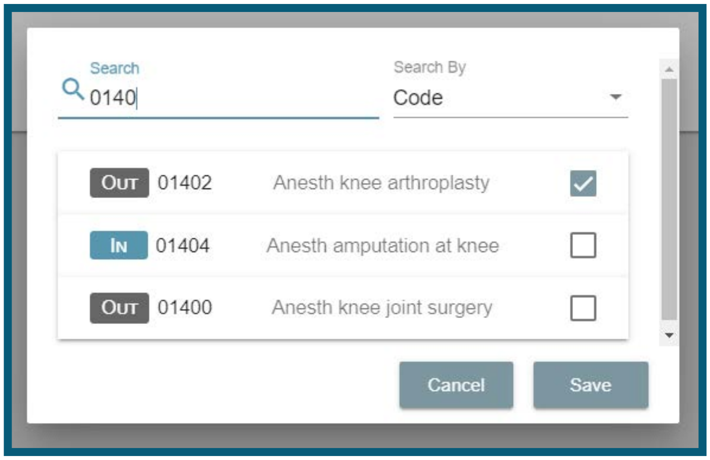


Figure 3

a note which already exists will throw a duplicate note error.

Editing Note Relationships

In the Code Notes list, edit which codes are referenced by a note by clicking the note. Each code will show its status and short description, but clicking the code will display its long description.

Use the plus icon to add new codes using the code search dialog. After clicking save, codes which you intend to add will be marked in green (Figure 4). You must still click Save on the 'Edit Note' screen to commit your changes.

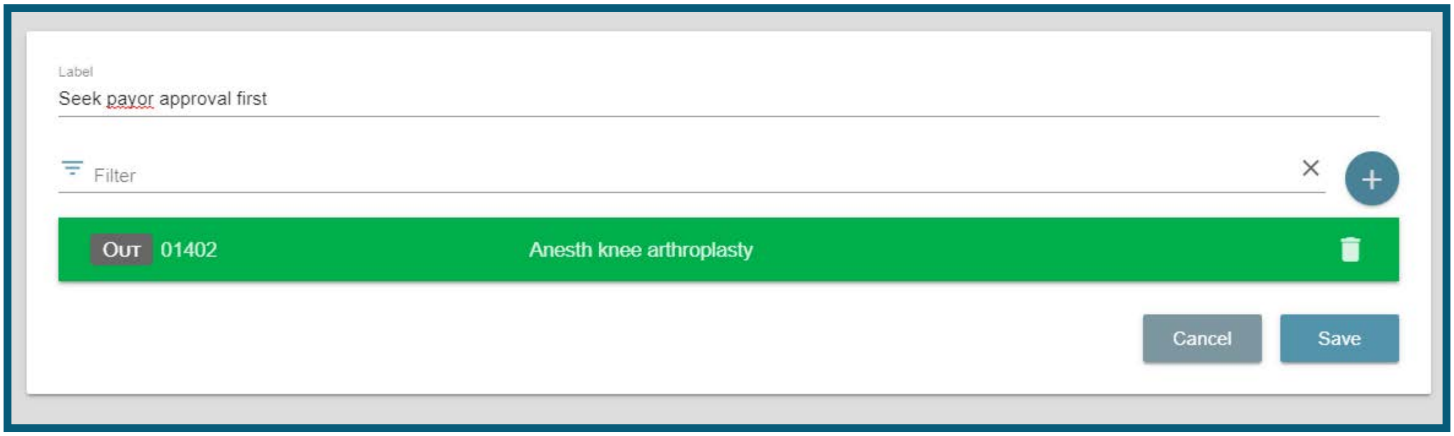


Figure 4

Removing Notes

A code can be disassociated from a note by clicking the trashcan icon next to the code. The line will turn red (Figure 5), showing that the code is set to be removed. However, the code will not actually be removed until the 'Save' button is clicked. To undo removing a code, click the Undo icon on a red line before saving.

To entirely remove a keyword from all codes, navigate to the main 'Code Notes' list. Click the trashcan icon next to a keyword to open the delete confirmation dialog. Click the 'Delete' button on the dialog to confirm.

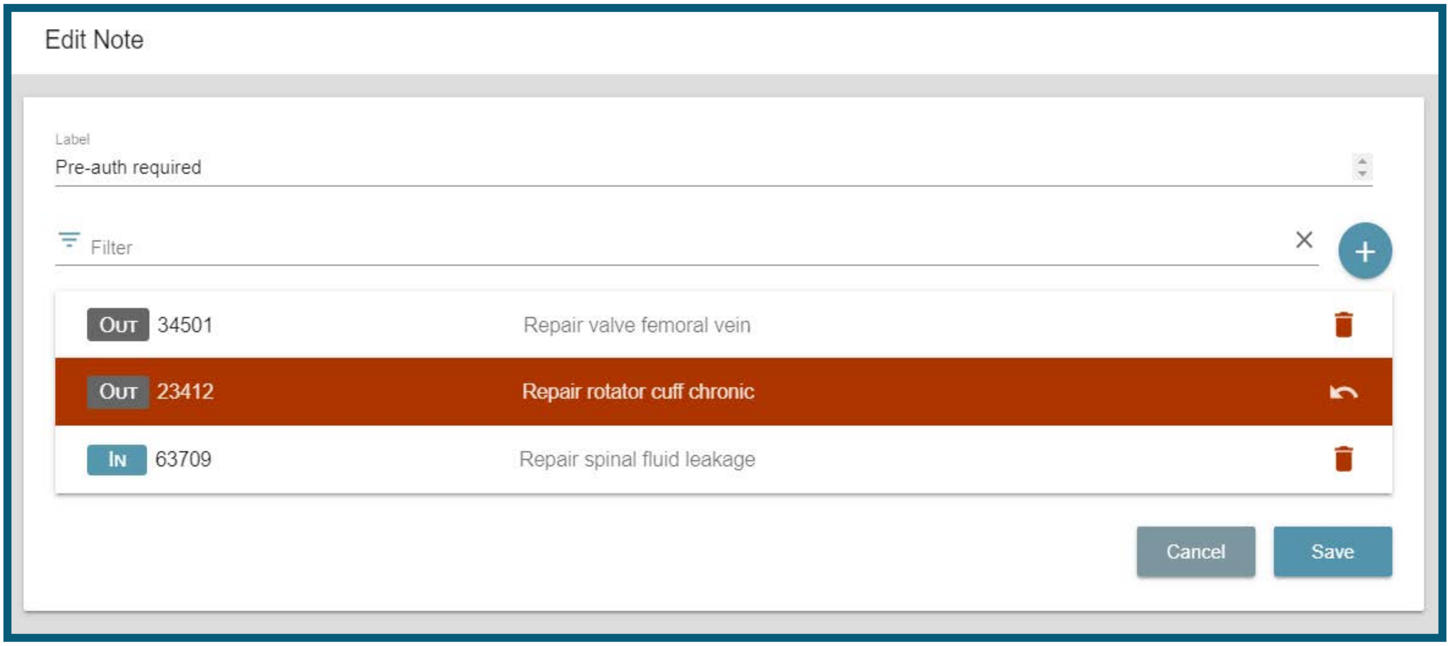


Figure 5

Users

Seats

Only System Admins and Administrators can see the list of users by accessing the 'Users' choice in the side menu. Each active user in the system uses one 'Seat'. The number of used/total seats is available at the top left of the Users screen. Deactivated users do not count toward your total seat count.

The total number of seats can affect the cost of I/O Surg. To request a higher number of total seats, contact the Support Team. While the total number of available seats has not been met, a new user can be added without additional cost.

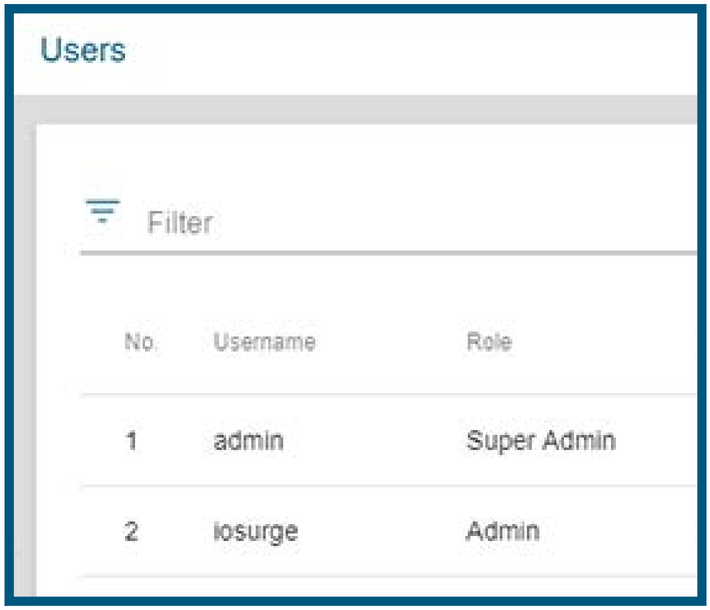
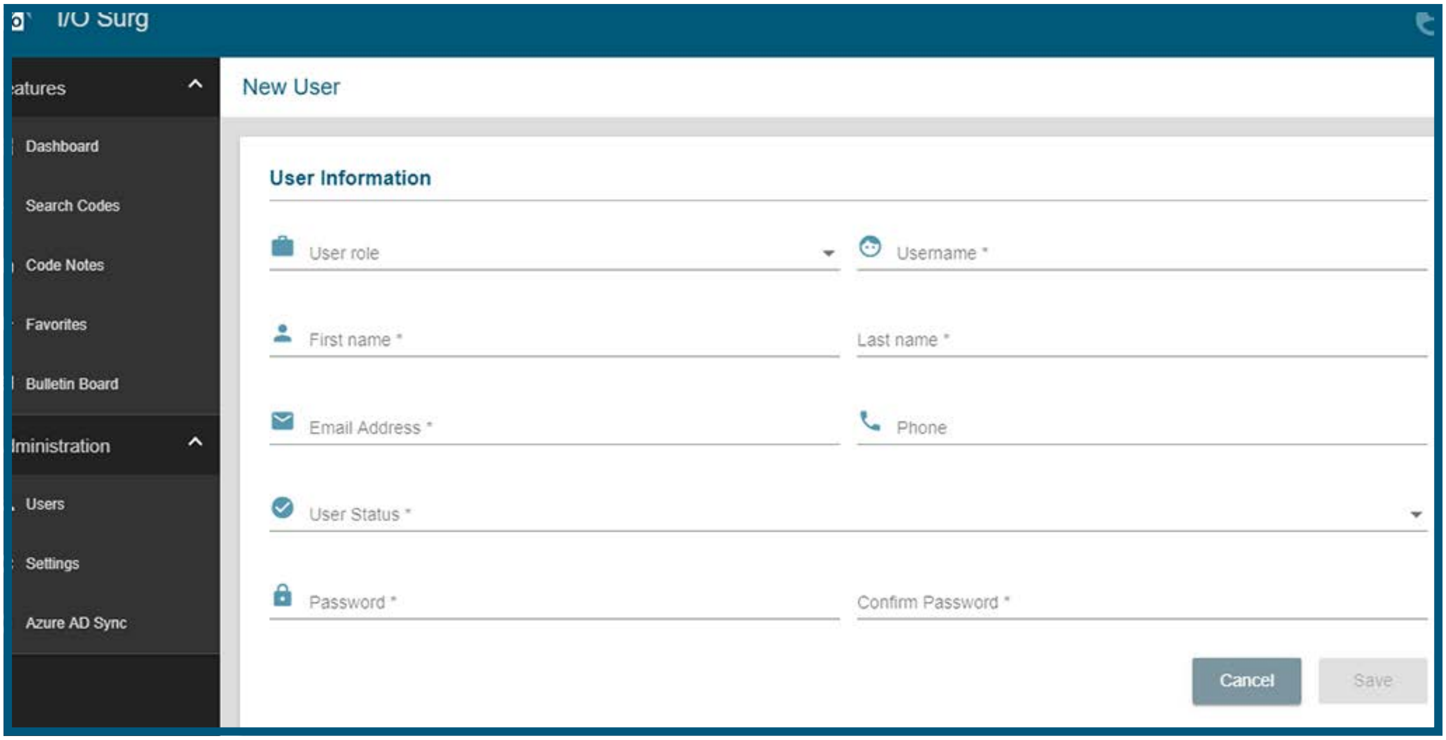


Figure 14

The user list can be filtered by typing into the Filter box at the top of the Users page (Figure 14). The result will be matched against Username, Role, Name, Email, and Phone.

Figure 15



User Levels

System Admins can make Administrators and Standard Users, but can only be changed by other System Admins. Any user created by an Administrator will automatically be a Standard User. Administrators cannot make other Administrators or change the user-level of existing users.

Add User

Clicking the 'Add User' button will open a new page (Figure 15). A new user must have a role, username, first name, last name, email address and password. The phone number is optional.

The user role will determine what features can be accessed by the user. Keep in mind that System Admins can create both Administrators and Standard Users. However, Admins can only create Standard Users, but can edit/create new notes, keywords and posts. A Standard User will be able to view codes, and bulletin board posts, but will not be able to add notes, keywords, or new posts.

Any attempt to create a username which already exists will result in an error message after clicking save. The user can also be created in an inactive status and activated later by editing the user. Inactive users do not count toward your available seats. A username cannot be changed once it has been saved.

A new user will receive a welcome email with instructions at the email address specified when they were created.

Edit/Delete User

A System Admin can click on a user to edit their information. Only the username cannot be changed. The user's password can also be reset if the Reset Password box is checked.

In order to reset the password as part of the user update, check the box next to 'Password reset'. A pair of password confirmation boxes will appear. The password in each must match before you will be allowed to save.

To deactivate a user, click the checkmark icon at the right of that user in the list (Figure 16). A confirmation box will appear.

Figure 16

You must click the ‘Disable’ button on this confirmation box to completely remove the user. Enabling a user works much the same way, but remember that enabling a user counts toward your seat limit.

Unlock User

If a user fails to provide correct username and password credentials enough times, they will be locked out of the system entirely until an Administrator unlocks their account. A locked user will have a filled lock icon next to their user listing. To unlock the user, click the lock icon and confirm the dialog which pops up. Their number of sign-in attempts will be reset to three. A locked Administrator can only be unlocked by a System Admin, or by using Forgot Password.

Profile

You may access the profile icon at the upper right corner of the scree. This small box will display your name, your role in the system, your email, ability to edit your profile, and finally sign out of the solution.

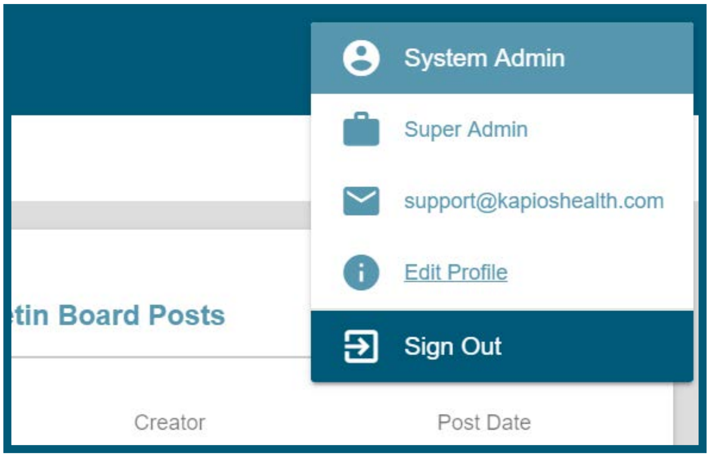


Figure 17

User role

You may be assigned either an Admin or a Standard User role. Admin users will have the ability to add/edit/delete Code Notes, and Bulletin Board posts, where Standard Users will not.

Edit Profile

At the top right of the screen, you will see a profile icon. Click this icon to see some information about the current user. You can also click the 'Edit Profile' link to access more informtion about the current user's profile (Figure 17).

By accessing this link, you will be taken to your own profile page, where you can edit your name, email address and phone number, as well as the ability to reset your password. Note that you will not be able to change your username.

Reset Password

To reset your password, start by checking the 'Reset password' checkbox. Two input fields will appear. You will have to enter the password twice before you can confirm the password save.

Settings

The settings section allows administrators to modify certain aspects of the I/O Surg features. Toggle a setting on and click the save button to enable that feature. If the save button is not clicked, the change will not take effect (Figure 16).

Users

You have an option to show or hide deactivated users. If enabled, you will be able to see the history of all users who have had access to I/O Surg under Users section. If it is not enabled, the disabled users will be hidden in the Users list.

Remember that deactivated users don't count toward the number of seats used. If 'Show deactivated users' is enabled, then the number of users listed may not match with the number of available seats. You can only reactivate a user if you have seats available and you will only be given the option to reactivate them if 'Show deactivated users' is enabled.

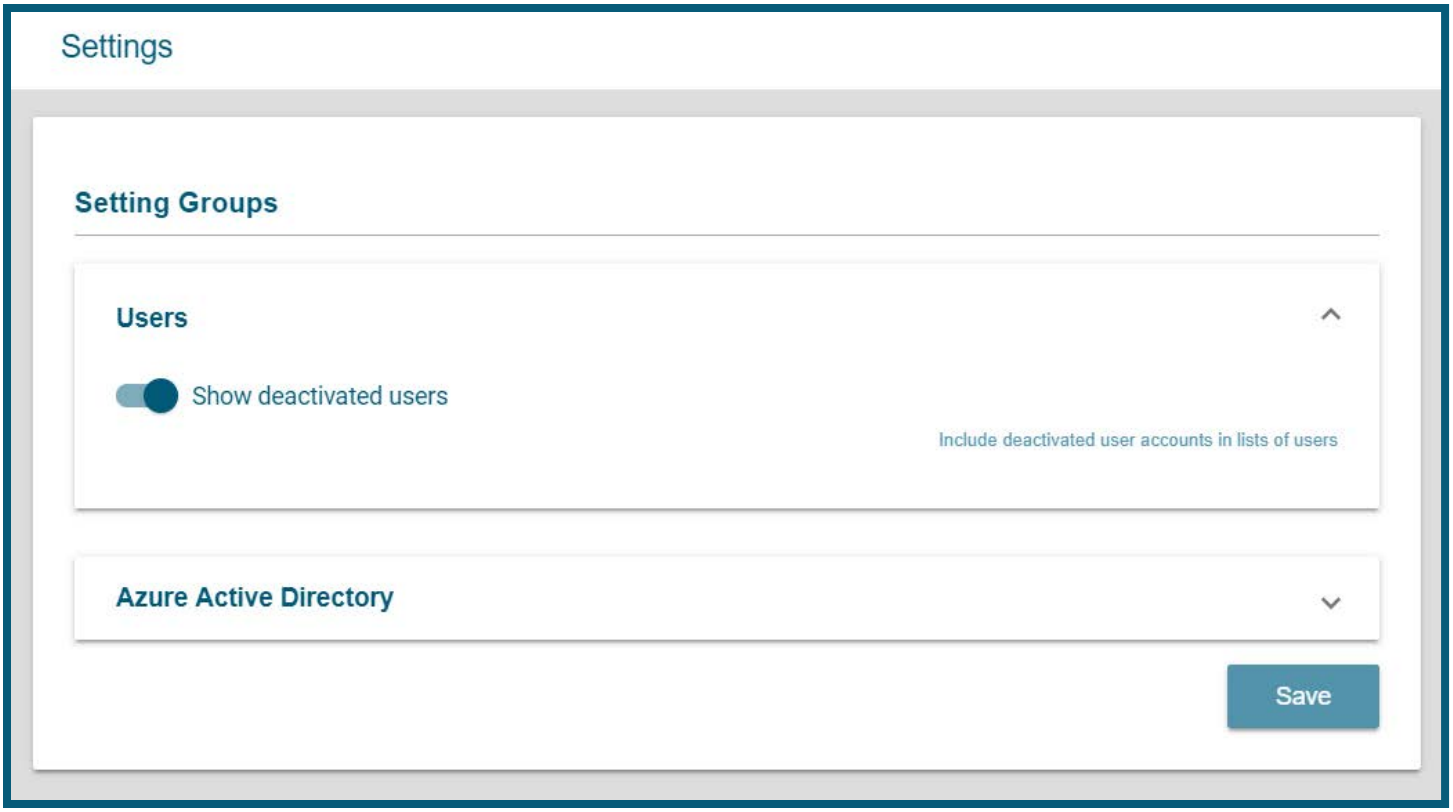


Figure 16

Azure Active Directory

If your organization utilizes Microsoft's Azure Active Directory, we have the ability to link up, allowing users to use their preexisting secure credentials to sign into I/O Surg (Figure 17). Note that this feature will require contact with your IT department, and should be discussed as part of initial deployment of I/O Surg.

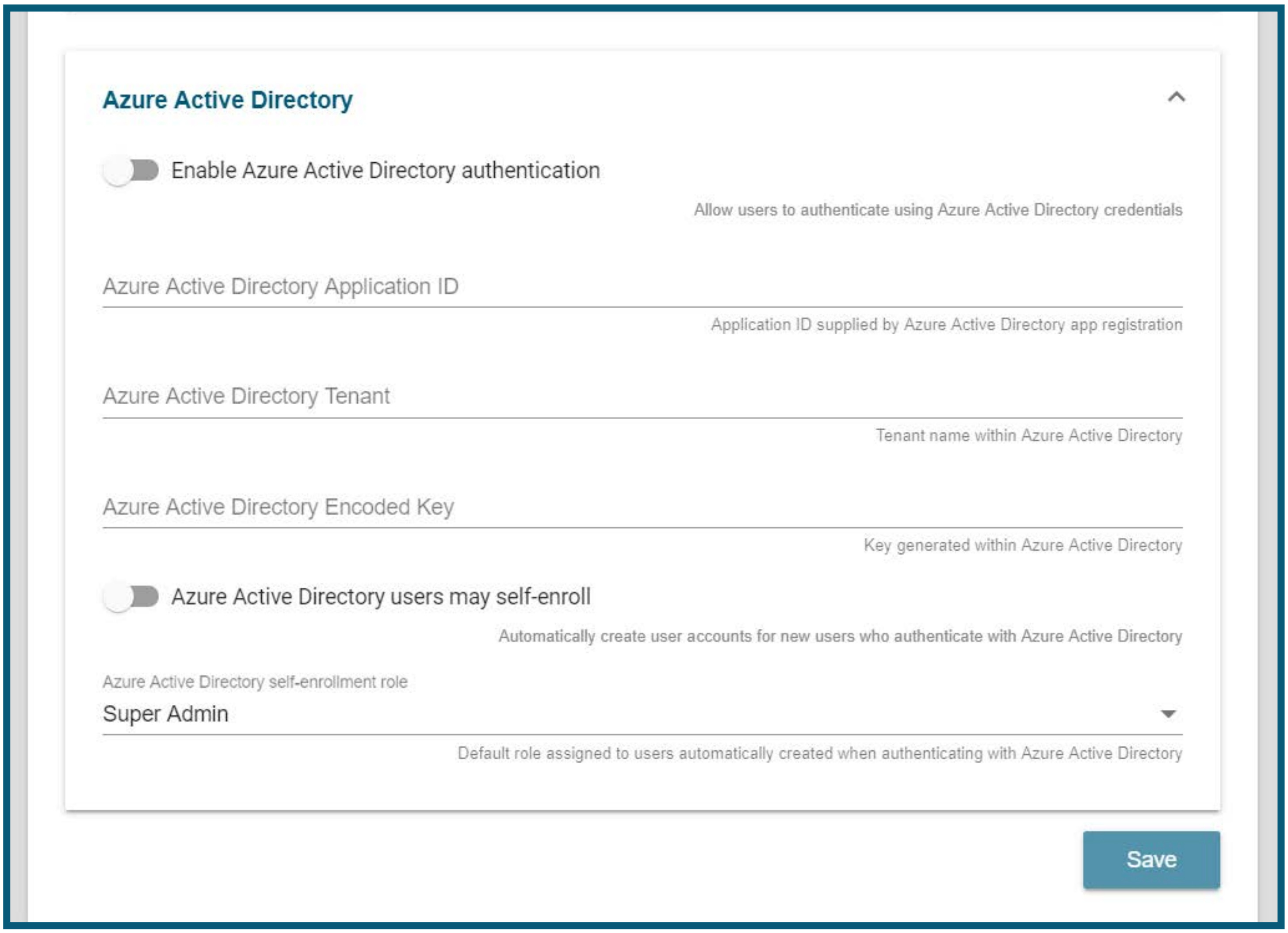


Figure 17

Contact Support

Any operational or administrative issues, including user lock-outs or password resets should be addressed with your direct supervisors.

For any technical issues with I/O Surg, send an email to iosurg.support@kapioshealth.com and don't forget to include:

- Your client name and location
- Your name
- Your title (if applicable)
- Your own contact information
- A detailed description of the issue you are having, with any relevant examples