OnBase®
Foundation EP5

Patient Window

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Copyright

Document Name	Patient Window
Department/Group	Documentation
Revision Number	Foundation EP5

OVERVIEW

Features **1**
Seamless Integrations 1
Security 1
Simple Navigation 1
Customizable Filters 1
Search 2
Side-by-Side Document Comparison 2
Document Corrections Submission 2
Patient Lists 2
Cases 2
Licensing **2**
Simplified Licensing 3
Additional Licensing 3
Legacy Licensing 3

INSTALLATION GUIDE

INSTALLATION

Requirements **5**
General Requirements 5
Web Client Browser Requirements 5
Pop-Up Blockers 6
Tabbed Browsing 6
Internet Explorer Disable Script Debugging 7
Proxy Server Setup 7
Licensing Requirements 8
Concurrent Client for EMR Integrations Licensing 8
Configuring the Application Server for EMR Licensing 9
Upgrade Considerations **9**
Patient Window Upgrade Considerations 10
Changes to User Access Privileges 10
Changes to Checksum Validation 10
Server Machine Considerations 11
End-User Workstation Considerations 11
Removal of ActiveX Client Type 11
Changes in Support for Query String Parameters 11
Changes in Filter Results 12
Compatibility of Saved Filters 12
Changes in Saved Filter Usage 12
Changes in Filter and Column Configuration 12
Changes in Emergency Access Configuration 12
Patient Tab Considerations 13

Form Creation Considerations 13
Additional Guidelines 13
Installing Patient Window 13
Installer Options 14
Preparing the Servers 16
Ensuring Proper IIS and .NET Installation 16
Installation Order for IIS and .NET 16
Manually Changing the .NET version 17
Automated Installation Steps for Patient Window 17
Controlling the Installer from the Command Line 24
APPLICATION_SERVER_URL 24
DATASOURCE 25
IIS_ASPNET_PASS 25
IIS_ASPNET_USER 25
PATIENTWINDOW_APPLICATION_NAME 25
PATIENTWINDOW_IIS_ASPNET_IMPERSONATION 26
PATIENTWINDOW_IIS_NTAUTH 26
PATIENTWINDOW_IIS_SSL 26
PATIENTWINDOW_IIS_WEBSITE_ID 26
PATIENTWINDOW_SERVICECLIENTTYPE 27
PATIENTWINDOW_URL 27
Manual Installation Steps for Patient Window 27
Web.config Settings 29
ApplicationServer Url 29
dmsVirtualRoot 29
dmsDataSource 29
AllowViewSource 30
webtheme 30
default_username 30
default_password 30
enableDefaultLogin 30
EnableAutoLogin 30
forceSSOAutoLoginOverDomain 30
EnableSplitView 31
EnablePatientSearch 31
EnablePatientContextSyncing 31
EnableTimestamp 32
TimestampTimeLimit 32
EnableWorkstationNameDNSLookup 32
enableRowColoring 32
ThumbnailHitListAllowCaching 32
ThumbnailHitListThumbnailMaxWidth 33
ThumbnailHitListThumbnailMaxHeight 33
ThumbnailHitListPreviewMaxWidth 33
ThumbnailHitListPreviewMaxHeight 33

AllowInsecureConnection 33
PreventViewerClientCaching 34
SystemListDisplayLabel 34
PersonalListDisplayLabel 34
SelectedTabSingleColor 35
__EnableEFormStandardPrinting 35
FederatedSearchWithMPI 35
HideToolbarPrintButton 35
autoDisplayNotePanelPDFOffice 36
IdPUrl 36
Checksum Validation Settings 36
EnableChecksum 36
ChecksumKey 37
EnableLegacyChecksumFallback 37
Encrypting Checksum Settings 37
Configuring Session Expiration 38
EnableSessionExpiration 38
PromptOnSessionExpire 38
sessionState Timeout 39
Configuring Service Client Settings 39
Remoting 39
SOAP 40
Enabling Impersonation 40
Disabling Impersonation 41
Autologin Configuration 41
Installing the Integrated Office Viewer 42
Creating URLs for OnBase Patient Window 42
Patient Record Links 43
Requirements for Patient Record Links 43
Creating a Patient Record Link 43
Patient Search Links 44
Chart Search Links 44
Patient List Links 45
Query String Parameters 45
Retrieval Parameters 45
Using Assigning Authorities 46
Session and Security Parameters 47
Banner & Display Parameters 48
Parameters for Embedding 49
Filter Parameters 49
Applying a Public Filter 51
Applying Multiple Values for a Filter 52
Date Formats 52
User-Configured Default Filters 53

Medical Imaging Viewer Parameters 53
Epic Integration Parameters 53
Meditech Integration Parameters 54
Special Characters 54
Embedding Patient Window 54
Embedding Requirements 55
Supporting Embedded Timeline Mode 55
Third-Party Integrations 56
Configuring Application Enabler for Patient Window 57
Application Enabler Requirements 57
Configuring Epic Authentication 58
Creating URLs for Epic Authentication 58
Enabling Meditech IP-Based Authentication 59
Sensitive Content Configuration 59
Designating Sensitive Document Types 60
Post-Installation 61
Impact of Running Antivirus Software on Servers 61
Loss of Session Context 62
Decreased Performance and Scalability 62
Performance Issues on Servers Running McAfee VirusScan 62
Performance Issues on Client Workstations Running McAfee VirusScan 63
Command Line Switches 63
Applying a Command Line Switch via a Desktop Shortcut 63
-MRMSINSTALL 64
Password 64
User Group Configuration Rights 64
Contacting Support 64

VIEWER FEATURE MATRIX FOR PATIENT WINDOW

Disabling Viewer Options 66
Viewer Right-Click Options 67

MEDICAL RECORDS MANAGEMENT BEST PRACTICES

Choosing a Medical Records Client 70
Medical Records Unity Client 70
OnBase Patient Window 71
DeficiencyPop 71
OnBase Client 71
Network Architecture for Medical Records 72
Setup for External Users 72
Medical Records Unity Client 72
OnBase Patient Window 72
DeficiencyPop 73

Setup for Internal Users 73
Citrix and Virtual Environments 73
Load Balancing 73
Medical Records Unity Client 73
Medical Web Applications 74
WAN Considerations 74
Upgrading Medical Records Clients 74
Available Resources 74
Testing an Upgrade 75
Upgrading OnBase Client Services 75
Deploying Unity 76
Deploying Patient Window 76
ActiveX Controls 76
Web.config Customizations 76
Deploying DeficiencyPop 76
ActiveX Controls 76
Web.config Customizations 77
Performing Post-Upgrade Tasks 77
Delinquency Configuration Best Practices 77
Before You Begin 77
Setup for One Letter Format 78
Setup for Multiple Letter Formats 79
Letter Templates 80
Command Line Switches 80
Delinquency Reporting 80
Setting Up Medical Records Servers 80
General Practices 80
Analysis Server 81
Closure Server 81
Delinquency Server 82
Delinquency Letters Server 82
Polling Service 82
Training Medical Records Users 82
Thoroughly Understand Users’ Processes 83
Have a Sponsor Champion the MRM Solution 83
Ensure New Trainers Are Prepared 84
Use Appropriate & Relevant Training Materials 84
Set Up the Training Environment in Advance 84
Be Prepared to Explain the Basics 85
Tell Users What They Need to Know 85

ADMINISTRATION GUIDE

CONFIGURATION

Overview **87**
Enforcing Configuration Changes 87
Configuration Rights 87
HL7 Configuration 88
HL7 Field Specifiers 89
Requirements for HL7 Field Specifiers 89
Handling Unknown HL7 Codes 89
User Group Configuration **90**
Document Type Configuration for Patient Window **91**
Medical Record Document Types 91
Non-Medical Record Document Types 91
Clinically Relevant Dates 92
Cross-References 92
Sensitive Content 92
Admit Type Configuration **93**
Fixing Charts with Admit Type Issues 94
Configuring the Admit Type 95
Fixing Charts in Review for HL7-Created Admit Types 96
Medical Facility Configuration **98**
Creating a New Facility 99
Configuring Facility Settings 99
Days Before Chart is Inactive 100
Days Before Chart Access Expires 101
Emergency Chart Access Request 101
Lock Down - Only Grant Access to Assigned Usergroups 101
HL7 Field Specifier 101
Ignore Attending Physician when verifying Chart Information 101
Configuring Chart Auto-Names 102
Assigning Facility User Group Privileges 103
Fixing Charts with Facility Issues 104
Configuring the Facility 104
Fixing Charts in Review for HL7-Created Facilities 105
Configuring Facilities to Automatically Complete Correction Tasks 106
Criteria for Automatic Correction Completion 107
Clinical Document Tab Configuration **108**
Available Tab Types 108
Documents Tabs 108
Secure Documents Tabs 109
Best Practices for Secure Tabs 109
Printing Secure Documents 109

Personal Tabs With Secure Documents 109
Displaying Non-Sensitive Documents in Secure Tabs 110
Patient Custom Query Tabs 110
Other Documents Tabs 110
Reference Tab 111
Personal Tab 111
Creating a Cross-Facility Tab 112
Configuring Tab Settings 112
Assigning Document Types to Tabs 113
Assigning User Groups to Secure Tabs 115
Configuring the Tab Sequence 116
Default Tab Selection 117
Medical Records Custom Query Configuration 118
Patient Window Custom Query Requirements 118
Configuring a Custom Query for Medical Records 118
Designating the Medical Records Custom Query 120
Department & Departmental Group Configuration 121
Configuring a Medical Department 121
Configuring Departmental Groups of Non-Physicians 123
Medical Unit Configuration 126
Nursing Station Configuration 127
Code Configuration for Procedures and Diagnoses 128
Supported Code Types 128
Code Import 128
Import File Requirements 128
Running the Code Importer 129
Code Maintenance 130
Requirements for Maintaining Codes Using HL7 130
Requirements for Assigning Codes to Charts 131
Requirements for Assigning Multiple Codes 131
Requirements for Diagnosis Types 131
Payor Configuration 132
Service Type Configuration 133
Physician Configuration 135
Configuring Provider Specialties 136
Configuring Physician Information 138
Deleting Physicians 141
Patient Data Access Reasons Configuration 142
Access Reasons in OnBase Patient Window 142
Access Reasons in the Medical Records Unity Client 143
Configuring Access Reasons 144
Chart Data Field Configuration 145
Configuring a Chart Data Field 146

HL7 Reference Field 148
Repeating Segment 148
Repeating Field 148
Track Chart Column Changes 148
Enable HL7 Null Handling 149
ID Number Keyword Type 149
Assigning Authority 149
Key Value 149
Zero-Pad For Searching 149
Confidentiality Code 150
Mapping Requirements 150
Keyword Mapping Requirements for Chart Attachment 150
Keyword Mapping Requirements for Chart Retrieval 150
Mapping Requirements for HL7 152
Pulling Values from Repeating HL7 Fields 153
Using Chart Data Fields to Implement Default Values 155
Data Fields Configuration 156
Medical System Settings 157
List Column Configuration 158
Displaying Values from Charts and Keywords 159
Configuring Columns for Lists 159
Changing the Default Sort Order 163
Search Configuration 167
Configuring the Medical Records Custom Query 167
Configuring Search Fields 168
Configuring Results Columns 169
Filter Configuration 170
Filtering on Chart and Keyword Values 170
Configuring Filter Criteria 171
Reordering Selected Filters 172
Removing a Filter 173
Hosted Content Configuration 175
Compatible Applications 175
Creating a New Hosted Content Button 176
Inserting Placeholder Variables 178
Assigning User Groups for Hosted Content 179
Configuring the Sequence of Hosted Content Buttons 182
Clinical Form Configuration 184
Requirements for Form Creation 184
Document Type Requirements 184
Form Template Requirements 185
User Privilege Requirements 185
Designating Forms for the Patient Window 186
Patient Window Settings 189

Documents Per Page 189
Prompt for Emergency Access Reason 190
Allow Users to Set Default Filters 191
Default Document View 191

Medical Client Settings 192

Medical Records Custom Query 193
Document List Sort Order 193
Show Document Count Within Each Tab 193
Show Tabs With No Documents 193
Show Queue Counts 193
Apply Facility Based Security to Chart Search 194
Apply Facility Based Security to Chartless Documents 194
Enable Unit Based Security 194
Display Confidentiality Notice 194
Maximum Chart Search Results 195

Banner Configuration 196

Creating Banner Templates 196
Dimensions 196
Expand Functions 197
Data Tags 197
Tag Format 198
Patient Identification 198
Patient Age 198
Patient Race 199
Patient Death Indicator 200
Patient Allergy Information 201
Patient Medical Alerts 201
Patient Address and Contact Information 201
Importing a Banner Template into OnBase 202
Configuring Banner Settings 202
Setting the Default Banner 205
Deleting a Banner’s Configuration 206

Notice Configuration 208

Document Corrections 210

Designing a Correction Process 210
Configuring Document Types for Correction Forms 211
Form Template Configuration 211
Document Type Settings 212
Configuring HL7 for Corrections 212
Configuring Life Cycles for Corrections 213
Creating the Healthcare Document Correction Action 213
Creating an Action 214
Assigning an Icon 215
Assigning User Group Privileges 217

Re-ordering Actions 217
Deleting Medical Record Configurations from OnBase 218
Password Confirmation Required 218
Password Confirmation and -MRMSINSTALL Switch Required 218
Troubleshooting 219
Logging to the Diagnostics Console 219
Cannot Access Patient Window 219
Custom Query Cannot Find Chart ID Keyword Type 219
Custom Query Does Not Include an MPI Keyword Type 220
Custom Query Includes Medical Documents 220
Failed to Identify Assigning Authority 221
Filter Not Configured 221
MPI Not Found 221
Epic Users Cannot Log On 222
Error Messages 222
Another session is currently active 222
Applied saved filter is not compatible 223
Failed to convert filter value 223
Failed to identify the default selected document 223
Invalid filter item values 224
The expandedMode parameter was detected 224
The platter for this document is currently unavailable 224
Notes, Redactions, Burned Markups, and Deficiencies on Documents with Overlays 225
Scrolling Unavailable in Timeline Mode 226

SECURITY CONFIGURATION

User Group Privilege Requirements 227
View Patient Records 227
View Patient Custom Query Documents 228
Search for Patient Records 228
Search for Charts 228
Submit a Document for Workflow-Based Corrections 228
Medical Records Privileges 229
Patient Window Privilege 229
Administration Privilege 230
Chart Search Privilege 230
Printing Privilege 231
Allow Confidentiality Code Override Access Privilege 231
Patient Search Privilege 232
Scheduled Patient Search Privilege 232
Patient Lists Privilege 233
Public Lists Privilege 233
Public Cases Privilege 234
Diagram: Search and List Privileges 235

Copying Medical Privileges to New User Groups 236
Emergency Access 237
Configuring Emergency Access Privileges 237
Emergency Access Notifications 239
Configuring Emergency Access Notifications 239
Secure Tabs 240
Confidentiality Codes 240
Configuring Confidentiality Codes 241
Applying Confidentiality Codes Automatically 243
Assigning Authorities for Confidentiality Codes 244
Automatically Removing Confidentiality Codes 245
Applying Document-Level Confidentiality Codes Automatically 245
Logging Confidentiality Code Assignment 246
VIP Chart Security 247
Document Type Security 247
Security Keywords 248

SECURITY FLOWCHARTS

Direct Link to Patient Record 250
Patient Search or Patient List 251
Chart Search 252

PATIENT WINDOW COLUMNS, FIELDS, AND FILTERS

Column and Field Descriptions 255
Allergy Information Columns 255
Chart Search Fields and Columns 256
Document List Columns 258
Medical Alert Columns 259
Patient List Columns 259
Patient Search Fields and Columns 261
Filter Descriptions 263

USER GUIDE

PATIENT WINDOW USAGE

Diagrams 266
Patient Record Diagram 267
Timeline Mode Diagram 269
Customizing the Layout 270
Resizing a Pane 270
Enabling Thumbnail View 271
Enabling Row View 272

Patient Demographics ... **274**
Hiding the Banner ... 274
Viewing Patient Allergy Information ... 275
Viewing Patient Medical Alerts ... 276
Viewing Patient Addresses ... 277
Viewing Patient Contact Information ... 278
Viewing Patient Notices ... 278
Document Navigation ... **280**
Opening a Document ... 280
Opening Sensitive Documents ... 281
Expanding the Viewer ... 282
Navigating Lists of Results ... 283
Sorting Lists ... 284
Browsing Document-by-Document ... 285
Browsing Page-by-Page ... 285
Browsing by Tab ... 286
Tab Document Counts ... 286
Empty Tabs ... 287
Personal Tab ... 287
New Documents Tab ... 287
Reference Tab ... 287
Timeline Mode ... **288**
Accessing Timeline Mode ... 289
Navigating in Timeline Mode ... 289
Zooming In or Out ... 289
Moving Forward or Backward ... 290
Displaying Documents ... 291
Browsing by Tab ... 292
Filtering Documents ... 292
Exiting Timeline Mode ... 292
Filters ... **293**
Filtering Documents ... 293
Filtering by Date Range ... 295
Entering a Custom Date Range ... 295
Collapsing Filters ... 296
Saving a Filter ... 297
Applying a Saved Filter ... 299
Removing a Filter ... 300
Form Creation ... **301**
Document Comparison ... **302**
Opening Split View ... 303
Exiting Split View ... 304
Opening Multi-Document View ... 304
Exiting Multi-Document View ... 305

Printing Documents **305**
Document Corrections **308**
Submitting a Document for Correction 309
Completing a Correction Request Form 310
Patient Cases **311**
Private vs. Public Cases 311
Creating a Case 312
Adding Documents to a Case 314
Removing Documents from a Case 316
Search **316**
Searching for Patient Records 317
Searching for Patients by Appointment 319
Searching for Charts 321
Tips for Searching 323
Using Wildcards 323
Searching by Date 324
Navigating Results 325
Clearing All Fields 326
Returning to a Patient Record 326
Patient Lists **327**
System Lists vs. Personal Lists 327
Public Lists vs. Private Lists 327
Viewing Patient Lists 327
Saving a Search as a System List 329
Creating a Personal Patient List 330
Adding Patients from Search 331
Copying Patients from One List to Another 333
Removing Patients from a Personal List 334
Editing a Patient List 335
Deleting a Patient List 336
Returning to a Patient Record 336
Hosted Content **337**
Emergency Patient Record Access **337**
User Options **339**
Customizing the Personal Tab 339
Adding Document Types to the Personal Tab 340
Removing Document Types from the Personal Tab 342
Copying Personal Tab Settings to the New Documents Tab 343
Managing Your Saved Filters 345
Setting a Default Filter 345
Removing the Default Filter 346
Renaming a Saved Filter 348
Deleting a Saved Filter 350

Sharing Filters 351
Editing & Deleting Cases....351
Editing a Case 352
Deleting a Case 357
Enabling Expanded Mode By Default....357
Resetting the Default Layout Options....358
System Interaction 359
Integration for Medical Imaging Viewer 359
Finding More Studies 359
Full-Text Search....360
Search Privileges 361
Medical Records Management 361
Video 361

DOCUMENT VIEWER USAGE

Viewer Toolbars and Navigation 363
Viewer Control Toolbar....363
Pages Toolbar 364
Reordering Pages in a Document Using Thumbnails 364
Deleting Pages from a Document Using Thumbnails 365
Suppressing Blank Pages 365
Document Viewer Shortcuts....366
Viewing a Specific Page Number....367
Saving Page Rotation....367
Inverting the Display....367
HTML Web Client Internal Text Search Toolbar....369
Performing an Internal Text Search in the HTML Web Client 369
Generating an Internal Text Search Report in the HTML Web Client 370
Notes and Annotations 371
Opening a Note....371
Viewing Notes on an Office or PDF Document 372
Adding Notes....375
Editing Note Text....375
Moving Notes 375
Deleting Notes....376
Viewing All Notes on a Document....376
Adding Annotations 379
Moving Annotations....380
Deleting Annotations....381
Changing the Note Type 381
Redacting a Document....381
Applying a Redaction 382
Removal of Unsaved Redactions 383

PATIENT WINDOW ADMINISTRATION

Filter Editor ... **384**
Accessing the Filter Editor ... 385
Available Filters ... 385
Creating a New Filter ... 386
Copying an Existing Filter ... 386
Editing an Existing Filter ... 387
Editing Filter Parameters ... 387
Dates ... 388
Entering a Custom Date Range ... 388
Keywords ... 389
Document Types ... 390
Deleting an Existing Filter ... 390
Returning to the Patient Record ... 391
Public Filters ... **391**
Making a Filter Public ... 391
Revoking Public Access to a Filter ... 393
Grant Record Access ... **394**
Granting Access to Records ... 395
Revoking Access to Records ... 397
Confidentiality Codes ... **399**
Assigning Confidentiality Codes to Patients ... 399
Assigning Confidentiality Codes to a Patient From an Open Record ... 400
Assigning Confidentiality Codes to Patients Retrieved Through Search ... 401
Assigning Confidentiality Codes to Charts ... 404
Assigning Confidentiality Codes to Documents ... 407
Patient Notices ... **409**
Assigning Patient Notices ... 410

QUICK REFERENCE GUIDE

OnBase Patient Window allows HIM departments, physicians, and clinical staff to view all medical documents associated with a patient's MRN or MPI. Designed to integrate seamlessly with third-party electronic medical record (EMR) systems, OnBase Patient Window provides an easy way to retrieve and navigate patient records stored in OnBase.

Features

Seamless Integrations

When integrated with an EMR system, OnBase Patient Window retrieves medical records from OnBase using patient information provided by the third-party system. Users can access the Patient Window without leaving their current system.

OnBase Patient Window can also integrate with third-party viewers to display studies stored in DICOM repositories.

Security

OnBase Patient Window provides a robust security model that can be designed to meet different needs. Security can be applied on several levels, including the patient, chart, and document level. Through the use of confidentiality codes, secure tabs, and VIP chart security, administrators can design a solution that provides users access to only the records they should be allowed to see. Users who require immediate access to records can be given emergency access privileges. Emergency access is always logged.

Simple Navigation

Users can navigate patient records in a manner that makes sense for them. Either by browsing tabs or by scrolling along a timeline, users can filter and find the documents they need.

Customizable Filters

Filters allow users to retrieve a subset of documents within a patient record. A variety of criteria can be configured for filtering, including facility, date of admission, or Document Type. Users can also save filter criteria for quick execution later.

Search

Users can retrieve records using patient demographics, appointment information, or visit information. Searching can be locked down as needed through configuration and user privileges.

Side-by-Side Document Comparison

Users can view two related documents side-by-side for comparison. For example, physicians may use this feature to compare progress notes or a patient's lab results.

Document Corrections Submission

The document correction process allows users to submit medical documents to OnBase Workflow, where HIM staff can re-index or correct the documents as needed. This process offers the following benefits:

- Corrections are centralized. All documents that need to be corrected are accessible through OnBase Workflow.
- Correction-related privileges are limited to a small subset of users. Other users can submit documents for corrections as needed, but only users who should be allowed elevated privileges will be able to perform the corrections.
- OnBase remains synchronized with external EMR systems. When a document is created, modified, or deleted in OnBase, OnBase can send an HL7 message notifying the EMR system of the event.

Patient Lists

Users can create patient lists to quickly access records for a group of patients. For example, a physician may want a single location to review records for patients who are coming in the following week. A researcher may want to maintain a list of patients who share a specific chronic condition.

Cases

Cases are patient-specific tabs that allow users to organize documents related to a specific case or condition. For example, if a patient has a history of arrhythmia, the user could create an Arrhythmia tab to contain any documentation related to that condition.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Patient Window functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 3.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 3.

Simplified Licensing

In addition to an enterprise base package license for standard OnBase functionality, the following add-on licenses are required to access standard OnBase Patient Window functionality:

- OnBase Patient Window
- Basic HL7 Listener or HL7 Listener

For more information on the packages available to you, contact your account manager.

Additional Licensing

Additional licensing is required to use the following products in conjunction with Patient Window:

- Medical Imaging Viewer - NilRead
- Workflow

For the licensing requirements of a specific product, see that product's documentation.

Legacy Licensing

OnBase Patient Window requires the following licenses:

- A Basic HL7 Listener license or an HL7 Listener license
- A Concurrent Client for EMR Integrations license, a Concurrent Client license, or a Named User Client license for each user accessing documents
- The OnBase Patient Window license
- A Workflow license (required only if your solution includes document corrections submission)

For information about the Concurrent Client for EMR Integration license, see Concurrent Client for EMR Integrations Licensing on page 8.

Check your current licensing status by selecting **Utils** | **Product Licenses** from the Configuration module.

OnBase®

Foundation EP5

Patient Window

Installation Guide

Foundation EP5

For information about installing OnBase Patient Window, see the following topics:

- Requirements on page 5
- Upgrade Considerations on page 9
- Installing Patient Window on page 13
- Installing the Integrated Office Viewer on page 42
- Creating URLs for OnBase Patient Window on page 42
- Embedding Patient Window on page 54
- Third-Party Integrations on page 56
- Post-Installation on page 61
- Contacting Support on page 64

Requirements

The following sections outline requirement information specific to Patient Window in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Patient Window and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Databases Supported
- Operating System Requirements
- Server Browser Requirements
- Server and Core Services Hardware Requirements

Web Client Browser Requirements

OnBase Patient Window is supported on the following browsers:

- Mozilla Firefox Extended Support Release (ESR) 78
- Google Chrome 92 or greater
- Windows only:
  - Microsoft Edge on Chromium 92 or greater
  - Microsoft Internet Explorer 11 (IE 11)
- Mac OS only: Safari 14.1.x with the exceptions of full screen mode and Safari Reader

For additional browser requirements, see the following sections.

Pop-Up Blockers

Pop-up blockers are not supported. On client workstations, either pop-up blockers must be disabled, or OnBase Patient Window must be added to the pop-up blocker's list of sites that allow pop-ups.

Tabbed Browsing

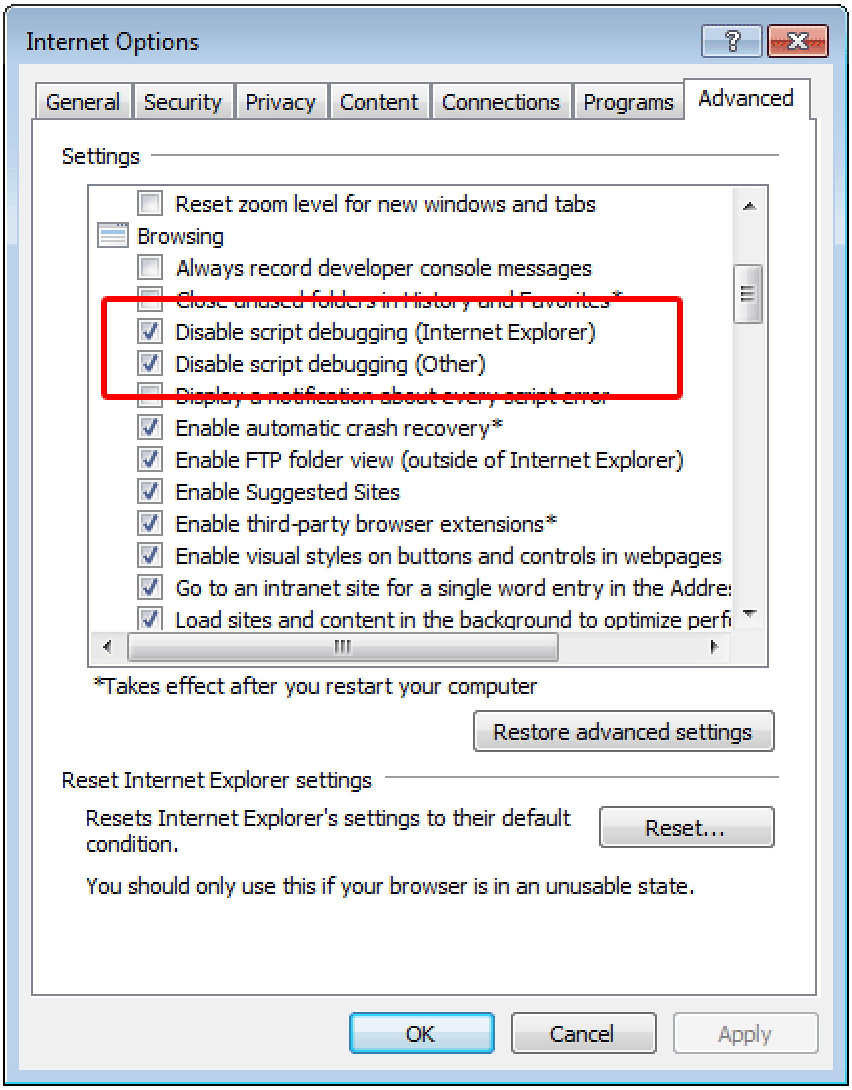
It is considered a best practice to make sure Internet Explorer's Tabbed Browsing Settings are configured to use either of the following pop-up settings:

- **Always open pop-ups in a new window**
- **Let Internet Explorer decide how pop-ups should open**

Using these settings will ensure OnBase Patient Window functions as intended.

Internet Explorer Disable Script Debugging

Internet Explorer Settings must have **Disable Script Debugging (Internet Explorer)** and **Disable Script Debugging (Other)** checked (from Internet Explorer, select **Tools | Internet Options... | Advanced**):

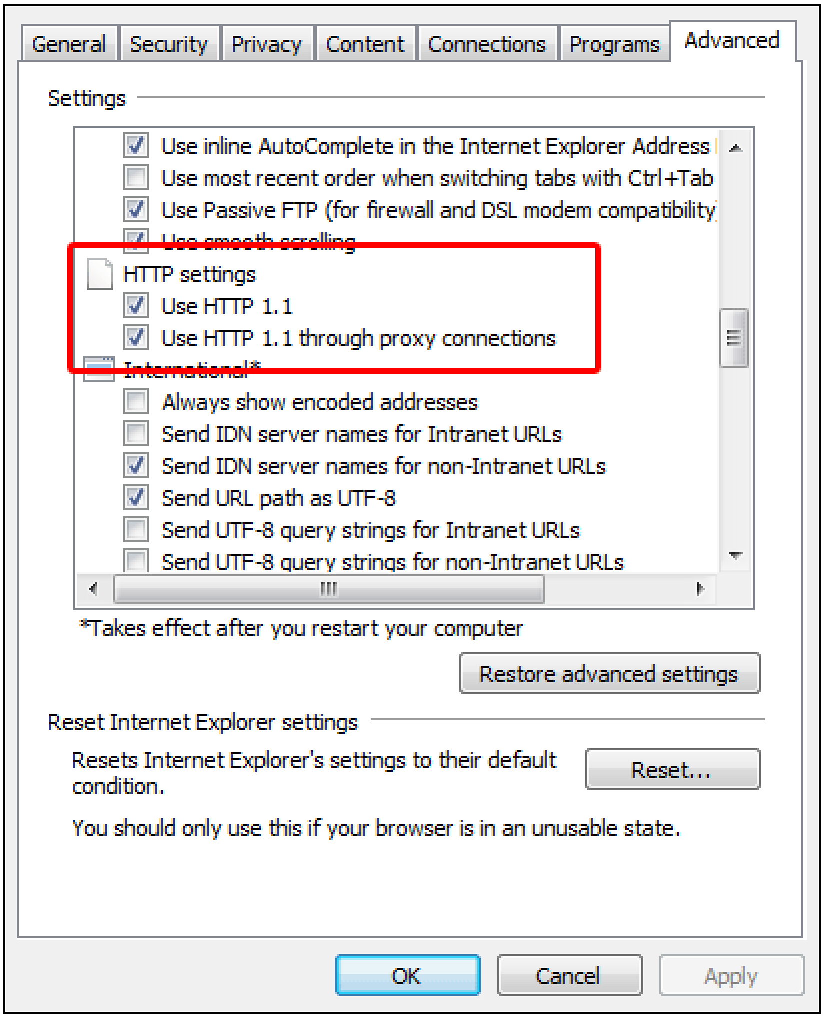


Proxy Server Setup

Ensure the following items are configured when using a Proxy Server:

Server side — If the Web server is using a proxy server, verify that the proxy is setup with HTTP 1.1.

Client side — In Internet Explorer, please ensure that **HTTP 1.1 through proxy connections** is checked when using a proxy.



Licensing Requirements

See Licensing on page 2 for a list of licensing requirements.

Concurrent Client for EMR Integrations Licensing

Note: The following information applies only to deployments using the legacy licensing model.

The Concurrent Client for EMR Integrations license works in conjunction with the Medical Emergency Concurrent Client license, which allows a user to log on to OnBase even if all Concurrent Client for EMR Integrations licenses have been consumed. The combination of these two licenses allows clinical solutions to remain highly available without the risk of clinical users or physicians from being shut out of OnBase due to insufficient licenses.

In situations where the Medical Emergency Concurrent Client license is invoked to grant access to a new user connection, the lack of licenses is logged so that the system can be audited to ensure that the proper quantity of Concurrent Client for EMR Integrations licenses exist to support the user community.

Configuring the Application Server for EMR Licensing

By default, the Application Server uses standard Concurrent Client licenses for connections. The virtual directories on an Application Server can be configured to use the Concurrent Client for EMR Integrations license.

The following procedure describes how to configure the Application Server to change its default licensing strategy. It should be used only for virtual directories that support clinical users, so that they can take advantage of the Medical Emergency Concurrent Client license from a high availability perspective.

Caution: Back-office OnBase users should not connect to a virtual directory on the Application Server configured with this switch. Doing so will result in over-consumption of the Concurrent Client for EMR Integrations licenses. Perform this procedure only for the virtual directory on the Application Server being used by OnBase medical applications.

1. Open the Application Server's Web.config file.
2. Under **appSettings**, add the following key:

```
<add key="MedicalApplicationServer" value="true"/>
```

   Ensure the value is set to **true**. Setting the value to **false** is the same as omitting the key altogether.
3. Save the file.

Upgrade Considerations

The following upgrade considerations have been compiled by OnBase subject matter experts. These upgrade considerations are general and applicable to most OnBase solutions and network environments and should be considered each time an upgrade is performed.

Carefully consider the impact of making any changes, including those listed below, prior to implementing them in a production environment.

For additional general information about upgrading OnBase, refer to the Upgrade Guidelines reference manual, and visit the Hyland Community at: https://www.hyland.com/community.

Patient Window Upgrade Considerations

The following information should be considered or noted when upgrading OnBase Patient Window deployments. Read this information prior to upgrading your version of OnBase.

Changes to User Access Privileges

This version of OnBase has additional upgrade considerations when you upgrade from one of the following earlier versions:

- Any release prior to 18 SP 2
- Foundation EP1
- Foundation EP2
- Foundation EP3, prior to Patch 16
- Foundation EP4

When upgrading from any of these versions, you must grant the **Patient Window** medical records privilege to all User Groups that require access to OnBase Patient Window.

The upgrade process does not automatically grant this privilege to any User Group. Until they are granted the **Patient Window** medical records privilege, users who could access OnBase Patient Window before the upgrade will be unable to access OnBase Patient Window after the upgrade.

Changes to Checksum Validation

This version of OnBase has additional upgrade considerations when you upgrade from one of the following earlier versions:

- Any release prior to 18 SP 2
- Foundation EP1
- Foundation EP2
- Foundation EP3, prior to Patch 22
- Foundation EP4

If your solution requires checksum validation for Patient Window URLs, you are now required to configure a unique checksum key value, which is used to validate the checksum value in the URL.

If your solution did not previously use a unique string value for checksum validation, you must take additional action in order for previously created Patient Window URLs to be valid. You can set the **EnableLegacyChecksumFallback** setting in the Patient Window web.config file to **true** to validate checksums using the legacy method. This should be considered a temporary method of validating legacy checksums until you can re-create and replace the existing URLs using a unique string value as the checksum key.

If your solution was already using a unique string value for checksum validation, then Patient Window URLs that were created before the upgrade will continue to be valid with no additional action needed.

Server Machine Considerations

The following should be considered with regard to server machines hosting OnBase Patient Window:

- Back up the OnBase Patient Window Web.config file. Refer to the backup copy when updating specific settings for the new version of OnBase.
- Note the authentication settings for the Web application in IIS.
- Note the settings for the OnBase Patient Window application pool in IIS.
- As of OnBase Foundation EP3, if OnBase Patient Window is embedded in another application or an iframe, then the **cookieSameSite** attribute in the OnBase Patient Window web.config file must be set to **None**. It is set to **Lax** by default.
- As of OnBase Foundation EP1, if OnBase Patient Window is integrated with Epic, then Epic encryption settings must be configured in OnBase Configuration as described in the **Integration for Epic** module reference guide. The **PopChecksumKey** and **EpicAuthenticationType** web.config settings are no longer used.
- As of OnBase 18, OnBase Patient Window requires a 64-bit application pool. When upgrading to OnBase 18 or later, ensure the **Enable 32-Bit Applications** setting is **False** for the OnBase Patient Window application pool (Advanced Settings).

End-User Workstation Considerations

The following should be considered with regard to end-user workstations where OnBase Patient Window is accessed:

- Delete the browsing history on end-user machines.
- Delete the Temporary Internet Files cache for Internet Explorer.

Removal of ActiveX Client Type

As of OnBase Foundation EP5, OnBase Patient Window no longer uses ActiveX controls. The **WebClientType** setting has been removed from the OnBase Patient Window web.config file.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, remember to uninstall the existing ActiveX controls from users' workstations.

Changes in Support for Query String Parameters

During an upgrade, you may need to update the query strings used to retrieve patient records.

- As of OnBase Foundation EP1, query strings that include Epic authentication parameters must also include the **epicTimestamp** parameter.
- As of OnBase 18, the **assigningAuthority** query string parameter is no longer supported. For information on providing the assigning authority in a URL query string, see the section on creating URLs in the **Patient Window** module reference guide.

Changes in Filter Results

If upgrading from a version prior to OnBase 17 to OnBase 17 or later, users may notice a difference in the document set returned by filters. Prior to OnBase 17, if a user applied a filter based on a chart data field, OnBase Patient Window automatically included patient-level documents in the filtered result set. After an upgrade to OnBase 17 or later, the same filter omits patient-level documents that do not meet the filter criteria. This change occurs because filters that were previously based on chart data fields are based on Keyword Types in OnBase 17 and later.

As of OnBase Foundation EP1, a Reference tab can be configured to display documents that should not be filtered out based on filter criteria. Contact your first line of support for assistance enabling this feature.

Compatibility of Saved Filters

Saved filters created prior to OnBase 17 may be incompatible with OnBase 17 or later. Upon upgrading to OnBase 17 or later, if users have any saved filters that include a filter type based on a chart data field, the users must delete the saved filters and create new ones. If a user attempts to execute a saved filter that is incompatible with OnBase Patient Window, then OnBase Patient Window will log an error to the Diagnostics Console, and the user will have to log in again to be able to continue working.

Changes in Saved Filter Usage

As of OnBase 18, users must click **Apply** in order to apply a saved filter. In versions prior to OnBase 18, users could apply a saved filter by selecting the filter from a drop-down list. In OnBase 18 and later, selecting the saved filter only displays the criteria associated with the filter in the filter pane. Users must click **Apply** in order to apply the saved filter criteria.

Changes in Filter and Column Configuration

As of OnBase 17, the configuration for filters and document list columns no longer provides **Chart Data Fields** as a separate category. Instead, all filters and document list columns are configured based on Keyword Types or document metadata. Make sure Keyword Types are mapped to all chart data fields configured for filters or display columns. This mapping is necessary to ensure OnBase Patient Window correctly handles filters and columns that previously were based on chart data fields.

Changes in Emergency Access Configuration

As of OnBase Foundation EP4, the **Allow Emergency Access** medical records privilege has been replaced by the **Emergency Access** dialog box. This dialog box is accessed in the OnBase Configuration module under **Medical | Healthcare Clients | Emergency Access**. User Groups that have the ability to gain emergency access are listed as **Selected User Groups** in the **Emergency Access** dialog box.

As of OnBase Foundation EP4, the **Emergency Access Duration (Hours)** setting can be found in the **Emergency Access** dialog box in the OnBase Configuration module under **Medical | Healthcare Clients | Emergency Access**. Prior to OnBase Foundation EP4, this setting was found under **Medical | User Interface Settings | Patient Window | Settings**.

Patient Tab Considerations

As of OnBase 17, administrators cannot create Patient Custom Query tabs to be used in OnBase Patient Window. If a Patient Custom Query tab was configured at the cross-facility level in an earlier version of OnBase, it is recommended to reconfigure the tab using the **Documents** tab type. If OnBase Patient Window must use a previously configured Patient Custom Query tab, then the medical records custom query must not contain Document Types belonging to a medical record Document Type Group.

If a Patient Custom Query tab has been configured to display documents that do not belong to a medical record Document Type Group, be aware the non-medical documents cannot be filtered using the filter pane.

Form Creation Considerations

As of OnBase Foundation EP4, the **Form Selection Configuration** dialog box gives system administrators more control over the order of forms available for creation in OnBase Patient Window. To access the **Form Selection Configuration** dialog box, select **Medical | User Interface Settings | Patient Window | Form Selection**. The following elements have changed:

- The **Document Context** drop-down list has been removed.
- Form templates for the patient context and the chart context are displayed in a unified list.
- Unity Form templates are identified by their template names instead of by their Document Types. If multiple Unity Form templates are assigned to a Document Type, then each Unity Form template is listed.

As of OnBase 18 SP 1, users who need to create Unity Forms in OnBase Patient Window must have the **Create** privilege for the associated Unity Form Document Types.

Additional Guidelines

For general recommendations about upgrading medical systems, see Upgrading Medical Records Clients on page 74.

Installing Patient Window

For information about installing OnBase Patient Window, see the following topics and procedures:

- Installer Options on page 14
- Preparing the Servers on page 16
- Ensuring Proper IIS and .NET Installation on page 16
- Automated Installation Steps for Patient Window on page 17

- Manual Installation Steps for Patient Window on page 27
- Web.config Settings on page 29
-
- Configuring Session Expiration on page 38
- Configuring Service Client Settings on page 39
- Enabling Impersonation on page 40
- Autologin Configuration on page 41
- Installing the Integrated Office Viewer on page 42
- Creating URLs for OnBase Patient Window on page 42
- Third-Party Integrations on page 56
- Sensitive Content Configuration on page 59
- Post-Installation on page 61

Installer Options

Before installing OnBase Patient Window using the automated installer, refer to the following information about installer options.

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.

OnBase installers may consist of both an executable file (**.exe**) and a Windows Installer Package file (**.msi**). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

Note: The Microsoft .NET Framework prerequisite must always be installed separately before running either the EXE or MSI installer.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

For more information about configuring a silent installation, see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

ClickOnce Installers — Some OnBase modules are installed for deployment using ClickOnce. ClickOnce is a Microsoft technology that installs a deployment package to a central server. This package can then be accessed by users to install the application on their local workstations. The application is installed entirely under the user's profile, ensuring that it cannot interfere with other applications installed on the workstation.

ClickOnce deployments also have the following advantages:

- Previously installed versions of the module can be easily and automatically updated to the latest version with little or no user interaction, as long as the deployment server and deployment instance name are not changed.
- The module is installed on a per-user basis and does not require administrator privileges for local installation.
- There can be multiple instances of the module deployed, allowing for different versions of the module to be installed on a per-user basis, to match the version requirements of the workstation it is being installed to.

For more information on Microsoft's ClickOnce technology see https://docs.microsoft.com/en-us/visualstudio/deployment/clickonce-security-and-deployment.

Note: ClickOnce-deployed applications are not supported by Microsoft within a Remote Desktop environment.

OnBase modules that are deployed using ClickOnce should either take advantage of the ClickOnce deployment method as an alternative to a Remote Desktop deployment, or the module should be installed using a standard installer and deployed using the Remote Desktop methodology.

Note: Not all OnBase modules that support ClickOnce have a standard installer available. Contact your first line of support if you are unsure how to install and deploy a specific module.

User Account Control (UAC) — If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

Silent Installation Using setup.exe — If you are running setup.exe silently from the command line you must use the **/q** switch and the **/CompleteCommandArgs** switch, followed by the required command-line arguments.

The **q** switch specifies quiet mode and is required to suppress the GUI. The **CompleteCommandArgs** switch must be followed by the command-line parameters required to configure and install the desired components.

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using ****. For example: **setup.exe /q /CompleteCommandArgs "INSTALL_PROPERTY=\"my value\" INSTALL_PROPERTY_2=\"my value 2\""**.

Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

Preparing the Servers

To prepare servers for OnBase Patient Window:

1. Install a supported database on your database server.
2. Install the OnBase Application Server. For installation information, see the **Application Server** module reference guide.
3. On the OnBase Patient Window server, do the following:
   - Install a supported server operating system.
   - Install a supported version of IIS.
   - Install .NET Framework. For Microsoft .NET Framework requirements, see the general requirements chapter of the **Installation Requirements** manual.

   See Ensuring Proper IIS and .NET Installation on page 16.
4. If OnBase is licensed for Concurrent Client for EMR Integrations, see Concurrent Client for EMR Integrations Licensing on page 8 to ensure the Application Server consumes the correct licenses.

Ensuring Proper IIS and .NET Installation

Ensure IIS and the required .NET Framework version are properly installed on the OnBase Patient Window server by checking the following items:

- Installation Order for IIS and .NET on page 16
- Manually Changing the .NET version on page 17

Installation Order for IIS and .NET

In order for .NET Framework to function properly, it must be installed after IIS is installed on the server. If .NET Framework has been installed first, it must be re-installed after IIS is installed. Certain components of .NET Framework can only be registered when an IIS installation is present.

The following sections outline the correct order for installing .NET Framework.

Note: These steps cover the requirements for OnBase Patient Window to function correctly. If other applications that require .NET Framework are installed on the server, then multiple versions of .NET may be required. When installing different versions of .NET, start with the lower required versions and work your way up to the latest.

To ensure .NET Framework is installed properly:

1. Add the Web Server (IIS) Role.
2. Install the .NET Framework 4.5 Features.
3. Add the following Role Services:
   - Static Content
   - Default Document

- ASP.NET
- .NET Extensibility
- ISAPI Extensions
- ISAPI Filters
- Windows Authentication (optional)
- Request Filtering
- IIS Management Console

4. If necessary, install any available updates.

Manually Changing the .NET version

Some supported peripheral products change the default .NET version when they are installed. This means that subsequent virtual directories will inherit this default version. The following steps describe how to change the .NET version for OnBase Patient Window manually. It should be set to version 4.0.30319.

To change the .NET version on a virtual directory:

1. On the start screen, click Run.
2. Type **inetmgr** and click **OK**. The Internet Information Systems (IIS) Manager is displayed.
3. In the left pane, navigate to **Application Pools**.
4. From the list of application pools, double-click the application pool for OnBase Patient Window. The **Edit Application Pool** dialog box is displayed.
5. Under **.NET CLR Version**, select **.NET CLR Version v4.0.30319.**
6. Click **OK**.

Automated Installation Steps for Patient Window

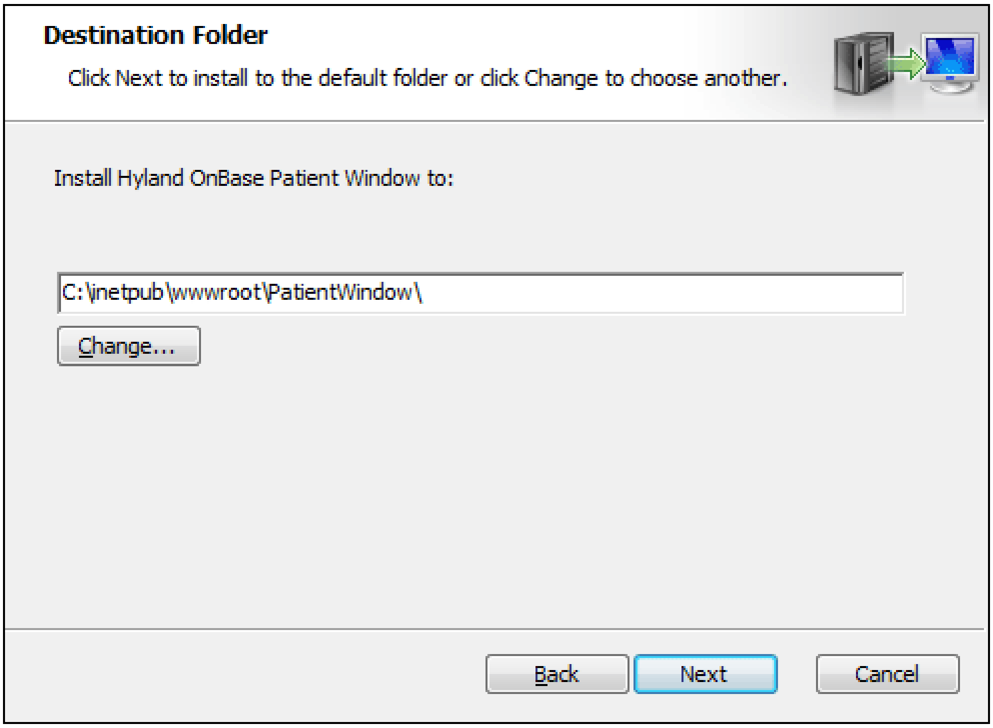
The following procedure describes how to install OnBase Patient Window using the installer and setup wizard. To install OnBase Patient Window using a command line, see Controlling the Installer from the Command Line on page 24.

Note: If you are upgrading deployment that was installed manually, be sure to uninstall the old components before running the installer. If the previous deployment was installed using the installer, you do not need to uninstall the old components.

To run the OnBase Patient Window installer:

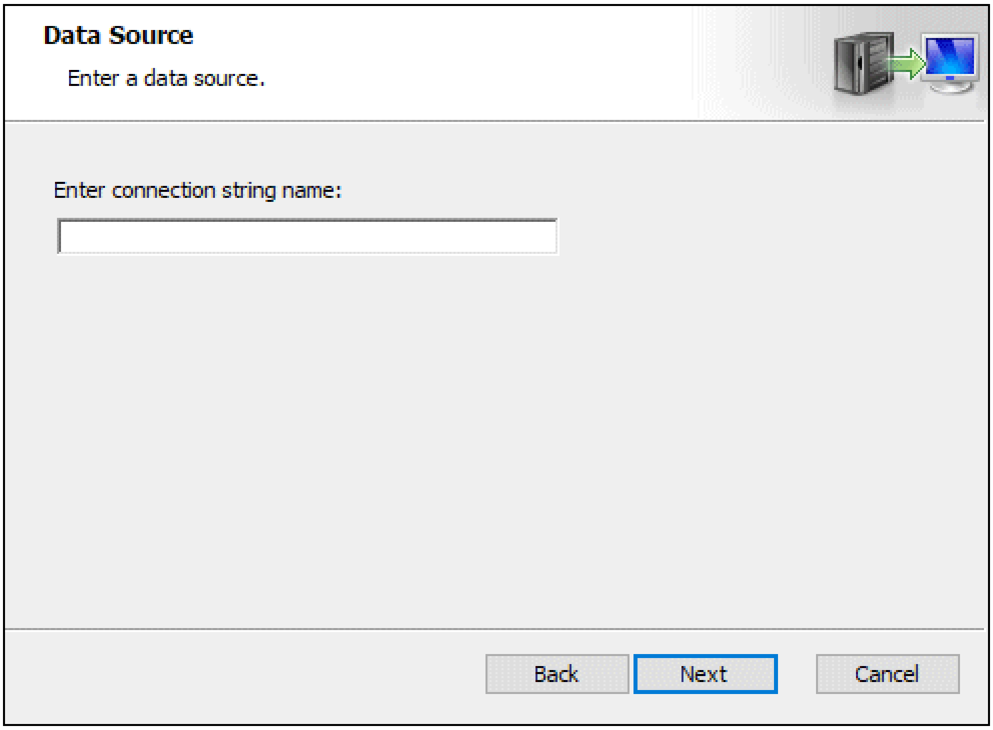
1. Open the folder containing the installer.
2. Double-click **setup.exe**. The Hyland OnBase Patient Window Setup Wizard is displayed.

3. Click **Next**. The **Destination Folder** page is displayed.



4. Enter the directory where OnBase Patient Window should be installed. To browse to the directory, click **Change**.

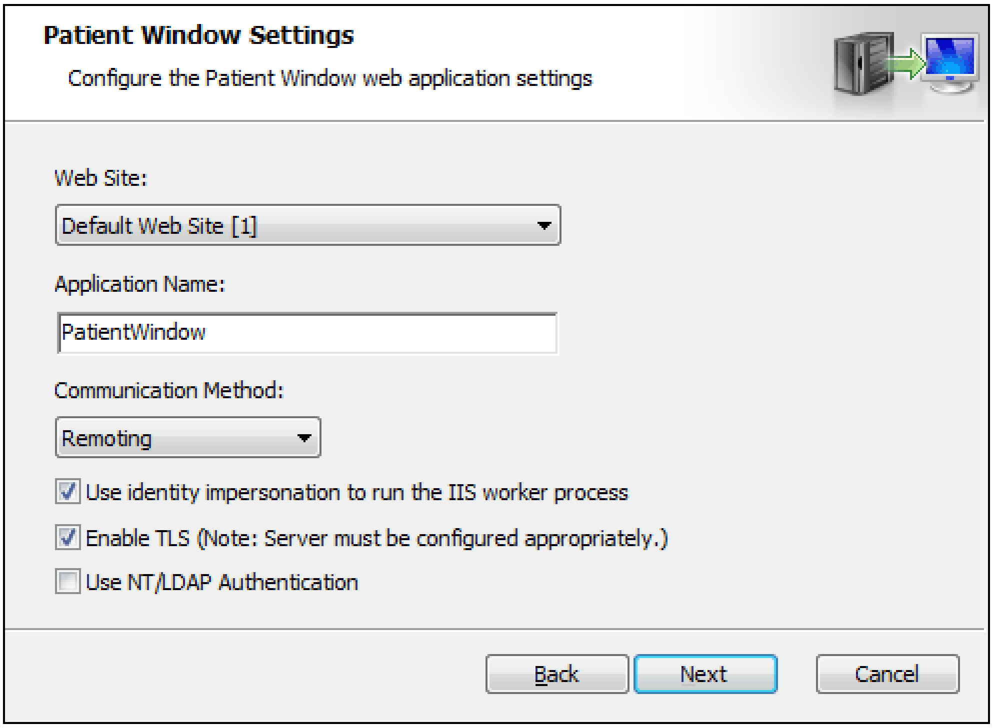
5. Click **Next**. The **Data Source** page is displayed.



6. Enter the name of a valid connection string in the field.

   This value should match the **name** of a connection string configured in the Web.config file for the Application Server. For information about configuring data source connection strings, see the **Application Server** module reference guide.

7. Click **Next**. The **Patient Window Settings** page is displayed.



8. Select the Web site where OnBase Patient Window should be installed.
9. Enter a name for the OnBase Patient Window application.

Tip: It is considered a best practice to omit parentheses from the **Application Name**.

10. Under **Communication Method**, specify how OnBase Patient Window and the Application Server will communicate.

Method	Description
Remoting	.NET remoting allows OnBase Patient Window to use binary over HTTP to communicate with the Application Server. Remoting provides better performance than SOAP and is enabled by default. You may be unable to use remoting if a firewall needs to inspect the information passed between the Application Server and OnBase Patient Window, such as when the two servers are hosted on different machines. In these situations, use SOAP.
SOAP	SOAP allows OnBase Patient Window to use XML SOAP over HTTP to communicate with the Application Server. This option is useful for load balancing or situations where a firewall needs to inspect the information passed between OnBase Patient Window and the Application Server. If a load balancer is balancing traffic from OnBase Patient Window to the Application Server, then OnBase Patient Window must be configured to use SOAP.

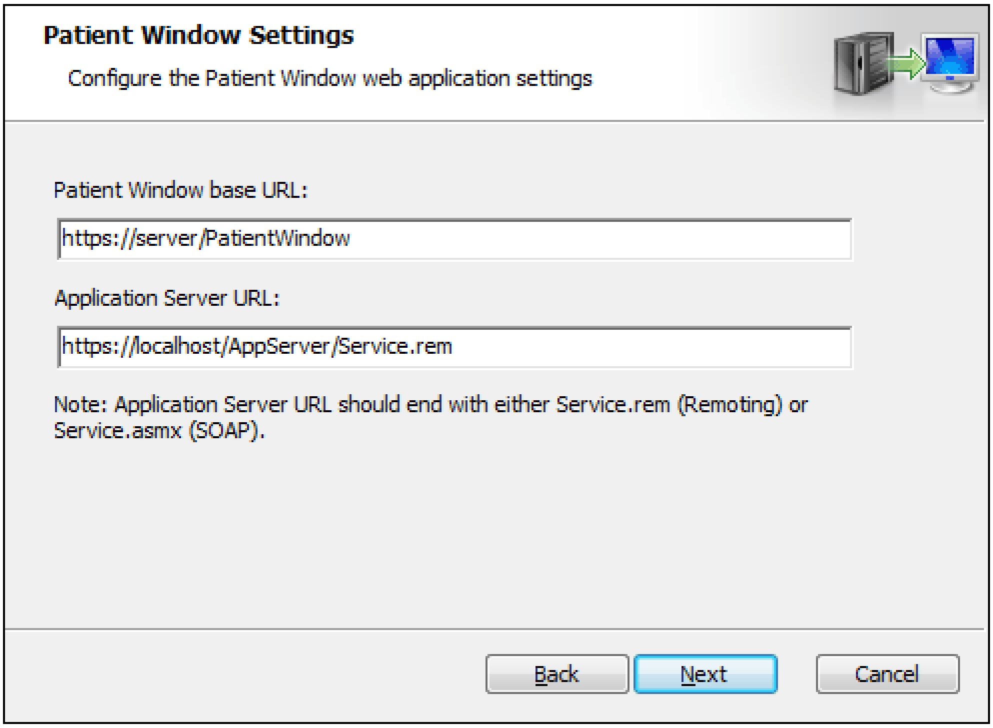
Tip: In most situations, select **Remoting** if OnBase Patient Window and the OnBase Application Server are hosted on the same machine. If OnBase Patient Window and the Application Server are hosted on different machines, select **SOAP**.

11. Select any other IIS settings you want to enable.

Option	Description
Use identity impersonation to run the IIS worker process	Identity impersonation allows the OnBase Patient Window process to run under a specified account. If this option is deselected, then the OnBase Patient Window process runs under the Network Service account.
Enable TLS	Select to run OnBase Patient Window using an HTTPS connection. If this option is selected, you must ensure the server is correctly configured for HTTPS connections. If this option is deselected, then an HTTP connection is used. When you click **Next**, you are prompted to acknowledge that you understand the risks associated with disabling this security layer before you can proceed with the installation.

Option	Description
Use NT/LDAP Authentication	Select **Yes** if your system uses Active Directory or LDAP authentication. Otherwise, select **No**. **Note:** For Active Directory or LDAP authentication to be used, the database must be separately configured for Active Directory or LDAP authentication. For more information, see the **Legacy Authentication Methods** module reference guide.

12. Click **Next**. You are prompted to provide the URLs for OnBase Patient Window and the Application Server.

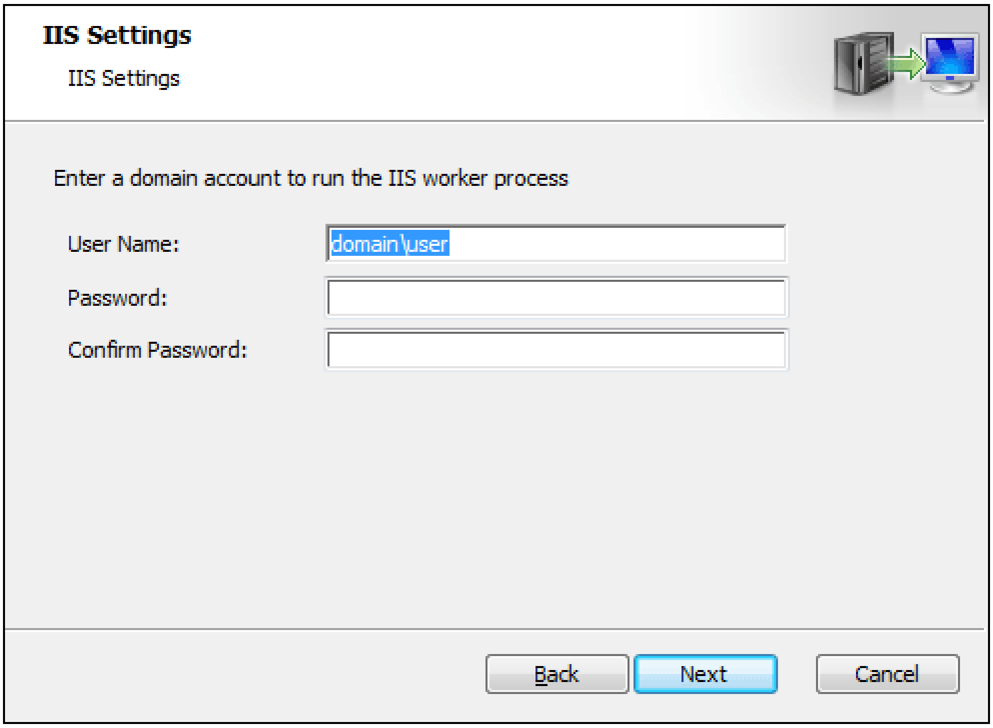


13. In the **Patient Window base URL** field, enter the virtual root for OnBase Patient Window.
    - The installer only supports installation to a virtual directory. You cannot use the installer to install to a Web site root.
    - If you selected **Enable TLS** earlier in the installation, the **Patient Window base URL** must begin with **https://**. The name of the virtual directory must match the **Application Name** configured on the previous page.

14. In the **Application Server URL** field, enter the full URL to the **Service** page on the OnBase Application Server you are installing. The file extension of the service page depends on the **Communication Method** you selected on the previous page.
    - If you selected **Remoting**, the service page is **Service.rem**.
    - If you selected **SOAP**, the service page is **Service.asmx**.

Tip: Use **localhost** in the URL of the Application Server if it is installed on the same machine as OnBase Patient Window. For example, **https://localhost/AppServer/Service.rem**.

15. Click **Next**. If you enabled identity impersonation, you are prompted for impersonation account credentials.



16. If prompted, enter the impersonation account credentials.
    - In the **User Name** field, enter the domain and user name to use to run the IIS worker process for OnBase Patient Window. This must be entered in the **domain\username** format.
    - In the **Password** field, enter the password for the user account provided.
    - In the **Confirm Password** field, re-enter the password for the user account provided. This field is used to ensure that the password is typed correctly.

Note: The impersonation account is granted modify rights to specific files and folders in the OnBase Patient Window directory (e.g., **PatientWindow**). The installer does not add modify rights for any other groups. If impersonation is not used, users may experience permissions errors when OnBase Patient Window attempts to modify certain files.

17. Click **Next**. The installer is now ready to install OnBase Patient Window.
18. Click **Install**.
19. When the installation is complete, click **Finish**.
20. Modify Web.config settings as needed. See Web.config Settings.

Controlling the Installer from the Command Line

When run from the command line, the Hyland OnBase Patient Window MSI must be launched using the following command, where **[PATH]** represents the location of the MSI:

```
msiexec /i "[PATH]\Hyland OnBase Patient Window.msi"
```

To control the installer from the command line, you must configure the installation options by applying the properties listed in the following sections. Properties are appended to the command in the format **PROPERTY NAME="VALUE"**.

To make a property empty, set its value to an empty string. For example, to disable impersonation, you would set the property like this on the command line:

```
PATIENTWINDOW_IIS_ASPNET_IMPERSONATION=""
```

See the following topics for property information:

- APPLICATION_SERVER_URL on page 24
- DATASOURCE on page 25
- IIS_ASPNET_PASS on page 25
- IIS_ASPNET_USER on page 25
- PATIENTWINDOW_APPLICATION_NAME on page 25
- PATIENTWINDOW_IIS_ASPNET_IMPERSONATION on page 26
- PATIENTWINDOW_IIS_NTAUTH on page 26
- PATIENTWINDOW_IIS_SSL on page 26
- PATIENTWINDOW_IIS_WEBSITE_ID on page 26
- PATIENTWINDOW_SERVICECLIENTTYPE on page 27
- PATIENTWINDOW_URL on page 27

APPLICATION_SERVER_URL

The URL of the OnBase Application Server. Be sure to use the correct file extension based on the PATIENTWINDOW_SERVICECLIENTTYPE setting. Use an extension of **.rem** for Remoting and **.asmx** for SOAP.

For example:

```
APPLICATION_SERVER_URL="https://localhost/AppServer64/Service.rem"
```

```
APPLICATION_SERVER_URL="https://localhost/AppServer64/Service.asmx"
```

This setting is required.

Tip: Use **localhost** in the URL of the Application Server when it is installed on the same machine as OnBase Patient Window. For example, **https://localhost/AppServer/Service.rem**.

DATASOURCE

This property specifies the data source name that will be entered for the **dmsDataSource** key in the OnBase Patient Window Web.config file.

For example:

```
DATASOURCE="Data Source Name"
```

This setting is required.

IIS_ASPNET_PASS

The password for the IIS_ASPNET_USER user name entered.

For example:

```
IIS_ASPNET_PASS="password"
```

This setting is required when IIS_ASPNET_IMPERSONATION is set to **1**.

IIS_ASPNET_USER

The domain user account to use for identity impersonation. This must be entered in the **domain\username** format. If this property is not included, the default value of **domain\username** is used.

For example:

```
IIS_ASPNET_USER="domain\username"
```

This setting is required when IIS_ASPNET_IMPERSONATION is set to **1**.

PATIENTWINDOW_APPLICATION_NAME

The name for OnBase Patient Window in IIS. If this property is not included, the default value of **PatientWindow** is used.

For example:

```
PATIENTWINDOW_APPLICATION_NAME="PatientWindow"
```

This setting is required.

PATIENTWINDOW_IIS_ASPNET_IMPERSONATION

Enter **1** to enable IIS identity impersonation. Leave empty to disable identity impersonation. If identity impersonation is disabled, then OnBase Patient Window runs under the Network Service account. If this property is not included, the default value of **1** is used and IIS identity impersonation is enabled.

For example:

```
PATIENTWINDOW_IIS_ASPNET_IMPERSONATION="1"
```

```
PATIENTWINDOW_IIS_ASPNET_IMPERSONATION=""
```

This setting is required.

Note: The impersonation account is granted modify rights to specific files and folders in the OnBase Patient Window directory (e.g., **PatientWindow**). The installer does not add modify rights for any other groups. If impersonation is not used, users may experience permissions errors when OnBase Patient Window attempts to modify certain files.

PATIENTWINDOW_IIS_NTAUTH

Enter **1** if using Active Directory or LDAP authentication. Ensure OnBase is configured to use the corresponding authentication method as described in the **Legacy Authentication Methods** module reference guide.

For example:

```
PATIENTWINDOW_IIS_NTAUTH="1"
```

This setting is optional.

PATIENTWINDOW_IIS_SSL

Enter **1** to run OnBase Patient Window using an HTTPS connection. If you enable this setting, you must ensure the server is correctly configured for HTTPS connections.

For example:

```
PATIENTWINDOW_IIS_SSL="1"
```

This setting is optional.

PATIENTWINDOW_IIS_WEBSITE_ID

The identifier number of the IIS Web site where OnBase Patient Window will be installed. Web site identifiers are found in the **Internet Information Services (IIS) Manager**. If you have only one Web site under IIS (e.g., **Default Web Site**), its number is typically **1**.

For example:

```
PATIENTWINDOW_IIS_WEBSITE_ID="1"
```

This setting is required.

PATIENTWINDOW_SERVICECLIENTTYPE

Enter **Remoting** if OnBase Patient Window and the Application Server are hosted on the same machine. If OnBase Patient Window and the Application Server are hosted on different machines, enter **SOAP**. This corresponds to the **Communication Method** setting in the graphical interface. If this property is not included, the default value of **Remoting** is used.

For example:

```
PATIENTWINDOW_SERVICECLIENTTYPE="Remoting"
```

```
PATIENTWINDOW_SERVICECLIENTTYPE="SOAP"
```

PATIENTWINDOW_URL

The base URL of the OnBase Patient Window virtual directory.

For example:

```
PATIENTWINDOW_URL="https://server/PatientWindow"
```

This setting is required.

Note: The installer only supports installation to a virtual directory. You cannot use the installer to install to a Web site root.

Note: If you set **PATIENTWINDOW_IIS_SSL="1"** the URL must begin with **https**.

Manual Installation Steps for Patient Window

OnBase Patient Window is a web application that requires its own virtual directory. Complete the following steps to manually create and configure the OnBase Patient Window virtual directory and application pool.

To install OnBase Patient Window manually:

1. Copy all of the files from the ..\web\industry\Medical.Pop directory of the distributed build.
2. Paste the files to the Web site root directory for OnBase Patient Window (..\inetpub\wwwroot\PatientWindow, for example).
3. Create the OnBase Patient Window application pool in Internet Information Services (IIS) Manager.
4. Right-click the OnBase Patient Window application pool and select **Advanced Settings**.
5. Confirm or update the following settings for the OnBase Patient Window application pool:

Advanced Setting	Value
.NET CLR Version	v4.0
Enable 32-Bit Applications	False
Managed Pipeline Mode	Integrated
Queue Length	65535
Start Mode	AlwaysRunning
Limit Interval (minutes)	0
Identity	Network Service, or another account with least domain privileges
Idle Time-out (minutes)	0
Ping Enabled	False
Rapid-Fail Protection: Enabled	False
Regular Time Interval (minutes)	0

6. Create the OnBase Patient Window application in Internet Information Services (IIS) Manager and point it to the directory from step 2. Ensure the application will be used only for OnBase Patient Window.
7. Configure the **HTTP Response Headers** feature for the entire application.
   a. Open the OnBase Patient Window application home page in IIS Manager.
   b. Double-click **HTTP Response Headers**.
   c. From the **Actions** pane, click **Set Common Headers**.
   d. Select **Expire Web content**.
   e. Select **Immediately**.
   f. Click **OK**.
8. Configure content expiration for the **..\Images**, **..\Scripts**, and **..\Styles** virtual subdirectories.

   For each subdirectory:
   a. Select the subdirectory and double-click **HTTP Response Headers**.
   b. From the **Actions** pane, click **Set Common Headers**.
   c. Under **Expire Web content**, select **After**.
   d. Enter **7 Day(s)**.
   e. Click **OK**.
9. Continue to the next topic, Web.config Settings.

Web.config Settings

At a minimum, you must configure the following Web.config settings for OnBase Patient Window:

- ApplicationServer Url on page 29
- dmsVirtualRoot on page 29
- dmsDataSource on page 29

If you used the automated installer, these settings are configured automatically. You may want to configure other Web.config settings to customize your solution. See the following topics for more information about each setting.

Note: To hide certain features and right-click options from users, you can add additional settings to the Web.config file. See Disabling Viewer Options on page 66.

ApplicationServer Url

You must configure the **ApplicationServer Url** element to point to the OnBase Application Server's service page. For example:

```
ApplicationServer Url="https://srv/AppServer/Service.rem"
ServiceClientType="Remoting"
```

For more information, see Configuring Service Client Settings on page 39.

dmsVirtualRoot

Enter the host name and virtual directory that will be provided in OnBase Patient Window URLs. For example, if URLs will start with **https://hostname/PatientWindow/Login.aspx**, then the **dmsVirtualRoot** key would look like the following:

```
<add key="dmsVirtualRoot" value="https://hostname/PatientWindow"></add>
```

Note: The host name provided in **dmsVirtualRoot** must not contain an underscore character (_). If the server's machine name contains an underscore character, use its IP address instead, or change the machine name. For information about valid host names, see the following Microsoft article: http://support.microsoft.com/kb/101785.

dmsDataSource

Enter the name of the data source configured for OnBase Patient Window.

For information about configuring data sources, see the **Application Server** module reference guide.

AllowViewSource

This setting is pending development.

webtheme

Do not modify this setting. **XP** is the only supported value.

default_username

Use this setting for testing purposes only. When **enableDefaultLogin** is set to **true**, users can automatically log on to OnBase Patient Window using the credentials provided in the **default_username** and **default_password** settings.

In a production environment, leave this setting blank.

default_password

Use this setting for testing purposes only. When **enableDefaultLogin** is set to **true**, users can automatically log on to OnBase Patient Window using the credentials provided in the **default_username** and **default_password** settings.

In a production environment, leave this setting blank.

enableDefaultLogin

Use this setting for testing purposes only. When set to **true**, the **enableDefaultLogin** setting automatically logs the user on to OnBase Patient Window using the credentials provided for **default_username** and **default_password**. The login page will not be displayed. Any actions performed by the user will be logged under the account provided for **default_username**.

In a production environment, set **enableDefaultLogin** to **false**. This is the default setting.

EnableAutoLogin

For information about the **EnableAutoLogin** setting, see the **Legacy Authentication Methods** module reference guide.

forceSSOAutoLoginOverDomain

For information about the **forceSSOAutoLoginOverDomain** setting, see the **Legacy Authentication Methods** module reference guide.

EnableSplitView

This setting determines whether users are able to compare documents side-by-side using the split view feature in OnBase Patient Window.

For split view to work, the document the user wants to compare must be configured for cross-references. If the user clicks the **Split View** button for a Document Type that has no cross-references configured, the following message is displayed:

- No cross referenced documents are available for the selected document

Set **EnableSplitView** to **false** to remove the **Split View** button from OnBase Patient Window. By default, this setting is **true**, and the **Split View** button is available.

EnablePatientSearch

This setting determines the availability of Patient Search and Scheduled Patient Search. For example, you may want these search contexts to be available only during certain times, such as when your EMR system is down for maintenance.

- When this is value **true**, Patient Window users who have the **Patient Search** privilege can access Patient Search. Patient Window users who have the **Scheduled Patient Search** privilege can access Scheduled Patient Search.
- When this value is **false**, Patient Search and Scheduled Patient Search are available only to users who have both the corresponding search privilege and either the **Administration** or **Patient List** medical record privilege.

This setting does not affect access to Chart Search.

EnablePatientContextSyncing

This setting applies to custom integrations with Allscripts™, where OnBase Patient Window is embedded within Allscripts™ Sunrise Acute Care. You may need to work with your solution provider to determine whether context syncing can be enabled in your environment.

In environments that support context syncing, setting **EnablePatientContextSyncing** to **true** will allow Sunrise Acute Care and OnBase Patient Window to remain synchronized. When a Sunrise Acute Care user opens a document in OnBase Patient Window, OnBase Patient Window sends the associated MPI, MRN, and chart ID (with assigning authorities, if applicable) to Sunrise Acute Care, allowing Sunrise Acute Care to retrieve the relevant patient visit.

If the chart ID in OnBase differs from the chart ID in Sunrise Acute Care, additional configuration may be required. For more information and assistance, please contact your first line of support.

Note: Context syncing is not available for correction forms or external studies. Syncing also is not available for documents retrieved using split view.

EnableTimestamp

For non-Epic integrations, this setting determines whether OnBase Patient Window URLs require a valid timestamp in the query string.

Note: Do not change this setting to **true** if OnBase Patient Window is integrated with Epic.

- If **EnableTimestamp** is set to **false**, then the **timestamp** parameter is not required in the URL query string. If the **timestamp** parameter is included in the URL query string, it is ignored.
- If **EnableTimestamp** is set to **true**, then the URL query string must contain the **timestamp** parameter with a valid UTC-based timestamp. If the **timestamp** parameter is missing, or if the specified timestamp is too old (based on the **TimestampTimeLimit** Web.config setting), then the user is presented with an error.

For more information about the **timestamp** query string parameter, see Session and Security Parameters on page 47.

TimestampTimeLimit

This setting is used only when the **EnableTimestamp** Web.config setting is set to **true**. The **TimestampTimeLimit** setting specifies the number of minutes OnBase Patient Window URLs remain valid, based on the **timestamp** query string parameter.

If the UTC-based timestamp in the query string is older than the number of minutes specified for the **TimestampTimeLimit**, then the URL has expired. If a user attempts to access OnBase Patient Window with an expired URL, the user is presented with an error.

EnableWorkstationNameDNSLookup

This setting exists for legacy purposes only.

enableRowColoring

When this setting is set to **true**, alternating rows in the Document Search Results list are shaded, making it easier to distinguish one result from others in the list. When this setting is set to **false**, all rows in the Document Search Results list have the same background color.

ThumbnailHitListAllowCaching

Set to **true** to allow thumbnail images to be cached on the server where OnBase Patient Window is installed. When thumbnail images are cached, they can be retrieved for subsequent requests more quickly. A user’s thumbnail cache is stored temporarily during the user’s session and is emptied when the user exits OnBase Patient Window. Set to **false** to disable thumbnail caching and to ensure that thumbnails always reflect recent changes to the documents.

ThumbnailHitListThumbnailMaxWidth

In pixels, enter the maximum width for thumbnails when the document list is in thumbnail view before CSS scaling is applied. Values larger than 140 pixels may result in an overall decrease in the quality of thumbnail images. If a value larger than 140 pixels is specified, thumbnails will be scaled down to a width of 140 pixels when displayed in the document list.

Valid values range from **20** through **500**. The default value is **140**.

ThumbnailHitListThumbnailMaxHeight

In pixels, enter the maximum height for thumbnails when the document list is in thumbnail view before CSS scaling is applied. Values larger than 175 pixels may result in an overall decrease in the quality of thumbnail images. If a value larger than 175 pixels is specified, thumbnails will be scaled down to a height of 175 pixels when displayed in the document list.

Valid values range from **20** through **500**. The default value is **175**.

ThumbnailHitListPreviewMaxWidth

In pixels, enter the maximum width for preview images displayed in multi-document view before CSS scaling is applied. Due to CSS scaling, preview images displayed in multi-document view are scaled to fit the height of the Document Viewer.

Valid values range from **100** through **1000**. This value must be at least twice as large as the value for **ThumbnailHitListThumbnailMaxWidth**. The default value is **1000**.

Note: While larger values may improve image quality in multi-document view, they also may increase the load time for preview images.

ThumbnailHitListPreviewMaxHeight

In pixels, enter the maximum height for preview images displayed in multi-document view before CSS scaling is applied. Due to CSS scaling, preview images displayed in multi-document view are scaled to fit the height of the Document Viewer.

Valid values range from **100** through **1000**. This value must be at least twice as large as the value for **ThumbnailHitListThumbnailMaxHeight**. The default value is **1000**.

Note: While larger values may improve image quality in multi-document view, they also may increase the load time for preview images.

AllowInsecureConnection

AllowInsecureConnection - This setting controls whether or not the server will only accept https:// connections, or if it will accept both http:// and https:// connections. By default, this setting is set to **false**.

To only allow https:// connections to the server, this setting should be set to **false**.

To allow both http:// and https:// connections to the server, this setting should be set to **true**.

Note: If **AllowInsecureConnection** is set to **false**, then the server must be correctly configured for HTTPS connections.

PreventViewerClientCaching

This setting restricts the HTML viewer from caching images of viewed documents to the client workstation. By default, **PreventViewerClientCaching** is **true**, and the HTML viewer does not cache document images. Change this setting to **false** to allow the HTML viewer to cache document images to the user's Temporary Internet Files folder. Cached documents expire after five minutes. Once expired, documents must be re-requested from the server.

The **PreventViewerClientCaching** setting applies to documents that are rendered as images in the HTML Document Viewer. It does not apply to documents that are not rendered as images, such as OLE documents. These documents will be cached regardless of this setting.

Note: Setting **PreventViewerClientCaching** to **true** may impact HTML viewer performance.

SystemListDisplayLabel

OnBase Patient Window offers two types of patient lists: system lists and personal lists. The **SystemListDisplayLabel** setting controls the label used for system patient lists in OnBase Patient Window.

For example, with the default setting of **System List**, the title of the dialog box used for creating system lists is **Create System List**. If you changed this setting to **Search-Based List**, then the title of the dialog box would be **Create Search-Based List**.

Note: The characters **<**, **>**, and **&** are not supported in the system list display label.

For information about system lists, see System Lists vs. Personal Lists on page 327.

PersonalListDisplayLabel

This setting controls the label used for personal patient lists in OnBase Patient Window.

For example, with the default setting of **Personal List**, the title of the dialog box used for creating personal lists is **Create Personal List**. If you changed this setting to **Static Patient List**, then the title of the dialog box would be **Create Static Patient List**.

Note: The characters **<**, **>**, and **&** are not supported in the personal list display label.

For information about personal lists, see System Lists vs. Personal Lists on page 327.

SelectedTabSingleColor

The **SelectedTabSingleColor** setting applies to clinical document tabs in OnBase Patient Window. When configured, this setting specifies the color in which the currently selected (active) tab is displayed.

By default, the **SelectedTabSingleColor** setting is blank, and a tab's color does not change when it becomes active. However, if all tabs are configured to be the same color, users may find it difficult to identify the active tab. In this case, you may want to configure the **SelectedTabSingleColor** setting so that users can identify the active tab by its color.

Valid values include the following:

- RGB hex values in the format #AAAAAA. For example, #0000FF is blue.
- Color names, such as red, green, blue, and purple.

For more valid values, visit the following site:

http://www.w3schools.com/colors/colors_groups.asp

Note: After configuring this setting, log in to OnBase Patient Window to make sure the label of the selected tab is readable against the color specified here.

__EnableEFormStandardPrinting

Do not change this setting. Its value must be **true** to ensure E-Form documents can be printed without error.

FederatedSearchWithMPI

This setting is used for integrations with medical imaging viewers that allow federated searching. When a user clicks the **Find More Studies** button in OnBase Patient Window, OnBase Patient Window attempts to retrieve more studies for the current patient from the integrated medical imaging viewer.

- By default, **FederatedSearchWithMPI** is **false**, and OnBase Patient Window attempts to retrieve studies by sending the medical imaging viewer all MRNs associated with the MPI of the current patient.
- Change **FederatedSearchWithMPI** to **true** if OnBase Patient Window should attempt to retrieve studies by sending the medical imaging viewer the MPI of the current patient.

HideToolbarPrintButton

This setting is used to hide the **Print** button in the main toolbar when a PDF document is displayed in OnBase Patient Window. This setting is intended for solutions where users should only be allowed to print PDF documents using the native printing functionality of the PDF application.

By default, this setting is **false**, and the main toolbar displays the **Print** button for all documents as long as the user has the **Printing** medical records privilege.

Change this setting to **true** to hide the **Print** button in the main toolbar when a PDF document is displayed in the viewer. When the **Print** button is hidden, users can print PDF documents only by using the native printing functionality of the PDF application.

autoDisplayNotePanelPDFOffice

This setting controls whether the **Notes** pane is expanded by default when a user opens a PDF or Microsoft Office document in OnBase Patient Window.

By default, this setting is **true**, and the **Notes** pane is expanded every time a PDF or Office document is opened.

Change this setting to **false** if you want the **Notes** pane to be expanded by default only if the PDF or Office document contains any notes. If the document does not contain a note, the **Notes** pane is collapsed by default.

IdPUrl

For information about the **IdPUrl** setting, see the **Identity and Access Management Services** module reference guide.

Checksum Validation Settings

The settings in the **Hyland.Web.HealthcarePop** section of web.config are specific to checksum validation. A checksum is a security measure to ensure the OnBase Patient Window URL has not been altered, thereby preventing users from retrieving MRNs or MPIs other than the one specified in the URL.

Note: The **Hyland.Web.HealthcarePop** settings do not apply to checksum validation for URLs used with the Integration for Epic.

See the following topics:

- EnableChecksum on page 36
- ChecksumKey on page 37
- EnableLegacyChecksumFallback on page 37
- Encrypting Checksum Settings on page 37

EnableChecksum

This setting indicates whether a checksum must be included in the Patient Window URL.

If **EnableChecksum** is set to **true**, the Patient Window URL must contain a valid checksum value. You also must specify the key used to create checksums in the **ChecksumKey** web.config setting. When attempting to retrieve documents, OnBase Patient Window will compare the checksum value to the expected checksum. If they match, OnBase Patient Window attempts to retrieve the specified documents. If the checksums do not match, the user is presented with an error.

Note: Checksums must be generated using HMACSHA256. OnBase Patient Window supports only HMACSHA256 checksum verification.

If **EnableChecksum** is set to **false**, OnBase Patient Window ignores the checksum value.

ChecksumKey

This setting specifies the unique, secret string value to be used for checksum validation. A **ChecksumKey** value is required when **EnableChecksum** is set to **true**.

EnableLegacyChecksumFallback

This setting is used for situations in which OnBase Patient Window must validate URLs containing legacy checksums. Legacy checksums are checksums that were generated before the **ChecksumKey** setting was available in the Patient Window web.config file. Legacy checksums may be required for certain OnBase environments, such as an environment where multiple versions of OnBase are used (an Incremental Parallel Upgrade Process, or IPUP, environment).

If your solution needs to support Patient Window URLs with legacy checksums, set the **EnableLegacyChecksumFallback** setting to **true** to validate checksums using the legacy method. This should be considered a temporary method of validating legacy checksums until you can re-create and replace the existing URLs using a unique string value as the checksum key.

If the **EnableLegacyChecksumFallback** setting is **false**, then all checksums used in Patient Window URLs must be generated using the specified **ChecksumKey** value.

Encrypting Checksum Settings

You can use the Web Application Management Console to configure and encrypt all settings in the **Hyland.Web.HealthcarePop** element. This is highly recommended. When encrypted, information such as the **ChecksumKey** value cannot be viewed within the OnBase Patient Window web.config file.

Encryption is enabled by the **Encrypt Configuration** setting in the Web Application Management Console. When this setting is applied and saved, information within the **Hyland.Web.HealthcarePop** element is replaced with an **EncryptedData** element, which contains the encrypted settings.

Caution: Saving changes to web.config causes OnBase Patient Window to restart. All users connected to OnBase Patient Window will lose their sessions.

For information about using the console to modify and encrypt settings, see the **Web Application Management Console** documentation.

Configuring Session Expiration

Session expiration allows users' sessions to time out after a period of inactivity. Enabled by default, session expiration helps enforce a more secure OnBase environment and ensures licenses are not held unnecessarily.

Note: When the session is created through a separate application, the session will not automatically be disconnected by OnBase Patient Window, and the license will remain in use. It is the responsibility of the application that creates the session ID to disconnect the session when finished, which will release the license. For information about creating session IDs, see the Hyland SDK.

See the following topics:

- To enable or disable timeout, see EnableSessionExpiration on page 38.
- To warn users whose sessions are about to expire, see PromptOnSessionExpire on page 38.
- To change the timeout period, see sessionState Timeout on page 39.

EnableSessionExpiration

The **EnableSessionExpiration** setting controls whether users' sessions expire after a configured period of inactivity.

Note: When the session is created through a separate application, the session will not automatically be disconnected by OnBase Patient Window, and the license will remain in use. It is the responsibility of the application that creates the session ID to disconnect the session when finished, which will release the license. For information about creating session IDs, see the Hyland SDK.

When **EnableSessionExpiration** is set to **true**, users are logged out when no activity is detected. The length of allowed inactivity is set by the **timeout** period in the **sessionState** element, which has a default value of 20 minutes. To change the timeout period, see sessionState Timeout on page 39.

When **EnableSessionExpiration** is set to **false**, users' sessions do not expire due to periods of inactivity.

PromptOnSessionExpire

The **PromptOnSessionExpire** setting takes effect if **EnableSessionExpiration** is set to **true**.

If both **PromptOnSessionExpire** and **EnableSessionExpiration** are set to **true**, a user whose session is about to expire will be presented with a warning prompt. This prompt gives the user 30 seconds to choose to stay logged in. If the user does not respond, the user is logged out.

If **PromptOnSessionExpire** is set to **false** while **EnableSessionExpiration** is set to **true**, no warning prompt is displayed when a user's session expires. The user is logged out automatically without prompting.

sessionState Timeout

The session timeout is configured in the OnBase Patient Window Web.config file. It is set to 20 minutes by default, as shown below:

```
<sessionState mode="InProc" stateConnectionString="tcpip=127.0.0.1:42424"
sqlConnectionString="data source=127.0.0.1;Trusted_Connection=yes"
cookieless="false" cookieSameSite="Lax" timeout="20"/>
```

To specify a different interval, edit the **timeout** value to reflect the number of minutes an inactive session should remain open before it expires. The minimum value is **1**.

Session expiration is enabled if **EnableSessionExpiration** is set to **true**. To disable session expiration, set **EnableSessionExpiration** to **false**. This setting is configured under **appSettings** in the OnBase Patient Window Web.config file.

Note: OnBase Patient Window supports only in-process (**InProc**) mode for its session state settings.

Configuring Service Client Settings

After installing the Patient Window application, you must configure it to communicate with the Application Server for services. Determine whether the Patient Window application will use .NET remoting or SOAP to communicate with the Application Server. For information about these communication methods, see Remoting on page 39 and SOAP on page 40.

Remoting

.NET remoting allows the Patient Window application to use binary over HTTP to communicate with the Application Server. Remoting provides better performance than SOAP and is enabled by default.

You may be unable to use remoting if a firewall needs to inspect the information transmitted between the Application Server and Patient Window application.

1. In the Application Server's Web.config file, ensure that the **useRemoting** attribute in the **Endpoint** element is set to **true**.
2. In the Patient Window application's Web.config file, under **Hyland.Services.Client**, set the **ServiceClientType** attribute to **Remoting**.
3. In the same element, set the **URL** to the URL of the service page on the Application Server.

   Ensure **.rem** is the extension on the service page. For example: **<ApplicationServer URL="https://server1/AppServer/service.rem" ServiceClientType="Remoting">**.

SOAP

SOAP allows the Patient Window application to use XML SOAP over HTTP to communicate with the Application Server. This option is useful for load balancing or Internet situations where firewalls need to inspect the XML passed between the Patient Window application and Application Server.

Note: If a load balancer is balancing traffic from the Patient Window application to Application Server, then the Patient Window application must be configured to use SOAP.

1. In the Patient Window application's Web.config file, under **Hyland.Services.Client**, set the **ServiceClientType** attribute to **SOAP**.
2. In the same element, set **ApplicationServer URL** to the URL to the service page on the Application Server.

   Ensure **.asmx** is the extension on the service page. For example: <**ApplicationServer URL="https://server1/AppServer/service.asmx" ServiceClientType="SOAP">**.

Enabling Impersonation

Impersonation allows OnBase Patient Window to run under a specified user account, whose credentials are encrypted in the registry.

Note: Full details on creating encrypted account registry keys are available in the Microsoft article: "How to use the ASP.NET utility to encrypt credentials and session state connection strings" available at: http://support.microsoft.com/kb/329290/

To manually configure impersonation, complete the following steps:

1. From a command line, change the directory to the location where the aspnet_setreg.exe tool resides. A copy of this tool is provided in the ..\utilities\MISC subdirectory of the distributed build.
2. Enter the following command, where **DOMAIN** is the domain for the impersonation account, **name** is the user name of an account that has rights to the Application Server's virtual directory, and **password** is the password for the user account.

```
aspnet_setreg.exe -k:SOFTWARE\Hyland\AppNet\Identity -u:"DOMAIN\name"
-p:"password"
```

3. Open a **Run** dialog box and enter **regedt32**.

4. Grant the application pool's identity account **Read** permissions for the necessary registry key.
    - In 32-bit environments, grant the **Read** permission on `HKLM:SOFTWARE\Hyland\AppNet\Identity\ASPNET_SETREG`.
    - In 64-bit environments, grant the **Read** permission on `HKLM:SOFTWARE\Wow6432Node\Hyland\AppNet\Identity\ASPNET_SETREG`. The aspnet_setreg utility automatically stores the encrypted credentials in this key when impersonation is configured for the application in a 64-bit environment.

Note: If the application pool is configured to use the built-in ApplicationPoolIdentity account, then the IIS_IUSRS group must be granted **Read** access to the registry key.

5. Grant the impersonated identity account **Modify** permissions to the OnBase disk group storage locations and other domain locations where resources (such as style sheets) are stored.
6. Open the OnBase Patient Window Web.config file from the directory where it was installed (for example, C:\inetpub\wwwroot\PatientWindow).
7. Uncomment the **<identity>** element by removing the **<!--** and **-->** located above and below it.
8. Set **impersonate** to **true**.
9. Ensure the **userName** and **password** values point to the registry paths created using the aspnet_setreg utility.
10. Save Web.config.

Disabling Impersonation

To disable impersonation, comment out the **identity** element from the OnBase Patient Window Web.config file. If you only set **impersonate** to **false**, the .NET Framework still causes the application to check the registry for the encrypted credentials, even though the credentials are not used for impersonation. This behavior can cause issues if the registry key does not exist or if the identity account is denied access to the key.

To comment out the **identity** element, enclose the entire element within comment tags (**<!--** and **-->**), as shown in the following example.

```
<!--<identity impersonate="true"
userName="registry:HKLM\SOFTWARE\Wow6432Node\Hyland\AppNet\Identity\ASPNET_SETREG,
userName"
password="registry:HKLM\SOFTWARE\Wow6432Node\Hyland\AppNet\Identity\ASPNET_SETREG,
password"
/>-->
```

Autologin Configuration

To configure OnBase Patient Window for autologin using the Hyland Identity Provider (IdP), see the **Identity and Access Management Services** module reference guide.

To configure OnBase Patient Window for autologin using the following authentication types, see the **Legacy Authentication Methods** module reference guide:

- Active Directory or LDAP
- Active Directory Federation Services (AD FS)
- Integration for Single Sign-On
- OnBase Entrust

Installing the Integrated Office Viewer

The OnBase Integrated Office Viewer (previously known as the WOPI Viewer or WOPI Server) integrates with the Microsoft Office Online Server or Office for the web. It provides users with integrated access to OpenDocument and Microsoft Office documents within OnBase and seamlessly displays Word, Excel, and PowerPoint documents to end users within the familiar OnBase client interfaces.

In addition to the OnBase Integrated Office Viewer, depending on whether you use the Microsoft Office Online Server or Office for the web, two additional configurations may be used: the WOPI endpoint and the Hyland Broker for Microsoft Office.

The WOPI endpoint is a communication layer between the separately installed and configured Microsoft Office Online Server or Office for the web and the OnBase Application Server.

The Hyland Broker for Microsoft Office is used to enable communication between the OnBase Integrated Office Viewer and Office for the web.

OnBase Patient Window supports the display of Office documents using the Integrated Office Viewer. For information about the Integrated Office Viewer installation and configuration, see the **Integrated Office Viewer** documentation.

Creating URLs for OnBase Patient Window

OnBase Patient Window offers several modes for accessing patient records through a hyperlink:

Link Type	Description
Patient Record	Create links that point to a specific record. Filters can be applied to limit the documents displayed by default. See Patient Record Links on page 43.
Patient Search	Create links that point to the Patient Search screen, where users with sufficient privileges can search for patient records. See Patient Search Links on page 44.
Chart Search	Create links that point to the Chart Search screen, where users with sufficient privileges can search for specific charts. See Chart Search Links on page 44.

Link Type	Description
Patient List	Create links that point to the Patient List screen, where users with sufficient privileges can create and manage patient lists. See Patient List Links on page 45.

Patient Record Links

Create patient record links to take users directly to a specific patient record.

To create a patient record link, see the following sections:

- Requirements for Patient Record Links on page 43
- Creating a Patient Record Link on page 43

Requirements for Patient Record Links

Patient record links have the following requirements:

- The link must include one of the following in the query string: the patient's MPI, the patient's MRN, or a document ID.
- When passing the MPI or MRN on the query string, you may need to include the corresponding assigning authority. For information about adding an assigning authority to the query string, see Using Assigning Authorities on page 46.
- If the MRN is included in the query string, make sure the MRN Keyword Type is configured as a Patient Window filter parameter in OnBase Configuration.
- If **Force Uppercase Alphanumeric Data Fields** is disabled in Medical System Settings, make sure the parameter values reflect the correct case on the record or chart. For example, a query for the MRN **e201** would not retrieve documents belonging to the MRN **E201**. If the **Force Uppercase Alphanumeric Data Fields** setting is enabled, cases do not matter.

Creating a Patient Record Link

To create a link to a specific record:

1. Begin with the URL to the Login.aspx page in the OnBase Patient Window virtual directory. For example:

```
https://server/PatientWindow/Login.aspx
```

2. Append a query string that includes at least one of the following parameters: **mpi**, **mrn**, or **docid**.

   In these examples, the **mpi** and **mrn** include an assigning authority named **AA1**.

https://server/PatientWindow/Login.aspx**?mpi=101^^^AA1**

https://server/PatientWindow/Login.aspx**?mrn=201^^^AA1**

https://server/PatientWindow/Login.aspx**?docid=13865**

3. If necessary, append additional query string parameters to filter the documents displayed to the user by default. See Query String Parameters on page 45.

Patient Search Links

Patient search links navigate directly to the Patient Search screen. The URL must include the parameter **searchclient=true**, as shown in the following example.

`https://server/PatientWindow/Login.aspx`**?searchclient=true**`&banner=false`

To create a patient search link:

1. Begin with the URL to the Login.aspx page in the OnBase Patient Window virtual directory. For example:

`https://server/PatientWindow/Login.aspx`

2. Append the **searchclient=true** query string parameter.

`https://server/PatientWindow/Login.aspx`**?searchclient=true**

3. If necessary, append additional query string parameters for displaying the banner or for Epic authentication. See Query String Parameters on page 45.

Chart Search Links

Chart search links navigate directly to the Chart Search screen. The URL must include the parameter **chartSearch=true**, as shown in the following example.

`https://server/PatientWindow/Login.aspx`**?chartSearch=true**`&banner=false`

To create a chart search link:

1. Begin with the URL to the Login.aspx page in the OnBase Patient Window virtual directory. For example:

`https://server/PatientWindow/Login.aspx`

2. Append the **chartSearch=true** query string parameter.

`https://server/PatientWindow/Login.aspx`**?chartSearch=true**

3. If necessary, append additional query string parameters for displaying the banner or for Epic authentication. See Query String Parameters on page 45.

Patient List Links

Patient list links navigate directly to the Patient List screen. The URL must include the parameter **patientlist=true**, as shown in the following example.

`https://server/PatientWindow/Login.aspx`**?patientlist=true**`&banner=false`

To create a patient list link:

1. Begin with the URL to the Login.aspx page in the OnBase Patient Window virtual directory. For example:

```
https://server/PatientWindow/Login.aspx
```

2. Append the **patientlist=true** query string parameter.

`https://server/PatientWindow/Login.aspx`**?patientlist=true**

3. If necessary, append additional query string parameters for displaying the banner or for Epic authentication. See Query String Parameters on page 45.

Query String Parameters

The URL query string supports additional parameters for filtering, security, and display behavior. See the following topics:

- Retrieval Parameters on page 45
- Session and Security Parameters on page 47
- Banner & Display Parameters on page 48
- Parameters for Embedding on page 49
- Filter Parameters on page 49
- Medical Imaging Viewer Parameters on page 53
- Epic Integration Parameters on page 53
- Meditech Integration Parameters on page 54

Retrieval Parameters

The following parameters can be used to specify the patient record that should be retrieved. To retrieve a document or record, the query string must include at least one of these parameters.

Parameter	Description
mpi	Specifies the Master Patient Index (MPI) number of the record to be retrieved. If an **mpi** value matches multiple MPIs in OnBase, then you need to include the MPI assigning authority. See Using Assigning Authorities on page 46.

Parameter	Description
mrn	Specifies the Medical Record Number (MRN) to be retrieved. This parameter can be used only if the MRN Keyword Type is configured as a filter in OnBase Configuration (under **Medical | User Interface Settings | Patient Window | Filter Criteria**). If an **mrn** value matches multiple MRNs in OnBase, then you need to include the MRN assigning authority. See Using Assigning Authorities on page 46.
docid	Specifies the document handle of the document to display by default. For example, to open a record to document #1385, use the parameter **docid=1385**. For a record to be retrieved using only a **docid**, the **docid** must specify a medical record document that is attached to a chart, MRN, or MPI. If the **docid** specifies a Patient Custom Query document, then the query string must also include either the **mrn** or **mpi** parameter. **Note:** When the **docid** is passed on the query string, the medical record will not be filtered. Filter parameters (except for **mrn**, **mpi**, and **acctnum**) are ignored. The user's configured default filter is not applied.

Using Assigning Authorities

If OnBase is set up to use assigning authorities to make patient identifiers unique, then query strings may need to include an assigning authority when specifying an MPI, MRN, or chart (**mpi**, **mrn**, or **acctnum**). If an identifier is configured to require an assigning authority, be sure to provide an assigning authority with the identifier in the query string.

The following table illustrates how to pass assigning authorities on the query string with the MPI, MRN, and chart identifiers.

Identifier	Query String Format	Example
MPI	mpi=mpinumber^^^assigningauthority	mpi=101^^^AA1
MRN	mrn=mrnumber^^^assigningauthority	mrn=101^^^AA1
Chart	acctnum=chartnumber^^^assigningauthority	acctnum=101^^^AA1

Session and Security Parameters

The following parameters can facilitate user login and increase security.

Parameter	Description
checksum	For non-Epic integrations, this parameter specifies the checksum value. If **EnableChecksum** is set to **true** in the OnBase Patient Window Web.config file, then OnBase Patient Window uses the checksum to verify the URL has not been tampered with. If a value in the URL query string has been modified, the checksum verification will fail, and users will not be able to log on with the modified URL. If Application Enabler is being used to generate OnBase Patient Window URLs that include session IDs, a checksum is appended to the URL automatically.
sessionID	Specifies the session ID of a valid, active session to be used by OnBase Patient Window. Use this parameter if another application needs to control the user session. Sessions cannot be shared among multiple Application Servers. The Application Server used by OnBase Patient Window must be the same Application Server that created the session ID. This parameter is not applicable to Epic authentication. **Note:** When the session is created through a separate application, the session will not automatically be disconnected by OnBase Patient Window, and the license will remain in use. It is the responsibility of the application that creates the session ID to disconnect the session when finished, which will release the license. For information about creating session IDs, see the Hyland SDK.
timestamp	For non-Epic integrations, this parameter specifies the timestamp of the request. This value must be provided in the format **yyyyMMddHHmmss** using the 24-hour clock, UTC. If **EnableTimestamp** is set to **true** in the OnBase Patient Window Web.config file, then OnBase Patient Window uses the timestamp to check whether the URL has expired. If the URL has expired, then users are not able to log on with the URL. URL expiration is based on the **TimestampTimeLimit** value specified in Web.config. For more information, see TimestampTimeLimit on page 32.

Parameter	Description
workstationName	Specifies the host name of the workstation from which the user is accessing OnBase Patient Window. If the user has workstation privileges to a Facility or unit, then OnBase Patient Window checks this value to determine which documents to display to the user. If the **workstationName** parameter is omitted from the query string, then OnBase Patient Window checks the **EnableWorkstationNameDNSLookup** Web.config setting. If the setting is **true**, then OnBase Patient Window uses the IP address of the HTTP request to retrieve the workstation's name from a Domain Name System (DNS) server.

Banner & Display Parameters

The following parameters allow you to adjust the banner and viewer display behavior when OnBase Patient Window is accessed through a URL.

Parameter	Description
banner	Shows or hides a patient information banner across the top of OnBase Patient Window. This option is especially useful if OnBase Patient Window is embedded in an EMR that already displays patient information in a banner. Set this parameter to **true** if the banner should be available (the default behavior). Set this parameter to **false** if the banner should not be available.
bannertype	Specifies which banner should be displayed, if your system has multiple banners configured. Set this parameter to the identifier provided for the banner in OnBase Configuration. For example, if a banner has an identifier of **complete**, you would use the parameter **bannertype=complete**. If this parameter is missing or invalid, the default banner for your system will be used.
expandedMode	Specifies whether OnBase Patient Window should automatically load the specified document in expanded mode. Expanded mode enlarges the Document Viewer by hiding the document list, tabs, and banner (if present). Users can restore OnBase Patient Window to its normal display by clicking the **Exit Expanded Mode** button in the upper-right corner of the viewer. Set this parameter to **true** to automatically display the specified document in expanded mode. To load OnBase Patient Window in its normal mode, set this parameter to **false**, or omit it altogether. **Note:** Use this parameter only when a default document is specified in the query string. You can specify a default document using either the **docid** parameter or the **studyuid** parameter. The **studyuid** parameter is valid only for DICOM integrations.

Parameter	Description
tabID	Specifies the ID number of the cross-facility tab to select by default. For example, supposed the Lab tab has an ID number of 208. To open a record to this tab by default, use the parameter **tabID=208**. If the user cannot access the specified tab, or if the tab is empty, then OnBase Patient Window follows the rules outlined under Default Tab Selection on page 117. **Note:** This parameter must refer to a cross-facility tab ID. Cross-facility tabs are configured under **Medical | Facilities | Cross Facility Clinical Document Tabs**. When you select a tab from the **Tab Configuration - Cross Facility Clinical Document Tabs** dialog box, the tab's ID is displayed in the upper-right corner.

Parameters for Embedding

The **isembedded** parameter allows OnBase Patient Window to be embedded within an iframe or a desktop application. To enable embedding, append **isembedded=true** to the URL query string. For example:

`https://server/PatientWindow/Login.aspx?mrn=201&`**isembedded=true**

For additional requirements, see Embedding Patient Window on page 54.

Filter Parameters

Filter parameters apply only to patient record links. They define how a record is filtered upon retrieval. Before using filter parameters, make sure the associated Keyword Types are configured as filters in OnBase Configuration under **Medical | User Interface Settings | Patient Window | Filter Criteria**.

Note: If a user has a default filter configured, the default filter can override other filter parameters specified in the query string, with the exception of **acctnum** and **savedFilterID**. For more information, see User-Configured Default Filters on page 53.

Caution: Once users are logged in to OnBase Patient Window, they can remove any filter except for the patient's MPI. Do not use the optional query parameters as a means to restrict access to documents.

The following parameters allow you to automatically filter the medical record specified in the query string.

Parameter	Description
acctnum	Displays only documents from the specified chart ID (which may also be called a visit number, account number or encounter number). If OnBase is configured to require assigning authorities for chart IDs, then the **acctnum** value must also include the chart's assigning authority. For formatting information, see Using Assigning Authorities on page 46. **Note:** If an **acctnum** is passed on the query string, the user's default filter is ignored.
admitdatefrom	Displays only documents from charts admitted no earlier than the specified date. See Date Formats on page 52.
admitdateto	Displays only documents from charts admitted no later than the specified date. See Date Formats on page 52.
admitsource	Displays only documents from charts with the specified admit source. To show only documents that do not have an admit source defined, pass in this parameter with a value of **unspecified**.
admittype	Displays only documents from charts with the specified Admit Type. This is the Admit Type name as displayed in Configuration. Any spaces in the name must be replaced with a plus sign (+). To show only documents that do not have an Admit Type defined, pass in this parameter with a value of **unspecified**.
department	Displays only documents from charts within the specified department. This is the department name as displayed in Configuration. Any spaces in the name must be replaced with a plus sign (+). To show only documents that do not have a department defined, pass in this parameter with a value of **unspecified**.
dischargedatefrom	Displays only documents from charts discharged no earlier than the specified date. See Date Formats on page 52.
dischargedateto	Displays only documents from charts discharged no later than the specified date. See Date Formats on page 52.
facility	Displays only documents from charts at the specified facility. This is the medical facility name as displayed in Configuration. Any spaces in the name must be replaced with a plus sign (+). To show only documents that do not have a facility defined, pass in this parameter with a value of **unspecified**.
savedFilterID	Applies the specified public filter. See Applying a Public Filter on page 51.

Parameter	Description
service	Displays only documents from charts with the specified service type. This is the service type name as displayed in Configuration. Any spaces in the name must be replaced with a plus sign (+). To show only documents that do not have a service type defined, pass in this parameter with a value of **unspecified**.

Applying a Public Filter

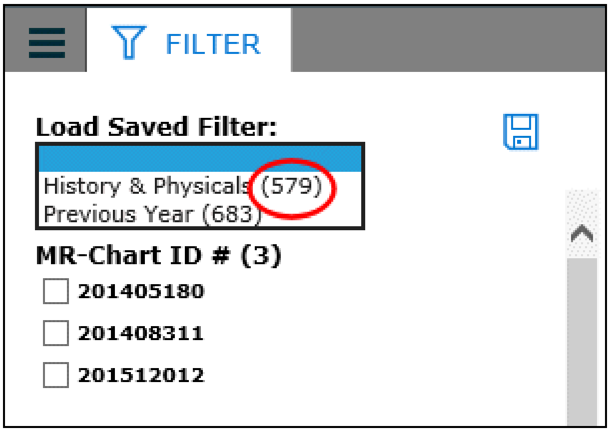
The **savedFilterID** parameter allows for a public filter to be applied automatically. The value for this parameter should be the internal ID number of the public filter.

When a **savedFilterID** is passed on the query string, the following are ignored:

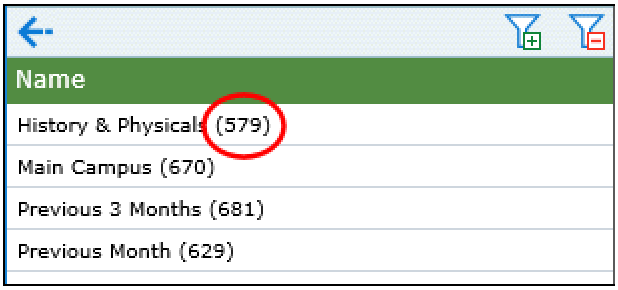
- The default filter set by the user (if applicable)
- Other filter parameters in the query string

Note: If the query string includes the **acctnum** or **docID** parameter, the **savedFilterID** parameter is ignored.

Filter IDs are displayed in the saved filter drop-down list in the filter pane:



You can also find the ID for filters in the Filter Editor:



Applying Multiple Values for a Filter

The following filter parameters can accept multiple values. For example, if you specify two facility values, OnBase Patient Window will display documents from charts at either facility; documents from charts at other facilities will be filtered out.

- acctnum
- admitsource
- admittype
- department
- facility
- mrn (requires mpi to be specified)[1]
- service

To specify multiple values for a filter parameter, separate them with commas using the following format:

```
[parameter]=[value1],[value2],[value3]
```

For example, the following URL would display only documents from charts at either the **HS East** or the **HS West** facility:

`https://server/PatientWindow/Login.aspx?mrn=201&`**facility=HS+East,HS+West**

Date Formats

When specifying a date parameter in the query string, use only short date formats accepted for your system's locale.

For example, the following are a few of the formats accepted for the English (United States) locale:

- yyyy-MM-dd
- MM-dd-yyyy
- yyyy/MM/dd
- MM/dd/yyyy
- yyyy.MM.dd
- MM.dd.yyyy

When using the OnBase Patient Window in a specific locale, make sure the client workstation, web server, and application server all are properly configured for that locale.

See the **International Considerations** module reference guide for additional internationalization requirements and best practices.

1. The **mrn** parameter can specify multiple values only when the patient **mpi** is provided in the query string. If the **mpi** is not provided, then the **mrn** parameter can specify only one value.

User-Configured Default Filters

If the **Allow Users to Set Default Filters** setting is selected in Patient Window Settings, then users can configure their own default filters in Patient Window. A default filter is a saved filter that is applied by default when the user logs on.

If a user has a default filter configured, all filter parameters in the query string are ignored, with the following exceptions:

- OnBase Patient Window always retrieves the correct MPI based on the **mpi** or **mrn** parameter in the query string.
- If the query string specifies an **acctnum**, **docid**, or **savedFilterID**, the user's default filter is not applied to the record.

To control whether users are allowed to set default filters, see Allow Users to Set Default Filters on page 191.

Medical Imaging Viewer Parameters

If OnBase Patient Window is integrated with a DICOM viewer, you can specify a DICOM study that should be displayed by default. For more information, see the module reference guide for your medical imaging viewer integration.

Epic Integration Parameters

The following parameters are specific to solutions where OnBase Patient Window is integrated with Epic.

Parameter	Description
arg	This parameter is used for Epic integrations. It specifies the encrypted query parameters used to authenticate the user and retrieve the correct record. All other query string parameters (with the exception of the **isembedded** parameter, if used) are encrypted within the **arg** parameter. If you are embedding OnBase Patient Window, then **arg** and **isembedded** are the only parameters visible in the query string.
epicID	For Epic integrations, this parameter specifies the user name of the Epic user who is accessing OnBase Patient Window. If this user name is not found in OnBase, then a new user is created with this value as the user name, and a default password is assigned. This parameter is not visible in the final URL; it is encrypted as part of the **arg** parameter.
epicUserToken	For Epic integrations, this parameter specifies the value provided in OnBase Configuration for the **EpicUsername** key. This parameter is not visible in the final URL; it is encrypted as part of the **arg** parameter.

Parameter	Description
epicPasswordToken	For Epic integrations, this parameter specifies the value provided in OnBase Configuration for the **EpicPassword** key. This parameter is not visible in the final URL; it is encrypted as part of the **arg** parameter.
epicTimestamp	The timestamp of the request. This value must be provided in the format **yyyyMMddHHmmss** using the 24-hour clock, UTC. This parameter is not visible in the final URL; it is encrypted as part of the **arg** parameter.

For more information, see Configuring Epic Authentication on page 58.

Meditech Integration Parameters

The following parameter is specific to solutions where OnBase Patient Window is integrated with Meditech.

Parameter	Description
meditechAuth	For the OnBase Integration for Meditech, this parameter specifies whether IP-based authentication should be used. Set this parameter to **true** to use Meditech IP-based authentication, which authenticates users based on their Meditech user names and the IP address of the client workstation. If this parameter is missing or set to **false**, IP-based authentication will not be used.

For more information, see Enabling Meditech IP-Based Authentication on page 59.

Special Characters

When adding values to a query string, ensure all special characters are URL-encoded (also called percent-encoded). Examples of special characters include ä, é, and ñ. Consult an HTML reference for URL encoding information.

Embedding Patient Window

OnBase Patient Window can be embedded within the following components:

- An ASP.NET application.
- A regular browser window or tab.
- A WebBrowser control within a Windows Forms application (Internet Explorer only).

- A custom web page using an iframe. For information about frames and iframes, consult an HTML reference.

Note: Within Firefox, iframes always display OnBase Patient Window as embedded, even if OnBase Patient Window is not configured to be embedded.

For requirements, see the following sections:

- Embedding Requirements on page 55
- Supporting Embedded Timeline Mode on page 55

Embedding Requirements

To embed OnBase Patient Window, ensure the following requirements are met:

- To provide a seamless login experience, OnBase Patient Window must be configured for auto-login.
- In the Web.config for OnBase Patient Window, the **cookieSameSite** attribute must be set to **None**. It is set to **Lax** by default.
- The URL to retrieve documents in OnBase Patient Window must contain the query string parameter **isembedded=true**. For example:

`https://server/PatientWindow/Login.aspx?mrn=201&`**isembedded=true**

Note: If you are using Epic authentication, the **isembedded** parameter must be added outside the encrypted **arg** value.

- The hosting application or web page must be configured to display the embedded URL.
- Internet Explorer security settings must be set correctly on client workstations. If the domain hosting OnBase Patient Window is different from the domain of client workstations, then the OnBase Patient Window domain must be added to the **Local Intranet** zone on the client workstations.
- The registry on client workstations must be updated to support timeline mode. See Supporting Embedded Timeline Mode on page 55.

Supporting Embedded Timeline Mode

When OnBase Patient Window is embedded within an EMR, the Windows registry must be updated on the client or Citrix machines running the EMR application. These steps are necessary to ensure scrolling is available in timeline mode in OnBase Patient Window.

Caution: Modify the registry at your own risk. Incorrectly editing the Windows registry can cause serious problems that may require you to reinstall your operating system. Be sure to back up the registry before making any changes to it. For more registry information, see the following Microsoft articles: http://support.microsoft.com/kb/256986 and http://technet.microsoft.com/en-us/library/cc725612.aspx

To update the registry:

1. Gather the following information about the EMR application that hosts OnBase Patient Window:
   - The process name of the application. For example: **app.exe**.
   - The platform (32-bit or 64-bit) on which the application is running.

   This information can be found using Windows Task Manager on the workstation where the EMR application is running.
2. Open the Windows Registry Editor by entering **regedit** into the Windows Start menu.
3. Browse to one of the following keys.
   - If the EMR application is 64-bit:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Internet Explorer\Main\FeatureControl
```

   - If the EMR application is 32-bit and running on a 64-bit operating system:

```
HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Microsoft\Internet
Explorer\Main\FeatureControl
```

   - If the EMR application is 32-bit and running on a 32-bit operating system:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Internet Explorer\Main\FeatureControl
```

4. Right-click the **FeatureControl** key and select **New | Key**.
5. Name the new key **FEATURE_NINPUT_LEGACYMODE**.
6. Right-click the **FEATURE_NINPUT_LEGACYMODE** key and select **New | DWORD (32-bit) Value**.
7. Name the DWORD value using the process name of the application, including the extension. For example, if the process name is **app.exe**, then you would name the value **app.exe**.
8. Double-click the new DWORD value. The **Edit DWORD (32-bit) Value** dialog box is displayed.
9. Ensure the **Value data** is set to **0**.
10. Click **OK**.
11. Close and re-open the EMR application on the workstation.

    The changes are applied. You do not need to restart the workstation or recycle the application pool.

Third-Party Integrations

OnBase Patient Window can be integrated with and accessed from various third-party medical records systems.

Configuring Application Enabler for Patient Window

OnBase Application Enabler can integrate OnBase Patient Window with some third-party medical records management systems.

- For general information about configuring Application Enabler and the **ApplicationEnabler.exe.config** file, see the **Application Enabler** module reference guide.
- For information about installing Application Enabler using an installer or a ClickOnce deployment, see the **Unity Client** module reference guide.

The following topic describes how to configure Application Enabler to retrieve medical records using OnBase Patient Window.

Application Enabler Requirements

In order for the **Application Enabler - Patient Window** context to function correctly, the **Patient Window - MPI** or **Patient Window - MRN** Keyword Types must be selected for the Document Type on the **Keyword Type Configuration** screen in Application Enabler.

Note: The **Patient Window - MPI** and **Patient Window - MRN** Keyword Types are part of Application Enabler Configuration. You do not need to create these Keyword Types in the OnBase Configuration module.

Note: When used with Application Enabler, OnBase Patient Window allows medical records to be retrieved by MPI and/or MRN.

In addition, the **<PatientWindow>** setting in the Unity Client configuration file must be set appropriately.

The **url** attribute must be set to the path to the Login.aspx page on the web server.

If OnBase Patient Window should share sessions with the Unity Client and not require a log in every time a related context is triggered, the **sendSessionID** attribute must be set to **true**.

Additionally, when session sharing is enabled for OnBase Patient Window, a checksum is appended to the OnBase Patient Window URL. This adds an extra layer of security. For checksum validation to occur, **EnableChecksum** must be set to **true** in the OnBase Patient Window Web.config file. For more information on the **EnableChecksum** setting, see the Patient Window documentation.

If you want the patient information banner to be displayed, the **showBanner** attribute must be set to **true**. Additionally, you must create a custom element for the hotspot with the following values:

Custom Element Attribute	Value
XML Tag	PATIENTWINDOWURLATTRIBUTES
Name	bannerType

Custom Element Attribute	Value
Value	Enter the banner's configured identifier. For example, if a banner has an identifier of **complete**, you would enter **complete** as the Value attribute.

OnBase Patient Window scrape events require users to log in to OnBase Patient Window.

Configuring Epic Authentication

To integrate OnBase Patient Window with Epic, you must have the OnBase Integration for Epic installed and configured to authenticate Epic users.

You must configure the ALL EPIC USERS group, authentication and encryption settings, Epic external IDs, and OnBase Application Server as described in the **Integration for Epic** module reference guide.

Note: Epic authentication creates OnBase accounts as needed when users access OnBase through Epic. With OnBase Patient Window, an account is created only if the Epic user is accessing the Pop application with a valid URL. If the URL has been altered, the validation will fail, and the account is not created in OnBase.

Creating URLs for Epic Authentication

The OnBase Patient Window URL must be configured to use the Epic Integration Parameters on page 53.

When OnBase Patient Window is integrated with Epic, the Epic parameters are encrypted. The only parameters that may appear in the query string are **arg** and **isembedded**, as shown in the following example:

```
https://server/PatientWindow/
Login.aspx?arg=j%2BmZV4vd67iEuI9kvMKcn9QitVDFpphKqGvYmmyzgXm2CUq4LjuOpHjkMVI8%2B6M
baT45ifFKczVv1GjPFz2GTJQChago2IUQ8SxdVE2iNHMgaj4Gj%2BownDK02ySmxioRDblhaeket%2BXPU
NeA94osXg%3D%3D&isembedded=true
```

The **arg** value provides the encrypted credential and medical record information needed for Epic users to retrieve medical records from OnBase. See Epic Integration Parameters on page 53 for information about Epic authentication parameters.

Enabling Meditech IP-Based Authentication

If the OnBase Integration for Meditech is configured, users can access OnBase Patient Window through the Meditech client application.

The Meditech integration can authenticate users based on their Meditech user names and the IP address of the client workstation. This type of authentication eliminates the need for users to manually authenticate multiple times, and it provides a proper audit history within OnBase for users who access the Meditech system from shared workstations or kiosks.

To enable this authentication method, append the following parameter to the OnBase Patient Window query string:

```
&meditechAuth=true
```

For example, a URL generated for the Meditech integration might resemble the following:

`https://server/PatientWindow/Login.aspx?docid=501`**&meditechAuth=true**

Note: The Meditech system also needs to be configured to use IP-based authentication.

For more information about configuring the OnBase Integration for Meditech, see the **OnBase for Meditech with ODA** module reference guide.

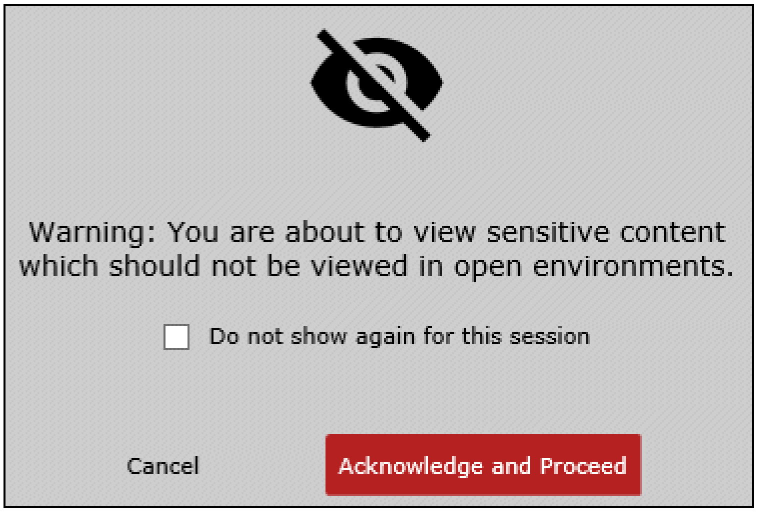
Sensitive Content Configuration

You can configure OnBase Patient Window to notify users when they are about to view content of a sensitive nature. For example, if a Document Type may contain images that should not be viewed in an open ward, OnBase Patient Window can prompt users to confirm that they are in a private location before they open a document from that Document type.

If you designate a Document Type as containing sensitive content, then OnBase Patient Window will do the following:

- In thumbnail view, display a generic icon for documents of that Document Type.

- Display a warning message when a user attempts to open a document of that Document Type. The user can choose to cancel or continue opening the document. The user also can choose to suppress the warning for the remainder of the user's session.



To configure this feature, continue to the following section: Designating Sensitive Document Types on page 60.

Designating Sensitive Document Types

To designate specific Document Types as sensitive, you need to configure a file in the OnBase Patient Window installation directory. If multiple instances of OnBase Patient Window are installed, then you should perform these steps for each instance of the application.

Note: You should have an understanding of JSON syntax before completing this procedure. If necessary, consult a JSON reference.

To designate sensitive Document Types:

1. Open the directory containing the OnBase Patient Window installation files. In a default installation, this directory is **C:\inetpub\wwwroot\PatientWindow**.
2. In a text editor, open **SensitiveContentDocumentTypes.json**. By default, the file contains a **DocumentTypes** array containing a single object.

```
{
  "DocumentTypes": [
    {
      "ID": "",
      "Name": ""
    }
  ]
}
```

3. Set the **ID** value to the ID number of the sensitive Document Type.

   The Document Type ID can be found in the upper-right corner of the Document Type configuration dialog box in the OnBase Configuration module.
4. Set the **Name** value to the name of the sensitive Document Type.

   The **Name** value is included only to help administrators identify the Document Types in the configuration file. OnBase Patient Window does not use the **Name** value.
5. To designate additional sensitive Document Types, add objects to the **DocumentTypes** array. Remember to separate objects with a comma.

   When you are finished, the contents may resemble the following example:

```
{
  "DocumentTypes": [
    {
      "ID": "151",
      "Name": "MR Wound Photos"
    },
    {
      "ID": "168",
      "Name": "MR Surgical Images"
    }
  ]
}
```

6. Save the file. The configuration takes effect the next time a user logs in. Users who are currently logged in are not affected until their next login session.

Post-Installation

After you have installed OnBase Patient Window, ensure that any antivirus software is properly configured. Read the Impact of Running Antivirus Software on Servers on page 61.

Impact of Running Antivirus Software on Servers

Modifying the contents of the virtual directory for OnBase Patient Window or the OnBase Application Server will cause the associated application to restart. When this occurs, connected users will lose their sessions and their applications will become unresponsive. This behavior occurs because OnBase Patient Window and the OnBase Application Server are ASP.NET Web Applications. ASP.NET detects file changes, including changes to file system attributes and time stamps, and restarts the application if a change is detected.

Unintended application restarts can occur when virus scanning software, backup software, or indexing services access the contents of an application’s virtual directory. These processes don’t modify the contents of an application’s files, but they can modify the files’ attributes, which is enough for ASP.NET to restart the application. To properly configure virus scanning, backup software, or indexing service software, follow these guidelines:

- Exclude the OnBase Patient Window virtual directory, the OnBase Application Server virtual directory, and the ASP.NET Temporary Files directory from antivirus, backup, or indexing service scanning. The ASP.NET Temporary Files directory is C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\Temporary ASP.NET Files.

  If these files are scanned by antivirus, backup, or indexing software, IIS will restart the application pool for the OnBase application. When an application pool restarts, all existing OnBase sessions are reset, causing errors for connected users.
- Real-time scanning of script execution, which is available in some antivirus software, should only be engaged according to the software manufacturer's instructions. Some manufacturers do not intend this functionality to be used on servers.

Consult your antivirus software's documentation for other recommended settings for web servers. Ensure that any virus scanning changes will not be overwritten by the automatic policy settings configured for your network.

Loss of Session Context

When antivirus software scans the virtual directory of a web server application like OnBase Patient Window, the scan may cause the application to restart. As a result, users currently logged on to the application lose their sessions, and the application becomes unresponsive. For OnBase applications, the OnBase Event Log records the "Application End" and "Application Start" events, which are followed by a series of errors. The Diagnostics Console logs the message, "Failed to get session for session id."

The recommended solution is to disable antivirus software from scanning the server's virtual directories as well as the ASP.NET Temporary Files located in C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\Temporary ASP.NET Files.

The Microsoft Knowledge Base describes this issue in greater detail. For more information, refer to the following articles:

- http://support.microsoft.com/kb/821438
- http://support.microsoft.com/kb/312592/en-us?spid=8940&sid=global
- http://support.microsoft.com/kb/316148/EN-US/

Decreased Performance and Scalability

Antivirus software running on a web server or client workstation may have adverse effects on system performance. Two known issues regarding McAfee® VirusScan® with ScriptScan are described below.

If you have any questions, please contact your solution provider.

Performance Issues on Servers Running McAfee VirusScan

Servers running any OnBase server application will exhibit decreased performance when running any version of McAfee VirusScan with ScriptScan enabled.

Per recommendations from McAfee, first attempt to resolve the problem by whitelisting URLs for trusted websites. If whitelisting does not resolve the issue, then disable ScriptScan on the affected servers.

The McAfee Knowledge Center describes these recommendations in greater detail. See the following article for more information:

- https://kc.mcafee.com/corporate/index?page=content&id=KB65382&actp=null&viewlocale=en_US&showDraft=false&platinum_status=false&locale=en_US

Performance Issues on Client Workstations Running McAfee VirusScan

Workstations running the OnBase Web Client or Medical Records Management Solution will exhibit decreased performance when running McAfee VirusScan Enterprise 8.0i with ScriptScan enabled. The recommended solution is to upgrade to VirusScan Enterprise 8.5i, for which the issue was resolved.

The makers of OnBase have tested all web-based applications using this version of VirusScan with ScriptScan enabled and confirmed the issue no longer occurs.

Command Line Switches

Command line switches are arguments attached to the run statement in the shortcut to the OnBase Client or Configuration module which modify the way the module logs on or processes data. The general format of a switch is **-SWITCHNAME="OPTIONAL PARAMETERS"**. Switches are case sensitive. Optional parameters must be enclosed in double quotes (" ").

Applying a Command Line Switch via a Desktop Shortcut

The most common way to add and apply a command line switch is to modify a shortcut to the OnBase Client or Configuration module executable.

Note: In some OnBase deployments, adding command line switches via a desktop shortcut is not a viable option. For information on other methods of applying command line switches, see the **System Administration** module reference guide or help file.

To add a command line switch from a desktop shortcut:

1. Create a shortcut to the OnBase Client or Configuration module.
2. In the **Target** field, add one space after the path to the module's executable file.
3. Add the desired command line switches to the value of the **Target** field. Separate multiple switches with one space.

Note: Some switches do not need to be preceded with a - (dash). For example, the automatic login switch (-AL) contains the dash, the user name (UN) and password (PW) switches do not.

4. The switch is applied to the executable the next time it is launched from the desktop shortcut.

-MRMSINSTALL

Apply the **-MRMSINSTALL** switch to the Configuration module command line to be able to delete the following configuration items:

- Admit Type
- Medical Facility
- Clinical Document Tabs
- Medical Department
- Non-Physician Groups
- Payors
- Service Types
- Physician Information (for deleting a physician or assigning a different user account to an existing physician)
- Physician Medical Group

Caution: This feature is intended for recently created items have not been used during the life of the installation. It is not intended to be used on items that were in use but have fallen out of use by the customer. Those items should either be renamed or ignored but not deleted. It is the user's responsibility to remove all related records in other aspects of the Medical Records configuration.

The **-MRMSINSTALL** switch also allows you to edit the following:

- The **Friendly Name** configured for assigning authorities
- The **HL7 Code** and **Assigning Authority** configured for location codes, personnel codes, and confidentiality codes
- The banner for OnBase Patient Window.

Password

A password is required for using this feature. Contact a Technical Support representative for assistance with this feature.

User Group Configuration Rights

In addition to the **-MRMSINSTALL** switch and the password, the user must belong to a User Group that has Medical Records selected for Configuration Rights in order to be able to delete items from the above configurations.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.

- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

The Patient Window is one of the OnBase web-based clients. Like other web clients, the Patient Window provides a document viewer with built-in access to OnBase features, such as the ability to view keywords and save documents externally.

For information about the availability of document viewer features, see Viewer Right-Click Options on page 67.

For information about disabling specific features in the document viewer, see Disabling Viewer Options on page 66.

Disabling Viewer Options

In a healthcare setting, certain features of the document viewer may need to be disabled to ensure compliance with privacy standards. In addition, some right-click options may be displayed due to your system's licensing, but these options are not functional in the context of the Patient Window.

To disable options in the document viewer, choose from the following options:

- To disable certain right-click menu options or toolbars, edit the Patient Window Web.config file as indicated in the **Notes** column of the Viewer Right-Click Options table.
- To disable the entire right-click menu in the document viewer, add the following line to the **appSettings** node in the Patient Window Web.config file:

```
<add key="DisableContextMenu" value="true" />
```

- To completely hide a feature from a user, revoke the associated privilege from the user groups the user belongs to. Be aware this method will affect the user's access to these features in all OnBase applications, not just the Patient Window. You may want to revoke certain privileges at the Document Type level using override privileges. For information about privileges and overrides, see the **System Administration** module reference guide.

Viewer Right-Click Options

The following matrix outlines the availability of right-click options in the document viewer. Available options may be further limited by licensing and the file type of the current document.

You may be able to disable some options, as described in the **Notes** column. For information about disabling options, see Disabling Viewer Options on page 66.

Legend	Description
Yes	Feature is fully functional.
No	Feature is not fully functional and may result in a user-facing error.

Right-Click Option	Functional	Notes
Keywords	No	To disable, add the following line to appSettings: **<add key="keywordsMenu" value="false" />** Or revoke these privileges: **View Keywords** and **Modify Keywords**
Revisions / Renditions	No	**Revisions / Renditions** dialog box is accessible, but previous revisions cannot be opened from the dialog box. Previous renditions and revisions can be opened using the **Show Alternate Rendition** toolbar button.
History	Yes	To disable, add the following line to appSettings: **<add key="historyMenu" value="false" />** Or revoke this privilege: **View History**
Notes | Add Notes	Yes	To disable, add the following line to appSettings: **<add key="addNoteMenu" value="false" />** **Note:** The **addNoteMenu** setting does not affect PDF or OLE file formats, which include Microsoft Office documents.
Notes | View Notes	Yes	
Re-Index	No	To disable, add the following line to appSettings: **<add key="reindexMenu" value="false" />** Or revoke this privilege: **Re-index**

Right-Click Option	Functional	Notes
Print	Yes	To disable, add the following line to appSettings: **<add key="printMenu" value="false" />** Or revoke this privilege: **Print**
Send To | File	Yes	To disable, add the following line to appSettings: **<add key="fileMenu" value="false" />** Or revoke this privilege: **Copy To Clipboard / Save As**
Send To | Create New Document	No	To disable, add the following line to appSettings: **<add key="createDocumentMenu" value="false" />** Or revoke either of these privileges: **Create** or **Copy To Clipboard / Save As**
Send To | Internal User	No	To disable, revoke this privilege: **Internal Mail**
Send To | Envelope	No	To disable, revoke this privilege: **Envelopes**
Delete Document	No	To disable, revoke this privilege: **Delete**
Navigate | Go To Page	Yes	
Process | Invert	Yes	
Process | Rotate All Pages 180	Yes	
Process | Save Rotation	Yes	
Workflow | Execute Workflow	No	To disable, add the following line to appSettings: **<add key="workflowMenu" value="false" />** Or revoke these privileges: **Workflow** and **Workflow Restricted**
Workflow | Workflow Queues	No	To disable, add the following line to appSettings: **<add key="workflowMenu" value="false" />** Or revoke these privileges: **Workflow** and **Workflow Restricted**
Workflow | Open Workflow	No	To disable, add the following line to appSettings: **<add key="workflowMenu" value="false" />** Or revoke these privileges: **Workflow** and **Workflow Restricted**

Right-Click Option	Functional	Notes
Workflow System Tasks	No	To disable, add the following line to appSettings: **<add key="workflowMenu" value="false" />** Or revoke System Task privileges, or both **Workflow** and **Workflow Restricted** privileges
Show Folder Locations	No	To disable, revoke this privilege: **Retrieve / View** (folders privilege)
Properties	Yes	To disable, add the following line to appSettings: **<add key="documentPropertiesMenu" value="false" />** Or revoke this privilege: **Document Properties**
Encoding	Yes	

Medical Records Management Best Practices

The following best practice recommendations were assembled by a team of OnBase subject matter experts. They represent the accumulation of years of experience installing and configuring OnBase solutions.

The following recommendations are general in nature, and are applicable to most OnBase solutions and network environments. Depending on your solution design and your organization's needs, not all of the best practice recommendations listed below may apply to, or be recommended for, your OnBase solution.

Carefully consider the impact of making any changes, including those listed below, to your OnBase solution prior to implementing them in a production environment.

See the following topics:

- Choosing a Medical Records Client on page 70
- Network Architecture for Medical Records on page 72
- Upgrading Medical Records Clients on page 74
- Delinquency Configuration Best Practices on page 77
- Setting Up Medical Records Servers on page 80
- Training Medical Records Users on page 82

Choosing a Medical Records Client

OnBase offers several ways to access medical records. The following topics provide information to help you choose the right medical records client for your solution:

- Medical Records Unity Client on page 70
- OnBase Patient Window on page 71
- DeficiencyPop on page 71
- OnBase Client on page 71

Medical Records Unity Client

The Medical Records Unity Client is the recommended client for all new installations of the OnBase Medical Records Management Solution.

When considering whether the Medical Records Unity Client is right for your solution, keep the following information in mind:

- The Medical Records Unity Client has richer functionality than the other clients, and new functionality can be developed more quickly.
- The Medical Records Unity Client's intuitive interface facilitates adoption by leveraging users' familiarity with Microsoft Office products.

- Interface settings for the Medical Records Unity Client are configured in OnBase Configuration and saved to the database. This approach allows for more centralized administration than an XML configuration file.
- The Medical Records Unity Client needs to be installed locally on users' workstations. The MSI and the ClickOnce Deployment Wizard can facilitate these deployments.

OnBase Patient Window

OnBase Patient Window allows HIM departments, physicians, and clinical staff to view all medical documents associated with a patient's MRN or MPI. When integrated with an electronic medical record (EMR) system, OnBase Patient Window retrieves medical records from OnBase using patient information provided in the third-party system. Users with appropriate privileges also can search for patient records when the EMR system is unavailable.

When considering OnBase Patient Window, keep the following information in mind:

- OnBase Patient Window is ideal for integrations with EMR systems, such as Allscripts, Cerner, Epic, and Meditech.
- OnBase Patient Window can provide access to OnBase in several ways, including through an integration using an HTTPS connection and through OnBase Application Enabler.
- OnBase Patient Window allow remote users or physicians to view records from workstations that cannot support the Medical Records Unity Client. Consider this option for remote users who don't require access to processes available only in the Medical Records Unity Client.

DeficiencyPop

DeficiencyPop retrieves deficiencies currently in a physician's Completion queue. The physician can review, complete, and reject pending deficiencies.

When considering DeficiencyPop, keep the following information in mind:

- DeficiencyPop is ideal for integrations with EMR systems, such as Allscripts, Cerner, Epic, and Meditech.
- DeficiencyPop can be accessed in several ways, including through an integration using an HTTPS connection.
- DeficiencyPop allows physicians to view or sign deficiencies from workstations that cannot support the Medical Records Unity Client. Consider DeficiencyPop an option for remote physicians who don't need all the functionality available in the Medical Records Unity Client.

OnBase Client

The OnBase Client is not ideal for casual chart access, but it is integral to any medical records solution for its administration and processing functions.

The OnBase Client will continue to be supported for server-side processing and chart administration. The Medical Records Unity Client is being enhanced to provide chart administration functions in the future.

Network Architecture for Medical Records

The following best practices offer guidelines on structuring your network environment for the Medical Records Unity Client and Web-based medical applications:

- Setup for External Users on page 72
- Setup for Internal Users on page 73
- WAN Considerations on page 74
- Citrix and Virtual Environments on page 73
- Load Balancing on page 73

Setup for External Users

The following topics describe how to set up the medical clients for external users.

- Medical Records Unity Client on page 72
- OnBase Patient Window on page 72
- DeficiencyPop on page 73

For additional considerations for wide area networks (WANs), see WAN Considerations on page 74.

Medical Records Unity Client

To set up the Medical Records Unity Client for external users, do the following:

1. Set up a reverse proxy server in a perimeter network (also known as the DMZ, or demilitarized zone) to communicate with the Application Server. For recommended configuration settings, see the **Application Server** module reference guide.
2. The front-end firewall between the perimeter network and external network must be configured to allow inbound traffic on port 80, or port 443 for HTTPS connections.
3. The back-end firewall between the perimeter network and your internal network also must be configured to allow traffic on port 80, or port 443 for HTTPS connections. This firewall should only allow inbound traffic originating from the perimeter network and destined for the Application Server's IP address or subnet.

OnBase Patient Window

To set up OnBase Patient Window for external users, do the following:

1. Install OnBase Patient Window in a perimeter network (DMZ).
2. In the front-end firewall between the perimeter network and external network, allow inbound traffic on port 80, or port 443 for HTTPS connections.

3. Ensure the back-end firewall between the perimeter network and your internal network also allows traffic on port 80, or port 443 for HTTPS connections. This firewall should only allow inbound traffic originating from the perimeter network and destined for the Application Server's IP address or subnet.

DeficiencyPop

To set up DeficiencyPop for external users, do the following:

1. Install DeficiencyPop in a perimeter network (DMZ).
2. In the front-end firewall between the perimeter network and external network, allow inbound traffic on port 80, or port 443 for HTTPS connections.
3. Ensure the back-end firewall between the perimeter network and your internal network also allows traffic on port 80, or port 443 for HTTPS connections. This firewall should only allow inbound traffic originating from the perimeter network and destined for the Application Server's IP address or subnet.

Setup for Internal Users

To provide internal users access to the Medical Records Unity Client or medical Web applications, install the applications on your local intranet.

For additional considerations for wide area networks (WANs), see WAN Considerations on page 74.

Citrix and Virtual Environments

If users need to access the medical records clients through Citrix, Remote Desktop, or a virtual environment, refer to the following resources, which are available through the Hyland Community at https://community.hyland.com:

- Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide
- Virtualizing OnBase (whitepaper)

Load Balancing

For information about load balancing the medical records clients, see the following topics:

- Medical Records Unity Client on page 73
- Medical Web Applications on page 74

Medical Records Unity Client

The Medical Records Unity Client supports load balancing across multiple Application Servers.

For information about deploying desktop applications like the Medical Records Unity Client in a load-balanced environment, see the Load Balancing topic in the Application Server module reference guide.

Medical Web Applications

OnBase Patient Window and DeficiencyPop can be installed multiple times to allow for load-balanced deployments.

Ensure the load balancer is configured to maintain a persistent session (also called client affinity or sticky sessions) with a specific server.

WAN Considerations

When setting up the medical records clients in a wide area network (WAN), ensure the OnBase Application Server is installed on a server physically close to the database.

Upgrading Medical Records Clients

The following best practices offer guidelines for upgrading your OnBase medical records solution:

- Available Resources on page 74
- Testing an Upgrade on page 75
- Upgrading OnBase Client Services on page 75
- Deploying Unity on page 76
- Deploying Patient Window on page 76
- Deploying DeficiencyPop on page 76

Available Resources

The following resources are available to help you plan and execute an upgrade:

1. The Customer Upgrade Program (CUP) is available to help you upgrade your OnBase solution to the latest version of the software. CUP is a billable service that provides assistance with upgrading the OnBase Client, Web Server, and third-party integrations. For information, please email upgrade-program@hyland.com.
2. For thorough OnBase upgrade documentation, download the **Best Practices and Guidelines for Upgrading** module reference guide from the Hyland Community:

   https://community.hyland.com

   The **Best Practices and Guidelines for Upgrading** module reference guide describes how to upgrade your base OnBase system. Its appendix includes an upgrade checklist, which provides step-by-step upgrade instructions and time lines.
3. See the Technical Requirements Overview for New Installations and Upgrades. This document describes the technical and installation requirements for the latest version of OnBase. This document also describes major changes you'll need to consider before upgrading to the latest version.

Testing an Upgrade

Before deployment, upgrades must undergo thorough administrative and user acceptance testing. Upgrade and perform testing in your test system prior to upgrading your production system.

1. Ensure you understand your business process and how users work in OnBase. This information will help you ensure all aspects of your solution are adequately tested.
2. Ensure your test system is up to date and synchronized with the OnBase version you want to deploy.
3. Perform end-to-end administrative testing to ensure all business processes work as expected. Be sure to test the entire solution as a whole rather than just individual pockets of functionality.
4. Send and process all types of HL7 messages that apply to your system. Do not limit testing to straightforward messages and simple import processes.
5. To thoroughly test your system, you should create new patient records from scratch, admit and discharge patients, merge records, transfer patients, and perform any other process that is part of your solution. All processes should be thoroughly tested from end to end.
6. After administrative testing, conduct end user acceptance testing. Set up a lab that allows representative users and process owners to verify whether the upgraded system satisfies users' needs and expectations.

Upgrading OnBase Client Services

When upgrading the client running HL7 and MRMS services, be sure to do the following:

1. Upgrade the client running the HL7 Listener at the same time the database is upgraded.
2. When upgrading the HL7 Listener, ensure your HL7 interface engine is set up to queue messages. Also ensure the engine's cache window is large enough for all messages that may be queued while the OnBase HL7 Listener is not running.
3. The -MRMSANALYSIS server, the -MRMSCLOSURE server, and the -MRMSDELINQUENCY server all acquire process locks when they perform processing. After you upgrade these servers, log on to the OnBase Client and remove any orphaned process locks under **Admin | Utilities | Process Lock Administration**. No processing can take place while an orphaned process lock exists.

Deploying Unity

When deploying or upgrading the Medical Records Unity Client, take the following into consideration:

1. If you are installing the Medical Records Unity Client for the first time, you do not need to make any Unity-specific changes to the database. Once installed, Unity should work properly with all the default settings. Run the client to ensure everything looks correct. You can modify global interface settings in OnBase Configuration under **Medical | User Interface Settings | Unity** and **Medical | User Interface Settings | Client Settings**.
2. If you are upgrading the Medical Records Unity Client, make sure the obmrmunity.exe.config file is configured the same as in previous versions. Back up the old file for reference. You do not need to take note of any interface customizations, because they all are stored in the database.
3. Review all release notes for the Medical Records Unity Client to familiarize yourself with new features added since the last version.
4. For ClickOnce deployments, create a deployment package using the Deployment Creation Wizard.

Deploying Patient Window

When upgrading OnBase Patient Window, be sure follow the guidelines in the following topics.

ActiveX Controls

As of OnBase Foundation EP5, OnBase Patient Window no longer uses ActiveX controls. If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, you should uninstall the existing ActiveX controls from users' workstations.

Web.config Customizations

OnBase Patient Window uses a Web.config file for specific configuration settings. Use the following guidelines when upgrading this file:

1. Before upgrading the Patient Window virtual directory, first take note of all customizations made to the Web.config file.
2. After upgrading the virtual directory, modify the new Web.config to reflect the correct customizations.

Deploying DeficiencyPop

When upgrading DeficiencyPop, be sure follow the guidelines in the following topics.

ActiveX Controls

As of OnBase 16, DeficiencyPop no longer uses ActiveX controls. If you are upgrading from a version of OnBase prior to OnBase 16, you should uninstall the existing ActiveX controls from users' workstations.

Web.config Customizations

DeficiencyPop uses a Web.config file for specific configuration settings. Use the following guidelines when upgrading this file:

1. Before upgrading the DeficiencyPop virtual directory, first take note of all customizations made to the Web.config file.
2. After upgrading the virtual directory, modify the new Web.config to reflect the correct customizations.

Performing Post-Upgrade Tasks

Please see the **Upgrade Guidelines** module reference guide for post-upgrade tasks and considerations.

Delinquency Configuration Best Practices

It is considered a best practice to configure OnBase delinquency settings to comply with Joint Commission standards and regulations.

The following topics provide tips on configuring a solution compliant with Joint Commission standards:

- Before You Begin on page 77
- Setup for One Letter Format on page 78
- Setup for Multiple Letter Formats on page 79
- Letter Templates on page 80
- Command Line Switches on page 80
- Delinquency Reporting on page 80

Before You Begin

When designing your solution, first answer the following questions:

1. Does your hospital comply with Joint Commission standards?
2. What is your delinquency suspension process?
3. Do you have any additional bylaws above and beyond Joint Commission standards?
    - If there are many different bylaws, then perform the necessary discovery to understand all the factors that affect delinquency at your hospital.
4. How do you notify your physicians of delinquency and suspension?
    - If you send physicians one or more letters that use the same wording, see Setup for One Letter Format on page 78.
    - If you send physicians two or more letters using different wording (i.e., one format for warning physicians of delinquency and another for warning physicians of suspension), see Setup for Multiple Letter Formats on page 79.

Setup for One Letter Format

If your facility requires only one letter template for notifying physicians about delinquency, then follow these guidelines:

Delinquency Configuration	Recommendations
Delinquency Levels	Create a single delinquency level named **Delinquent** or **Warning**.
Aging: Basis & Rate	For each facility, set the delinquency aging basis to **Discharge Date**. Do this for the **<Default>** Deficiency Type and the **<Default>** Document Type. **Tip:** Use the **Copy** button to copy settings from one facility to all other facilities.
Letters	Follow the module reference guide's instructions for delinquency letter configuration. Ensure the letter's wording reflects the potential date when the physician may receive the letter. For example, depending on your Global Letter Settings, a physician may receive a letter either seven days before incurring delinquency or on the day the physician becomes delinquent.
Global Letter Settings	1. Select **Use Current Date when Calculating Delinquency**. 2. Ask, "How many days in advance of delinquency should physicians be allowed to receive the delinquency letter?" Set **Days Prior to Delinquency Notification** to this value. For example, if the physician should receive the first delinquency letter no sooner than 7 days before incurring delinquency, set **Days Prior to Delinquency Notification** to **7**.
Medical System Settings	On the **Deficiency Settings** tab, select **Use Configured Aging Rates to Calculate Delinquency Settings**.

Setup for Multiple Letter Formats

If your facility requires multiple letter templates for notifying physicians about delinquency, then follow these guidelines:

Delinquency Configuration	Recommendations
Delinquency Levels	Create the following delinquency levels under the existing **Active** level: 1. **Alert** 2. **Warning** (or **Delinquent**) **Note:** For more complex requirements, create additional levels.
Aging: Basis & Rate	1. For each facility, set the delinquency aging basis to **Discharge Date**. Do this for the **<Default>** Deficiency Type and the **<Default>** Document Type. 2. For the **<Default>** options again, set the following rates for each new delinquency level: • **Alert**—14 days (336 hours) • **Warning**—30 days (720 hours) **Tip:** Use the **Copy** button to copy settings from one facility to all other facilities.
Letters	Follow the module reference guide's instructions for letter configuration. Ensure the wording of each letter reflects the potential date when the physician may receive the letter. For example, depending on your Global Letter Settings, a physician may receive a letter either seven days before incurring delinquency or on the day the physician becomes delinquent.
Global Letter Settings	1. Select **Use Current Date when Calculating Delinquency**. 2. Ask, "How many days in advance of delinquency should physicians be allowed to receive the delinquency letter?" Set **Days Prior to Delinquency Notification** to this value. For example, if the physician should receive the first delinquency letter no sooner than 7 days before incurring delinquency, set **Days Prior to Delinquency Notification** to **7**.
Medical System Settings	Select **Use Configured Aging Rates to Calculate Delinquency Settings** on the **Deficiency Settings** tab.

Letter Templates

When configuring and storing delinquency letter templates, use the following guidelines:

- To centralize administration, place the letter template on a network share. In OnBase Configuration, configure the **Path to Letter** to point to this share using a UNC path.
- Letters' font size should be no smaller than 10 pt and no larger than 12 pt. Fonts are configured under **Document | Named Fonts**. To change the font assigned to your letter template, go to **Medical | Delinquency Configuration | Letters** in OnBase Configuration. Then, select the letter you want to configure, and click **Settings**.

Command Line Switches

The delinquency command line switches (-MRMSDELINQUENCY="HH:MM" and -MRMSDELINQUENCYLETTERS) should be run on a service separate from the other MRMS processing switches.

Delinquency Reporting

For delinquency reporting, use the OnBase Report Services module. This module, which is licensed separately, provides several built-in delinquency reports to accommodate systems set up for either the default delinquency settings or delinquency levels.

For assistance constructing custom reports, contact your solution provider.

Setting Up Medical Records Servers

The following topics cover best practices for running the medical records servers (Analysis Server, Closure Server, Delinquency and Delinquency Letters Servers, and Polling Service).

General Practices

The following practices apply to all medical records servers:

1. Before setting up the medical records servers as Windows services, run them interactively in the OnBase Client (not as Windows services) for a few cycles. Monitor the servers to ensure they are working correctly (e.g., completing processes, creating and releasing locks). The OnBase Client's Medical Records Server window allows you to monitor whether individual processes are being started and finished.
2. Set up the medical records servers as Windows services.
   - The Analysis Server, Closure Server, and (if applicable) Polling Service should run on the same process. These are the only medical record servers that should run on the same process.
   - Configure each remaining medical records server as its own service. None of these services should be configured to run on the same process as another service (such as the OnBase Scheduler or the Workflow Timer Service).
3. Each service should have its own Windows user account and OnBase user account.

4. Run only one service per medical records server. For example, do not run two Analysis Servers at the same time. Doing so can lead to burning conflicts and prevent successful database upgrades.
5. For troubleshooting, use verbose logging. For more information about verbose logging, see the **System Administration** module reference guide.
6. Restart services sparingly. When you restart a service, clear the processing lock in the OnBase Client. Contact your solution provider for assistance.
7. Do not restart the OnBase Application Server that medical records servers or clients are connecting to. If you must restart the Application Server, do so when all users are logged out and services are stopped. Restart services after the Application Server is restarted.

Analysis Server

The Analysis Server transitions charts through the Analysis and Coding processes and burns deficiencies.

1. When going live, ensure the Analysis Server is up and running. Otherwise, there could be a large backlog of charts to process, which could negatively affect system and database performance.
2. Configure the Analysis Server, Closure Server, and (if applicable) Polling Service to run together on the same process.
3. Ensure the Windows user account running the Analysis Server has Modify permissions to the OnBase disk groups.
4. If Workflow system tasks are configured for medical records, ensure the Analysis Server has a connection to the OnBase Application Server.
5. Ensure the Analysis Server and OnBase Application Server are set to use the same time zone. Otherwise, burned signatures may display inconsistent time zones in their timestamps.

Closure Server

The Closure Server sets chart statuses to Inactive or Closed, checks for loose documents, and automatically unsuspends suspended charts after a configured period.

1. Configure the Analysis Server, Closure Server, and (if applicable) Polling Service to run together on the same process.
2. Configure the Closure Server to run during off-peak hours.
3. The Closure Server will not close a chart containing unburned deficiencies, but notes placed on chart documents after burning will be burned when the Closure Server runs.
4. Any chart that requires Coding or Analysis won’t close until these processes have been completed.
5. If Workflow system tasks are configured for medical records, ensure the Closure Server has a connection to the OnBase Application Server.

Delinquency Server

The Delinquency Server marks deficiencies as delinquent and tracks a physician's period of delinquency.

1. Configure the Delinquency Server to run once a day during off-peak hours.
2. If delinquency is not being calculated or updated properly, contact your first line of support. If this issue occurs, delinquency letters will be generated, but deficiencies won't appear to be delinquent in the user interface.

Delinquency Letters Server

The Delinquency Letters Server generates delinquency letters for physicians who either have or will soon have delinquent deficiencies.

1. Make sure the user account has access to the letter template.
2. Ensure the delinquency letter template has enough room for both the template text and the deficiency grid header.
3. Test the configuration by running the Delinquency Letters Server and generating letters. View the letters to ensure they are created and formatted properly.

Polling Service

The Polling Service synchronizes the creation and completion of external deficiencies between OnBase and an external system.

Note: Only External Missing Signatures and External Unsigned Orders are synced with the service. External Missing Information deficiencies are not supported.

1. Configure the Polling Service to run on the same process as the Analysis Server and Closure Server.
2. For the file-based method, ensure the user has **Read** and **Modify** rights to the directory where file is stored.
3. Change OnBase external deficiency names to be more consistent with your system, but ensure the mnemonics for external deficiency names match up with external deficiency types.

Training Medical Records Users

The following training best practices offer guidelines for training both end users and the people who will train end users:

- Thoroughly Understand Users' Processes on page 83
- Have a Sponsor Champion the MRM Solution on page 83
- Ensure New Trainers Are Prepared on page 84
- Use Appropriate & Relevant Training Materials on page 84
- Set Up the Training Environment in Advance on page 84

- Be Prepared to Explain the Basics on page 85
- Tell Users What They Need to Know on page 85

Thoroughly Understand Users' Processes

Each organization's processes are different, and training programs must be adapted to accommodate these differences.

1. When preparing to train new users, first discover the users' current processes.
2. Be prepared to learn new processes for every role or department that will be using OnBase.
3. Foster credibility with users by demonstrating that you thoroughly understand their processes. Users may be unwilling to learn the benefits of OnBase unless you know exactly how their processes work.
4. It will help if you create a diagram of the current processes and another diagram showing what the processes will look like in OnBase.
5. Stay focused on users' business processes. Show users how they can do their job using the software. Do not train users solely on what the software does, or they may either lose interest or become confused.
6. If you conduct training at several organizations or facilities, take note of common practices. Use this information to create a generic training program that can be adapted to apply to any organization or facility. Because practices can vary widely, also be prepared to start from scratch.

Have a Sponsor Champion the MRM Solution

Finding a sponsor who champions the project can have a big impact on user acceptance.

1. It is critical to garner support from managers in each department where OnBase Medical Records Management is being used. Adoption will be more successful if managers support OnBase and discuss the change with a positive attitude.
2. It is also important to garner physician support. Having a physician who advocates the project will be very helpful, because physicians listen to their peers.
3. If available, a project manager can help coordinate training efforts and identify potential roadblocks.
4. It helps to identify a stakeholder who both champions OnBase and is skilled at training others.

Ensure New Trainers Are Prepared

Because many organizations do not have a training department, choosing someone capable of training others is critical.

1. Ensure the new trainer has a thorough understanding of the end users' business processes.
2. If possible, choose trainers from each department where new users will be trained. It is difficult to have one person train different types of users, especially if that person is knowledgeable in only one part of the organization's processes.
3. When training trainers, ensure the trainer has mastered each concept before you move on to the next one. If trainers do not understand the tasks they're performing, they will have trouble training new users and answering their questions.

Use Appropriate & Relevant Training Materials

Having appropriate training materials and test data can make it easier for users to understand new concepts.

1. Know how many people you're training. Use this information to ensure you have enough test information to work through different usage scenarios.
2. When training users on a test system, ensure the test system accurately represents how the production system will work.
3. If users work in certain queues, train users only on queues relevant to the user. For example, if users will work in specific Workflow queues, be sure to use only the queues users will work in.
4. Use as much real information as possible. If time allows, use real charts that have been scrubbed of sensitive patient information. It may help to have an HIM director create a template chart that accurately represents the charts users will work on. Using "dummy" data may confuse users and reduce your credibility.
5. Design training materials suitable for each type of user. For example, physicians are short on time, and they like to get their jobs done as quickly as possible. Quick reference guides may be a good choice for physicians, because they provide simple step-by-step instructions for common tasks. Training videos also work well for several types of users, as long as the information in the video is relevant to the user.

Set Up the Training Environment in Advance

To help the training process go as smoothly as possible, perform the following preparation tasks:

1. Ensure a training room is reserved.
2. Ensure invitations are sent well in advance.
3. Ask attendees for a commitment to a time slot.
4. Ensure computers in the training room are configured and Internet connections are available.
5. Prepare handouts, if applicable.

6. Ensure the room, furniture, and equipment are configured best for training. All attendees should be able to see you and the material you are presenting, and you should be able to move easily from user to user to help individuals who need extra help.
7. If you use Microsoft PowerPoint® slides, ensure your laptop or PC is loaded and ready to go 30 minutes before the training session starts. This time buffer will allow you to address technical difficulties, should any arise.

Be Prepared to Explain the Basics

Users' training needs may vary widely, but patience and persistence will pay off.

1. Take nothing about your users for granted. Concepts that seem basic may be completely foreign to new users.
2. Some users may lack basic knowledge of common Microsoft Windows® and mouse concepts. Identify users who lack computer experience and teach them these basic concepts. The organization's Information Technology department may be able to provide this training. This training will make it easier for users to follow instructions when they are being trained in OnBase.
3. If users have no previous OnBase experience, train them on basic OnBase concepts, such as pages, documents, Document Types, and Keyword Types. Ensure users have enough OnBase knowledge to successfully accomplish their tasks.
4. If how OnBase handles medical records is completely new to users, be prepared to step back and educate them on the basic process. If possible, draw parallels between the users' current processes and the processes in OnBase. For more information, see Thoroughly Understand Users' Processes on page 83.
5. Demonstrate what could go wrong and the consequences.
6. If a user has a question you cannot immediately answer, remember to research and answer the user's question at a later time.

Tell Users What They Need to Know

When you start training a group, be sure to answer the following questions:

1. When will this new process start?
2. Why are we changing everything we do?
3. What's in it for me?
4. Who will help us when the transition starts?
5. How do I use OnBase to do my job? (For more information about answering this question, see Thoroughly Understand Users' Processes on page 83.)

OnBase® Foundation EP5

Patient Window

Administration Guide

Foundation EP5

Overview

OnBase Patient Window is configured in OnBase Configuration.

Enforcing Configuration Changes

Following a change in OnBase Configuration, you may need to either reset the Application Server's cache or recycle its application pool to ensure the change is reflected in OnBase Patient Window.

Caution: Recycling an application pool disconnects users who are logged on to OnBase through that server or application. Any unsaved work by those users will be lost. Application pool recycling should occur during scheduled maintenance hours when no users are connected to OnBase through the server or application.

Cache resets may be necessary for configuration changes like the creation of a new facility or a modified Medical System Setting. Resets are not necessary for changes to user privileges, which are not cached.

Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

See the **System Administration** or **Application Server** module reference guide for information about cache reset and application pool recycling.

Configuration Rights

To configure OnBase Patient Window, you must have the **Medical Records** configuration right. See the **System Administration** module reference guide for information about configuration rights.

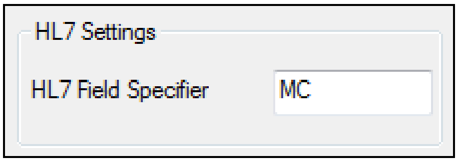
HL7 Configuration

In OnBase, patient records and charts are created and managed using the HL7 module. The HL7 module must be configured to process incoming HL7 messages properly for the creation and management of clinical data.

To configure the HL7 module, see the **HL7** module reference guide.

HL7 Field Specifiers

In OnBase, some medical components require the configuration of an **HL7 Field Specifier**. This configuration field allows you to define the expected HL7 code for the component.



For example, suppose HL7 messages identify the Main Campus facility by providing the code **MC** in the HL7 facility field. When the Main Campus facility is configured in OnBase Configuration, it should have an **HL7 Field Specifier** of **MC**.

Requirements for HL7 Field Specifiers

To be configured properly, HL7 field specifiers must meet the following requirements.

1. The value in the **HL7 Field Specifier** field must match the HL7 code in the HL7 message.
2. The expected location of the HL7 code must be configured one of two ways:
   - Using a chart field override on HL7 message templates
   - Using Chart Data Field Configuration
3. An HL7 field specifier must provided for any component that contains the **HL7 Field Specifier** field.

Handling Unknown HL7 Codes

If the HL7 Medical Records Chart action encounters HL7 code that does not match any configured items, it will automatically create a new item for the HL7 code.

For example, suppose an HL7 message has the value **MC** in the facility field, but MC is not associated with any facilities in OnBase. In this case, the Medical Records Chart action will do the following:

- Create a new facility named **MC**
- Place the value **MC** in the facility's **HL7 Field Specifier** field
- Assign the specified chart to the **MC** facility

Facilities and Admit Types created by HL7 are regarded as not configured. In the Medical Records Management Solution, if a chart is assigned a facility or Admit Type that has not been configured, the chart is sent to Charts Requiring Review. Once the facility or Admit Type is configured in OnBase Configuration, the chart can be removed from Charts Requiring Review. The chart will respect the newly configured settings.

User Group Configuration

User Groups for OnBase Patient Window are configured in the OnBase Configuration module. For information about User Group privileges, see Security Configuration on page 227.

Document Type Configuration for Patient Window

For information about configuring medical record Document Types, see the OnBase **HL7 Module** documentation.

The following topics describe additional considerations and requirements for the OnBase Patient Window:

- Medical Record Document Types on page 91
- Non-Medical Record Document Types on page 91
- Clinically Relevant Dates on page 92
- Cross-References on page 92
- Sensitive Content on page 92

Medical Record Document Types

Medical record Document Types contain documents that are intended to help clinicians treat or diagnose patients. In a typical installation, these documents are attached to a patient record or chart automatically. To be attached to a chart or patient record, a document must belong to a medical record Document Type. The OnBase Patient Window can display any document that is attached to a patient record or chart.

To configure medical record Document Types, see the OnBase **HL7 Module** documentation.

Non-Medical Record Document Types

Non-medical record Document Types belong to a Document Type Group that does not have the **Contains Medical Record Document Types** setting selected.

If the system has a Patient Custom Query tab configured at the cross-facility level, then non-medical record documents can be dynamically displayed in patient records based on the Medical Records Custom Query configured in Medical Client Settings. See Medical Records Custom Query Configuration on page 118.

Note: A previously configured Patient Custom Query tab may be available at the cross-facility level for legacy systems only. You cannot configure a new Patient Custom Query tab at the cross-facility level.

To prevent non-medical record documents from being sent to Chartless Documents, ensure their Document Types do not belong a medical record Document Type Group.

Clinically Relevant Dates

The OnBase Patient Window supports the use of clinically relevant dates to place documents on a timeline.

You can configure how OnBase assigns clinically relevant dates for each medical record Document Type. For example, you might want lab tests to use the sample date, while discharge summaries might use the discharge date.

Note: By default, the Document Date is the clinically relevant date for each medical record Document Type. If OnBase cannot determine the clinically relevant date for a document based on the Clinically Relevant Date Configuration, the Document Date will be used.

To configure clinically relevant dates for a Document Type, see the OnBase **HL7 Module** documentation.

Cross-References

Cross-references allow Patient Window users to compare a document side-by-side with other documents in the record. When a Patient Window user clicks the **Split View** button for a document containing cross-references, the user can view the original document and its cross-references side-by-side.

To disable cross-reference retrieval, set **EnableSplitView** to **false** in the OnBase Patient Window's Web.config file.

Sensitive Content

You can configure OnBase Patient Window to treat specific Document Types as sensitive. If a user attempts to open a document from a sensitive Document Type, OnBase Patient Window notifies the user that the document may contain sensitive content that should not be viewed in open environments.

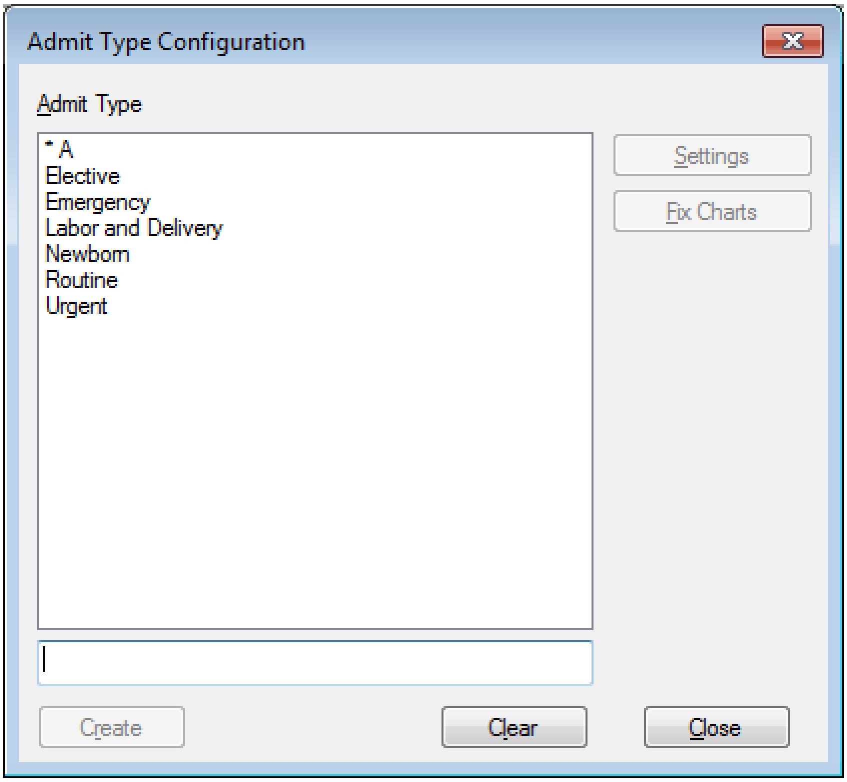
For more information, see Sensitive Content Configuration on page 59.

Admit Type Configuration

An Admit Type identifies the circumstances under which a patient is admitted. Examples may include **Elective**, **Emergency**, and **Routine**. Then, when a user retrieves a chart, the Admit Type is displayed in the chart's demographics. Users can also use Admit Types as criteria for chart retrieval.

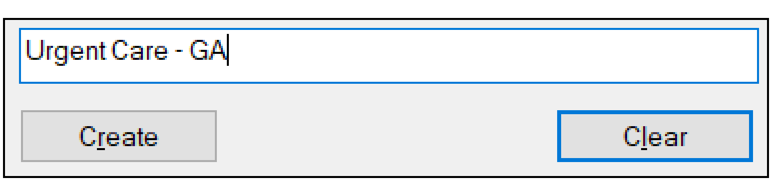
To configure an Admit Type to associate with charts:

1. In the OnBase Configuration module, select **Medical | Admit Types**. The **Admit Type Configuration** dialog box is displayed.

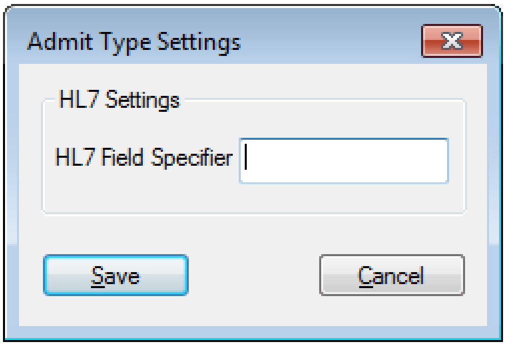


Note: Admit Types preceded by an asterisk (*) were created by HL7 and are not yet configured. Until the Admit Type is configured, and the HL7 Listener is restarted, any new charts created with the Admit Type will be marked as requiring review. See Fixing Charts with Admit Type Issues on page 94 for more information.

2. Enter a name for the Admit Type in the blank field at the bottom of the dialog box.



3. Click **Create**. The **Admit Type Settings** dialog box is displayed.



4. Enter the **HL7 code** for the Admit Type in the **HL7 Field Specifier** field.

   For example, if the **Routine** Admit Type is represented in the HL7 messages by the code **R**, then enter **R** in the **HL7 Field Specifier** field. For more details on field specifiers, refer to HL7 Field Specifiers on page 89.
5. Click **Save**.

Fixing Charts with Admit Type Issues

If the HL7 Medical Record Chart action processes an HL7 message containing an Admit Type that does not yet exist in OnBase, the action will create the Admit Type in OnBase automatically. If any charts are created with the Admit Type before it is fully configured, they will be sent to **Charts Requiring Review**.

The following topics describe how to address this situation:

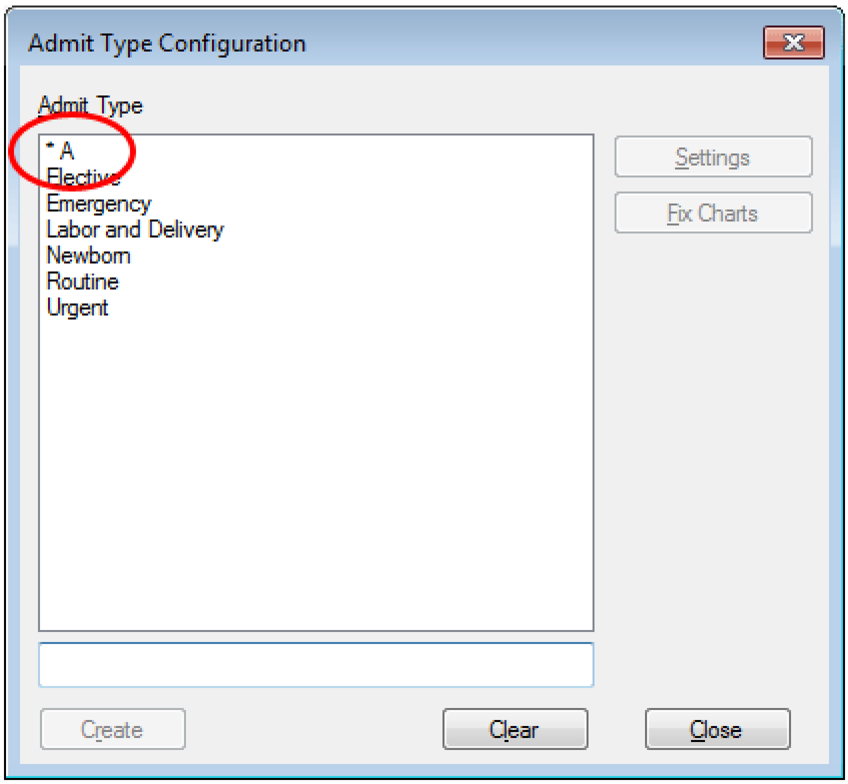
- Configuring the Admit Type
- Fixing Charts in Review for HL7-Created Admit Types

Configuring the Admit Type

The following procedure describes how to complete the configuration of an Admit Type created by the HL7 module. If the Admit Type is assigned to any charts in Charts Requiring Review, then it must be configured before the charts can be removed from the queue.

1. Select the Admit Type that requires configuration.

   Admit Types preceded with an asterisk (*) were created by HL7 and have not yet been configured.



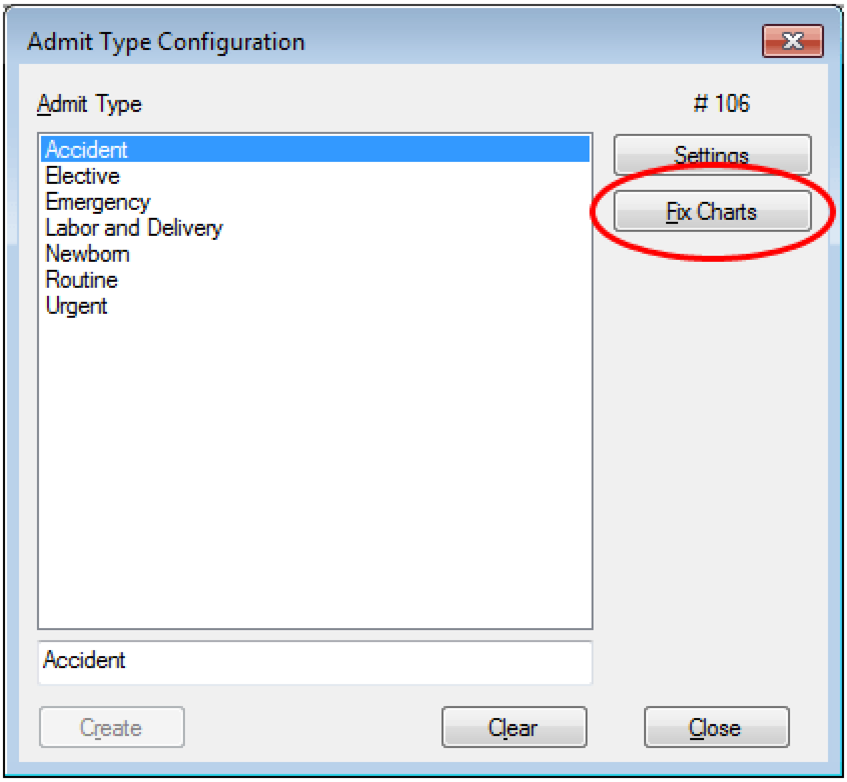
2. Click **Settings**.
3. Configure the Admit Type settings as needed.
4. Click **Save**. The asterisk is removed.
5. Restart the OnBase Client process that is running the HL7 Listener or the HL7 EDI Processor. Once the HL7 process responsible for chart creation is restarted, new charts for the Admit Type can be created without requiring review.
6. Proceed to Fixing Charts in Review for HL7-Created Admit Types on page 96.

Fixing Charts in Review for HL7-Created Admit Types

After you configure a Admit Type that has been created by HL7, OnBase can reevaluate the charts that are in Charts Requiring Review because the Admit Type was not configured.

If a chart is in Charts Requiring Review only because the Admit Type was not configured, then the following procedure will remove the chart from the Charts Requiring Review queue. If a chart requires review for other reasons, then the chart remains in the Charts Requiring Review queue, where it must be manually removed.

1. Select the Admit Type from the **Admit Type Configuration** dialog box.
2. Click **Fix Charts**. This button is available only after the Admit Type has been configured.



   OnBase displays a message indicating the number of charts that require review because the selected Admit Type was created by HL7.
3. Click **OK**. If any charts require review because the selected Admit Type was created by HL7, OnBase evaluates their review status.

   The time it takes to evaluate the charts depends on the number of charts requiring review. When the evaluation is complete, OnBase displays a message indicating whether all of the affected charts have been cleared from review.

Note: If any of the affected charts are still in Charts Requiring Review, then you must review and correct them manually. If any of these charts is associated with a facility that was created by HL7, you may be able to fix them through Medical Facility Configuration.

4. Click **OK** to return to the **Admit Type Configuration** dialog box.

Medical Facility Configuration

A facility represents a location where patient care is administered. In OnBase, each chart (or visit) is associated with the facility where the visit took place. Facility configuration is one of the most important factors affecting chart access. Because different facilities may have different requirements, you can configure each facility with its own rules and restrictions.

For example, a medical system could have both a downtown facility that is an accredited Level I Trauma Center, as well as a regional facility in a nearby suburb. These two facilities may follow different security requirements and standards. Medical Facility Configuration allows you to assign the appropriate settings to each facility.

To configure facilities, continue to the following topics:

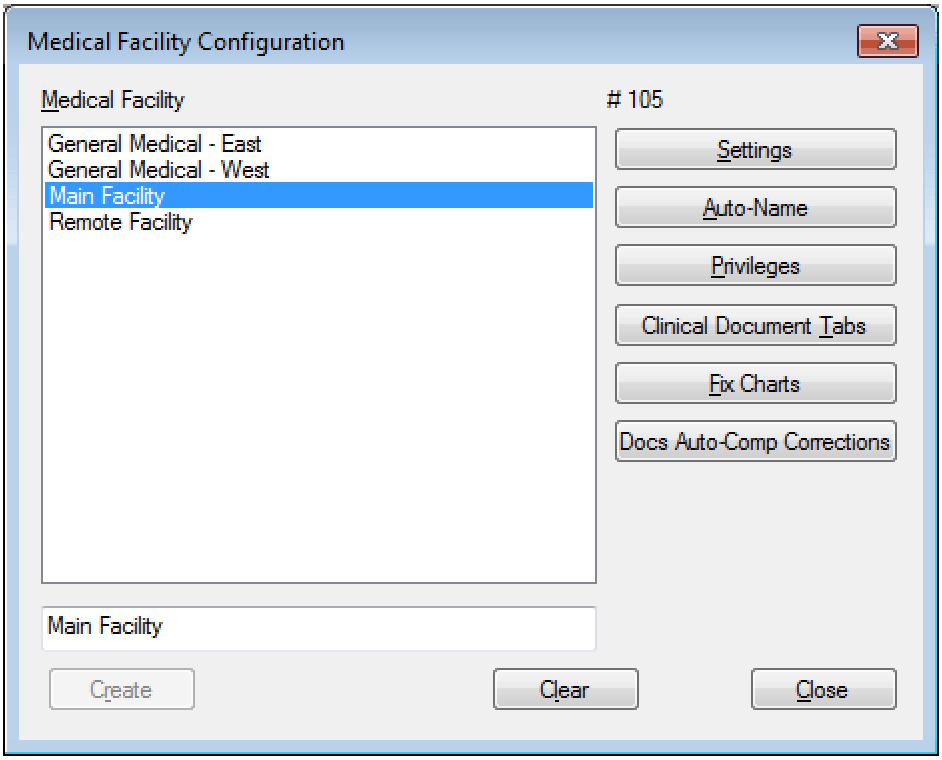
- Creating a New Facility on page 99
- Configuring Facility Settings on page 99
- Configuring Chart Auto-Names on page 102
- Assigning Facility User Group Privileges on page 103
- Fixing Charts with Facility Issues on page 104
- Configuring Facilities to Automatically Complete Correction Tasks on page 106
- Clinical Document Tab Configuration on page 108

Creating a New Facility

Facilities are created in OnBase Configuration. The screen shots in the following procedure are representative of a system with minimal additional licensing. More options may be available depending on the system's licensing.

To configure a facility:

1. In OnBase Configuration, select **Medical | Facilities | Facility Configuration**. The **Medical Facility Configuration** dialog box is displayed.



2. Type the name of a facility in the field provided.
3. Click **Create**. The name is added to the **Medical Facility** list.
4. Continue to Configuring Facility Settings on page 99.

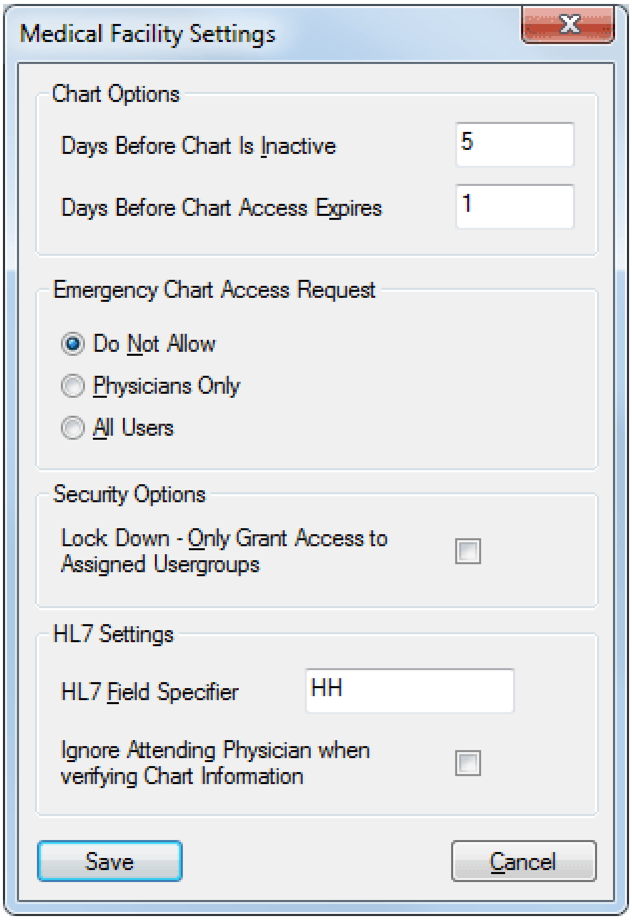
Configuring Facility Settings

Once a facility has been created, you can configure its settings.

1. Select the facility in the **Medical Facility Configuration** dialog box.

Note: Facilities preceded with an asterisk (*) were created by HL7 and have not yet been configured. Until a facility is configured and the HL7 Listener is restarted, any charts created for the facility will be marked as requiring review. See Fixing Charts with Facility Issues on page 104 for more information.

2. Click **Settings** to display the **Medical Facility Settings** dialog box. Available settings vary depending on your system's licensing.



3. Configure the following settings as needed:
   - Days Before Chart is Inactive on page 100
   - Days Before Chart Access Expires on page 101
   - Emergency Chart Access Request on page 101
   - Lock Down - Only Grant Access to Assigned Usergroups on page 101
   - HL7 Field Specifier on page 101
   - Ignore Attending Physician when verifying Chart Information on page 101
4. Click **Save** when finished.
5. Go to Configuring Chart Auto-Names on page 102.

Days Before Chart is Inactive

The **Days Before Chart is Inactive** setting does not affect OnBase Patient Window. For more information about this setting, see the **Medical Records Unity Client** module reference guide.

Days Before Chart Access Expires

The **Days Before Chart Access Expires Setting** does not affect OnBase Patient Window. For more information about this setting, see the **Medical Records Unity Client** module reference guide.

Emergency Chart Access Request

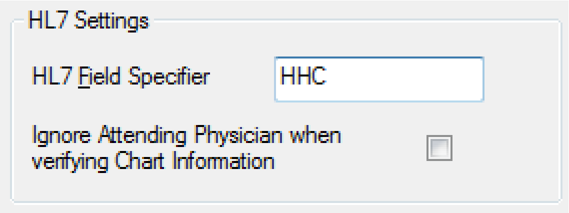
The **Emergency Chart Access Request** options do not affect OnBase Patient Window. For more information about this setting, see the **Medical Records Unity Client** module reference guide.

Lock Down - Only Grant Access to Assigned Usergroups

The **Lock Down** setting does not affect OnBase Patient Window. It affects only the OnBase Client and the Medical Records Unity Client. For information about how this setting affects other applications, see the **Medical Records Unity Client** module reference guide.

HL7 Field Specifier

In the **HL7 Field Specifier** field, enter the HL7 code for this facility. The HL7 field specifier must match the value used in HL7 messages to identify this facility.



Ignore Attending Physician when verifying Chart Information

Decide whether a valid attending physician must be provided in the HL7 message when chart information is verified. If a valid attending physician is required, clear the **Ignore Attending Physician when verifying Chart Information** option.

This option controls whether charts are sent to Charts Requiring Review when an invalid attending physician is provided in the HL7 message.

- Select this option if charts should not be sent to Charts Requiring Review when the attending physician is invalid or missing.
- Clear the option if charts should be sent to Charts Requiring Review when the attending physician is invalid or missing.

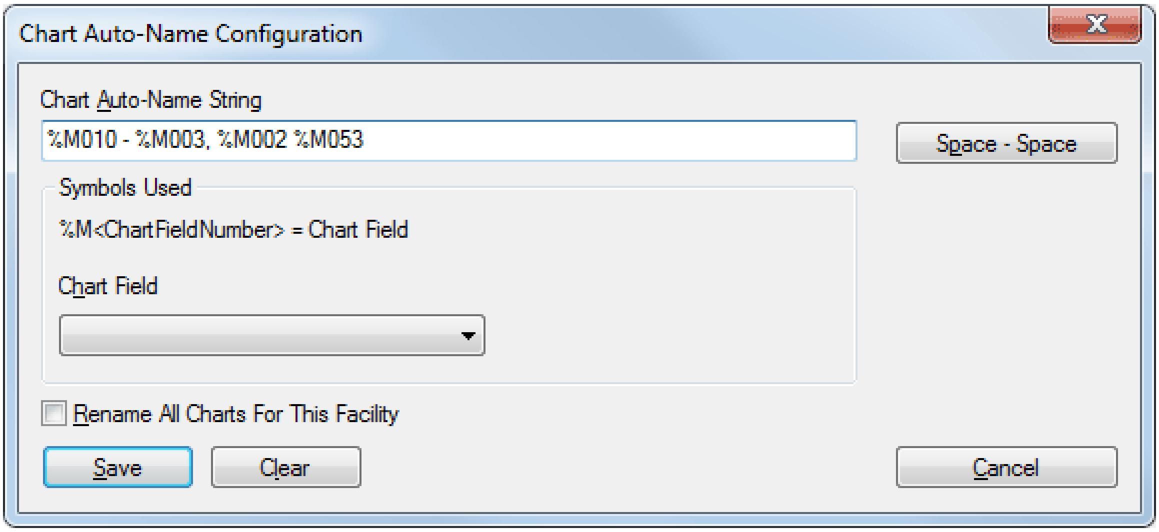
Configuring Chart Auto-Names

Complete the following steps to configure an **Auto-Name** string for all charts at this facility. The Auto-Name is the label users see when working with a patient's chart in modules like the OnBase Client or the Medical Records Unity Client.

Note: Chart Auto-Names cannot exceed 100 characters. If an auto-generated chart name contains more than 100 characters, the additional characters will be omitted.

---

1. Select a facility from the **Medical Facility Configuration** dialog box and click **Auto-Name**. The **Chart Auto-Name Configuration** dialog box is displayed.



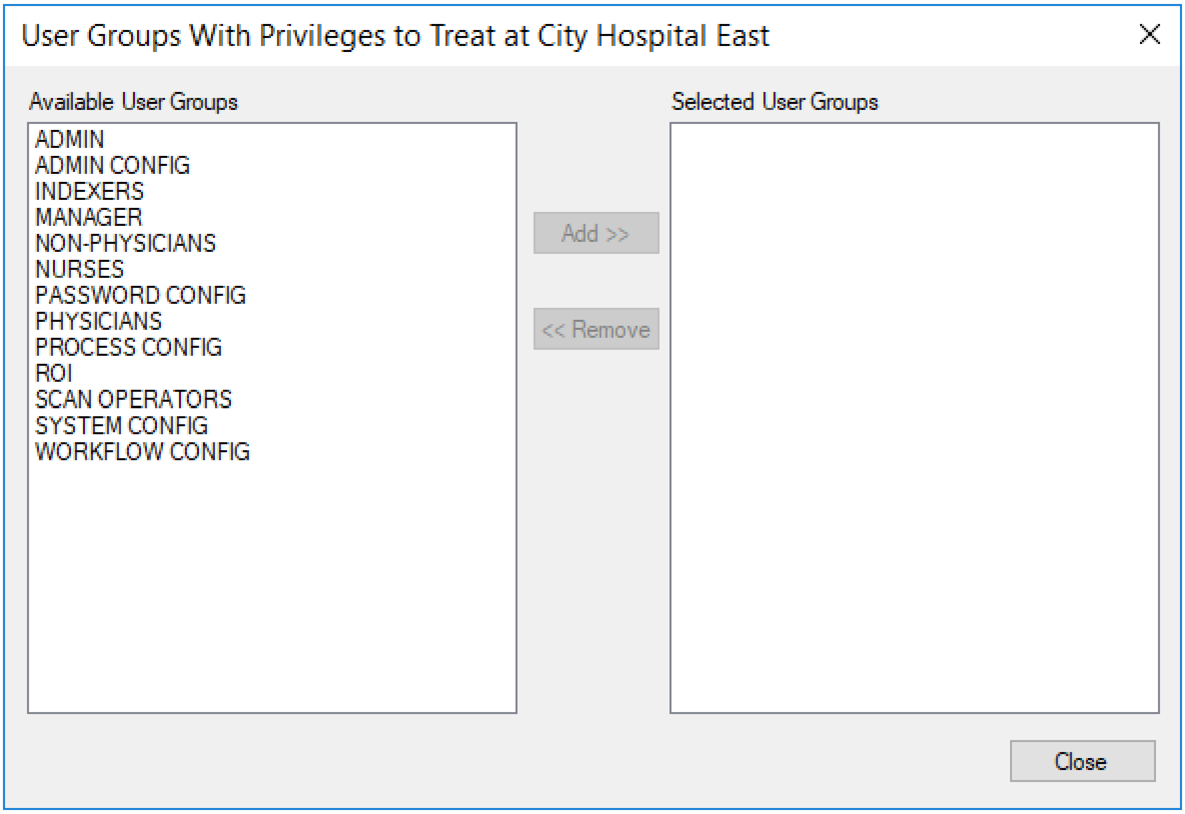
2. In the **Chart Auto-Name String** field, enter the Auto-Name string. To enter variables for patient IDs and names, select them from the **Chart Field** drop-down list.
   - It is considered a best practice to use a combination of auto-generated values (available in the **Chart Field** drop-down list), along with typed text to provide a useful label.
   - An example of an Auto-Name string is **MRN=%M007 - %M003, %M002**, which would be displayed to users as **MRN=1111 - Doe, Jane**. In this example, everything preceded with a **%** sign was selected from the drop-down list and everything else was manually typed.
   - Click **Space-Space** to insert a space - dash - space in the string.
   - To rename all existing charts for this facility, select **Rename All Charts For this Facility**.
3. Click **Save**.

Assigning Facility User Group Privileges

In certain modules, including the OnBase Client and the Medical Records Unity Client, users with limited chart search privileges can retrieve charts only from facilities to which they have been explicitly assigned.

To assign facility privileges:

1. Select a facility from the **Medical Facility Configuration** dialog box.
2. Click **Privileges**. The **User Groups with Privileges to Treat** dialog box is displayed.



3. From the **Available User Groups** list, select a User Group.
4. Click **Add** to add the User Group to the **Selected User Groups** list.
5. Repeat for all User Groups that you want to assign to the facility.
6. Click **Close**.

Fixing Charts with Facility Issues

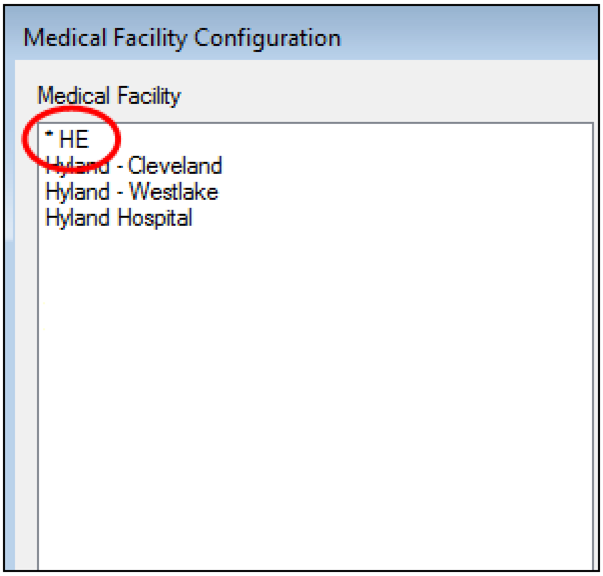
If an HL7 Medical Record Chart action processes a message containing a facility code that does not match a facility in OnBase, the action will create the facility in OnBase automatically. If any charts are created for the facility before it is fully configured, they will be sent to Charts Requiring Review. The following topics describe how to address this situation:

- Configuring the Facility
- Fixing Charts in Review for HL7-Created Facilities

Configuring the Facility

The following procedure describes how to complete the configuration of a facility created by the OnBase HL7 module. If the Charts Requiring Review queue contains any charts for the facility, the facility must be configured before the charts can be removed from the queue.

1. Select the facility that requires configuration. Facilities preceded with an asterisk (*) were created by HL7 and have not yet been configured.



2. Click **Settings**.
3. After modifying the facility's settings, click **Save**. The asterisk is removed.
4. Restart the OnBase Client process that is running the HL7 Listener or the HL7 EDI Processor. Once the HL7 process responsible for chart creation is restarted, new charts for the facility can be created without requiring review.
5. Proceed to Fixing Charts in Review for HL7-Created Facilities on page 105.

Fixing Charts in Review for HL7-Created Facilities

After you configure a facility that has been created by HL7, OnBase can reevaluate the charts that are in Charts Requiring Review because the facility was not configured.

If a chart is in Charts Requiring Review only because the facility was not configured, then the following procedure will remove the chart from the Charts Requiring Review queue. If a chart requires review for other reasons, then the chart remains in the Charts Requiring Review queue, where it must be manually removed.

1. Select the facility from the **Medical Facility Configuration** dialog box.
2. Click **Fix Charts**. This button is available only after the facility has been configured.

   OnBase displays a message indicating the number of charts that require review because the selected facility was created by HL7.
3. Click **OK**. If any charts require review because the selected facility was created by HL7, OnBase evaluates their review status.

   The time it takes to evaluate the charts depends on the number of charts requiring review. When the evaluation is complete, OnBase displays a message indicating whether all of the affected charts have been cleared from review.

Note: If any of the affected charts are still in Charts Requiring Review, then you must review and correct them manually. If any of these charts is associated with an Admit Type that was created by HL7, you may be able to fix them through Admit Type Configuration.

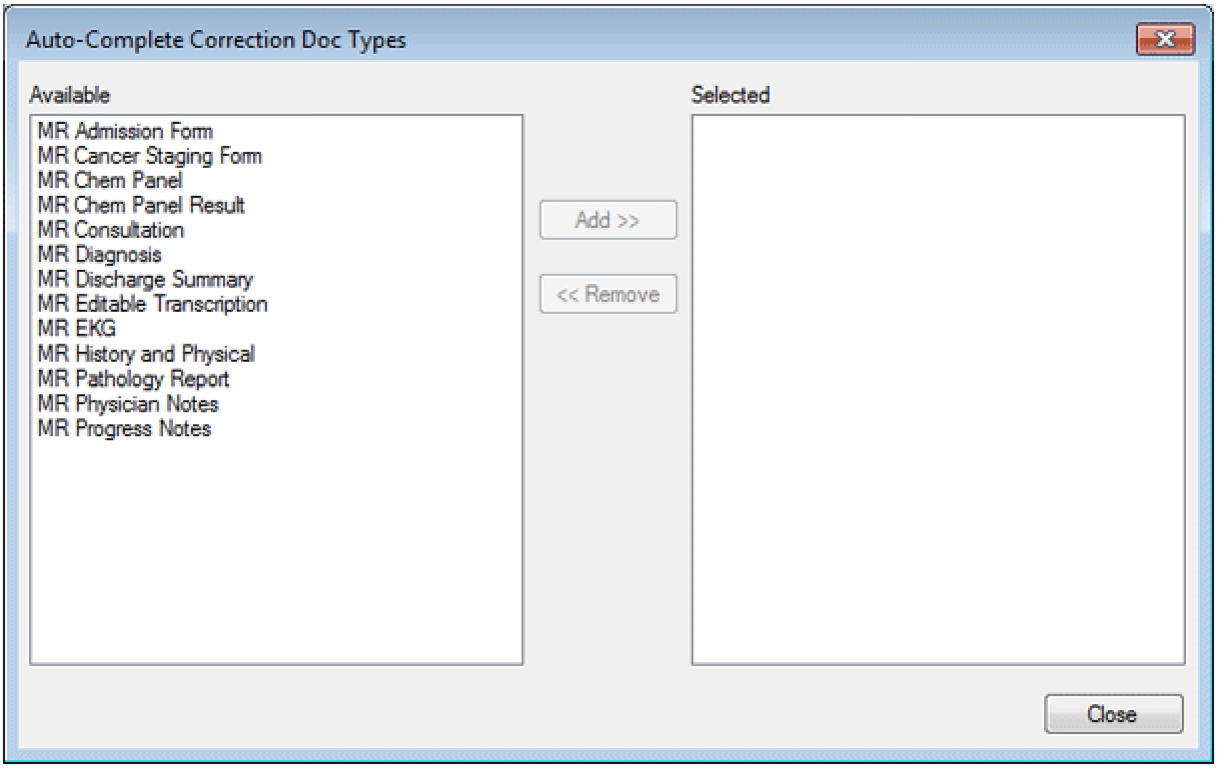
4. Click **OK** to return to the **Medical Facility Configuration** dialog box.

Configuring Facilities to Automatically Complete Correction Tasks

The Medical Records Unity Client allows users to create and complete chart correction tasks. The Add Document and Add Transcription task types, which are created for missing documents, can be automatically completed when the respective document is added to the chart. For each facility, you can specify the Document Types eligible to automatically complete these tasks.

Note: Correction tasks must satisfy certain criteria to be eligible for auto-completion. See Criteria for Automatic Correction Completion on page 107.

1. Select a facility from the **Medical Facility Configuration** dialog box.
2. Click **Docs Auto-Comp Corrections**. The **Auto-Complete Correction Doc Types** dialog box is displayed.



3. Select the Document Types that should be allowed to automatically complete Add Document and Add Transcription correction tasks.
4. Click **Add**.
5. Click **Close**. Repeat for each facility, as needed.

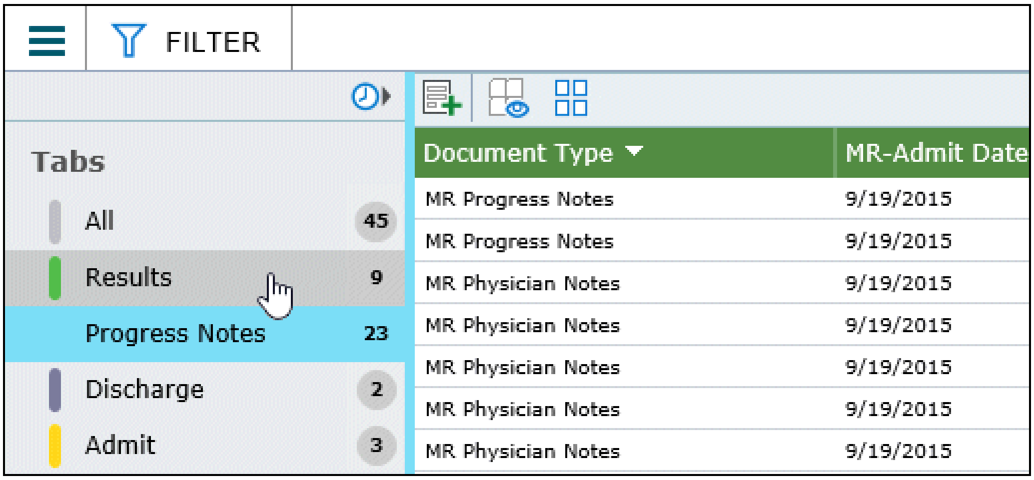
Criteria for Automatic Correction Completion

To be automatically completed, correction tasks must satisfy the following criteria:

1. The task type must be Add Document or Add Transcription.
2. The chart must contain only one pending Add Document or Add Transcription task associated with the missing document's Document Type.
    - If a chart has multiple pending Add Document or Add Transcription tasks associated with the same Document Type, these tasks must be manually completed in the Medical Records Unity Client.
    - If the chart has one pending Add Document task and one pending Add Transcription task associated with the same Document Type, then both tasks are completed when a document of that Document Type is added to the chart.
3. The task must have a status of **Pending**. Tasks currently in progress (assigned to a user) are not eligible for automatic completion.
4. The task must be associated with a Document Type. If a user creates an Add Document or Add Transcription task without selecting a Document Type, the task cannot be automatically completed.
5. The chart's facility must be configured to allow the associated Document Type to auto-complete tasks. Otherwise, the Add Document or Add Transcription correction task must be manually completed in the Medical Records Unity Client.

Clinical Document Tab Configuration

Clinical document tabs allow OnBase Patient Window to organize documents in a record or chart. Sometimes referred to as chart tabs, these tabs can also be configured for the patient record level.



To configure the appearance, content, and sequence of these tabs, see the following topics:

- Available Tab Types on page 108
- Creating a Cross-Facility Tab on page 112
- Configuring Tab Settings on page 112
- Assigning Document Types to Tabs on page 113
- Assigning User Groups to Secure Tabs on page 115
- Configuring the Tab Sequence on page 116
- Default Tab Selection on page 117

Available Tab Types

Several types of tabs are available, as described in the following topics:

- Documents Tabs on page 108
- Secure Documents Tabs on page 109
- Patient Custom Query Tabs on page 110
- Other Documents Tabs on page 110
- Reference Tab on page 111
- Personal Tab on page 111

Documents Tabs

Documents tabs are available to all users. These general-purpose tabs are populated based on their assigned Document Types.

Secure Documents Tabs

Secure Documents tabs, or Secure tabs, are the only types of tabs where access is restricted by User Group rights. Create Secure tabs to control access to sensitive medical record documents, such as HIV test results or mental health records. Only users who have been granted access to Secure tabs can view documents within those tabs.

Caution: Sensitive Document Types should be assigned only to a Secure tab and not to any other type of tabs configured for the facility or cross-facility. If a document is in both a Secure tab and a non-Secure tab, then any user who has access to the chart can view the document in the non-Secure tab.

Best Practices for Secure Tabs

When configuring Secure tabs, adhere to the following best practices:

- Ensure all sensitive Document Types are assigned to Secure tabs. If a sensitive Document Type is not assigned to any tabs for a facility, and the facility has an **Other Documents** tab configured, then users can view the sensitive Document Types in the **Other Documents** tab.
- Be sure to recycle the Application Server’s application pool as soon as possible after assigning Document Types to a Secure tab. Before the application pool is recycled, the Medical Records Unity Client and OnBase Patient Window can still display secure documents outside the context of the Secure tab. Be aware recycling the application pool may disconnect users who are currently logged on to OnBase through the Application Server.
- Remove all sensitive Document Types from a Secure tab before changing a Secure tab to another tab type. When a Secure tab is changed to another tab type, all User Groups assigned to the tab will be removed, and any users who have access to the chart will have access to the documents in the tab.
- Do not configure a Secure tab as the default tab for a facility. The default tab must be accessible to all users who can view the chart.

Printing Secure Documents

In the Medical Records Unity Client, if a user chooses to print either an entire chart or a print template, the user cannot print a document in a Secure tab unless the user has access to the tab.

In OnBase Patient Window, users can print only the document currently displayed in the viewer. If the user cannot access the document because it is on a secure tab, then the user cannot print the document using OnBase Patient Window.

Personal Tabs With Secure Documents

Document Types assigned to Secure tabs are available within Personal Tab configuration, even for users who do not have rights to those tabs. However, Personal Tabs will display secure documents only to the users who have rights to view them.

Displaying Non-Sensitive Documents in Secure Tabs

You can configure non-sensitive documents to show up in the same tab as sensitive documents. For example, suppose you want a tab to contain all lab results, including HIV test results, but only certain users should be able to see the HIV test results.

To accommodate this situation, create two Secure tabs, and then assign Document Types and User Group access as outlined in the following table.

Setting	Labs Tab (No HIV Tests)	Labs Tab (HIV Tests)
Tab Type	Secure	Secure
User Group	All clinical user groups except HIV (privileged) user group	HIV (privileged) user group
Document Types	Chem Panels CBC	Chem Panels CBC HIV Tests

Patient Custom Query Tabs

New Patient Custom Query tabs cannot be configured at the cross-facility level. All patient documents should be contained within the Documents or Secure Documents tab types.

Note: A Patient Custom Query tab may be available at the cross-facility level only if it was configured in an earlier version of OnBase. The Patient Custom Query tab is legacy functionality retained at the cross-facility level for backwards compatibility only. If a legacy Patient Custom Query tab is configured to display documents that do not belong to a medical record Document Type Group, be aware the non-medical documents cannot be filtered using the filter pane.

Patient Custom Query tabs typically contain patient-level documents, such as patient identification or insurance cards.

Patient Custom Query tabs are populated by a custom query configured to retrieve relevant documents by MPI or MRN. Once configured, this custom query is assigned in Medical Client Settings.

Other Documents Tabs

Other Documents tabs contain medical record documents whose Document Types are not assigned to any other tabs. You must create one tab using the Other Documents tab type.

In OnBase Patient Window, the Other Documents tab displays medical record Document Types that are not assigned to any cross-facility tabs.

Caution: If an Other Documents tab is not configured, and a document whose Document Type is not assigned to a tab is added to a patient record, then the document cannot be viewed within the tabs in the record.

Reference Tab

The Reference tab displays clinical documents that should not be filtered out based on filter criteria. This tab is useful for displaying patient-level documents even when chart-level filter criteria are applied.

The Reference tab feature requires a database update and is not available in a default installation. Once enabled, the Reference tab is displayed only in OnBase Patient Window.

To enable the Reference tab:

1. Configure a custom query to retrieve documents for the Reference tab.
   - This custom query must retrieve documents using the Keyword Type mapped to the **MPI** chart data field. If MPIs are configured to require assigning authorities, then the Keyword Type for the MPI assigning authority also must be used for retrieval.
   - Only documents that belong to medical record Document Types are retrieved.
   - Users must have privileges to this custom query in order to see documents in the Reference tab.
   - If the custom query retrieves documents that belong in a Secure tab, be aware the documents will be visible in the Reference tab to users who have privileges to the custom query.
2. Take note of the custom query ID number.
3. Contact your first line of support to make the database update necessary to enable the Reference tab. Provide your support representative the ID number of the custom query you configured.

Personal Tab

Each user can create a Personal Tab from within the OnBase Patient Window and the Medical Records Unity Client. Personal Tabs are populated based on user-selected Document Types. These tabs cannot be configured in OnBase Configuration.

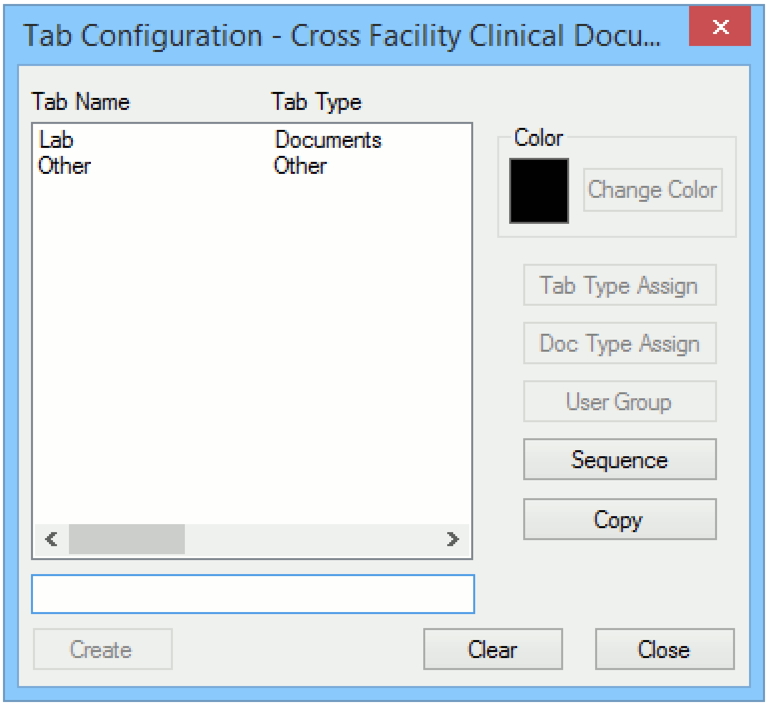
The Personal Tab is displayed in green. Keep this in mind when configuring tab colors.

Creating a Cross-Facility Tab

When a patient record is opened in the OnBase Patient Window, its contents are organized according to the cross-facility tab configuration.

To create a cross-facility tab:

1. In the OnBase Configuration module, select **Medical | Facilities | Cross Facility Clinical Document Tabs**.



2. Type a name for a tab in the **Tab Configuration** dialog box. For example, a tab could be named Doctor Notes, Lab Results, or Discharge.
3. Click **Create**.
4. Go to Configuring Tab Settings on page 112.

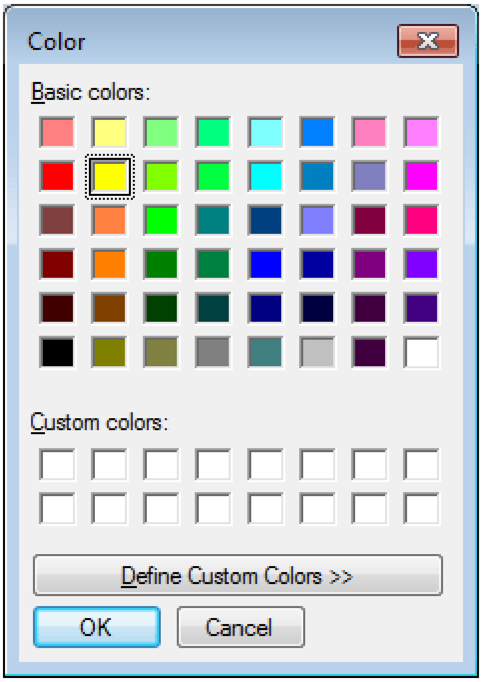
Configuring Tab Settings

Once a tab is created, you can assign it a color and tab type.

To configure tab settings:

1. Select the tab in the **Tab Configuration** dialog box.
2. Click **Change Color**.

3. Select a color for the tab and click **OK**.



Tip: Choose a color that will allow the tab's label to be easily read. When a tab is selected, the label text is white. When the tab is not selected, the label text is black. Tab colors that are too light or too dark will make the label difficult to read.

4. Click **Tab Type Assign**. The **Clinical Document Tab Type Settings** dialog box is displayed.
5. Select a tab type.

Caution: Be sure to configure an Other Documents tab. If an Other Documents tab is not configured, and a document whose Document Type is not assigned to a tab is added to a chart, then documents belonging to that Document Type cannot be viewed within the chart.

6. Click **Save**.

Assigning Document Types to Tabs

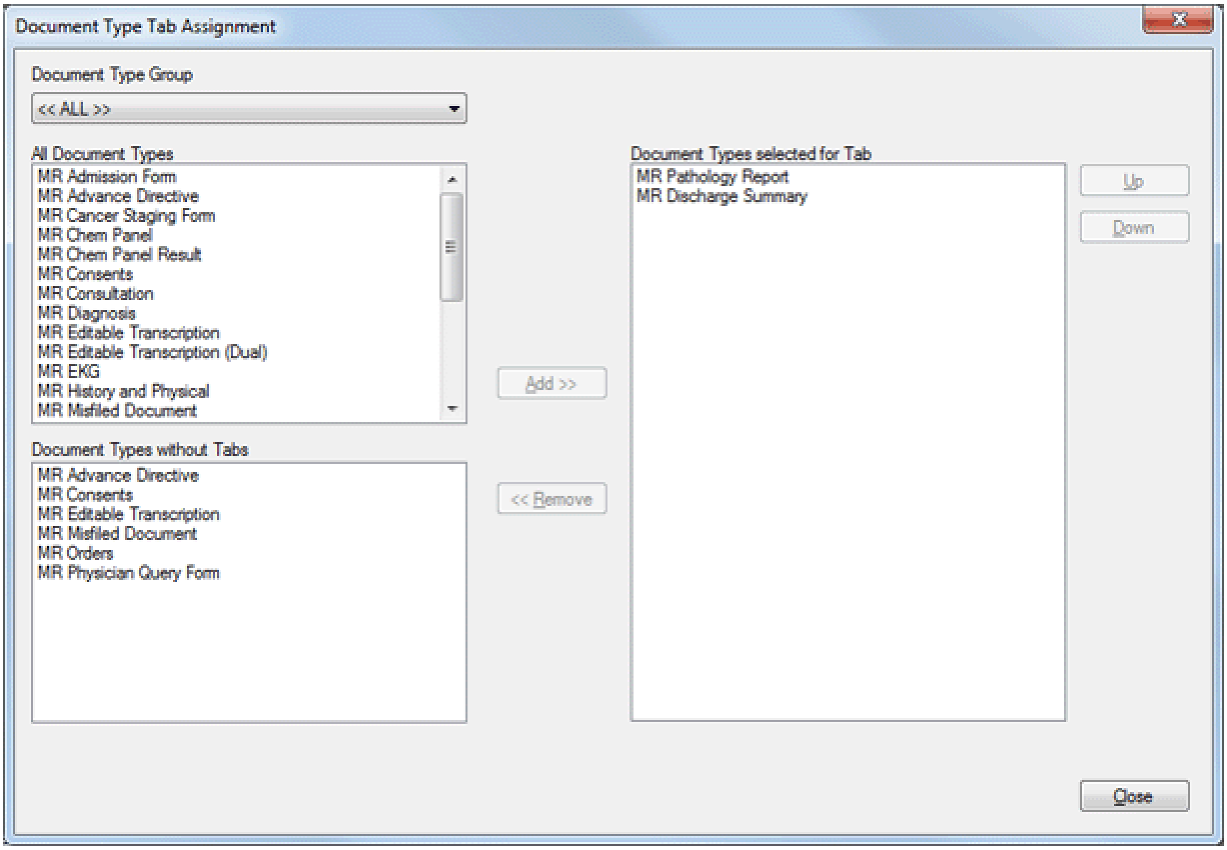
To display documents, the following types of tabs must have one or more Document Types assigned:

- Documents
- Secure Documents

This configuration also allows you to specify the default order of Document Types in a tab, though some modules allow users to sort documents using criteria other than Document Type.

To assign Document Types to a tab:

1. Select the tab from the **Tab Configuration** dialog box.
2. Click **Doc Type Assign**. The **Document Type Tab Assignment** dialog box displays all Document Types residing in a medical record Document Type Group.



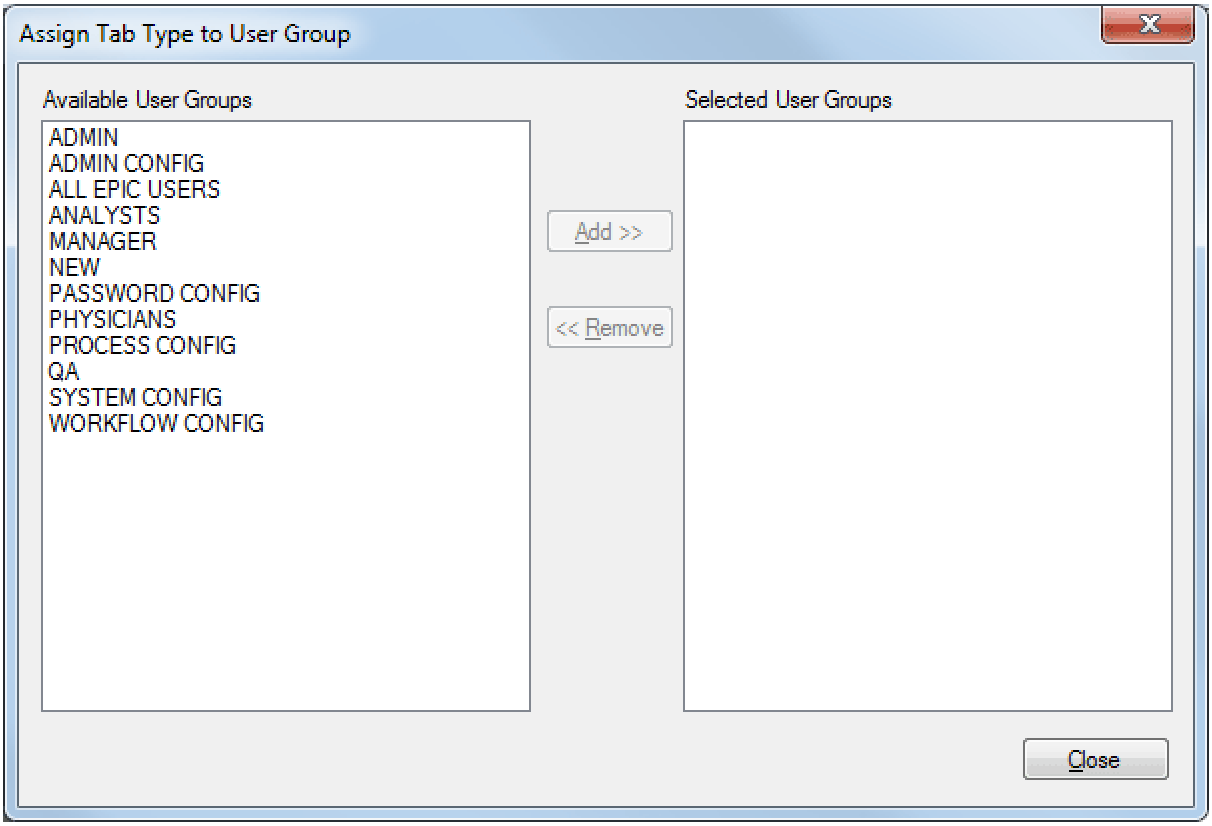
3. Select a **Document Type Group** to filter the lists of available Document Types.
4. Select one or more Document Types from one of the following panes:
   - **All Document Types**—Displays all Document Types in the selected Document Type Group.
   - **Document Types without Tabs**—Displays all Document Types not associated with a tab. (For tabs configured at the facility level, this list is specific to the current facility. For tabs configured at the cross-facility level, this list displays Document Types not assigned to a cross-facility tab.)
5. Click **Add**.
6. Repeat for all Document Types you want to be available from this tab.
7. Use the **Up** and **Down** buttons to change the default Document Type order for this tab.
8. Click **Close** when finished.

Assigning User Groups to Secure Tabs

If you are configuring a **Secure Documents** tab, then you must grant the appropriate User Groups access to the tab. For information about Secure tabs, see Secure Documents Tabs on page 109.

To assign User Groups to a Secure tab:

1. Select the tab from the **Tab Configuration** dialog box.
2. Click **User Group**. The **Assign Tab Type to User Group** dialog box is displayed.



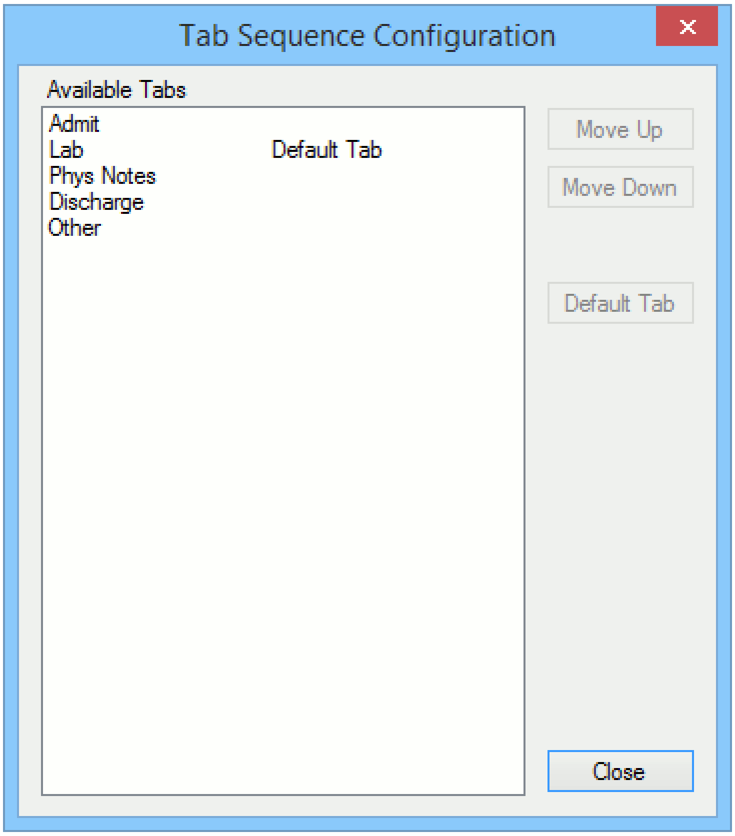
3. Select a User Group from the **Available User Groups** list.
4. Click **Add**.
5. Repeat for each User Group that requires access to this tab.
6. Click **Close** when finished.

Configuring the Tab Sequence

When a chart or record is retrieved, the configured tabs are always displayed in a specific sequence. Use the following steps to configure the tab sequence and to designate a default tab.

To configure tab sequence:

1. Click **Sequence** to display the **Tab Sequence Configuration** dialog box.



2. Select a tab to designate as the default tab.
3. Click **Default Tab**.
   - If you close the **Tab Configuration** dialog box without assigning a default tab, OnBase displays an error indicating that no default tab has been chosen.
   - See the following topic for other factors affecting default tab selection.

Caution: Do not configure a secure tab as the default tab. The default tab must be accessible to all users who can view the record or chart.

4. Use the **Move Up** and **Move Down** buttons to move the selected tab up or down in the tab sequence.
5. Click **Close** when finished.

Default Tab Selection

When a user opens a record in OnBase Patient Window, the following logic determines which tab is selected by default:

1. If a tab ID is passed in on the URL query string, then the record is opened to the specified tab.
2. If the tab ID is not passed on the query string, is not accessible to the user, or if the tab contains no documents, then the record is opened to the user's Personal Tab (if configured).
3. If the Personal Tab contains no documents or is not configured, then the record is opened to the default tab in cross-facility tab configuration.
4. If the default tab contains no documents, then the record is opened to the first tab containing documents.
5. If the record contains no documents, then one of the following will occur:
    - OnBase Patient Window selects the first case tab available for the patient.
    - If the patient has no case tabs that the user can view, then OnBase Patient Window selects the New tab.

Medical Records Custom Query Configuration

Solutions that include Patient Custom Query tabs also require the configuration of a medical records custom query. These tabs are populated using the medical records custom query, which retrieves all documents indexed with a unique patient identifier, such as the MPI.

See the following topics:

- Patient Window Custom Query Requirements on page 118
- Configuring a Custom Query for Medical Records on page 118
- Designating the Medical Records Custom Query on page 120

Patient Window Custom Query Requirements

You cannot create Patient Custom Query tabs to be used in the OnBase Patient Window. If a Patient Custom Query tab was configured at the cross-facility level in an earlier version of OnBase, it is recommended to reconfigure the tab using the **Documents** tab type.

If the Patient Window must use a previously configured Patient Custom Query tab, make sure the medical records custom query meets the following requirements:

Note: These requirements apply to the Patient Window only. They do not apply to the Medical Records Unity Client.

- The custom query must not contain Document Types belonging to a medical record Document Type Group.
- The retrieval keywords for the custom query must include the Keyword Type mapped to the MPI chart data field.

Configuring a Custom Query for Medical Records

The following procedure provides only the steps required to configure a custom query for associating non-medical record documents to charts. For information about custom queries, see the Queries and VB Scripts topic in the **System Administration** documentation.

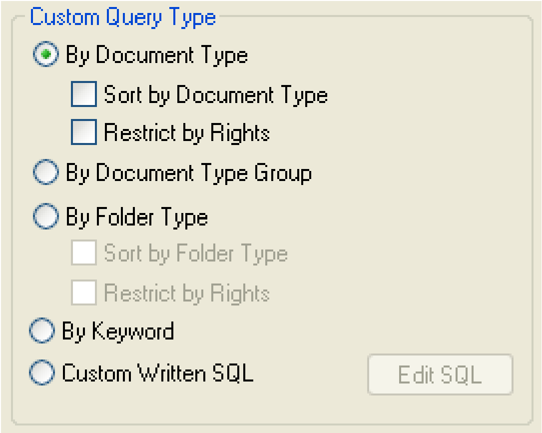
To configure a medical records custom query:

1. In OnBase Configuration, select **Queries | Custom Queries**.
2. Type a name for the new custom query in the field provided.
3. Click **Create**. The **Assign Custom Query to User Group** dialog box is displayed.
4. Assign the User Groups who need to see non-medical record documents within a clinical context.

Note: To view non-medical record documents using a clinical module, users need privileges to both the custom query and the Document Types assigned to the custom query.

5. Click **Close**. The **Custom Query Options** dialog box is displayed.

6. Ensure **By Document Type** is selected under **Custom Query Type**.



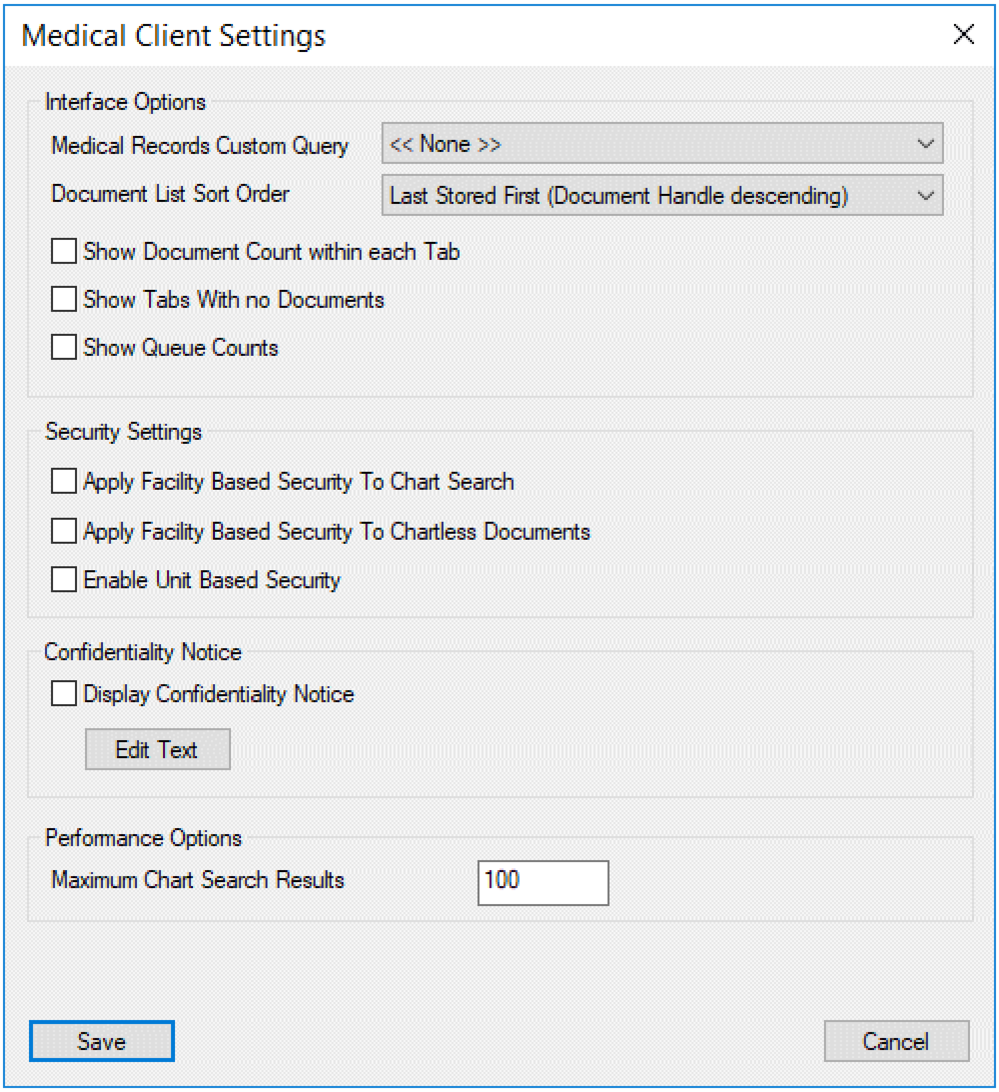
7. Click **Save**.
8. From the **Custom Query** dialog box, click **Document Type Query**.
9. Assign the Document Types containing the relevant documents. Ensure these Document Types are assigned the Keyword Types that will be used for retrieval.
10. Click **Close**.
11. From the **Custom Query** dialog box, click **Retrieval Keywords**.
12. Assign the Keyword Type that contains a unique value for each patient, such as the MRN or MPI.
13. Close the **Custom Query Retrieval Configuration** dialog box and the **Custom Query** dialog box.

Designating the Medical Records Custom Query

After configuring the custom query, you must configure OnBase to use it for retrieving documents in a clinical context.

To designate the medical records custom query:

1. In OnBase Configuration, select **Medical | User Interface Settings | Client Settings**. The **Medical Client Settings** dialog box is displayed.



2. Select the custom query from the **Medical Records Custom Query** drop-down list.
3. Click **Save**.

Department & Departmental Group Configuration

The following topics describe how to configure departments and Non-Physician Groups:

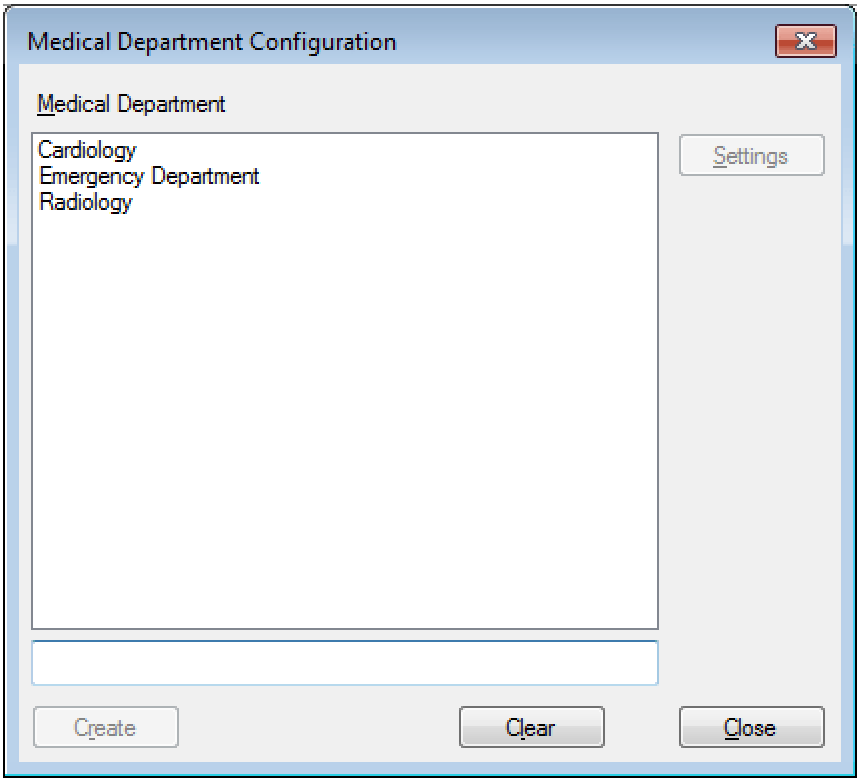
- Configuring a Medical Department on page 121
- Configuring Departmental Groups of Non-Physicians on page 123

Configuring a Medical Department

When a chart is created, it can be associated with the medical department where the patient received care. Department examples may include Cardiology, Neurology, and the Emergency Department.

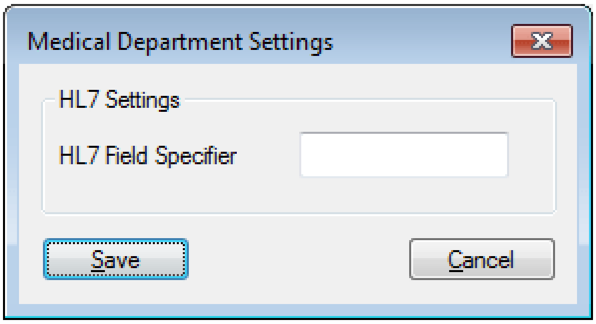
When a user retrieves a chart in OnBase, the department is displayed in the chart's demographics. Users can also use departments as criteria for chart retrieval.

1. Select **Medical | Departments | Department Configuration**. The **Medical Department Configuration** dialog box is displayed.



2. Enter a name for the department in the field provided.

3. Click **Create**. The **Medical Department Settings** dialog box is displayed.



4. Enter the HL7 code for the department in the **HL7 Field Specifier** field.
5. Click **Save**.

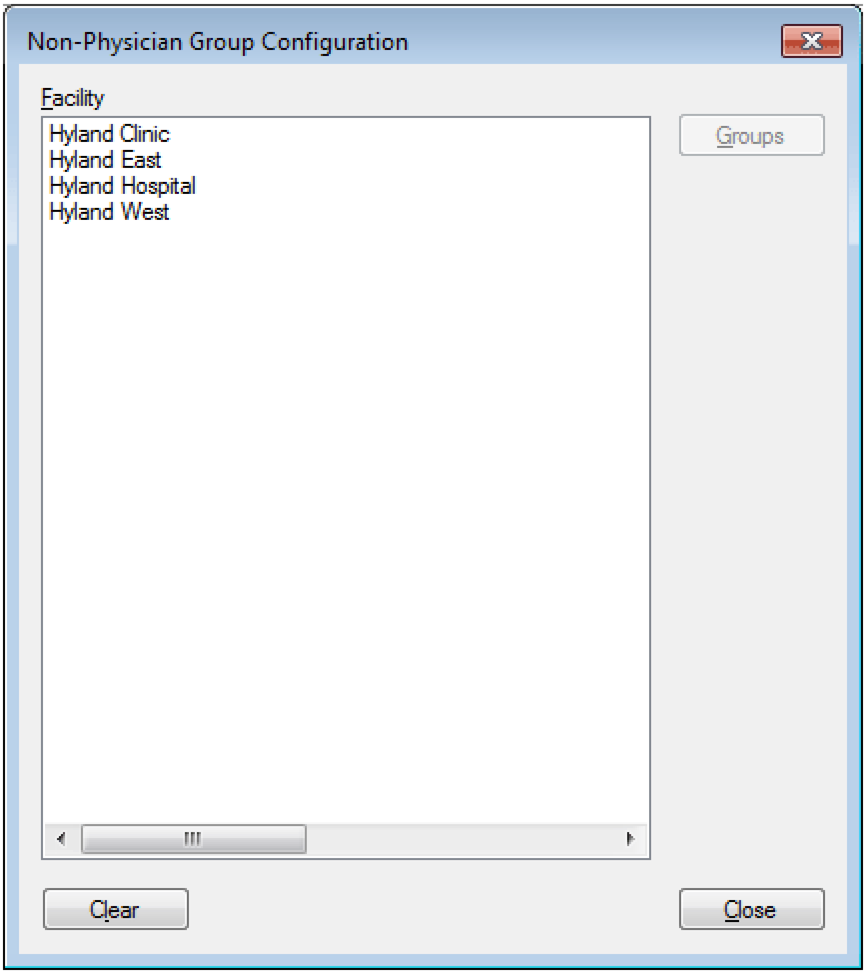
Configuring Departmental Groups of Non-Physicians

In some systems, users who are not physicians may require unrestricted access to non-VIP charts within specific departments. You can accommodate these users by assigning them departmental privileges at a specific facility.

Departmental privileges are respected in the Medical Records Unity Client and the OnBase Client. Users must have a chart search privilege in order to exercise their departmental privileges.

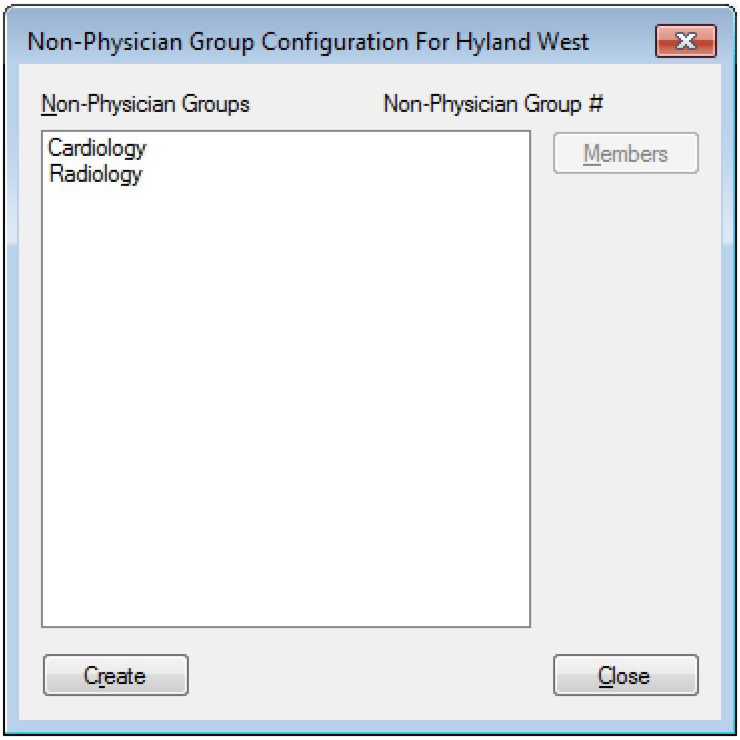
Before creating a departmental group, make sure you have configured User Groups, facilities, and departments.

1. In OnBase Configuration, select **Medical | Departments | Departmental Groups of Non-Physicians**. The **Non-Physician Group Configuration** dialog box is displayed.

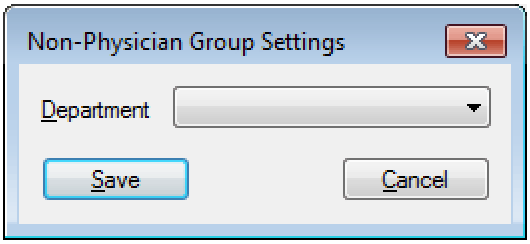


2. Select a facility.

3. Click **Groups**. The **Non-Physician Group Configuration** dialog box is displayed.

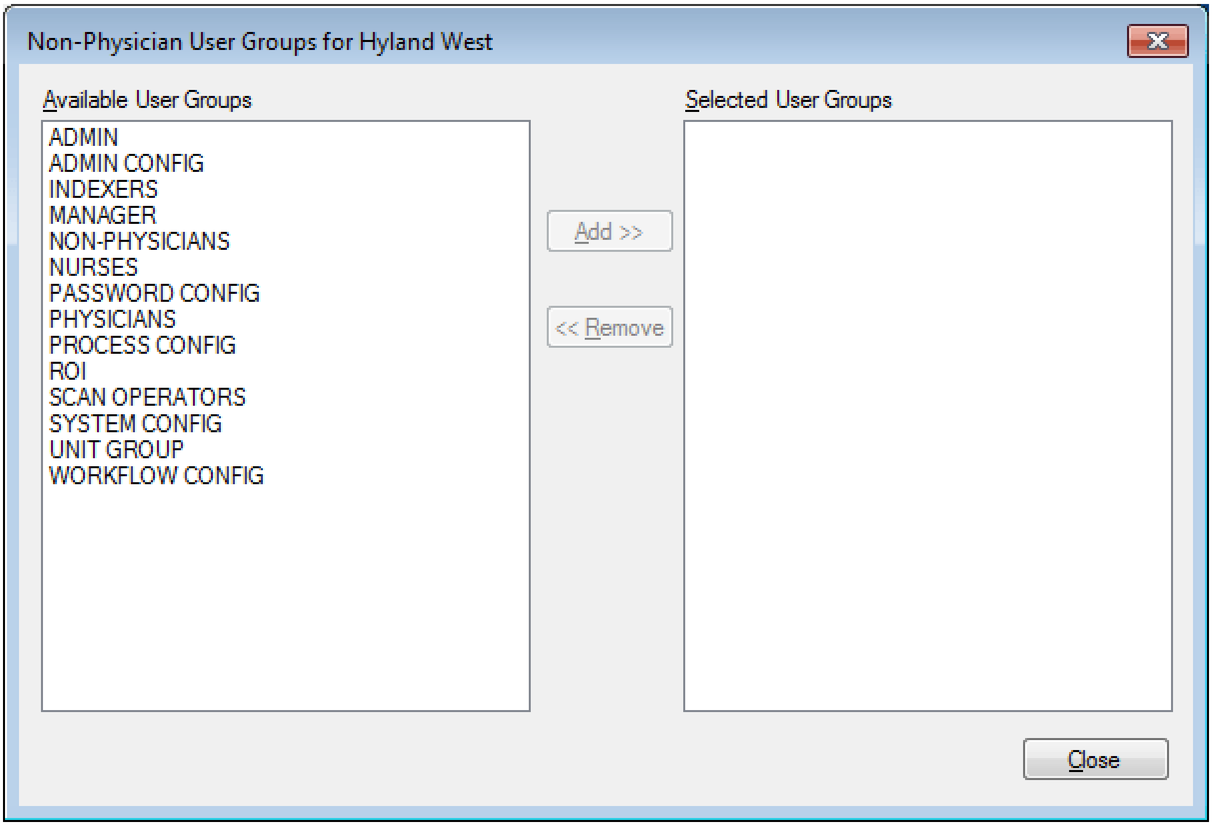


4. Do one of the following:
   - To add a departmental group, click **Create**. The **Non-Physician Group Settings** dialog box is displayed.
   - To assign members to an existing departmental group, select the group and skip to step 7.
5. Select a department to assign members to within this facility.



6. Click **Save**.

7. Click **Members**. The **Non-Physician User Groups** dialog box is displayed.



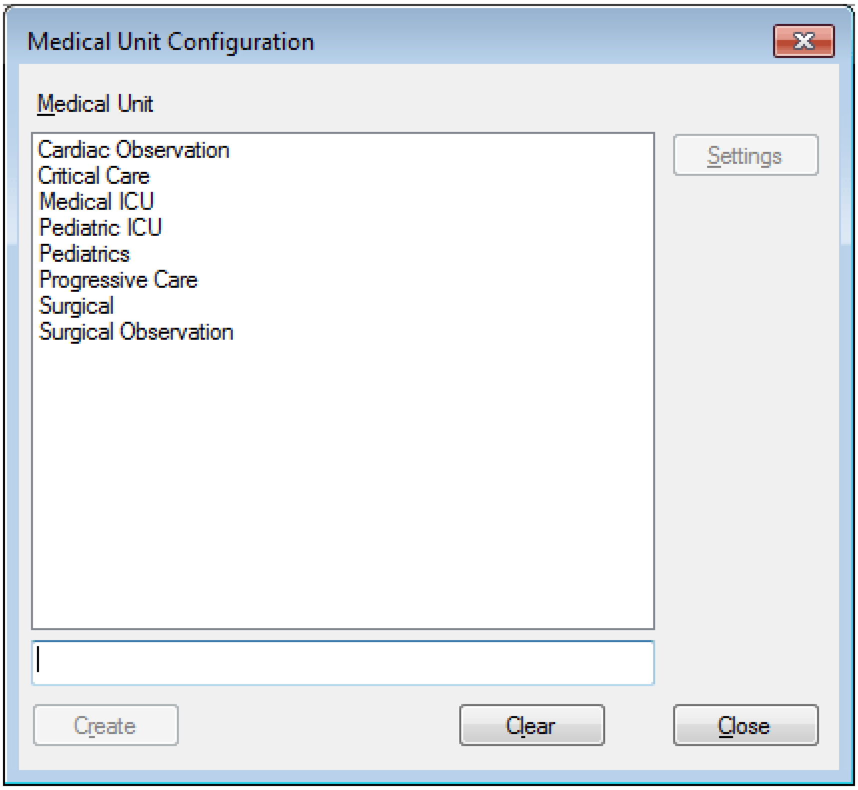
8. Select one or more User Groups from the left pane.
9. Click **Add** to add the User Groups to the **Selected User Groups** list.
10. Click **Close** when finished

Medical Unit Configuration

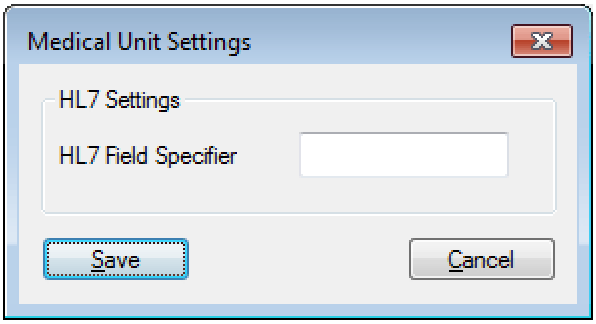
When a chart is created, it is associated with the medical unit where the received care. Unit examples may include Medical ICU, Critical Care Unit, and Pediatrics. When a user retrieves a chart in OnBase, the unit is displayed in the chart's demographics.

Units are configured in OnBase Configuration. To configure a medical unit:

1. Select **Medical | Units**. The **Medical Unit Configuration** dialog box is displayed.



2. Enter a name for the unit in the field provided.
3. Click **Create**. The **Medical Unit Settings** dialog box is displayed.

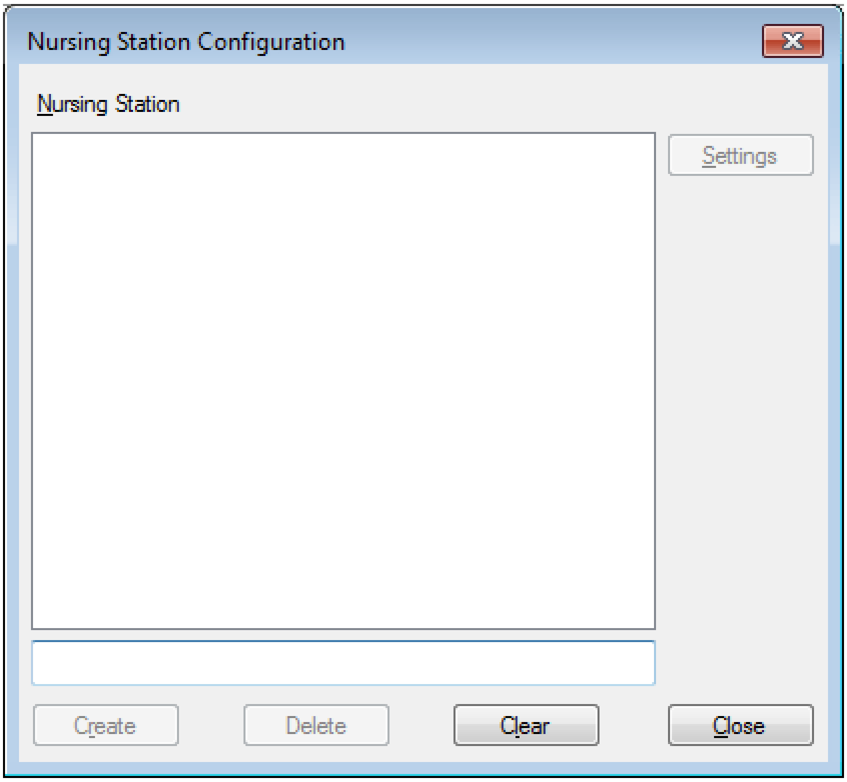


4. Enter the HL7 code for the unit in the **HL7 Field Specifier** field.
5. Click **Save**.

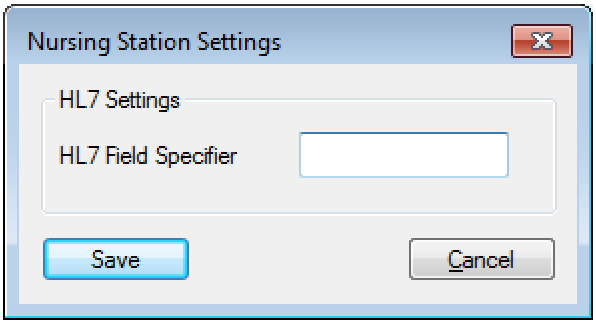
Nursing Station Configuration

When a chart is created, it can be associated with the nursing station responsible for administering care. Nursing stations can be included in chart-based AutoFill Keyword Sets, which help index chart documents. The nursing station associated with a chart is not visible in the chart's demographics.

1. Select **Medical | Nursing Stations**. The **Nursing Station Configuration** dialog box is displayed.



2. Enter a name for the station in the field provided.
3. Click **Create**. The **Nursing Station Settings** dialog box is displayed.



4. Enter the HL7 code for the nursing station in the **HL7 Field Specifier** field.
5. Click **Save**.

Code Configuration for Procedures and Diagnoses

OnBase can store the codes and descriptions for procedures, diagnoses, and diagnosis-related groups (DRGs). This feature allows clinicians and researchers to view procedure, diagnosis, and DRG descriptions on medical record charts.

See the following topics:

- Supported Code Types on page 128
- Code Import on page 128
- Code Maintenance on page 130
- Requirements for Assigning Codes to Charts on page 131

Supported Code Types

OnBase can store and associate the following types of codes with medical record charts.

- CPT procedure codes
- ICD procedure codes
- Diagnosis codes
- DRG codes

All code revisions currently in use are supported.

Code Import

Codes are imported through OnBase Configuration using import files. When OnBase Configuration processes an import file, it populates the appropriate database table with the specified codes and their descriptions.

See the following topics:

- Import File Requirements
- Running the Code Importer

Import File Requirements

To create an import file, use an EMR system to export a flat file containing the procedure, diagnosis, or DRG codes. Each flat file must satisfy the following requirements:

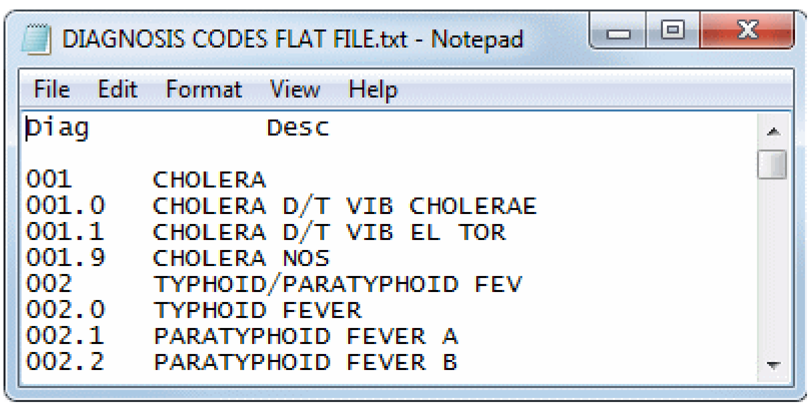
- The file format must be text (txt).
- A file can contain only one code type (for example, ICD procedure codes). You cannot use one file to import multiple code types at once.
- In each file, one of the first five lines must identify the type of codes being imported. The following table outlines the identifier for each type of code:

Identifier	Code Type
CPT	CPT procedure codes

Identifier	Code Type
Procedure	ICD procedure codes
Diag	Diagnosis codes
DRG	DRG codes

- The file must define only one code per line.
- For each line containing a code, the text up to the first space character must contain the code. The remaining text (up to the first group of three space characters) will be used as the description.
- The code and description must be separated by at least one space character. A tab character is not counted as a space character.

The following example shows an import file for diagnosis codes. Notice the first line contains the **Diag** identifier.

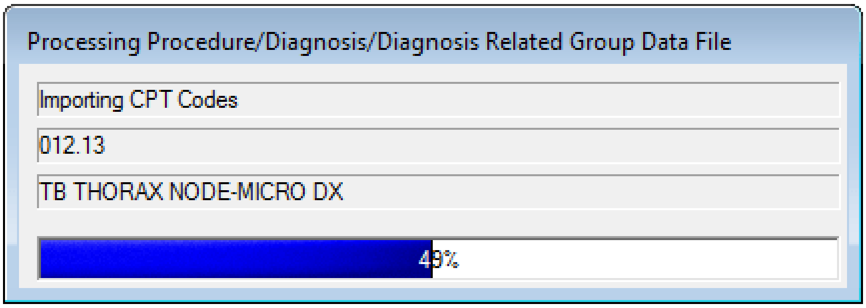


Running the Code Importer

The following steps describe how to import procedure and diagnosis information into OnBase.

1. In OnBase Configuration, select **Medical | Procedure/Diagnosis/DRG/CPT Codes**. The **Open** dialog box is displayed.
2. Browse to the location where the code file resides.
3. Select the import file.
4. Click **Open**.

5. Wait while OnBase imports codes.



When the operation is complete, a message indicates the following:

- The number of new codes imported
- The number of existing codes imported with new descriptions

6. Click **OK**.
7. Repeat this procedure for all necessary code files.

Code Maintenance

Procedure, diagnosis, and DRG codes can change over time. To maintain codes in OnBase, do either of the following:

- Import the revised codes using OnBase Configuration.
- Allow the HL7 Medical Records Chart message action to maintain codes using data from HL7 messages.

Both methods can add new codes to the database. If a code already exists in the database, but the description has changed, then the code is added again with the new description. Charts associated with the original description will continue to display the original description. The new description will be used for new charts on a day-forward basis.

Requirements for Maintaining Codes Using HL7

To allow codes to be maintained by HL7 Medical Records Chart message action, make sure the following requirements are met:

- HL7 messages must contain the code and description in the same HL7 field. For example: DRG|code^description|||.
- The HL7 message template must be configured to read the code and description as separate components within the same field. For example, for DRGs, configure **DRG.1.1** for the DRG code and **DRG.1.2** for the DRG description.
- The chart data field for the code must specify the first component of the associated HL7 field, not the entire HL7 field. For example, the HL7 reference field for the **Diagnosis Code** chart data field must be set to **DG1.3.1**, not DG1.3. Otherwise, codes will not be created properly.

Requirements for Assigning Codes to Charts

The following chart data fields allow procedures and diagnoses to be assigned to charts:

- Procedure Code
- Diagnosis Code
- Diagnosis Related Group

These chart data fields must be mapped to their respective HL7 message fields. When HL7 messages are processed to create or update charts, the charts are associated with the diagnoses or procedures provided in the HL7 messages.

For information about mapping chart data fields, see Chart Data Field Configuration on page 145.

Requirements for Assigning Multiple Codes

To allow multiple procedures or diagnoses to be associated with a single chart, you must configure the code's chart data field as a repeating segment.

For example, the **Repeating Segment** setting is selected by default for the **Diagnosis Code** chart data field. This setting allows OnBase to associate all diagnosis codes in an HL7 message with the specified chart. If the **Repeating Segment** setting is not selected, then OnBase uses only the first diagnosis code provided in the HL7 message.

By default, both the **Diagnosis Code** and **Procedure Code** fields are configured as repeating segments.

Note: If you turn off the **Repeating Segment** option after a chart has been associated with multiple diagnoses or procedures, then subsequent HL7 messages that update the chart will cause only the first diagnosis or procedure in the message to be associated with the chart.

Requirements for Diagnosis Types

When a chart is created or updated, it can be associated with the following types of diagnoses:

- Admitting
- Working
- Final

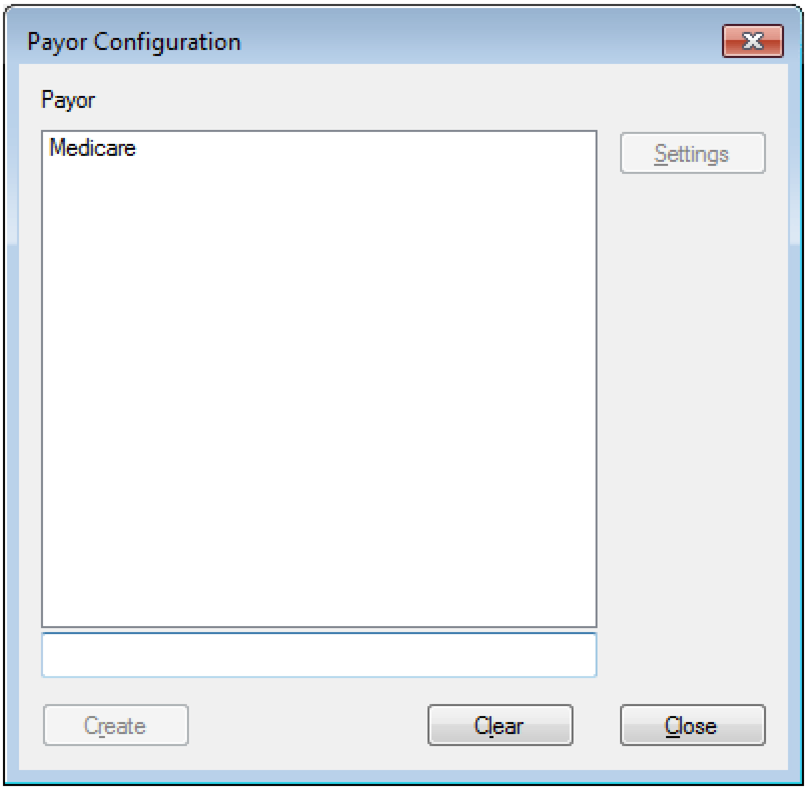
The diagnosis type is specified in the DG1.6 field of the HL7 message. Admitting, working, and final diagnoses are represented by the letters **A**, **W**, and **F**, respectively.

In the Medical Records Unity Client, the **Demographics** pane displays each of a chart's admitting diagnoses as an **Admitting Diagnosis Code**, while each working and final diagnosis is displayed as a **Diagnosis Code**.

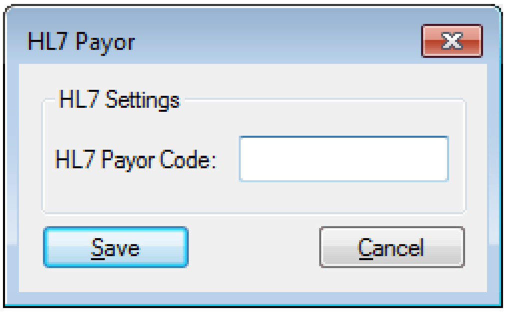
Payor Configuration

A payor (or payer) is the party responsible for the patient's expenses. Examples may include insurance companies and Medicare. Both OnBase Patient Window and the Medical Records Unity Client allow users to search for charts by payor.

1. Select **Medical | Payors**. The **Payor Configuration** dialog box is displayed.



2. Enter a name for a payor.
3. Click **Create**. The **HL7 Payor** dialog box is displayed.

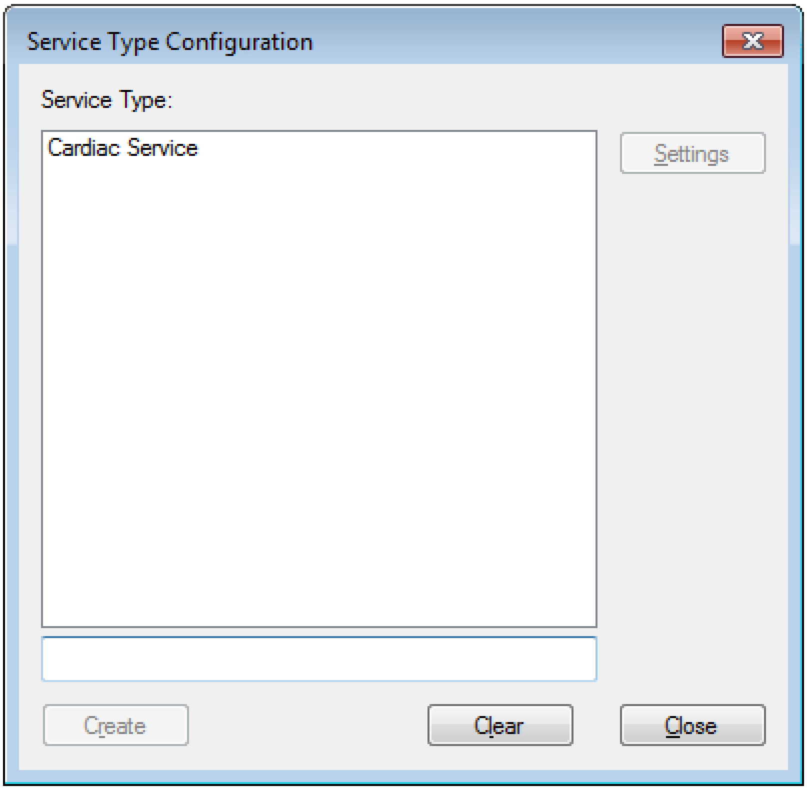


4. Enter the HL7 code for the payor in the **HL7 Payor Code** field.
5. Click **Save**.

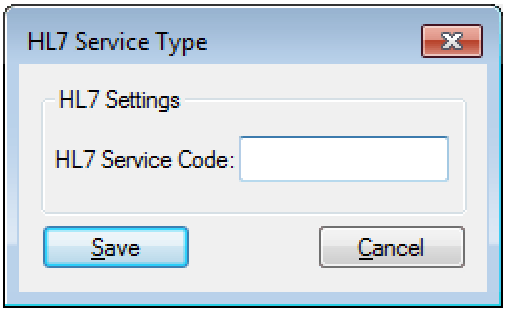
Service Type Configuration

A medical service describes the type of treatment the patient received or is scheduled to receive. Examples may include Cardiac, Pulmonary, and Surgical Service. Both the OnBase Patient Window and the Medical Records Unity Client allow users to search for charts by medical service.

1. Select **Medical | Service Codes**. The **Service Type Configuration** dialog box is displayed.



2. Enter a name for a service type.
3. Click **Create**. The **HL7 Service Type** dialog box is displayed.



4. Enter the HL7 code for the service in the **HL7 Service Code** field.

5. Click **Save**.

Physician Configuration

OnBase allows specific users to be configured as physicians. Physician users can be designated as the attending, admitting, or primary care physicians on charts in OnBase. In some modules, these users also have elevated chart access privileges.

Physicians can be created manually in OnBase Configuration or automatically using the Physician Import Processor. The following topics describe the manual configuration method. For information about the Physician Import Processor, see the **HL7** module reference guide.

See the following topics:

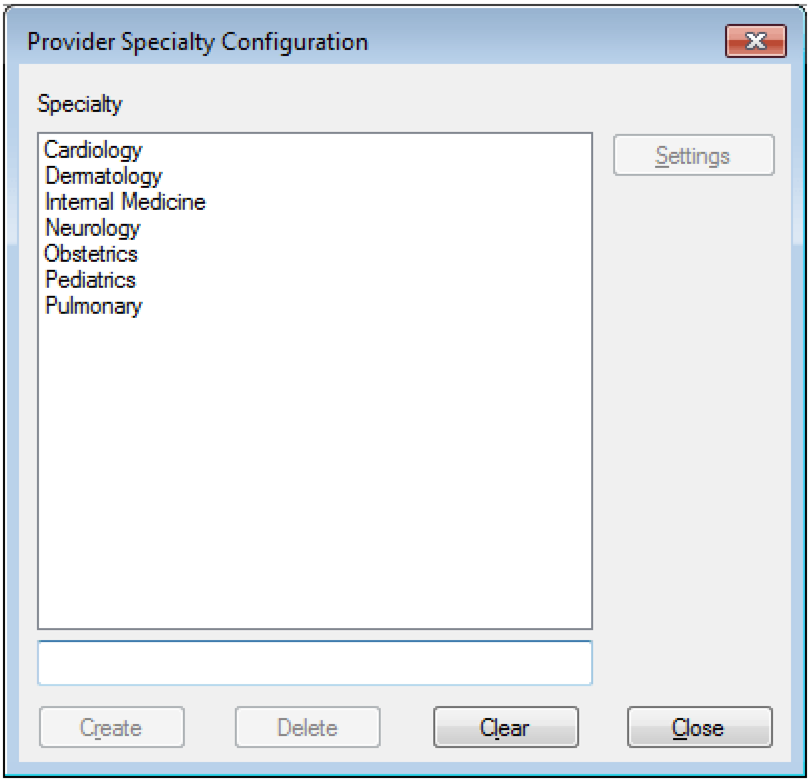
- Configuring Provider Specialties on page 136
- Configuring Physician Information on page 138
- Deleting Physicians on page 141

Configuring Provider Specialties

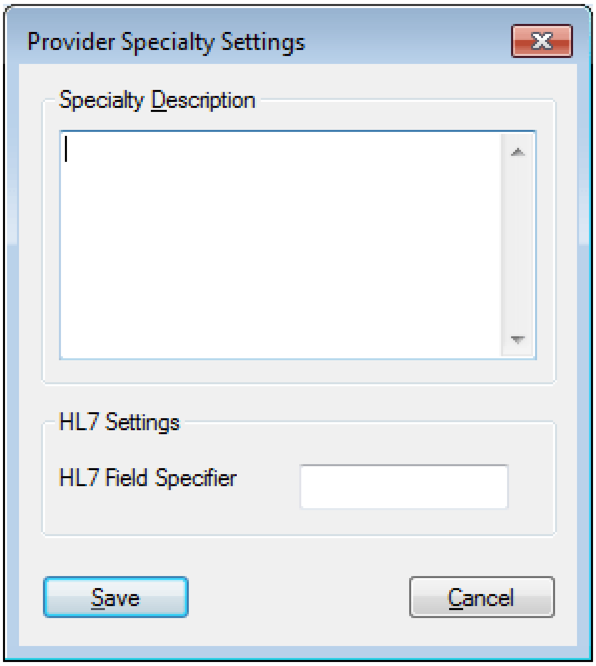
You can associate a physician with a primary specialty in Physician Information Configuration. For a specialty to be available, you must first configure it using Provider Specialty Configuration.

To configure a specialty, complete the following steps:

1. Select **Medical | Physicians | Provider Specialty**. The **Provider Specialty Configuration** dialog box is displayed.



2. Enter the name of the specialty and click **Create**. The **Provider Specialty Settings** dialog box is displayed.



3. Enter a description of the specialty.
4. Enter the HL7 code for the specialty in the **HL7 Field Specifier** field.
5. Click **Save**.

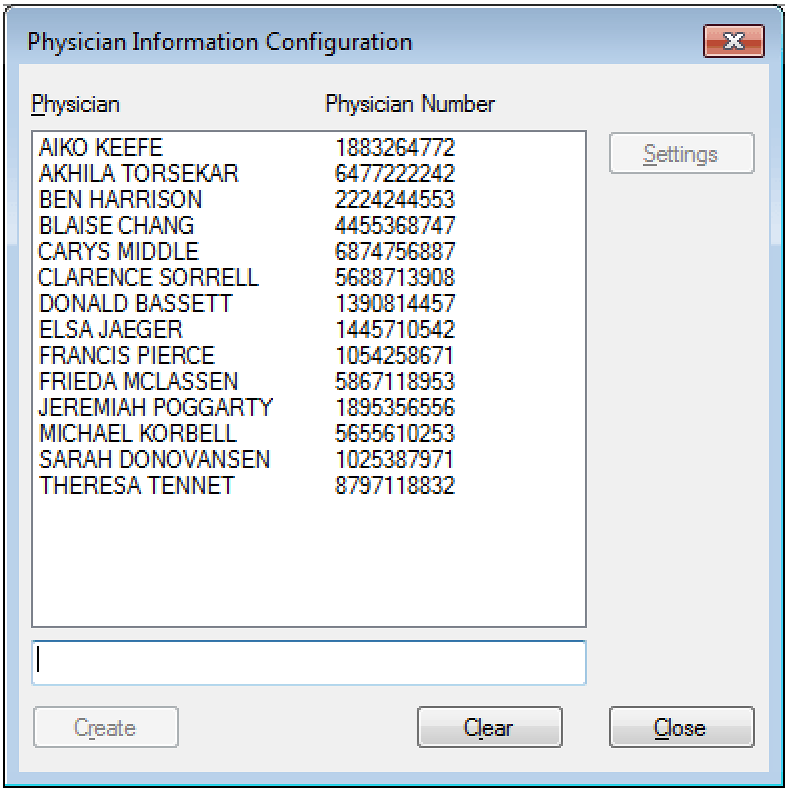
Configuring Physician Information

By configuring physician information, you can provide personal and professional information for each physician. This information is mapped to a single user account in OnBase. This is a one-to-one relationship, ensuring that multiple physicians cannot be mapped to a single user account.

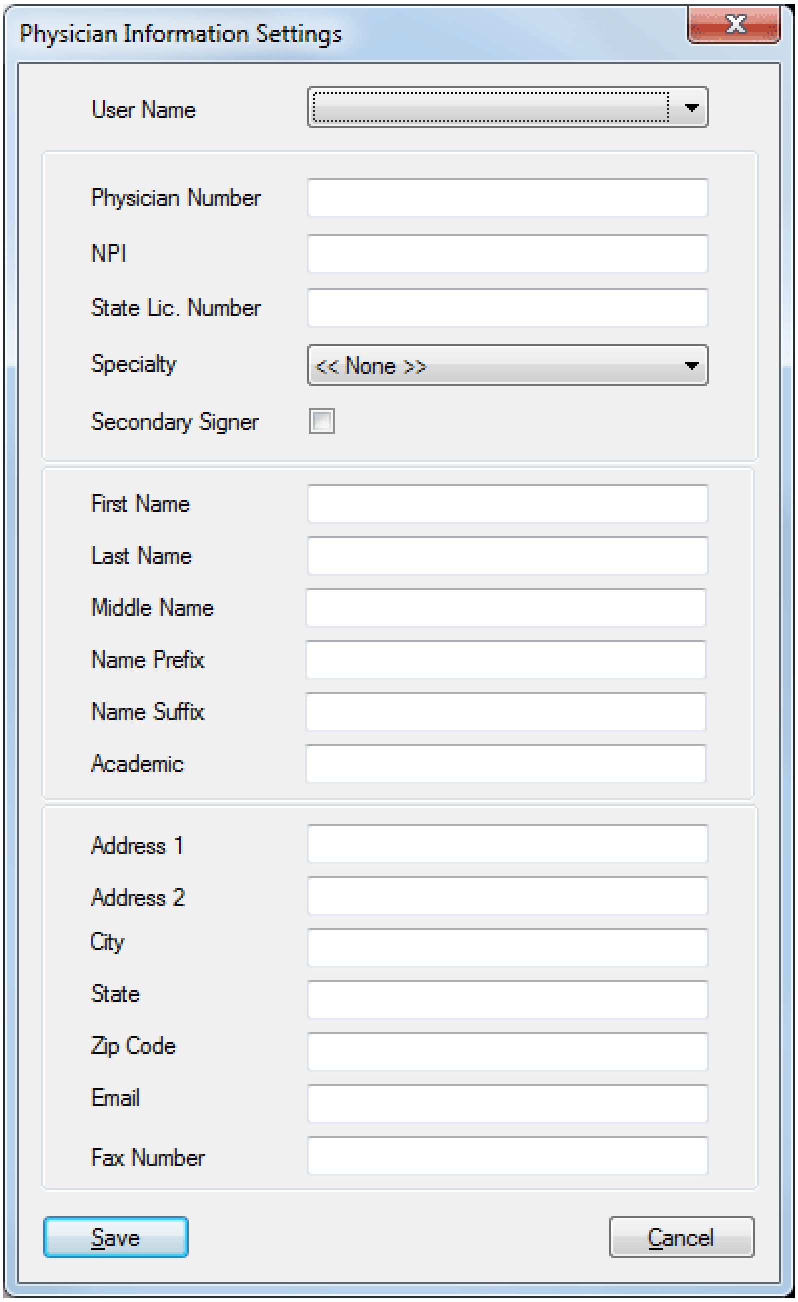
You can configure physician information using either OnBase Configuration or the Medical Records Unity Client.

To configure physician information using OnBase Configuration:

1. Select **Medical | Physicians | Physician Information**. The **Physician Information Configuration** dialog box is displayed.



2. Enter the name of the physician and click **Create**. The **Physician Information Settings** dialog box is displayed.



3. Select the physician's user account from the **User Name** drop-down list.

   If a physician's user account has been deleted from OnBase, then the user account is labeled as **deactivated**. You cannot assign a new physician to a deactivated account.

Caution: Ensure the correct user account is selected. Once you save the Physician Information Settings, the user account cannot be changed without the -MRMSINSTALL switch and password confirmation. Contact your solution provider for assistance.

4. Enter the appropriate physician identification information. The **Physician Number** must be unique to each physician.
5. If the user is a secondary signer or resident, select the **Secondary Signer** check box.
6. To store address information, complete the following fields:

Field	Description
Address 1	The street address for the physician.
Address 2	The second line of the address for the physician, if applicable.
City	The city for the physician.
State	The state for the physician.
Zip Code	The ZIP code for the physician.

7. Click **Save**.

Deleting Physicians

Some systems, especially those with teaching hospitals, may have a high rate of physician turnover. To keep physician lists up to date in the various OnBase clients, you can deactivate user accounts for physicians who have left the system.

The best practice for deleting a physician is to delete the associated user account by using the Medical Records Unity Client or OnBase Configuration. When a physician's user account is deleted from OnBase, the user account is labeled as **deactivated** in the **Physician Information Settings** dialog box. The physician's information is preserved in OnBase for reporting, chart searches, and historical chart demographics.

To delete physicians listed in the **Physician Information Configuration** dialog box, contact your first line of support. All links to the physician should be removed in all associated medical applications prior to the physician's removal from OnBase.

Patient Data Access Reasons Configuration

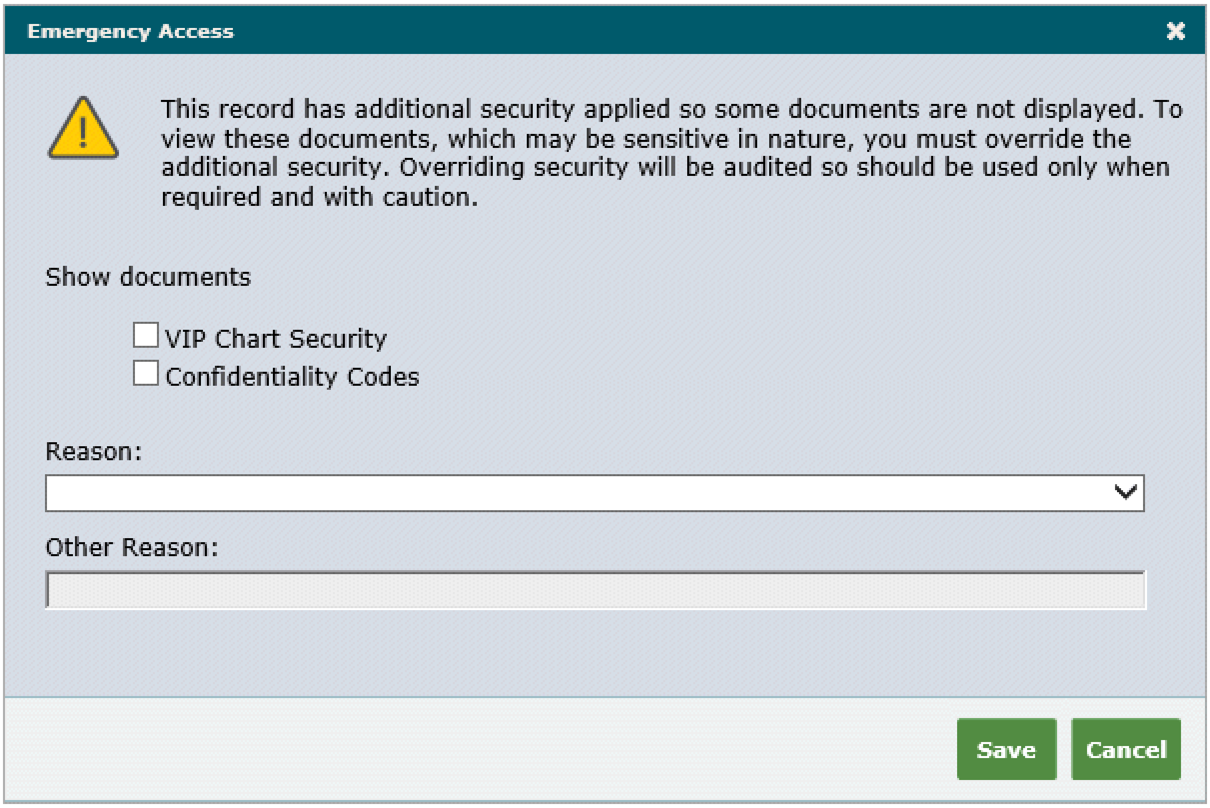
Access reasons allow users to quickly specify why they are attempting to access restricted charts or documents. Depending on whether you are using the Medical Records Unity Client or the OnBase Patient Window, these access reasons are used in different ways. See the following topics:

- Access Reasons in OnBase Patient Window on page 142
- Access Reasons in the Medical Records Unity Client on page 143
- Configuring Access Reasons on page 144

Access Reasons in OnBase Patient Window

In OnBase Patient Window, access reasons are used for emergency access requests, which give users immediate access to the requested documents.

If the **Prompt for Emergency Access Reason** setting is selected in Patient Window Settings, users requesting emergency access must provide a reason for the request. If **Prompt for Emergency Access Reason** is not selected, users will not be prompted to select a request reason.

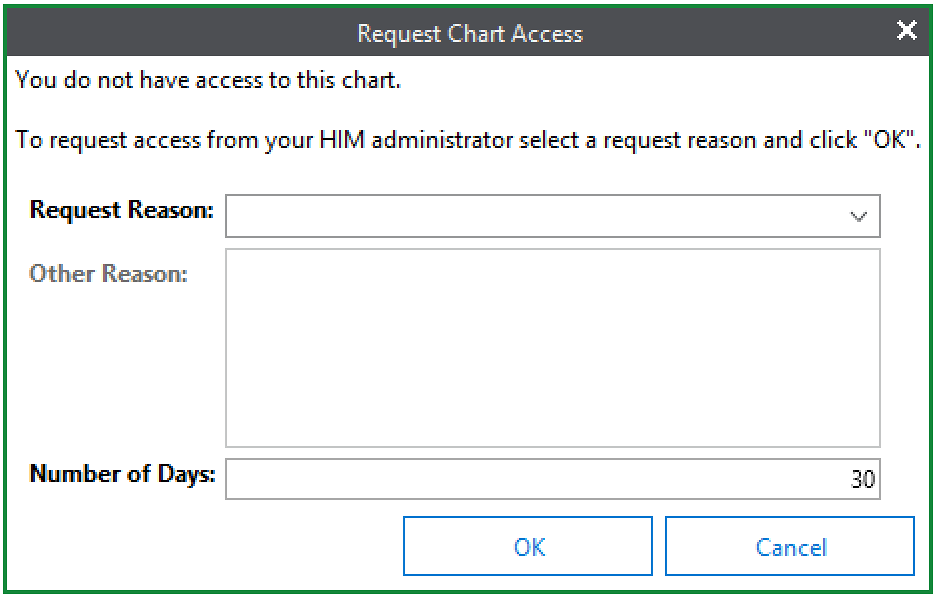


Even if no access reasons are configured, users can select **Other** as the access reason. After selecting **Other**, the user must type a reason for the request.

Access Reasons in the Medical Records Unity Client

In both the Medical Records Unity Client and the OnBase Client, access reasons are used for non-emergency chart access requests.

When a facility does not allow emergency access, or when a User Group lacks emergency access privileges, users trying to access charts that they lack rights to will receive an access denied message. Users can request non-emergency access using a set of request reasons, which are configured in OnBase Configuration.

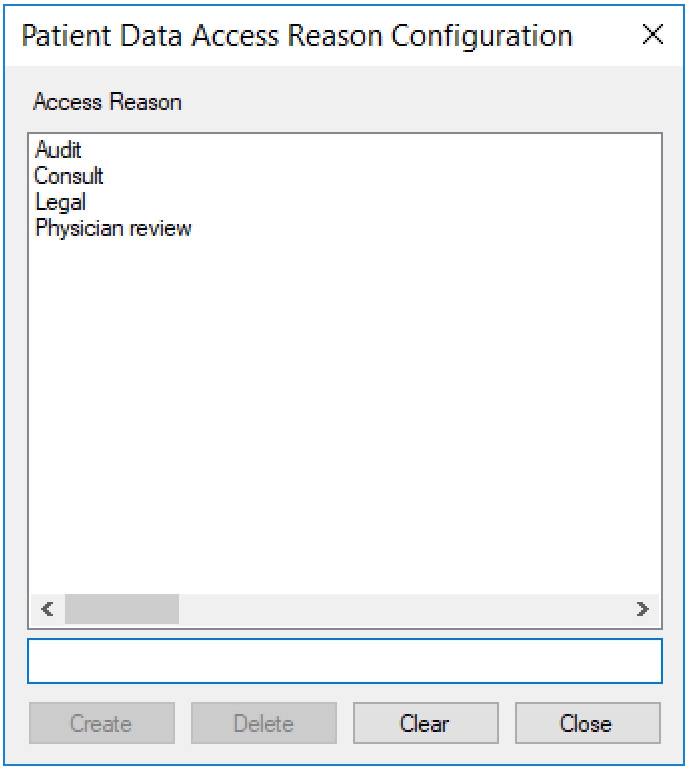


Even if no access reasons are configured, users can select **Other** as the access reason. After selecting **Other**, the user must type a reason for the request.

Configuring Access Reasons

To configure access reasons:

1. Select **Medical | Patient Data Access Request Reasons**. The **Patient Data Access Reason Configuration** dialog box is displayed.



2. In the **Access Reason** field, type a reason.

Note: Do not configure **Other** as an access reason. The **Other** access reason is already available by default in the client applications.

3. Click **Create** to add it to the list.
4. Click **Close** when finished.

Note: When an administrator approves or denies a user's non-emergency access request, the user can be notified of the decision by email. This feature requires the Hyland Distribution Service to be configured and running. To enable this feature, you must install the Hyland Distribution Service and configure OnBase to automatically send users email notifications. See the **Hyland Distribution Service** module reference guide for more information.

Chart Data Field Configuration

Chart data fields allow charts to be indexed with patient and visit information. Through keyword mapping, chart data fields populate values in chart-based and MRN-based AutoFill Keyword Sets, and they define how documents are matched to charts and patient records. Certain fields are used for specific types of processing through the HL7 module.

Caution: Each chart data field is intended to store a specific piece of information. Do not reconfigure a field to store other types of information, even if the field appears unused. Fields that appear unused may have a role in internal processing.

See the following topics:

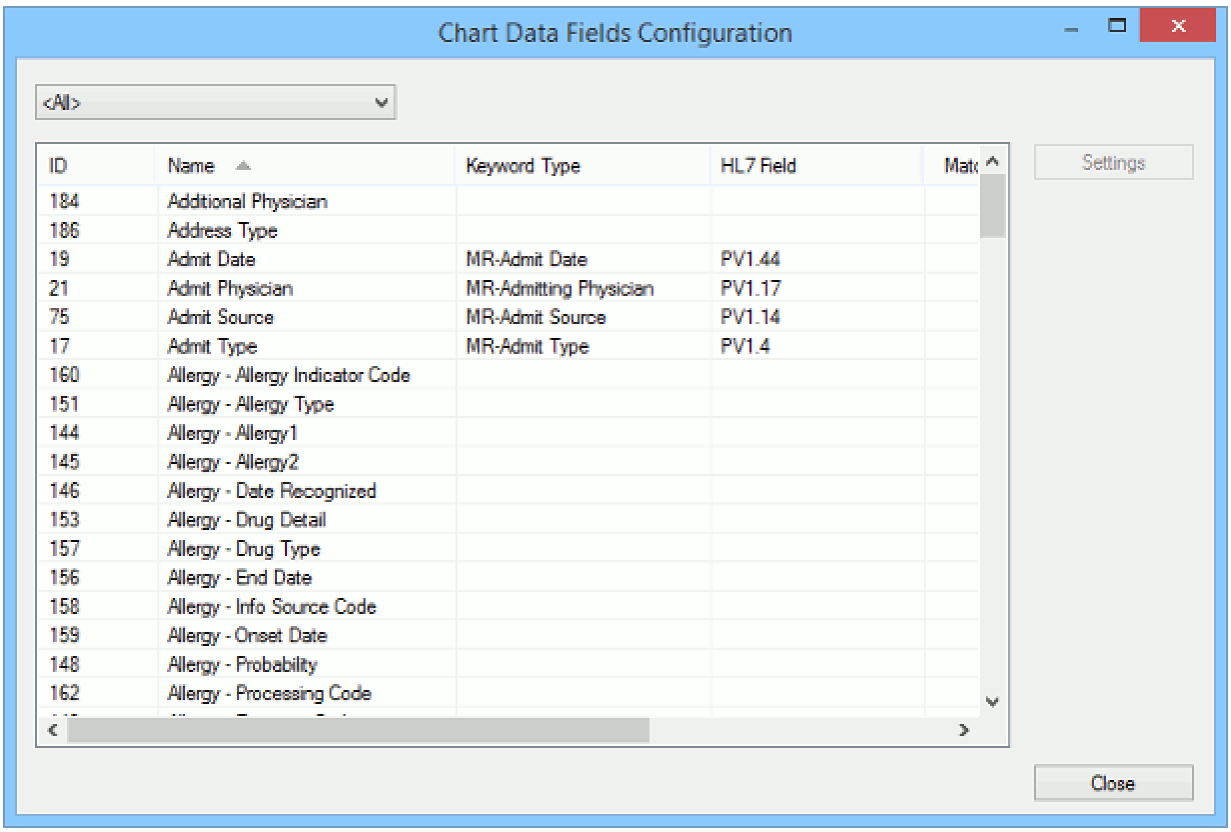
- Configuring a Chart Data Field on page 146
- Mapping Requirements on page 150
- Pulling Values from Repeating HL7 Fields on page 153

Configuring a Chart Data Field

Chart data field configuration allows you to modify the keyword and HL7 settings for a specific chart data field. Chart data fields are configured in OnBase Configuration.

To configure a chart data field:

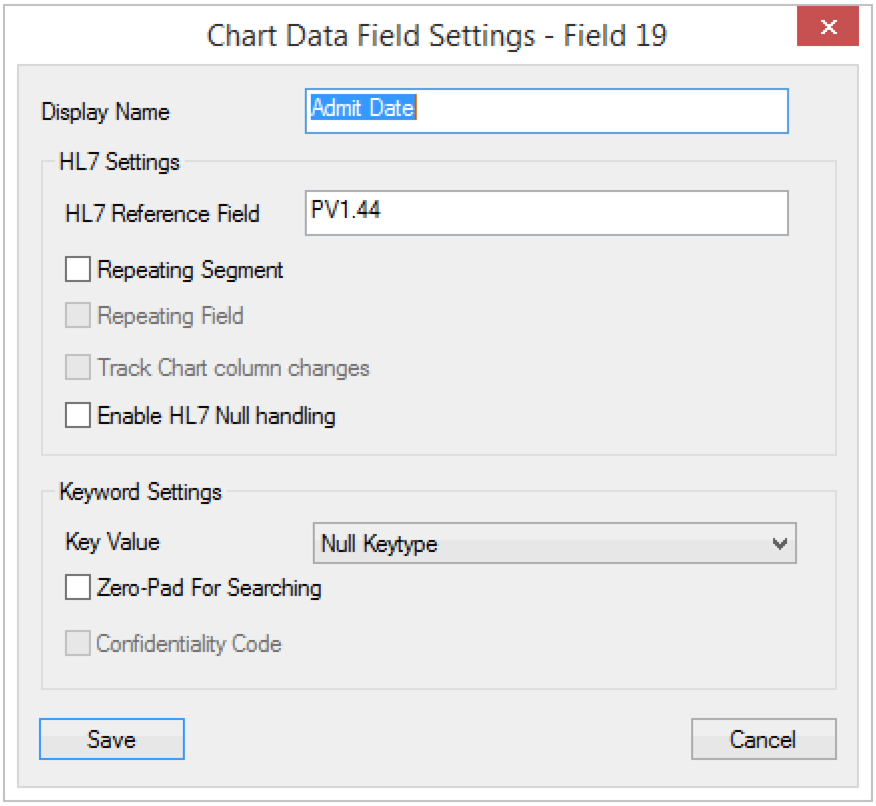
1. Select **Medical | Charts | Data Fields**. The **Chart Data Fields Configuration** dialog box is displayed.



   For each chart data field, the dialog displays the field ID, display name, and current settings. Settings are described later in this procedure.

2. Select a chart data field.
   - To sort the list of fields, click a column header.
   - To filter the list by category, select a category from the drop-down list in the upper-left corner of the dialog.

3. Click **Settings**. The **Chart Data Field Settings** dialog box is displayed.



4. Modify the display name as needed. The display name is respected in modules such as the Medical Records Unity Client and OnBase Patient Window.
5. Modify the available settings as described in the following topics:
   - HL7 Reference Field on page 148
   - Repeating Segment on page 148
   - Repeating Field on page 148
   - Track Chart Column Changes on page 148
   - Enable HL7 Null Handling on page 149
   - ID Number Keyword Type on page 149
   - Assigning Authority on page 149
   - Key Value on page 149
   - Zero-Pad For Searching on page 149
   - Confidentiality Code on page 150

Note: For some chart data fields, certain settings may be unavailable due to usage restrictions.

6. Click **Save**.

HL7 Reference Field

The **HL7 Reference Field** specifies the default HL7 field from which chart data is extracted. If a specific HL7 message template needs to override the setting configured here, assign a chart field override to the template.

Use the HL7 standard format to identify the field. For example, **PV1.3.4** indicates that the value is in segment **PV1**, field **3**, component **4**.

To pull a single value from a specific instance of a repeating field, see Pulling Values from Repeating HL7 Fields on page 153.

Repeating Segment

The **Repeating Segment** setting is intended for repeating HL7 segments. If an HL7 message contains repeating segments, this setting allows the specified chart to be associated with the value from each instance of the HL7 reference field.

For example, if this option is selected for the **Diagnosis Code** chart data field and an HL7 message contains multiple diagnosis segments, the HL7 module will associate each specified diagnosis with the chart.

Repeating Field

The **Repeating Field** setting applies to repeating HL7 fields. This setting allows the HL7 Scripted Merge Processor to perform processing for each MRN and assigning authority provided in an MRG segment. If this setting is not selected, only the MRN and assigning authority in the first instance of the field will be processed.

This setting is available only for the **Merge Medical Record #** field. It affects only the Scripted Merge Processor message action.

Track Chart Column Changes

Select the **Track Chart column changes** setting if the HL7 module should track when a chart's values change for this data field.

Facility, unit, and bed changes are visible in the Patient Location section of the History window in the Medical Records Unity Client. If tracking is enabled for the **Room** field, the Patient Location section also displays any room changes.

Note: Only changes made through HL7 messages are tracked, and only changes to the facility, unit, room (Unity only), and bed can be viewed.

Enable HL7 Null Handling

Select the **Enable HL7 Null handling** setting to allow an HL7 message containing a null value to delete the associated chart data value from the specified chart.

Note: If you are using one of the OnBase Medical Records products for Coding or Completion, do not select this setting on a field used for chart processing. Deleting a chart value could adversely affect the process. For assistance, contact your first line of support.

The **Enable HL7 Null handling** setting is available for a limited set of chart data fields.

- This setting is enabled by default for the **Discharge Date** field.
- It is considered a best practice to select this setting for the **Patient Deceased Date** field.

In HL7 messages, null values are represented by two single or double quotation marks. A null value received through HL7 will not affect the value already present on the specified chart, unless the **Enable HL7 Null handling** setting is selected for the associated chart data field.

ID Number Keyword Type

For the **Chart ID #**, **Medical Record #**, and **MPI Number** chart data fields, the **ID Number Keyword Type** drop-down list is displayed. Select the OnBase Keyword Type to associate with this identifier.

It is considered a best practice to use alphanumeric Keyword Types for the **Chart ID #**, **Medical Record #**, and **MPI Number** chart data fields. Ensure the selected Keyword Type is also assigned to Document Types.

Assigning Authority

For the **Chart ID #**, **Medical Record #**, and **MPI Number** chart data fields, an additional **Assigning Authority** section is available in the **Chart Data Field Settings** dialog box. Only change the settings in this section if your system needs to be configured to use overlapping values for these identifiers.

Key Value

From the **Key Value** drop-down list, select the OnBase Keyword Type to associate with this chart data field.

Keyword Type mapping allows OnBase to populate chart-based and MRN-based AutoFill Keyword Sets.

Note: Only certain chart data fields can have Keyword Types mapped to them. The **Key Value** drop-down list is only available for those chart data fields.

Zero-Pad For Searching

This setting allows users to search for numbers that start with one or more zeros without typing the leading zeros.

Confidentiality Code

Select the **Confidentiality Code** setting to allow the Keyword Type specified in the **Key Value** drop-down list to be used to automatically apply confidentiality codes to documents upon indexing.

When a documents is indexed with a valid confidentiality code name in the configured keyword field, the confidentiality code is automatically applied to the document. Then, when the document is opened in the viewer, a watermark is displayed in the lower pane to indicate that the document has been deemed confidential.

Caution: If a confidentiality code is configured with an **Assigning Authority** value, the confidentiality code cannot be automatically applied to documents through indexing.

Mapping Requirements

Chart data fields must be mapped correctly to ensure the attachment of documents to charts, the ability to retrieve charts in the OnBase Client, and the validity of charts created using HL7.

See the following topics for mapping requirements:

- Keyword Mapping Requirements for Chart Attachment on page 150
- Keyword Mapping Requirements for Chart Retrieval on page 150
- Mapping Requirements for HL7 on page 152

Keyword Mapping Requirements for Chart Attachment

For documents to be added to charts in OnBase, the **Chart ID #** and **MPI** chart data fields must be mapped to a Keyword Type.

Keyword Mapping Requirements for Chart Retrieval

To allow users to retrieve charts using the OnBase Client, ensure one of the following chart data fields is mapped to a Keyword Type:

Chart Data Field	Field ID #	Additional Notes
Chart ID #	10	None
Medical Record #	7	None
MPI Number	1	None
Patient First Name	2	In the OnBase Client, the length of the **Patient First Name** field in the **Chart Search** dialog box is dictated by the length of the mapped Keyword Type. Ensure the Keyword Type length is sufficient for all possible values. Charts allow up to 40 characters for the **Patient First Name**.

Chart Data Field	Field ID #	Additional Notes
Patient Last Name	3	In the OnBase Client, the length of the **Patient Last Name** field in the **Chart Search** dialog box is dictated by the length of the mapped Keyword Type. Ensure the Keyword Type length is sufficient for all possible values. Charts allow up to 100 characters for the **Patient Last Name**.
Patient SSN	5	None

Mapping Requirements for HL7

To prevent charts from being marked as needing review, ensure the following chart data fields are mapped to HL7 message fields and that valid values are provided for these fields when the chart is created through HL7.

Chart Data Field	Field ID #	Additional Notes
Chart ID #	10	None
Medical Record #	7	None
MPI Number	1	Blank MPIs are not supported in OnBase. If your system does not use MPI numbers, then map the MPI to the same HL7 field as the MRN (or another value that uniquely identifies a patient record).
Attending Physician	225	An attending physician is required only if both of the following are true: • The Medical Records Management Solution is the deficiency analysis application for the chart. • The **Ignore Attending Physician when verifying Chart Information** setting is not selected for the facility the chart belongs to. To be considered valid, the attending physician must be configured in OnBase.
Admit Type	17	An Admit Type is required only if the Medical Records Management Solution is the deficiency analysis application for the chart. To be considered valid, the Admit Type must be configured in OnBase.
Facility Name	8	A facility is required only if the Medical Records Management Solution is the deficiency analysis application for the chart. To be considered valid, the facility must be configured in OnBase.

Note: A chart's Admit Date and Discharge Date can be left blank. If the HL7 message provides a date for either of these fields, the date must be valid. Otherwise, the chart is marked as requiring review. For charts using the Medical Records Management Solution, the same requirement applies to the Date of Birth field.

Pulling Values from Repeating HL7 Fields

If an HL7 import process needs to pull a single value from a repeating HL7 field, you must update the chart data field's **HL7 Reference Field** value to use a different format.

Note: To use this format to populate Keyword Values on chart documents, you must use the HL7 Medical Records Chart import process. The format does not work for populating Keyword Values using the AutoFill Keyword Set, Advanced Document Import, or any other HL7 import process.

Consider the following example of a repeating field:

`PID|1||`**20110101^^^^HW~46010223^^^^HHMRN**`|||`

In this example, the PID.3 field is repeating, and each instance of the field is separated by a **~**.

20110101^^^^HW~46010223^^^^HHMRN

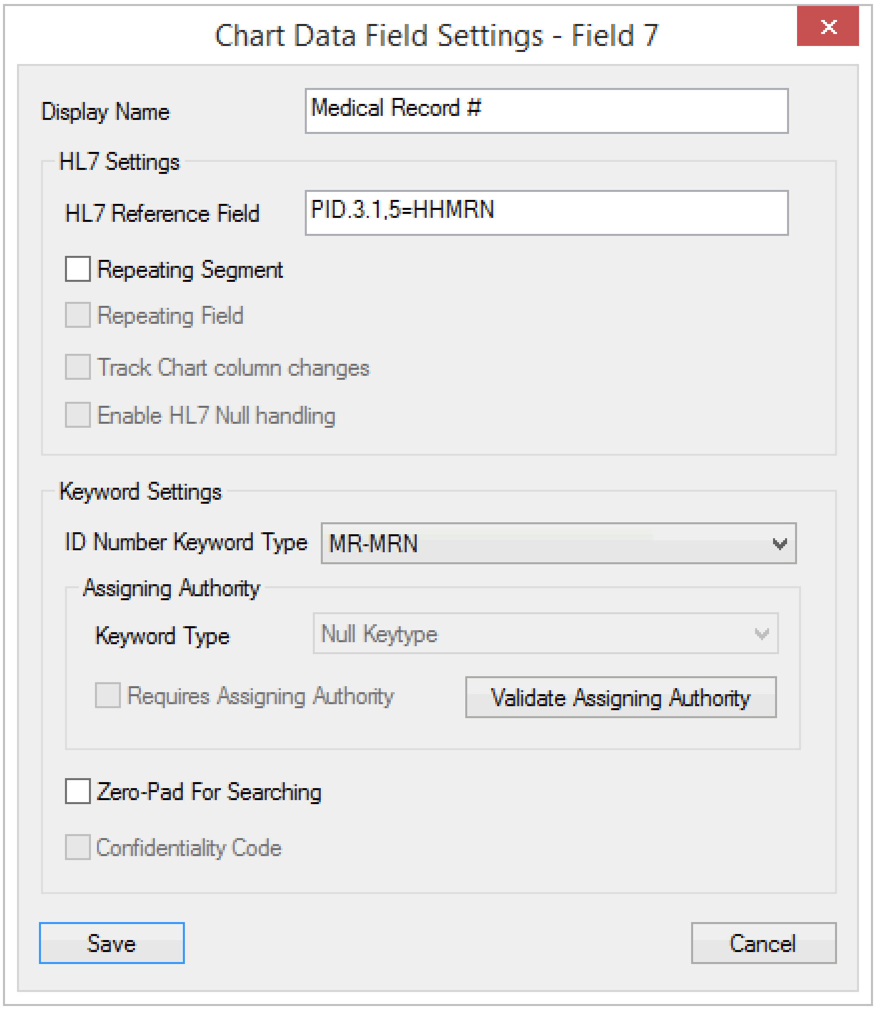
If the import process should extract **46010223** from this field, you would enter the following in the **HL7 Reference Field**:

```
PID.3.1,5=HHMRN
```

This value is composed of two parts:

- The first half of this value (**PID.3.1**) specifies the field (**PID.3**) and the component (**1**) where the import process should look for the value.
- The second half of this value (**5=HHMRN**) uses a constant (**HHMRN**) to specify which occurrence of the PID.3.1 field to use. In this example, you want to use the field where component **5** equals **HHMRN**. The field that matches this description is **46010223^^^^HHMRN**.

Once configured, the **HL7 Reference Field** in Chart Data Field Settings would resemble the following:



Using Chart Data Fields to Implement Default Values

Chart data fields provide the ability to insert default values for items whose values are not populated by HL7 messages. This configuration is appropriate for items available through the chart data fields whose value is a constant. Using chart data fields to define default values is not appropriate for items whose values might vary.

For example, if all charts to be created for a facility will have the same Facility Name, but the HL7 message used to create charts does not contain a value for Facility Name (PV1.3.4), you can use Chart Data Fields Configuration to insert a default value that will apply to all charts created.

As an example, the following procedure describes how to implement a default value for the Facility Name field.

1. From the Configuration module, select **Medical | Charts | Data Fields**.
2. Select the **Facility Name** chart data field and click **Settings**.
3. Remove the HL7 location value from the **HL7 Reference Field** and change the value to **=[Facility Name]**, where **[Facility Name]** represents the name of the facility.

   For example, **=Hyland-Westlake** would be an appropriate value for the Hyland Hospital Facility in Westlake.

Note: The name you select should be the same name as the **HL7 Field Specifier** for Medical Facility Settings.

Note: The value you enter in the Chart Data Field Settings **HL7 Reference Field** will override any value coming into the system in an HL7 message.

4. Click **Save** to exit the **Chart Data Field Settings** dialog box.
5. Click **Close** to exit the **Chart Data Fields Configuration** dialog box.

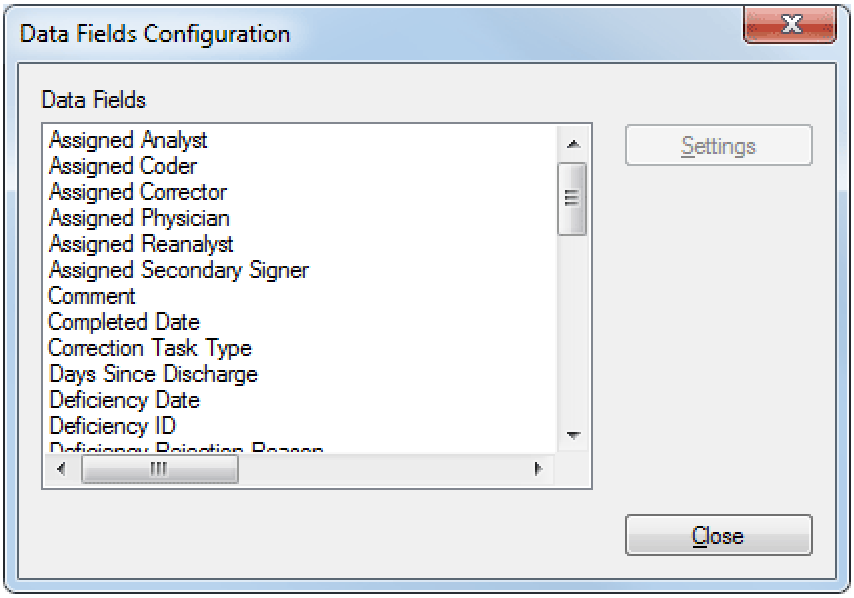
Data Fields Configuration

Data Fields Configuration allows you to rename fields and columns that are not associated with a chart data field. Fields and columns that are associated with chart data fields can be renamed in Chart Data Fields Configuration.

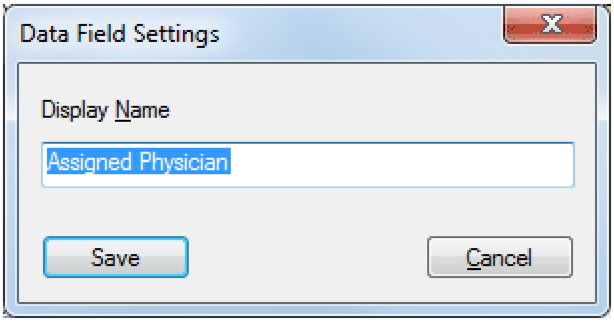
These settings affect the Medical Records Unity Client and OnBase Patient Window.

To configure data fields:

1. In OnBase Configuration, select **Medical | User Interface Settings | Data Fields**. The **Data Fields Configuration** dialog box is displayed.



2. Either double-click the field you want to modify, or select it and click **Settings**. The **Data Field Settings** dialog box is displayed.



3. Type the name to display for the field. Up to 100 characters are permitted.
4. Click **Save**.
5. Repeat for each data field as needed. Click **Close** when finished.

Medical System Settings

Medical System Settings are system-wide settings that affect all facilities. They are configured under **Medical | Medical System Settings** in OnBase Configuration. For information about these settings, see the OnBase **HL7** documentation.

List Column Configuration

OnBase Configuration allows you to specify the columns available in lists and search results. You also can change the order of columns and how sorting is applied.

Column configuration is available for the following OnBase Patient Window contexts:

Context	Description
Allergy Information	The **Allergies** dialog box lists information about allergies associated with the patient. Users can access it by clicking any allergy listed for the patient in the banner. For this feature to be available, the banner must be configured to display patient allergies.
Chart Search	Chart Search allows users who have sufficient privileges to search for charts. For Chart Search to be available, users must have the **Chart Search** privilege. See Chart Search Privilege on page 230.
Document List	Document lists in the OnBase Patient Window can display document information, including document names and keywords. See Displaying Values from Charts and Keywords on page 159.
Medical Alerts	The **Medical Alerts** dialog box lists information about medical alerts associated with the patient. Users can access it by clicking any alert listed for the patient in the banner. For this feature to be available, the banner must be configured to display patient medical alerts.
New Form List	When a user creates a chart-level form in Patient Window, the user is prompted to select the appropriate chart from a list. For information about creating forms in the Patient Window, see Clinical Form Configuration on page 184.
Patient List	The Patient List screen allows users to create and manage patient lists. For patient lists to be available, users must have the **Patient Lists** privilege. See Patient Lists Privilege on page 233.
Patient Search	Patient Search allows users who have sufficient privileges to retrieve patient records. For information about Patient Search availability, see Patient Search Privilege on page 232.
Scheduled Patient Search	Scheduled Patient Search allows users who have sufficient privileges to retrieve patient records based on scheduled appointments. For information about Scheduled Patient Search availability, see Scheduled Patient Search Privilege on page 232.

See the following topics:

- Displaying Values from Charts and Keywords on page 159
- Configuring Columns for Lists on page 159
- Changing the Default Sort Order on page 163

Displaying Values from Charts and Keywords

For documents attached to charts, the document list can display information both from the document Keyword Values and from the charts documents are attached to.

Only Keyword Types mapped to the following chart data fields are eligible to display chart values for documents attached to charts. For documents attached to charts, the Keyword Values stored for Keyword Types mapped to these fields are ignored. For documents not attached to charts, the document list displays the associated Keyword Values.

- Admit Date
- Admit Source
- Admit Type
- Admitting Physician
- Attending Physician
- Chart ID #
- Consulting Physician
- Department Name
- Diagnosis Code
- Discharge Date
- Disposition
- Facility Name
- Financial Class
- Medical Service
- MRN
- Payor
- Primary Care Physician
- Procedure Code
- Referring Physician
- Total Charges

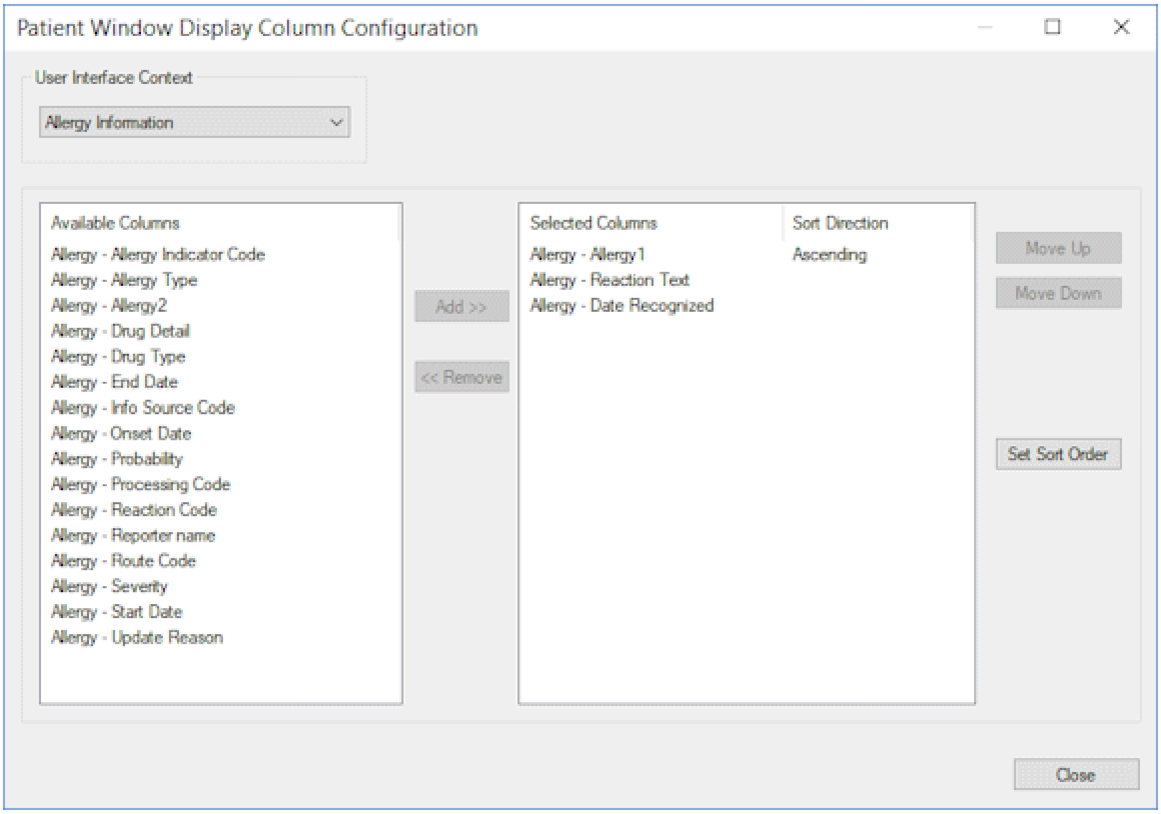
For keyword-based columns that are not mapped to these chart data fields, the document list displays document Keyword Values regardless of whether documents are attached to charts.

Configuring Columns for Lists

Using OnBase Configuration, you can configure the columns displayed by lists in the Patient Window. For information about available list contexts, see the descriptions under List Column Configuration on page 158.

To configure the default columns and sort order for lists:

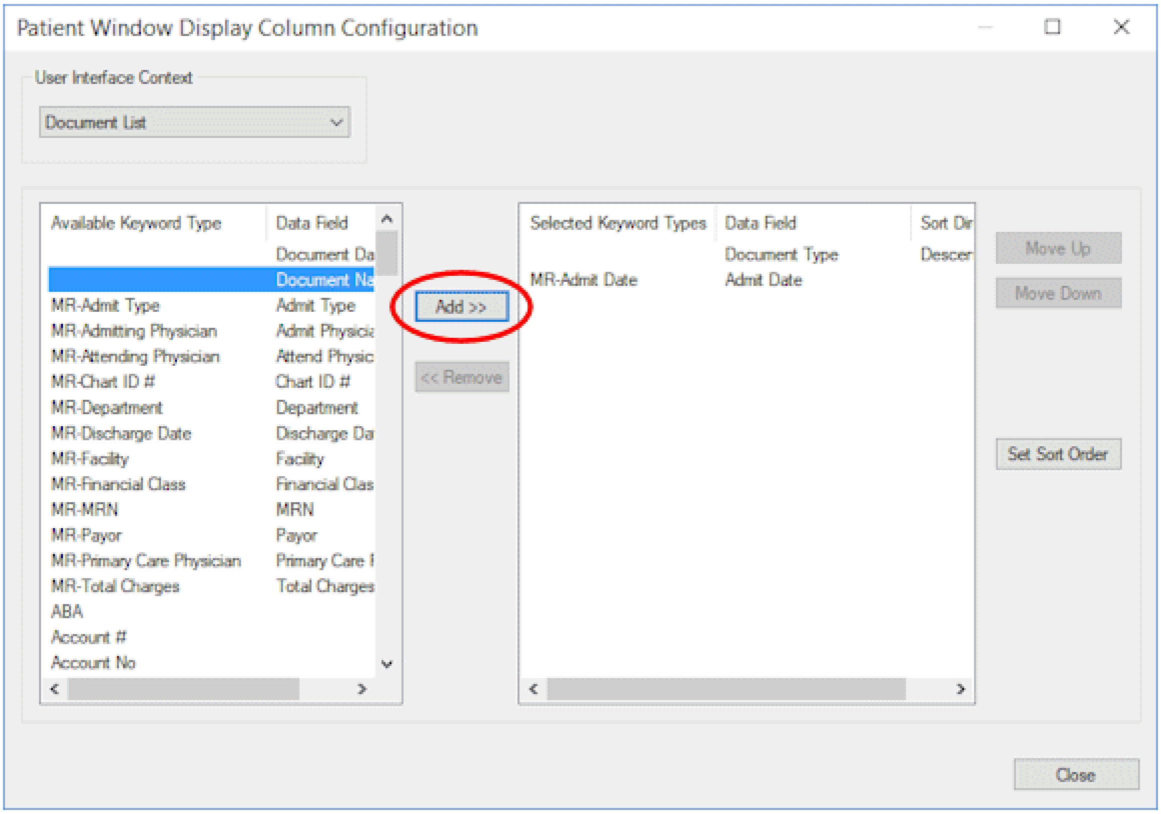
1. In OnBase Configuration, select **Medical | User Interface Settings | Patient Window | Display Columns**. The **Patient Window Display Column Configuration** dialog box is displayed.



2. Select the list you want to configure from the **User Interface Context** drop-down list.
   - For information about available contexts, see the table under List Column Configuration on page 158.
   - When you select the Document List context, the left pane displays non-Keyword columns first, followed by Keyword Types that display chart data, and finally Keyword Types that display Keyword Values from documents. For information about columns that display chart data, see Displaying Values from Charts and Keywords on page 159.
3. Under **Available Columns**, select a column you want to display in the list.

Tip: For information about available columns, see Column and Field Descriptions on page 255. Columns associated with both a Keyword Type and a chart data field will use the Keyword Type name as their display name. Columns that are not associated with a Keyword Type can be renamed under **Medical | Charts | Data Fields** or **Medical | User Interface Settings | Data Fields** in OnBase Configuration.

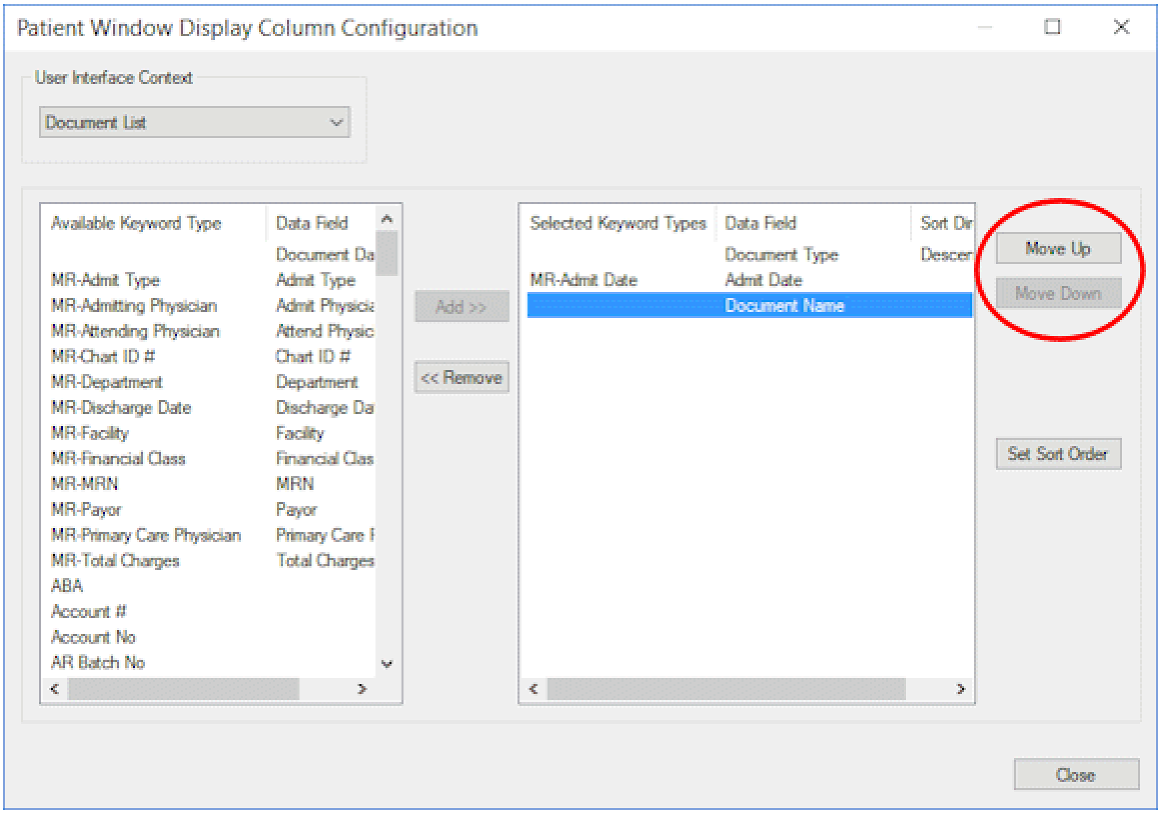
4. Click **Add**.



To remove a column, select it from the **Selected Columns Display Order** list and click **Remove**.

5. Repeat steps 3 and 4 for each column that should be added to the selected context.

6. Use the **Move Up** or **Move Down** button to move the selected column up or down the list. The list order reflects the display order in the OnBase Patient Window.



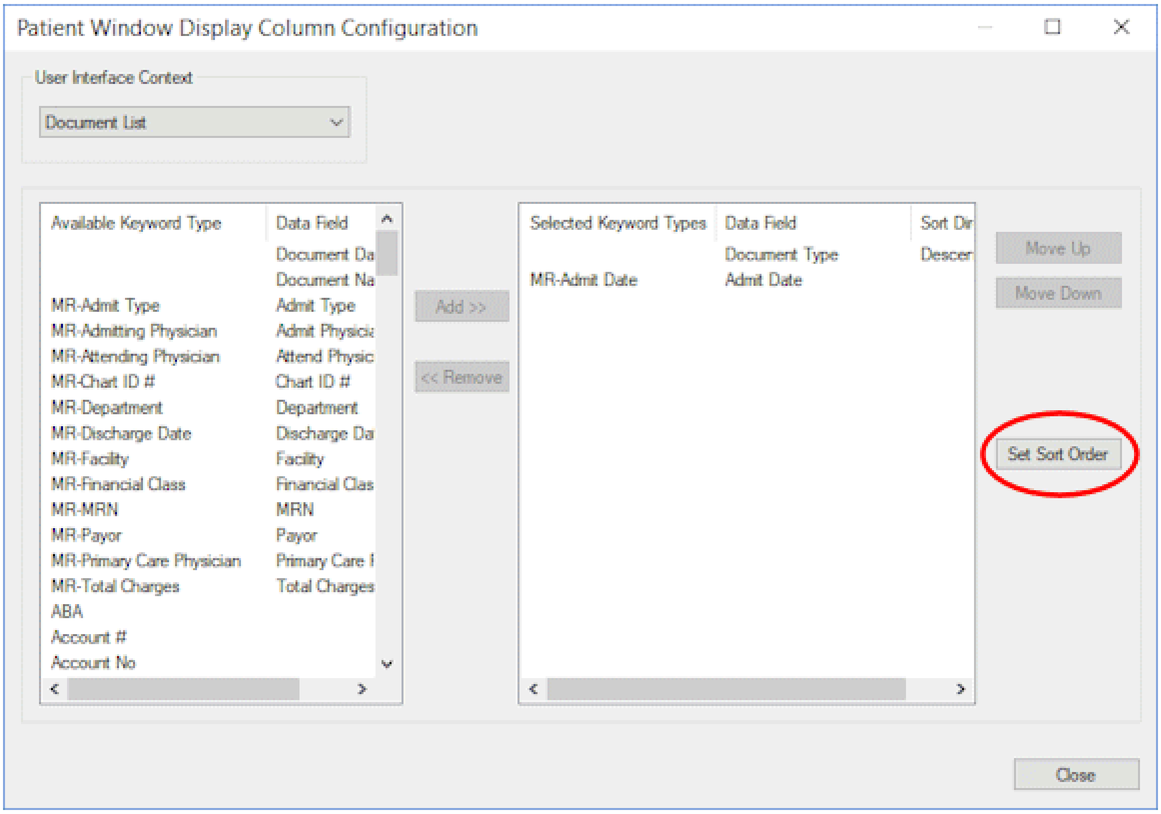
7. To specify the default sort order for individual columns, see Changing the Default Sort Order on page 163. The **Selected Columns Display Order** list displays an asterisk (*) next to the columns currently used for sorting.
8. Click **Close**.

Changing the Default Sort Order

List items can be sorted in ascending or descending order by one or more columns. Follow these steps to specify the default sort order. Users can apply different sort orders as needed within the OnBase Patient Window.

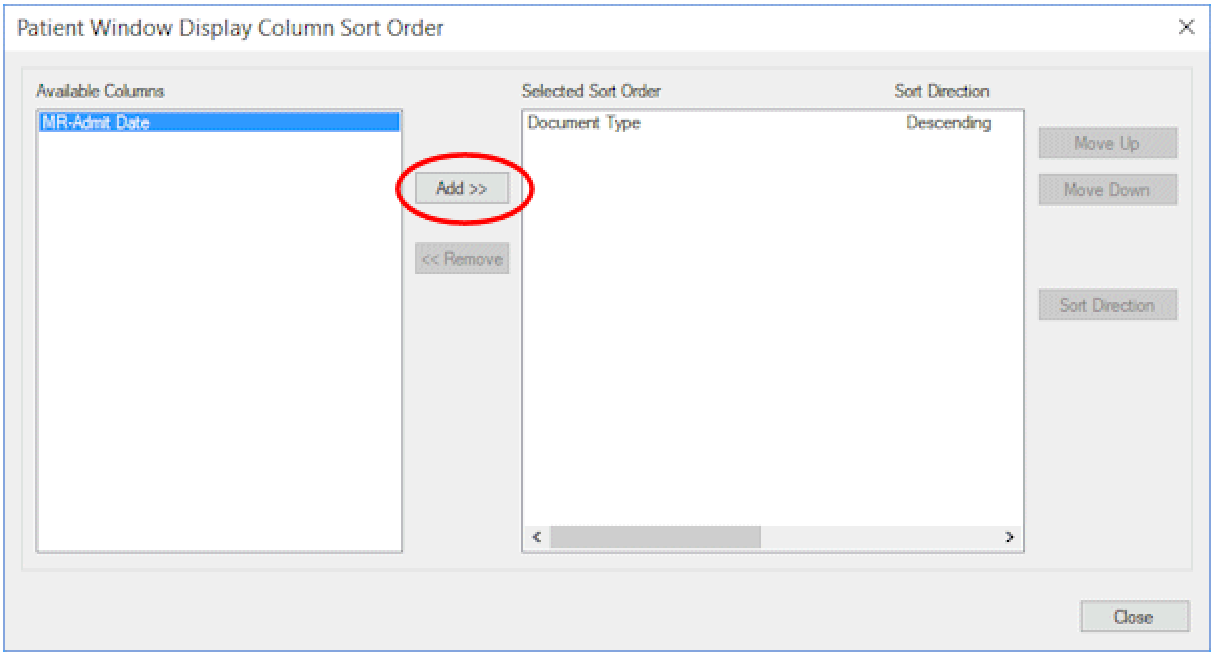
To configure the default sort order:

1. Click **Set Sort Order** from the **Patient Window Display Column Configuration** dialog box.



2. Under **Available Columns**, select a column you want to sort by.

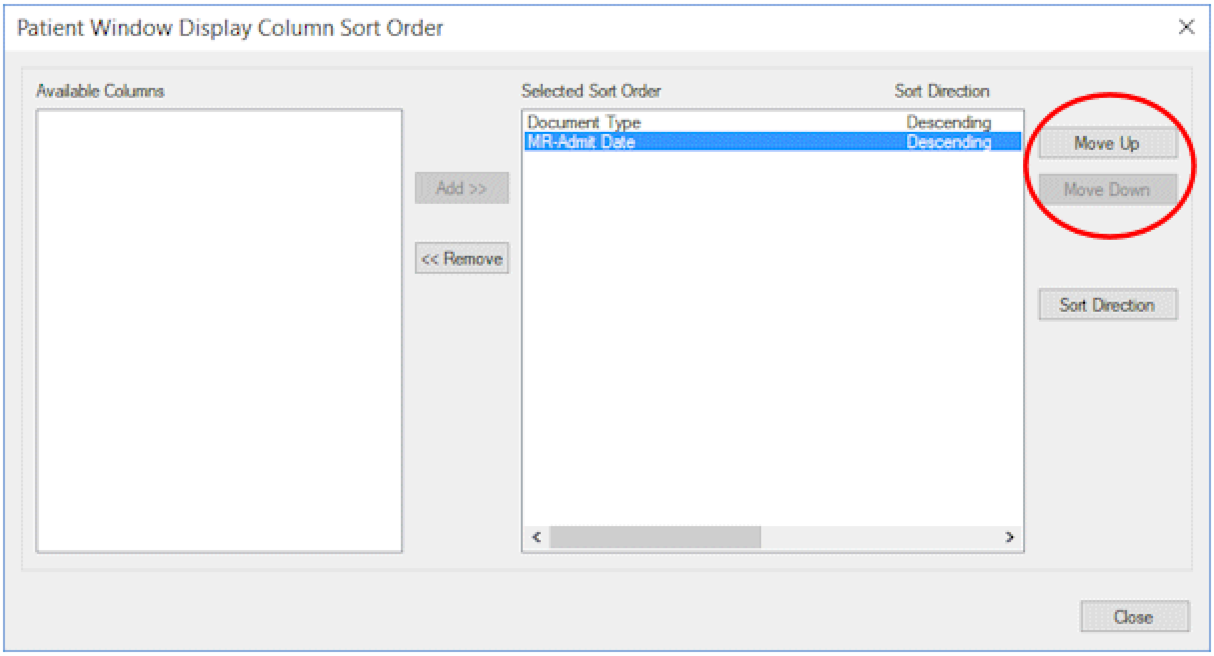
3. Click **Add**.



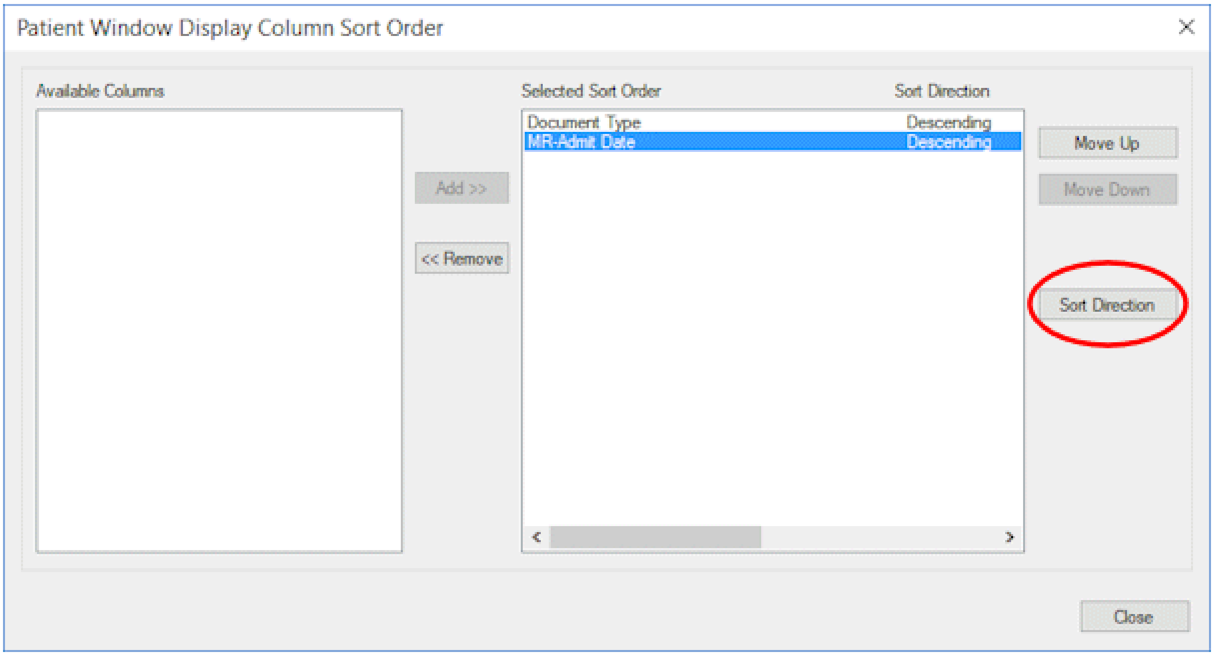
To remove sorting from a column, select the column from the **Selected Sort Order** list and click **Remove**.

4. If you are sorting by multiple columns, use the **Move Up** and **Move Down** buttons to specify the order in which sorting should be applied.

   For example, suppose you are configuring the document list sort order. If documents should be sorted first by Document Type (primary sort) and then by Discharge Date (secondary sort), make **Document Type** first in the list, with **Discharge Date** second.



5. To change a column's sort direction (from ascending to descending, for example), do the following:
   a. Select the column from the **Selected Sort Order** list.
   b. Click **Sort Direction**.



6. Click **Close** when finished.

Search Configuration

The Patient Window allows users who have sufficient privileges to search for patient records and charts.

The following search contexts are available:

Context	Description
Chart Search	Chart Search allows users to search for charts based on patient and visit information. Users must have a **Chart Search** privilege to use Chart Search.
Patient Search	Patient Search allows users to search for patient records based on patient information and inpatient status. Users must have the **Patient Search** privilege to use Patient Search. For other requirements, see Patient Search Privilege on page 232.
Scheduled Patient Search	Scheduled Patient Search allows users to search for patient records based on scheduled appointments. The HL7 Appointment Processor must be configured to import appointment information into OnBase. For information about the Appointment Processor, see the **HL7** module reference guide. Users must have the **Scheduled Patient Search** privilege to use Scheduled Patient Search. For other requirements, see Scheduled Patient Search Privilege on page 232.

To configure the Patient Window for searching, see the following topics:

- Configuring the Medical Records Custom Query on page 167
- Configuring Search Fields on page 168
- Configuring Results Columns on page 169

To understand the requirements for enabling or disabling search privileges, see Diagram: Search and List Privileges on page 235.

Configuring the Medical Records Custom Query

The search feature requires the Medical Records Custom Query to use the MPI Keyword Type as a retrieval Keyword Type.

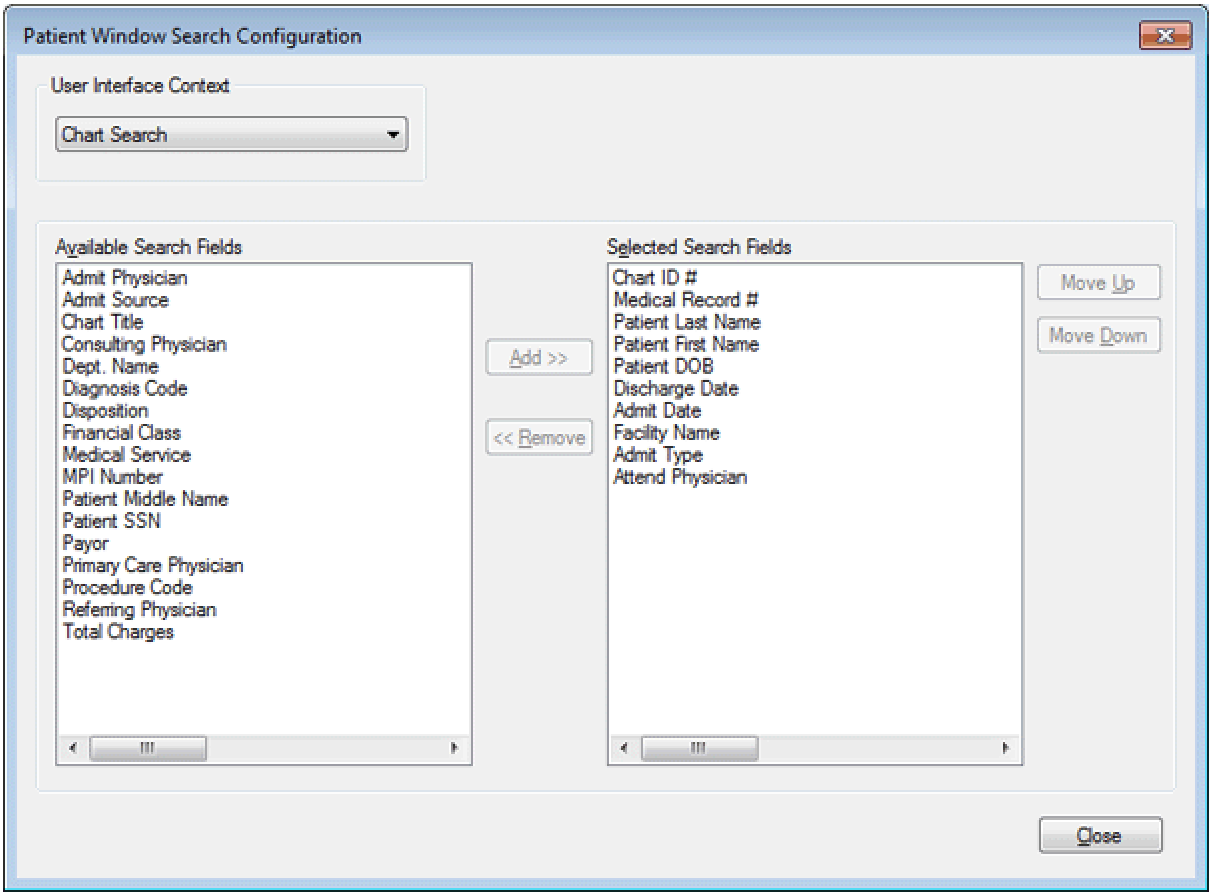
- Assign the MPI Keyword Type as a retrieval Keyword Types under **Queries | Custom Queries** in OnBase Configuration.
- Also make sure the MPI Keyword Types are mapped to the MPI data field under **Medical | Charts | Data Fields**.

For more information about the Medical Records Custom Query, see Medical Records Custom Query Configuration on page 118.

Configuring Search Fields

OnBase Configuration allows you to designate the available search fields and their sequence within the OnBase Patient Window. Field display names are based on the display names configured under **Medical | Charts | Data Fields**.

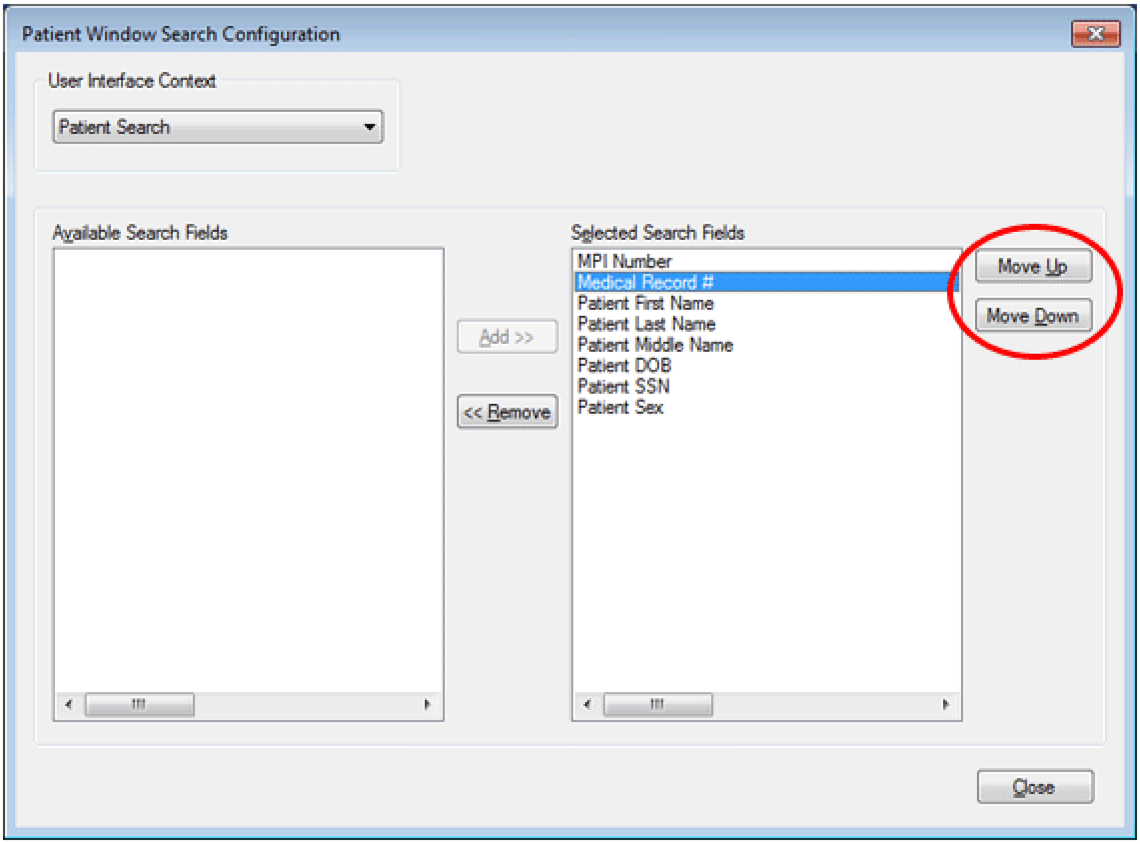
1. Select **Medical | User Interface Settings | Patient Window | Search Fields**. The **Patient Window Search Configuration** dialog box is displayed.



2. Select a search context from the **User Interface Context** drop-down list. See Search Configuration on page 167 for descriptions of available contexts.
3. Do the following:
   - To add a field to the selected search context, select the field under **Available Search Fields** and click **Add**.
   - To remove a field from the selected search context, select the field under **Selected Search Fields** and click **Remove**.

Tip: For information about available search fields, see Column and Field Descriptions on page 255. To change the name of a search field, update its display name under **Medical | Charts | Data Fields** in OnBase Configuration.

4. Use the **Move Up** or **Move Down** button to move the selected fields up or down the list. The list order reflects the display order of fields in the Patient Window.



5. Click **Close** when finished.

Configuring Results Columns

To configure the columns available for search results, see Configuring Columns for Lists on page 159.

Filter Configuration

When viewing a patient's record, users can apply filters to limit the number of documents displayed. OnBase Configuration allows you to specify the filters available in OnBase Patient Window.

See the following topics:

- Filtering on Chart and Keyword Values on page 170
- Configuring Filter Criteria on page 171
- Reordering Selected Filters on page 172
- Removing a Filter on page 173

Filtering on Chart and Keyword Values

For Keyword Types mapped to of the following chart data fields, chart documents are filtered based on the corresponding chart value (ignoring the document Keyword Value). Non-chart documents are filtered based on the corresponding document Keyword Value.

- Admit Source
- Admit Type
- Admitting Physician
- Attending Physician
- Chart ID #
- Consulting Physician
- Department Name
- Diagnosis Code
- Disposition
- Facility Name
- Financial Class
- Medical Service
- MRN
- Payor
- Primary Care Physician
- Procedure Code
- Referring Physician
- Total Charges

For Keyword Types that are not mapped to these chart data fields, filtering is based only on document Keyword Values regardless of whether documents are attached to charts.

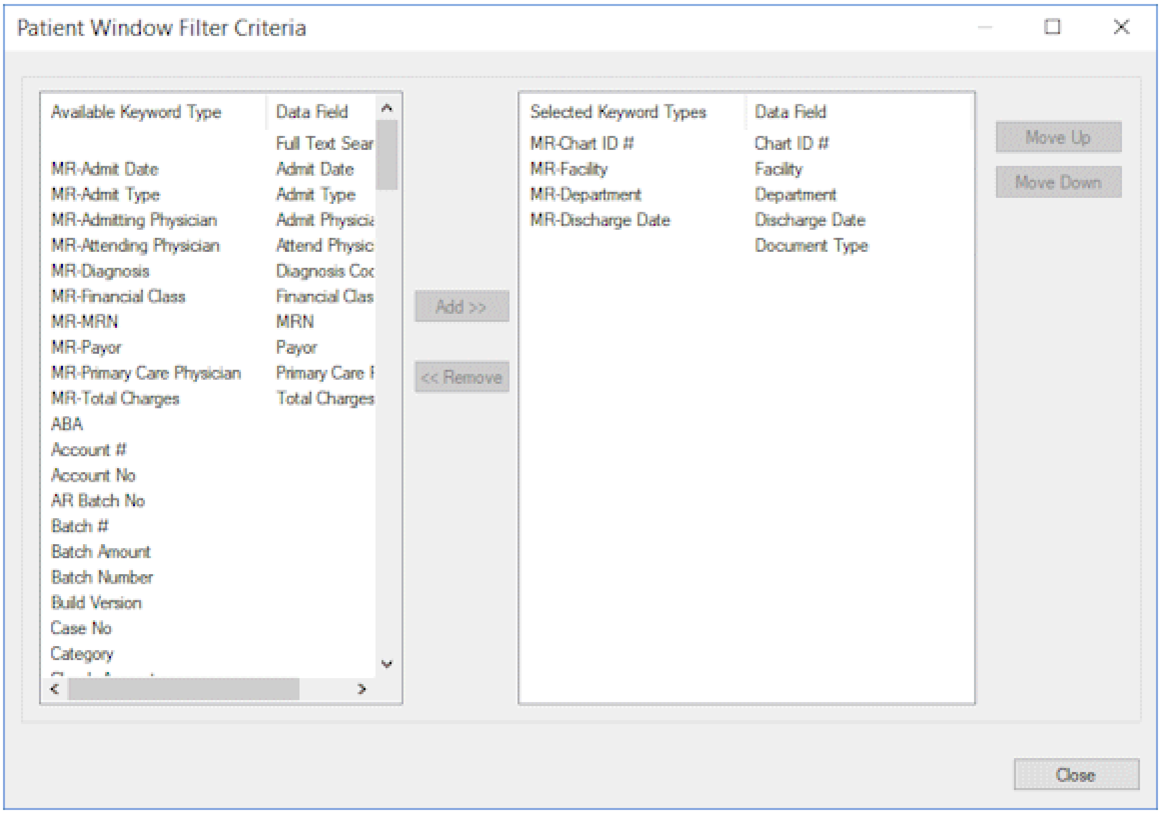
Configuring Filter Criteria

Using the OnBase Configuration module, you can configure the availability and display order of filters for OnBase Patient Window. For information about available filters, see Filter Descriptions on page 263.

Note: Make sure all Keyword Types configured as filter criteria are also assigned to the Document Types that may be displayed in OnBase Patient Window.

To configure the filters available in OnBase Patient Window:

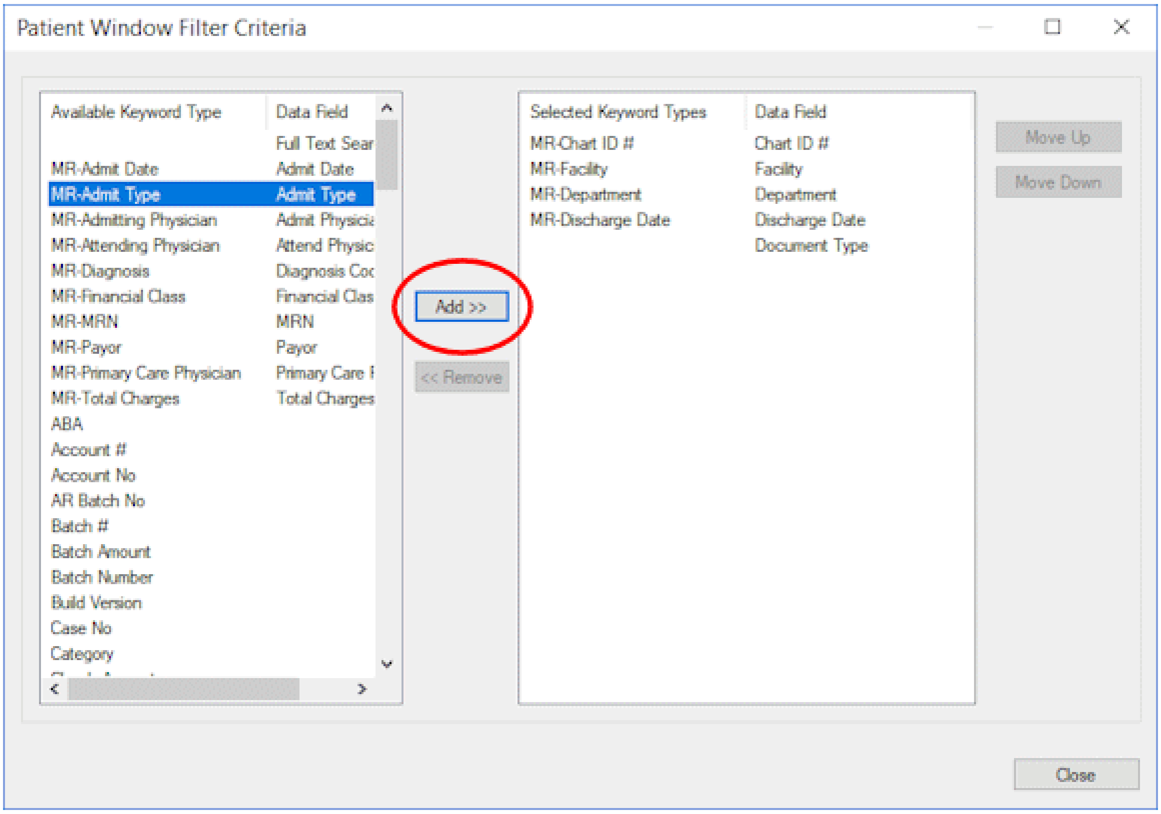
1. In the OnBase Configuration module, select **Medical | User Interface Settings | Patient Window | Filter Criteria**. The **Patient Window Filter Criteria** dialog box is displayed.



   The left pane displays non-Keyword filters first, followed by filters capable of using chart data, and finally filters that use only Keyword Values. For information about filters that use chart data, see Filtering on Chart and Keyword Values on page 170.

2. Select a filter from the left pane.

3. Click **Add**.



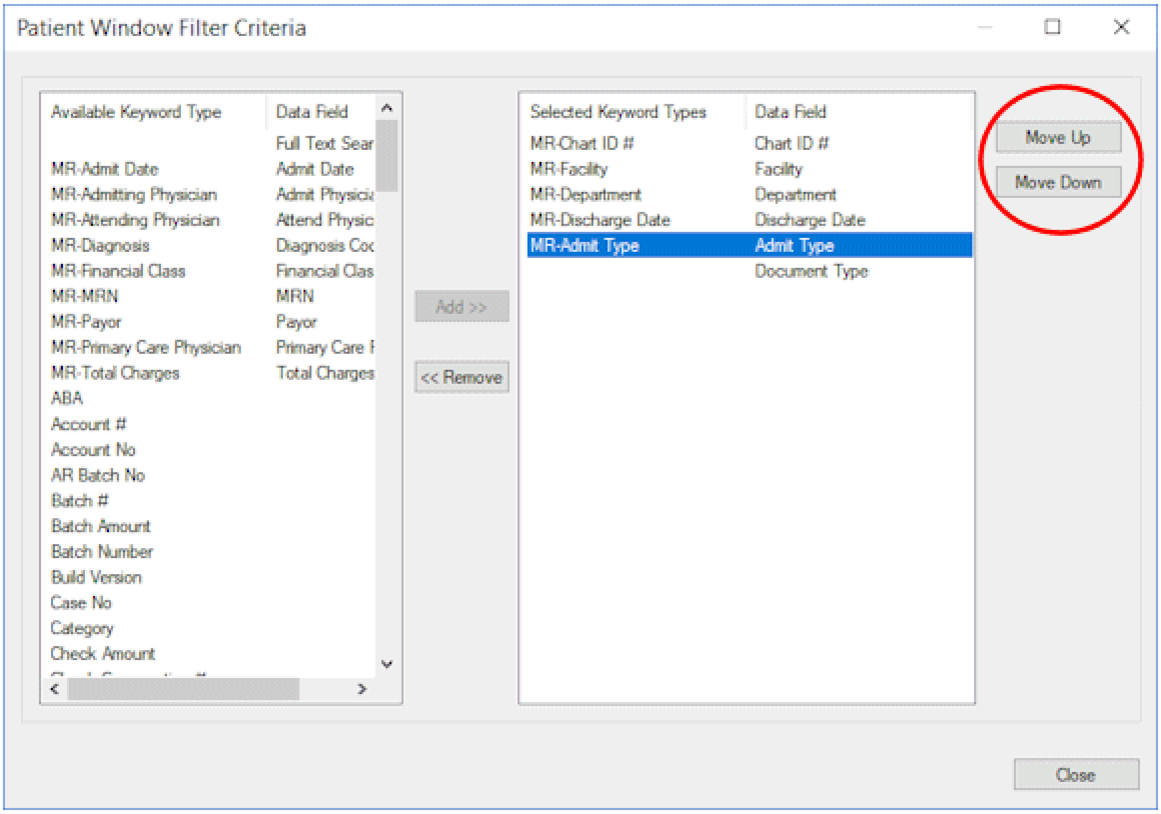
4. To change the filter order, see Reordering Selected Filters on page 172.
   To remove a filter, see Removing a Filter on page 173.
5. Click **Close**.

Reordering Selected Filters

To change the display order of filters, follow these steps:

1. In the OnBase Configuration module, select **Medical | User Interface Settings | Patient Window | Filter Criteria**.
2. Select a filter from the right pane.

3. Use the **Move Up** or **Move Down** arrow button to move the filter up or down the list.



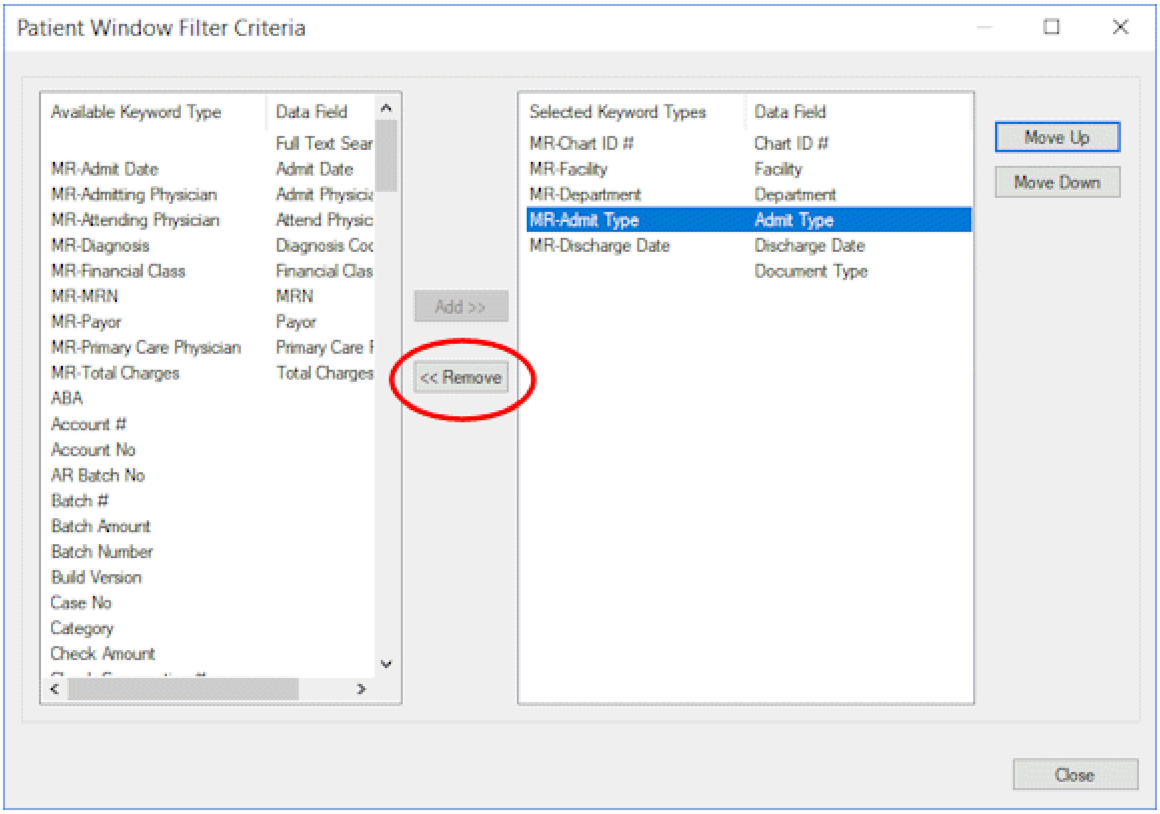
4. Repeat for other filters as needed.
5. Click **Close**.

Removing a Filter

To remove a filter, follow these steps:

1. In the OnBase Configuration module, select **Medical | User Interface Settings | Patient Window | Filter Criteria**.
2. Select the filter from the right pane.

3. Click the **Remove** button.

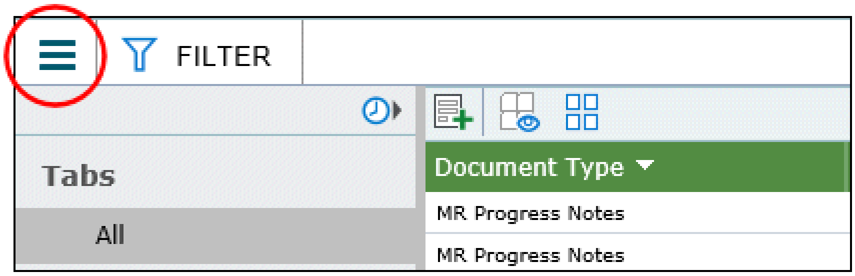


4. Click **Close**.

Hosted Content Configuration

OnBase Patient Window can provide access to content hosted on another server or Website. When a user clicks a hosted content button, OnBase Patient Window accesses a configured URL using values from the user's current context.

When configured, hosted content buttons are available from the main menu in OnBase Patient Window.



Hosted content configuration allows you to configure both the URL and the icon for the hosted content button. See the following topics for more information:

- Compatible Applications on page 175
- Creating a New Hosted Content Button on page 176
- Assigning User Groups for Hosted Content on page 179
- Configuring the Sequence of Hosted Content Buttons on page 182

Compatible Applications

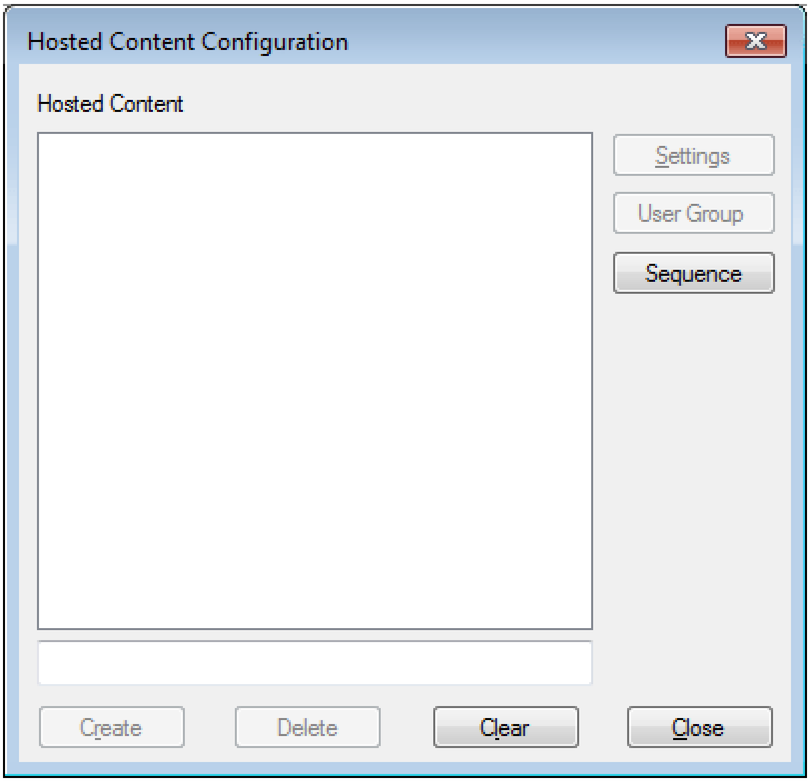
The hosted content feature works with any application or Web page that supports being embedded in another application.

Tip: Some OnBase modules, like DocPop, have additional configuration settings or parameters that enable support for embedding. For more information, see the module reference guide for the OnBase module you are embedding.

Creating a New Hosted Content Button

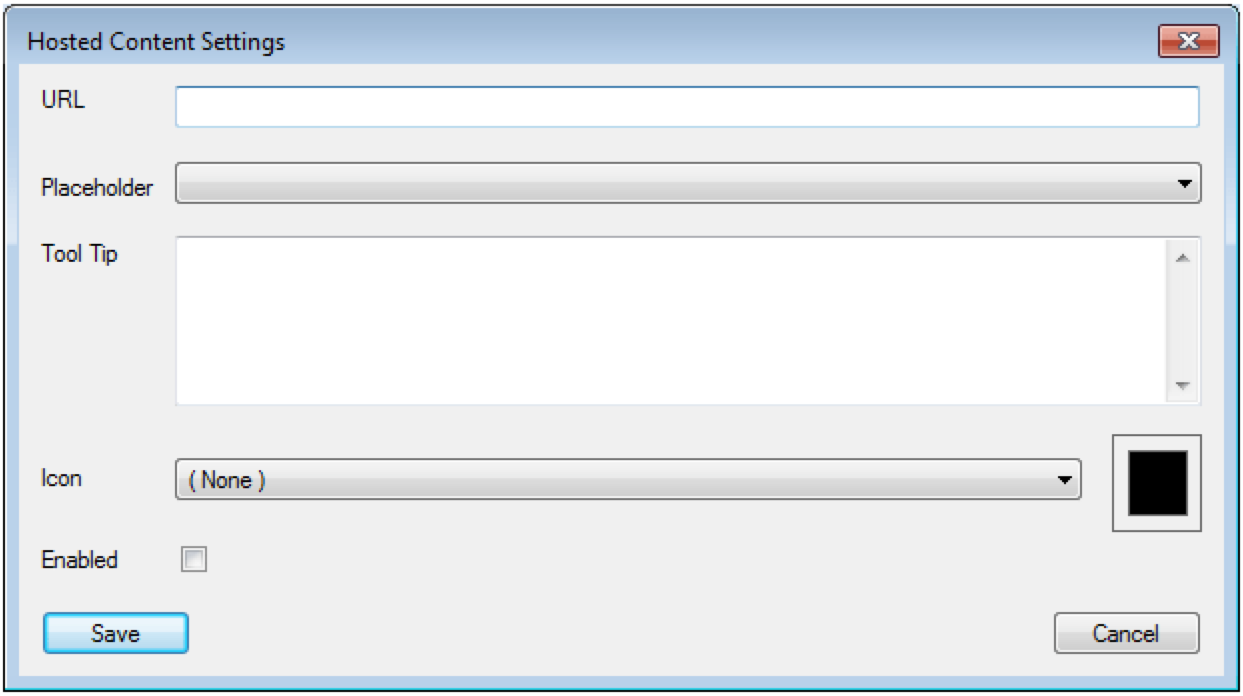
The following steps describe how to configure OnBase Patient Window to access hosted content.

1. In OnBase Configuration, select **Medical | User Interface Settings | Patient Window | Hosted Content**. The **Hosted Content Configuration** dialog box is displayed.



2. Type a descriptive name in the field provided. This name is used for administrative purposes only.

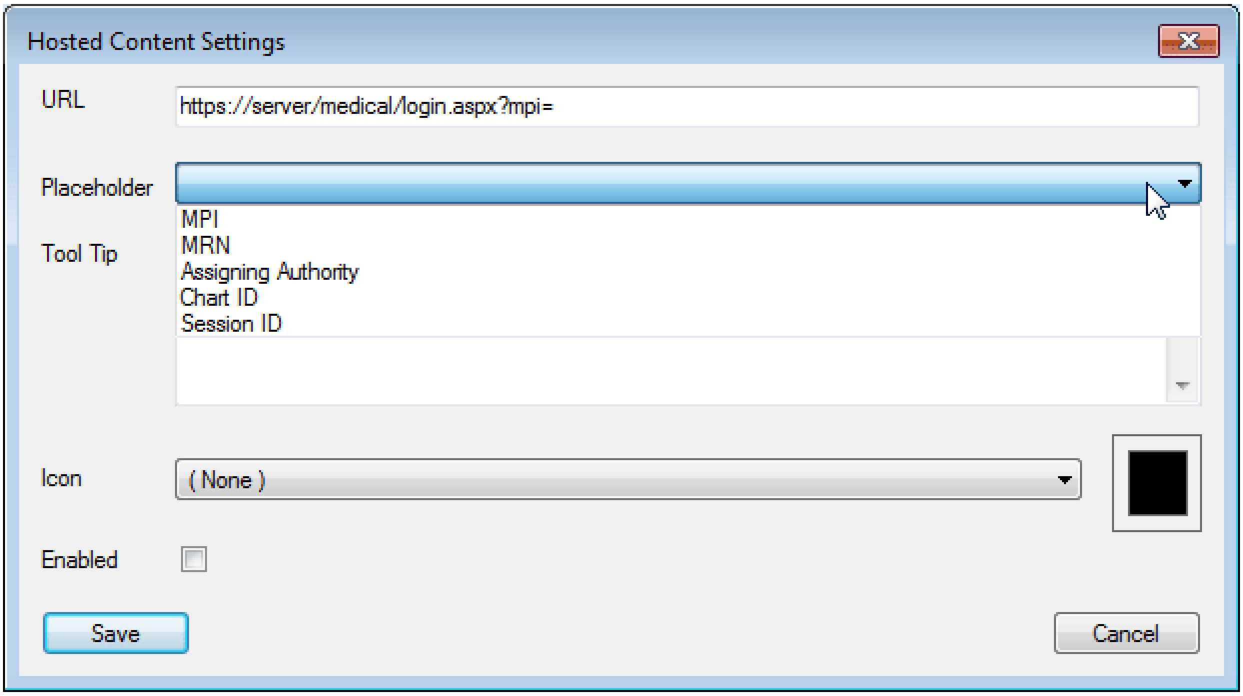
3. Click **Create**. The **Hosted Content Settings** dialog box is displayed.



4. Type the **URL** the hosted content button should launch when clicked. To insert placeholders for variable values, see Inserting Placeholder Variables on page 178.
5. Type a helpful **Tool Tip** for the button. No label is displayed on the button itself.
6. Select a logical **Icon** to represent the button.
7. Select **Enabled** if the button should be enabled for use in OnBase Patient Window. If **Enabled** is not selected, the button will not be available.
8. Click **Save**.

Inserting Placeholder Variables

Placeholders allow the hosted content button to dynamically insert query string values based on the user's current context.



For example, suppose the **URL** field currently contains the following value:

```
https://server/medical/login.aspx?mpi=
```

If you select **MPI** from the **Placeholder** drop-down list, the URL will be updated to the following:

```
https://server/medical/login.aspx?mpi={{mpi}}
```

The **{{mpi}}** placeholder tells OnBase Patient Window to automatically insert the MPI for the current patient when the user clicks the hosted content button.

To add a placeholder, do the following:

1. In the **URL** field, click the location where the placeholder should be inserted.
2. Select one of the following from the **Placeholder** drop-down list:

Placeholder Name	Inserted Value	Description
MPI	{{mpi}}	The MPI value for the current patient

Placeholder Name	Inserted Value	Description
MRN	{{mrn}}	The MRN value for the selected record The MRN is taken from the filter currently applied in OnBase Patient Window. If the record is not being filtered by MRN, then the first MRN for the current patient will be used.
Assigning Authority	{{assigningauthority}}	The assigning authority for the MRN of the current record The assigning authority is taken from the MRN in the currently applied filter. If the record is not being filtered by MRN, then the assigning authority for the patient's first MRN will be used.
Chart ID	{{chartnumber}}	The chart ID value for the current chart The chart ID is taken from the filter currently applied in OnBase Patient Window. • If the record is not being filtered by chart, then this placeholder will be left blank.[a] • If the filter returns multiple chart IDs, then the first matching chart ID will be used.
Session ID	{{sessionid}}	The session ID for the user's current session

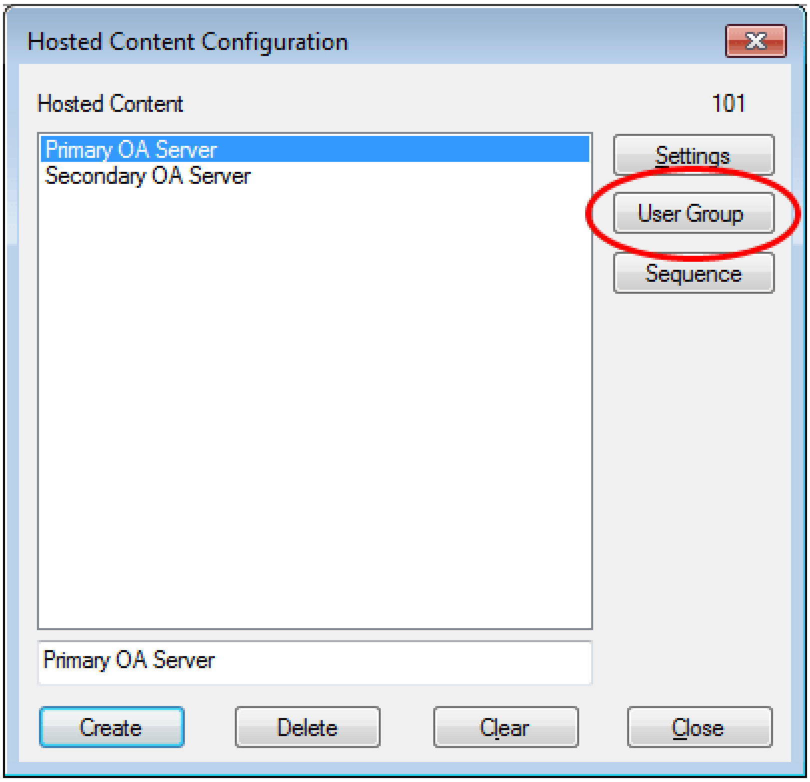
a. Some modules may handle blank parameters as an unconstrained query. Ensure the results returned by the hosted content feature are appropriate for the current user, regardless of whether the user has a chart filter applied.

Assigning User Groups for Hosted Content

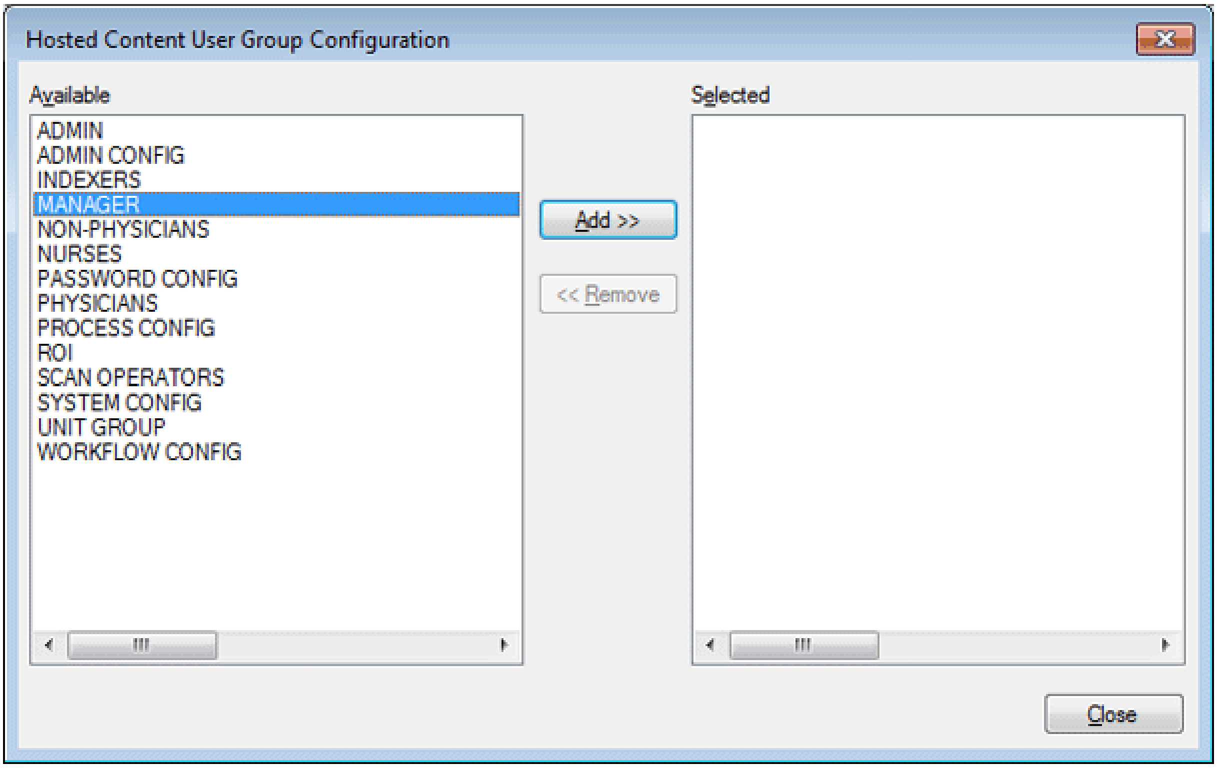
Users must have sufficient privileges to see and use a hosted content button. If a user does not have privileges to a hosted content button, the button is not available in OnBase Patient Window.

1. In OnBase Configuration, select **Medical | User Interface Settings | Patient Window | Hosted Content**.
2. Select an item from the list.

3. Click **User Group**.



4. From the **Available** list, select a user group.

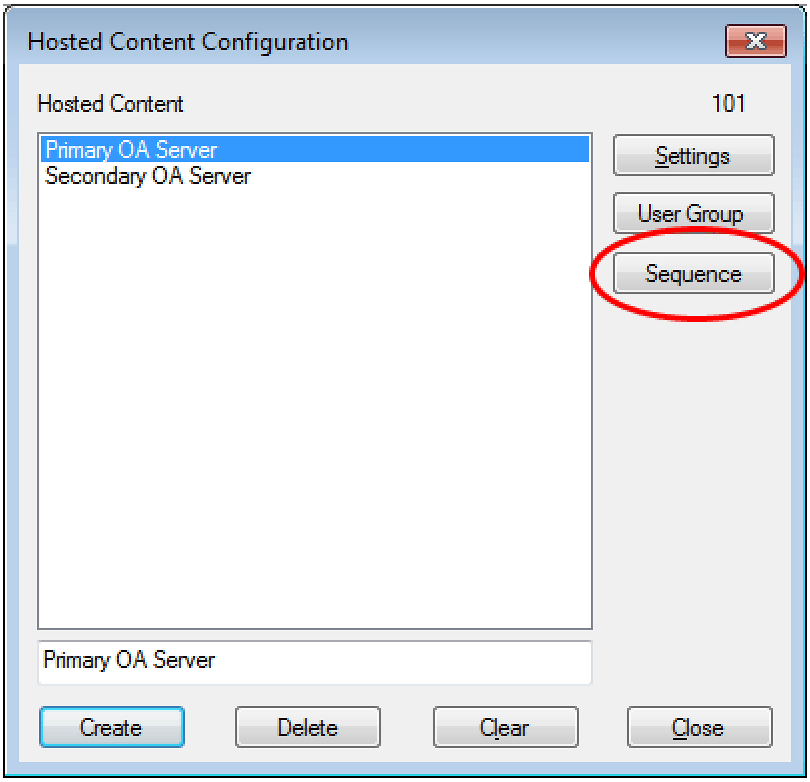


5. Click **Add** to add the user group to the **Selected** list.
6. Repeat for all user groups that should have access to the button.
7. Click **Close** when finished.

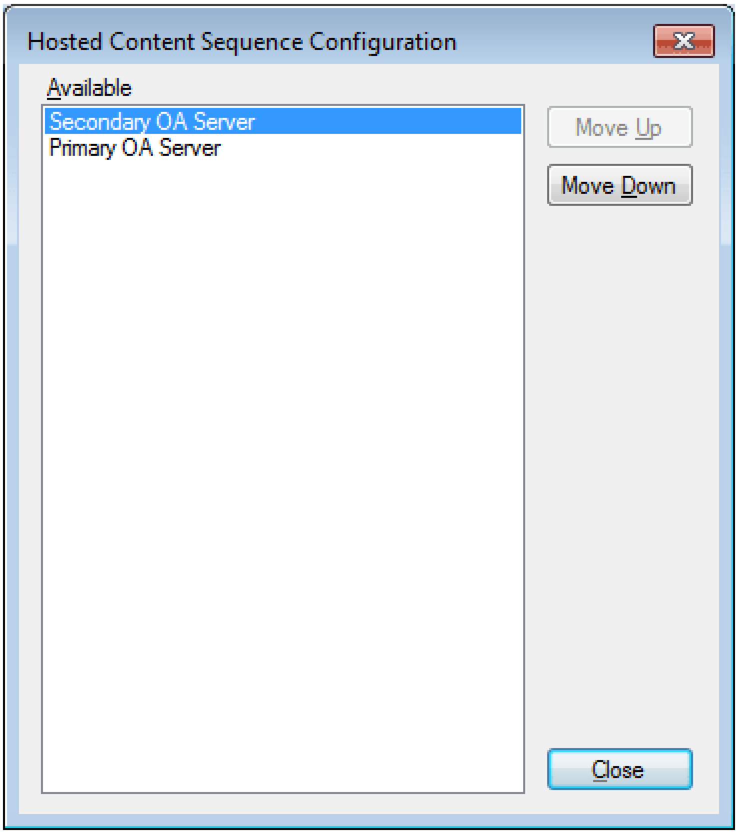
Configuring the Sequence of Hosted Content Buttons

If a user has access to multiple hosted content buttons, each button will be displayed in the OnBase Patient Window toolbar. To configure the order in which these buttons are displayed, complete the following steps.

1. In OnBase Configuration, select **Medical | User Interface Settings | Patient Window | Hosted Content**.
2. Click **Sequence**.



3. Select an item from the list.



4. Use the **Move Up** and **Move Down** buttons to move the item up or down in the sequence.
5. Click **Close** when finished.

Clinical Form Configuration

OnBase Patient Window allows users to create and add clinical forms to the patient record. By allowing users to create forms electronically, OnBase Patient Window can help reduce the paper volume of the patient record and make it easier to capture patient information.

See the following topics:

- Requirements for Form Creation on page 184
- Designating Forms for the Patient Window on page 186

Requirements for Form Creation

The following requirements must be met in order for forms to be created using OnBase Patient Window.

- Document Type Requirements on page 184
- Form Template Requirements on page 185
- User Privilege Requirements on page 185

Document Type Requirements

The Document Types for forms must satisfy the following requirements:

- Form Document Types must belong to a Medical Record Document Type Group.
- Form Document Types must be assigned the Keyword Types used for the **MPI Number** and **Medical Record #** chart data fields (fields #1 and 7, respectively).
- For forms to be attached to charts, form Document Types must be assigned the Keyword Types used for the **Chart ID #**, **MPI Number**, and **Medical Record #** chart data fields (fields #10, 1, and 7, respectively).

Note: If a chart data field is configured to require an assigning authority, then the associated assigning authority Keyword Type must also be assigned to the form Document Type.

- For forms to be attached to charts, form Document Types must be assigned to the chart context under **Medical | Context Configuration | Chart Context Document Types** in OnBase Configuration. For more information about configuring medical record Document Types, see the OnBase **HL7 Module** documentation.
- As a best practice, chart-level forms should be configured to use an AutoFill Keyword Set where the chart ID is the primary Keyword Type. Patient-level forms should be configured to use an AutoFill Keyword Set where the MPI is the primary Keyword Type.

Form Template Requirements

Both Unity Forms and E-Forms are supported for clinical form creation in OnBase Patient Window.

Form templates must satisfy the following requirements:

- E-Form templates must adhere to the configuration requirements described in the **E-Forms** documentation.
- Unity Form templates must adhere to the configuration requirements described in the **Unity Forms** documentation.
- Unity Form templates must be configured to target documents.

Note: For Unity Forms, the repeating section control is supported, but the **Default Row Count** setting has no observable effect on forms created in OnBase Patient Window. This limitation exists because forms are indexed and saved before they are displayed to the user.

User Privilege Requirements

Form creation has the following privilege requirements:

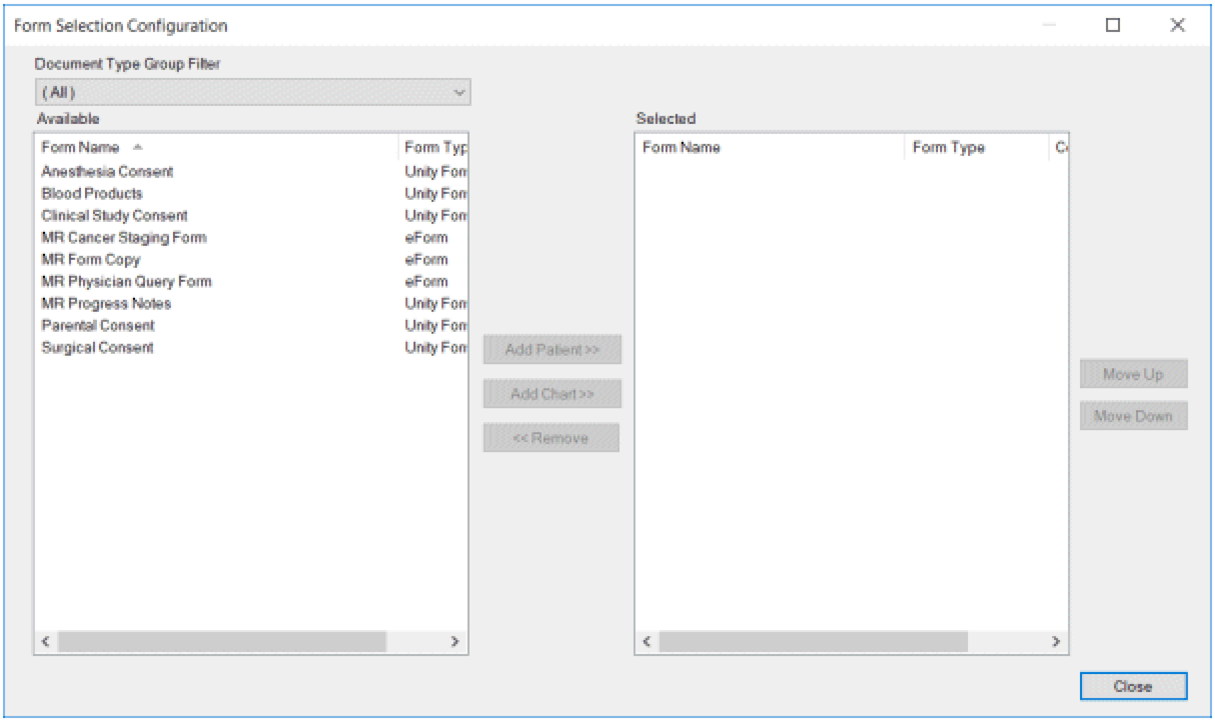
- For Unity Forms, users must have the **Create** privilege for the Document Types the Unity Forms belong to.
- For E-Forms, users require no additional privileges. As long as users have access to a patient record, they can create any E-Form configured to be available in the OnBase Patient Window.

Designating Forms for the Patient Window

OnBase Patient Window allows users to create forms that have been designated for form creation in the OnBase Configuration module.

To make forms available for creation in OnBase Patient Window:

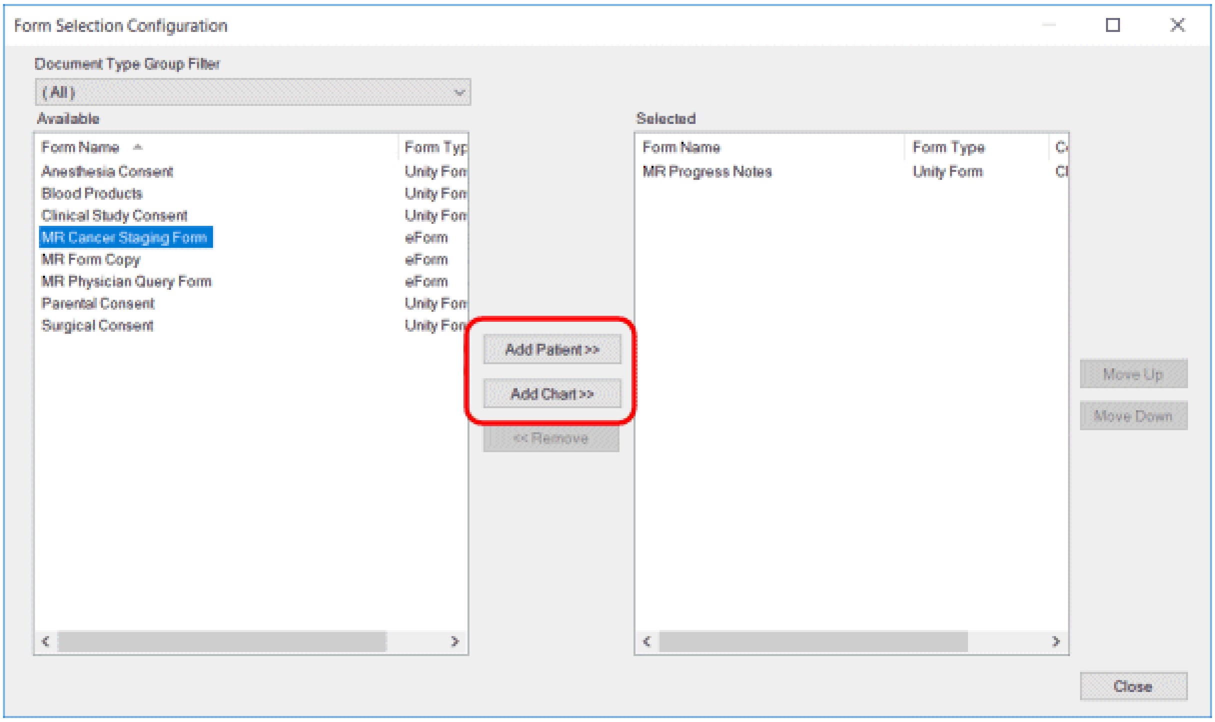
1. Select **Medical | User Interface Settings | Patient Window | Form Selection**. The **Form Selection Configuration** dialog box is displayed.



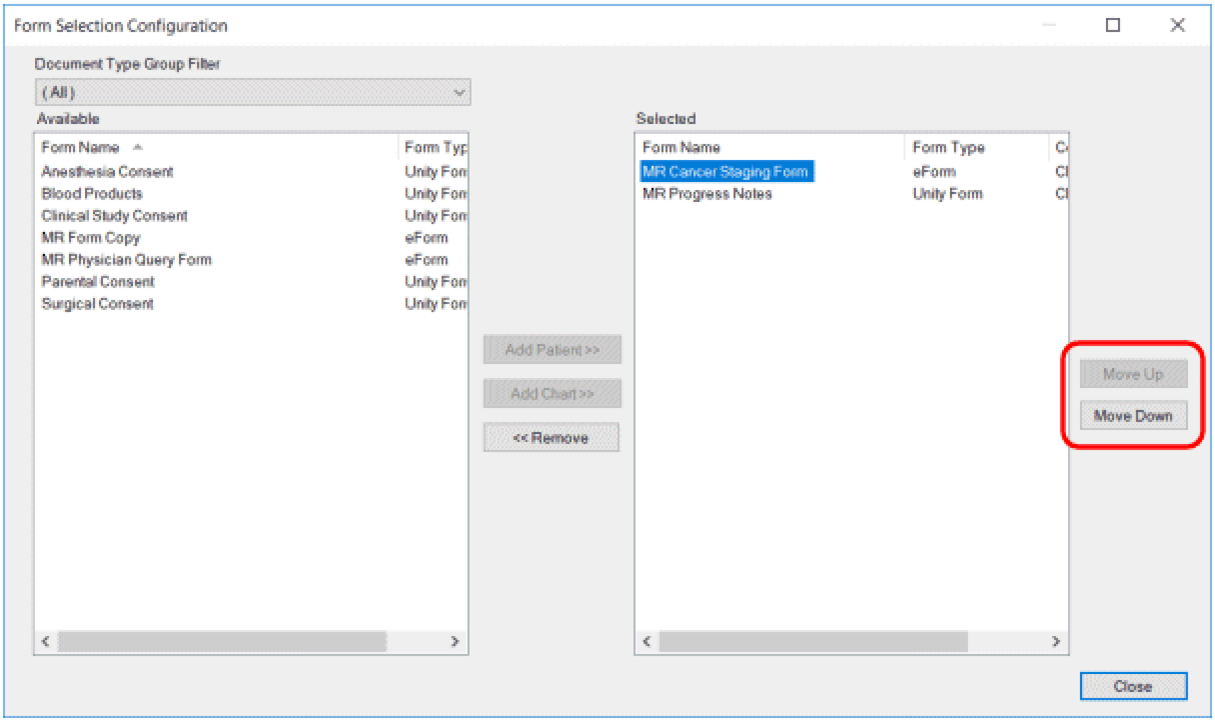
2. To filter the forms available in the left pane, select a Document Type Group from the **Document Type Group Filter** drop-down list.
3. From the left pane, select one or more forms.
   - For Unity Forms, the name of the Unity Form template is displayed.
   - For E-Forms, the name of the Document Type is displayed.

4. Click one of the following:
   - **Add Patient**—Click if the selected forms should be attached to the patient's record, but not to a specific chart.
   - **Add Chart**—Click if the selected forms should be attached to a specific chart in the patient's record.

   Ensure the associated Document Types are assigned the Keyword Types necessary for attaching the forms to charts or patients. For more information, see Requirements for Form Creation on page 184.



5. Use the **Move Up** and **Move Down** buttons to change the order in which forms are listed in the **Create Form** dialog box in OnBase Patient Window.



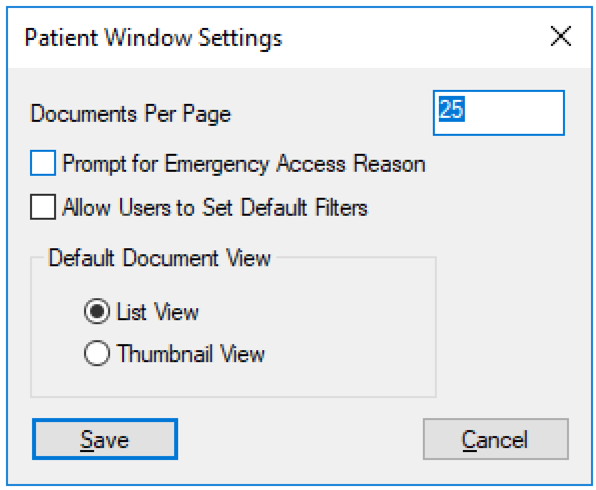
6. Click **Close** when you are finished designating forms.

Patient Window Settings

Patient Window settings include paging sizes for lists, emergency access settings, default filter availability, and the default view for the documents pane.

To configure Patient Window settings:

1. Select **Medical | User Interface Settings | Patient Window | Settings**. The **Patient Window Settings** dialog box is displayed.



2. Configure the settings described in the following sections.
   - Documents Per Page on page 189
   - Prompt for Emergency Access Reason on page 190
   - Allow Users to Set Default Filters on page 191
   - Default Document View on page 191
3. Click **Save**.

Documents Per Page

In the **Documents Per Page** field, enter the number of items the OnBase Patient Window should allow in lists before splitting the list into multiple pages of results. This limit applies both to document lists and to search results lists.

For example, if you set **Documents Per Page** to **20** and a tab contains 45 documents, then the document list spans three pages of results: 20 documents on each of the first two pages and 5 documents on the third page.

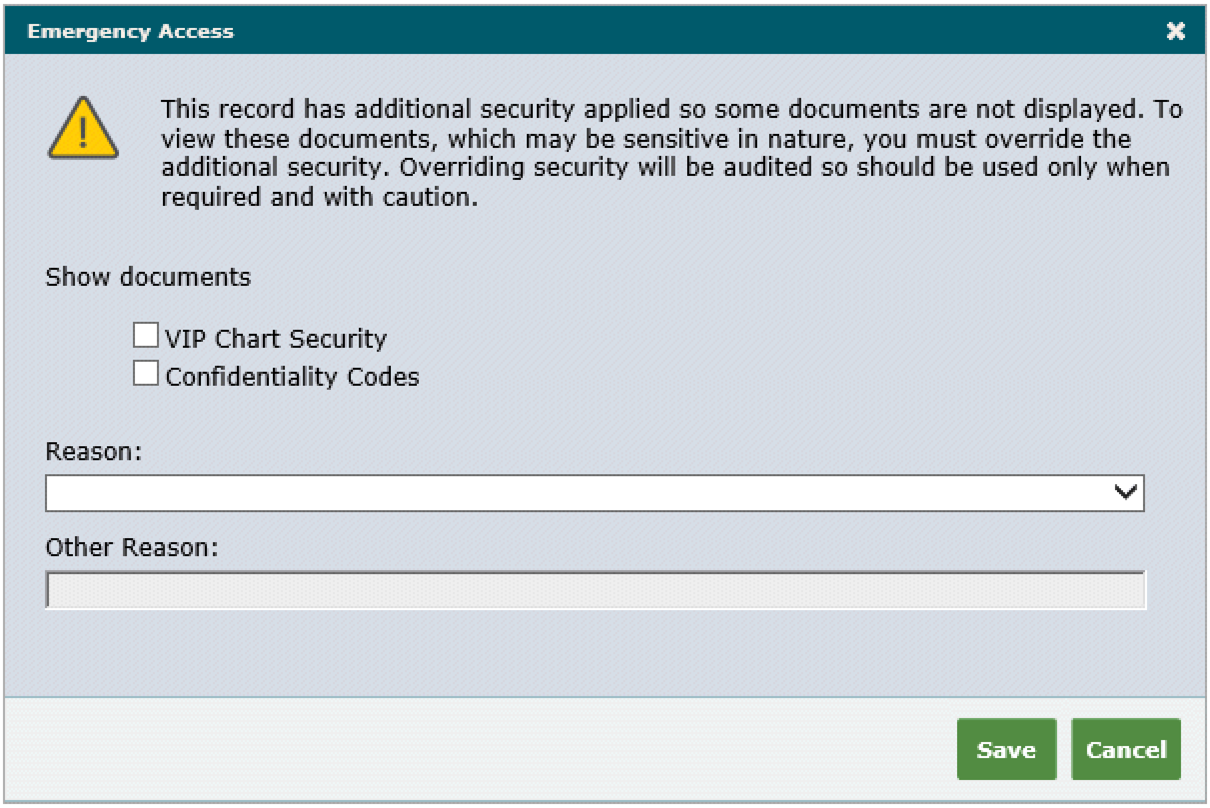
Note: To achieve optimal performance, it is recommended to avoid setting the **Documents Per Page** higher than necessary for user acceptance. Try to limit this setting to **100** or lower.

The default value is **25**.

Prompt for Emergency Access Reason

The **Prompt for Emergency Access Reason** setting applies only to the OnBase Patient Window. This setting improves auditing by requiring users to specify the reason they are requesting emergency access to documents.

- Select this setting if users who request emergency access to documents should be prompted to specify an access reason. The user must first select an access reason before the OnBase Patient Window displays the restricted documents.



- If this setting is not selected, the **Reason** field will be unavailable in the OnBase Patient Window's **Emergency Access** dialog box.

To configure access reasons, see Configuring Access Reasons on page 144.

Allow Users to Set Default Filters

In the OnBase Patient Window, users can create filters to display smaller subsets of documents from a patient's record. Depending on the **Allow Users to Set Default Filters** setting, each user may be able to designate a filter to be applied by default to each record the user views.

- If **Allow Users to Set Default Filters** is selected, then each user can designate a default filter in the OnBase Patient Window. If a user opens a record using a URL that contains additional filter parameters, some of the parameters may be overridden by the user's default filter. See User-Configured Default Filters on page 53 for more information.
- If **Allow Users to Set Default Filters** is not selected, then users cannot designate a default filter. You may want to clear this setting to ensure the OnBase Patient Window uses the parameters passed in the URL query string.

Default Document View

The **Default Document View** setting specifies the default view (thumbnail vs. list) for the documents pane in the OnBase Patient Window. The Patient Window allows users to override this setting by choosing a different view for each tab. Each user's preference (thumbnail vs. list) is preserved on a per-tab basis.

Select one of the following:

Option	Description
List View	The documents pane displays documents in a list. The list displays information about each document in sortable columns. This is the default setting.
Thumbnail View	The documents pane displays each document as a thumbnail. The Document Type and clinically relevant date (if applicable) are displayed under each thumbnail.

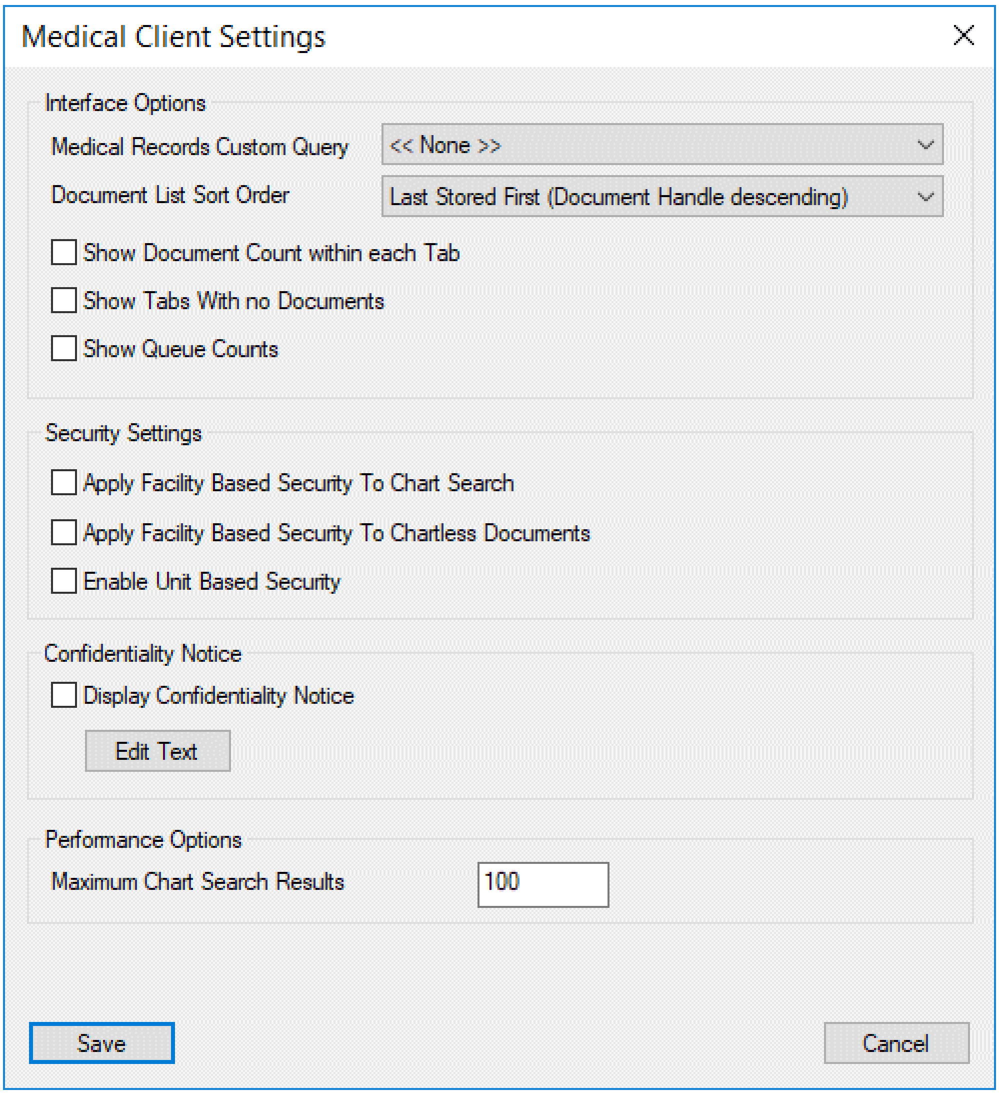
Medical Client Settings

Medical client settings affect client-side behavior in multiple medical clients. For example, some settings affect the display of tabs in the Medical Records Unity Client and the OnBase Patient Window.

Not all settings apply to the OnBase Patient Window. Applicable settings are described in the following sections.

To modify medical client settings:

1. In OnBase Configuration, select **Medical | User Interface Settings | Client Settings**. The **Medical Client Settings** dialog box is displayed.



2. Configure the settings as needed. Settings that affect the OnBase Patient Window are described in the following sections.
3. Click **Save**.

Medical Records Custom Query

This setting specifies the custom query designed to dynamically pull non-medical record documents into the Patient Custom Query tab. This optional parameter allows the Patient Custom Query tab (if configured) to display non-medical record documents.

From the **Medical Records Custom Query** drop-down list, select the custom query you created for retrieving non-medical record documents.

For additional custom query information, see Medical Records Custom Query Configuration on page 118.

Document List Sort Order

The **Document List Sort Order** setting affects only the Medical Records Unity Client. See the **Medical Records Unity Client** documentation for more information.

Show Document Count Within Each Tab

Select **Show Document Count within each Tab** if tabs should display the number of documents they contain.

Note: This option is turned off by default. Turning this option on may have a negative impact on system performance, depending on the number of tabs and the number of documents in each tab.

Show Tabs With No Documents

The **Show Tabs With no Documents** option controls whether empty tabs are displayed.

- If this option is selected, tabs containing zero documents are displayed.
- If this option is not selected, tabs containing zero documents are hidden. Hiding tabs with no documents can help save users time spent checking each tab for documents, especially if the **Show Document Count within each Tab** option is not selected. However, some users may be confused to see tabs available for some patients and not for others.

Note: For visibility, the OnBase Patient Window always displays any case tabs the user can view, even if the cases are empty. The OnBase Patient Window also always displays the New tab, which provides access to documents added since the last time the user logged on and viewed the record using the Patient Window.

Show Queue Counts

The **Show Queue Counts** setting affects only the Medical Records Unity Client. See the **Medical Records Unity Client** documentation for more information.

Apply Facility Based Security to Chart Search

The **Apply Facility Based Security to Chart Search** setting affects only the Medical Records Unity Client. See the **Medical Records Unity Client** documentation for more information.

Apply Facility Based Security to Chartless Documents

The **Apply Facility Based Security to Chartless Documents** setting affects only the Medical Records Unity Client. See the **Medical Records Unity Client** documentation for more information.

Enable Unit Based Security

The **Enable Unity Based Security** setting affects only the Medical Records Unity Client. See the **Medical Records Unity Client** documentation for more information.

Display Confidentiality Notice

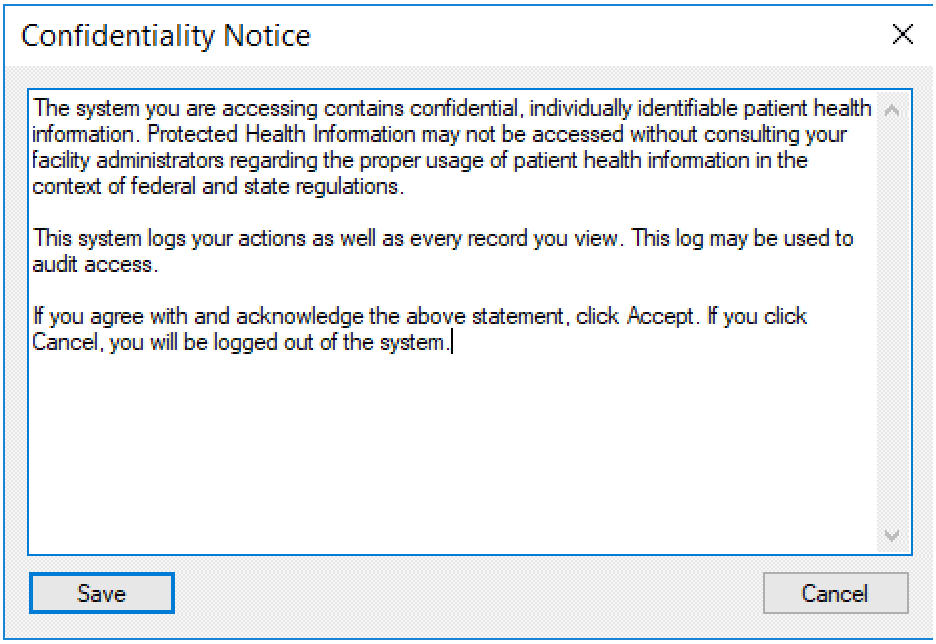
The **Display Confidentiality Notice** setting controls whether a confidentiality notice is displayed when users log in to the Medical Records Unity Client, DeficiencyPop, or the OnBase Patient Window. Users must click **Accept** to continue logging on. Otherwise, they are denied access.

Note: This notice is not displayed when users access charts using the OnBase Client.

To enable a confidentiality notice:

1. Select **Display Confidentiality Notice** to require users to accept a confidentiality notice each time they log on to the Medical Records Unity Client, DeficiencyPop, or the OnBase Patient Window.
2. Click the **Edit Text** button.

3. Type the confidentiality notice in the field provided.



4. Click **Save**.

Maximum Chart Search Results

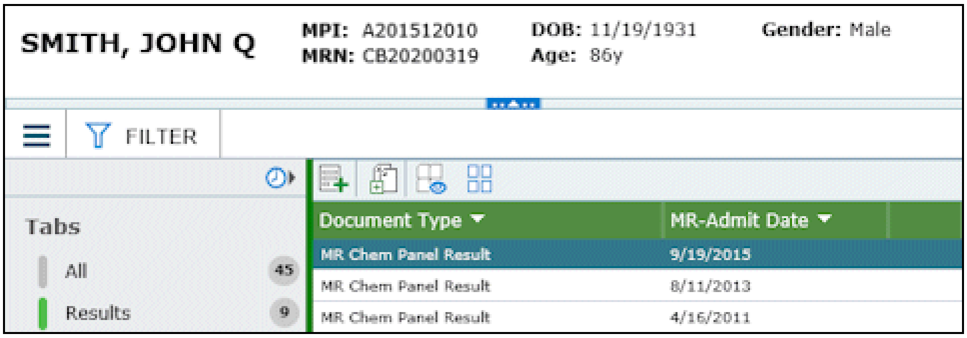
In the **Maximum Chart Search Results** field, enter the maximum number of results you want to display for searches. This setting helps preserve database performance by limiting the number of results returned. The default value is **100** results.

For example, if this setting is **10**, then only the first 10 results that match the search criteria are retrieved. A message notifies the user that a limited number of results are displayed. The message instructs the user to narrow the search criteria for more refined results.

Note: This setting does not limit results returned by system lists in the OnBase Patient Window.

Banner Configuration

To help users identify patient records, the OnBase Patient Window can display a banner across the top of the screen. For example, the banner may include the patient's name, MPI, MRN, sex, and date of birth.



Caution: If you create or customize a banner for your system, be sure to have the banner configuration validated by your solution provider. This validation is strongly recommended to ensure the new banner is properly set up to display accurate information from your system.

To create a banner, see the following topics:

- Creating Banner Templates on page 196
- Importing a Banner Template into OnBase on page 202
- Configuring Banner Settings on page 202
- Setting the Default Banner on page 205
- Deleting a Banner's Configuration on page 206

Creating Banner Templates

Banner templates are HTML pages that use special tags to retrieve patient data. See the following topics:

- Dimensions on page 196
- Expand Functions on page 197
- Data Tags on page 197

Dimensions

Be sure to account for the height of the banner display area. The display area has a default height that can be increased using the **extendBanner()** function.

- The default height is 60px.
- The expanded height is 160px. To design an expandable banner, see Expand Functions on page 197.

Expand Functions

In some countries, user interface guidelines require banners to display additional data in a zone that can be expanded and collapsed as needed. To satisfy this requirement, configure the banner template to use the following functions:

Function	Description
extendBanner()	This function extends the height of the banner area by 100 pixels, allowing for additional information to be displayed.
shrinkBanner()	This function reduces the height of the banner area back to its original 60 pixels.
isBannerExtended()	This function should be used to make sure the banner automatically expands the zone containing additional data if the user had the zone expanded when viewing the previous patient. On document ready, the banner can invoke this function to determine whether the banner was expanded for the last patient the user viewed during the current session.

For example, you might use these functions configure a button that toggles the display of more information when clicked. For information about executing scripts and functions on HTML pages, consult an HTML reference guide.

Data Tags

Data tags allow the banner to display patient data when the OnBase Patient Window loads the patient's record.

For information about available tags, see the following topics:

- Tag Format on page 198
- Patient Identification on page 198
- Patient Age on page 198
- Patient Race on page 199
- Patient Death Indicator on page 200
- Patient Allergy Information on page 201
- Patient Medical Alerts on page 201
- Patient Address and Contact Information on page 201

After creating the banner template, import the template into OnBase as described under Importing a Banner Template into OnBase on page 202.

Tip: The following information describes only the tags for displaying medical data retrieved from OnBase. For help designing HTML pages, consult an HTML reference guide.

Tag Format

When adding tags to a banner, make sure they are formatted correctly. Tags are enclosed in two sets of braces, as shown in the following example:

```
{{tag}}
```

For example, to display a patient's name, a template may use the following format:

```
{{lastname}}, {{firstname}} {{middlename}}
```

For labeled information, a template may contain the label tag followed by its corresponding value tag:

```
{{mrn_label}}: {{mrn}}
```

If a value tag does not have a corresponding label, the template can display a static label as shown in the following example:

```
Mobile: {{cellphone}}
```

Patient Identification

The following tags can display patient identification information in the banner. Use the **Label Tag** to display the name of the associated chart data field. Use the **Value Tag** to display the value stored for that chart data field.

Patient Data	Label Tag	Value Tag
Patient Date of Birth	{{dateofbirth_label}}	{{dateofbirth}}
Patient First Name	{{firstname_label}}	{{firstname}}
Patient Last Name	{{lastname_label}}	{{lastname}}
Patient Middle Name	{{middlename_label}}	{{middlename}}
Patient MPI	{{mpi_label}}	{{mpi}}
Patient MRN[a]	{{mrn_label}}	{{mrn}}
Patient Sex	{{gender_label}}	{{gender}}
Patient SSN	{{ssn_label}}	{{ssn}}

a. If a patient's record is retrieved by MPI, then each MRN currently associated with the MPI will be displayed. If the MRN is associated with an assigning authority in OnBase, then the assigning authority is displayed in brackets next to the MRN.

Patient Age

To display the patient's age, use the following tag:

```
{{age}}
```

Age is calculated differently depending on whether a patient is living or deceased:

Patient Status	Basis for Age
Living	The **{{age}}** tag displays the patient's current age based on today's date and the patient's date of birth.
Deceased	The **{{age}}** tag displays the patient's age at the time of death, based on the patient's deceased date and date of birth. If the deceased date is unknown, but the patient is marked as deceased via the patient death indicator, then the **{{age}}** tag displays a value of **Unknown**.

Ages are displayed in different formats depending on the age range of the patient. The following table describes the expected format based on age range.

Patient Age	Age Format
< 2 hours	Age is displayed in minutes.
< 2 days	Age is displayed in hours.
< 4 weeks	Age is displayed in days.
< 1 year	Age is displayed in weeks and days.
< 2 years	Age is displayed in months and days. Months are measured in units of 31 days, not calendar months.
< 18 years	Age is displayed in years and months. Months are measured in units of 31 days, not calendar months.
18+ years	Age is displayed in years.

Patient Race

To display a patient's race, use the following tag:

```
{{race}}
```

A patient's race can be recorded using the OnBase HL7 module. To configure the HL7 module to record a patient's race, do the following:

1. Assign the **Patient Race Code** chart data field to the appropriate HL7 field.
2. Configure one of the following HL7 message actions to process messages containing patient race information:
    - Medical Records Chart
    - Patient Record Processor

3. Ensure messages provide the race information in the HL7 field you mapped to the **Patient Race Code** chart data field. Values should be provided in one of the following formats:

```
Race Code^Race Description^HL7 Root
```

```
Race Code^Race Description
```

For example, if the import processor encounters this value for the patient race field, the patient's race will be displayed in the banner as **ASIAN**.

```
2028-9^ASIAN^2.16.840.1.113883
```

For more information about HL7 configuration, see the **HL7** module reference guide or help files.

Patient Death Indicator

To display the word **Deceased** for patients designated as deceased, use the following tag:

```
{{deathindicator}}
```

The death indicator is displayed in the banner only if a patient has been marked as deceased by the OnBase HL7 module. The indicator is not displayed if the patient has not been marked as deceased.

To configure the HL7 module to mark patients as deceased:

1. Assign the **Patient Death Indicator** chart data field to an HL7 field.

Note: Ensure this HL7 field provides a value only when a patient is deceased. Any non-null value in this HL7 field will indicate the specified patient is deceased.

2. Configure one of the following HL7 message actions to process messages containing the patient death indicator. These message actions mark a patient as deceased when a message provides a non-null value for the death indicator.
   - Medical Records Chart
   - Patient Record Processor

   For more configuration information, see the **HL7** module reference guide.

Patient Allergy Information

Use allergy tags to display allergy information for a patient. The following allergy tags are available:

Allergy Tag	Description
{{allergies}}	Displays a comma-delimited list of the patient's allergies. Users can click any allergy in the list to open the **Allergies** dialog box and view the patient's allergy information. If no allergies are recorded, the phrase **No Allergies Listed** is displayed.
{{allergiesanddate}}	Displays each recorded allergy followed by its date recognized. Each allergy is displayed on a new line. If no allergies are recorded, the phrase **Allergies not recorded** is displayed.
{{allergieslink}}	Displays the **View All** link, which users can click to open the **Allergies** dialog box and view the patient's allergy information. If no allergies are recorded, no value is displayed for this tag.
{{allergystatus}}	Displays the phrase **Known Allergies** if the patient has any allergies recorded in OnBase. If no allergies are recorded, the phrase **Allergies not recorded** is displayed.

Patient Medical Alerts

To display medical alerts recorded for the patient, use the following tag:

```
{{medicalalerts}}
```

This tag displays a comma-delimited list of the patient's medical alerts. Users can click any alert in the list to open the **Medical Alerts** dialog box and view all alerts for the patient. If no alerts are recorded, the phrase **No Medical Alerts Listed** is displayed.

Patient Address and Contact Information

The following tags can display active contact information for a patient. Use the **Label Tag** (where applicable) to display the name of the associated chart data field. Use the **Value Tag** to display the value stored for that data field.

Patient Data	Label Tag	Value Tag
Address Type	N/A	{{addresstype_label}}
Country Code	N/A	{{country}}
Patient Address 1	N/A	{{address1}}
Patient City	N/A	{{city}}
Patient Email	{{email_label}}	{{email}}

Patient Data	Label Tag	Value Tag
Patient Home Phone	{{homephone_label}}	{{homephone}}
Patient Mobile Phone	{{cellphone_label}}	{{cellphone}}
Patient State	N/A	{{state}}
Patient Work Phone	{{workphone_label}}	{{workphone}}
Patient Zip Code	N/A	{{zip}}

Only active information is displayed in the banner. If a patient has no active information for a data type, the banner indicates the information is **Not Recorded**.

A patient can have multiple active addresses, phone numbers, or email addresses. In this case, the associated tag displays only the first active value found in the database. Use the following tags to allow users to view all active addresses, phone numbers, or email addresses on record.

Contact Tag	Description
{{addresseslink}}	Displays the **View All** link, which users can click to open the **Addresses** dialog box and view all active addresses recorded for the patient. If no active addresses are recorded, no value is displayed for this tag.
{{contactinfolink}}	Displays the **View All** link, which users can click to open the **Contact Info** dialog box and view all active phone numbers and email addresses recorded for the patient. If no active phone numbers or email addresses are recorded, no value is displayed for this tag.

Importing a Banner Template into OnBase

Once configured, the banner template must be stored within a Document Type in OnBase.

1. Configure a Document Type to store banner templates for your system. For information about Document Type configuration, see the **System Administration** module reference guide.
2. Import the banner template you configured into the new Document Type.

Configuring Banner Settings

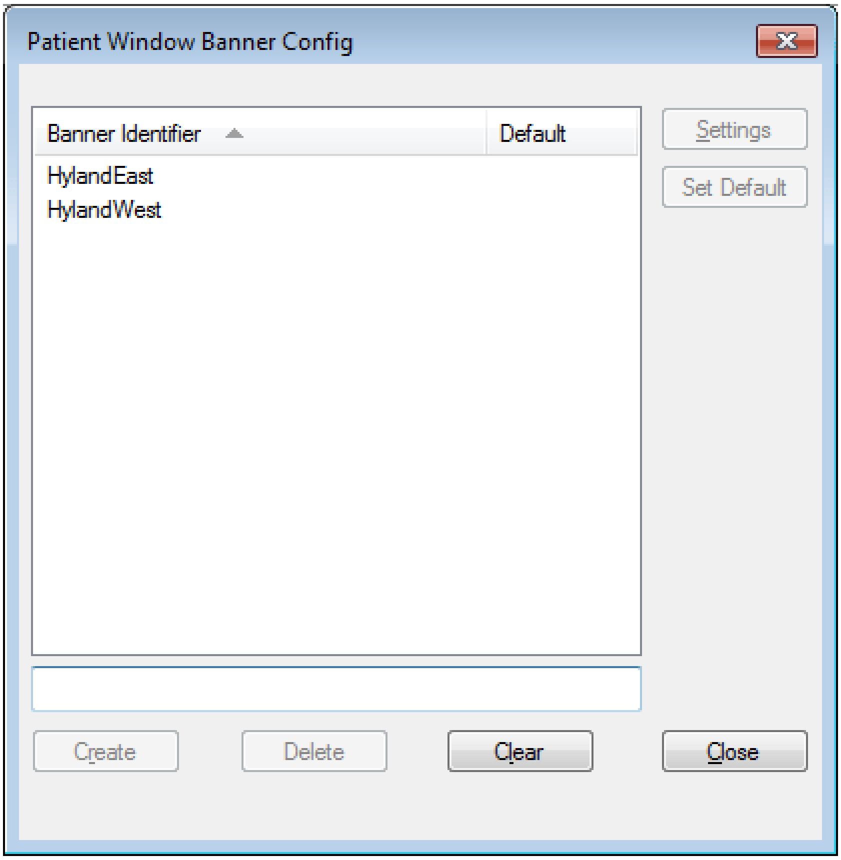
Note: Because banners typically are set up at the time of installation, banner configuration is available only when OnBase Configuration runs with the -MRMSINSTALL command line switch. Make sure this switch is applied before attempting to access banner settings in OnBase Configuration.

After importing a banner template into OnBase, you must configure the banner's settings in OnBase Configuration.

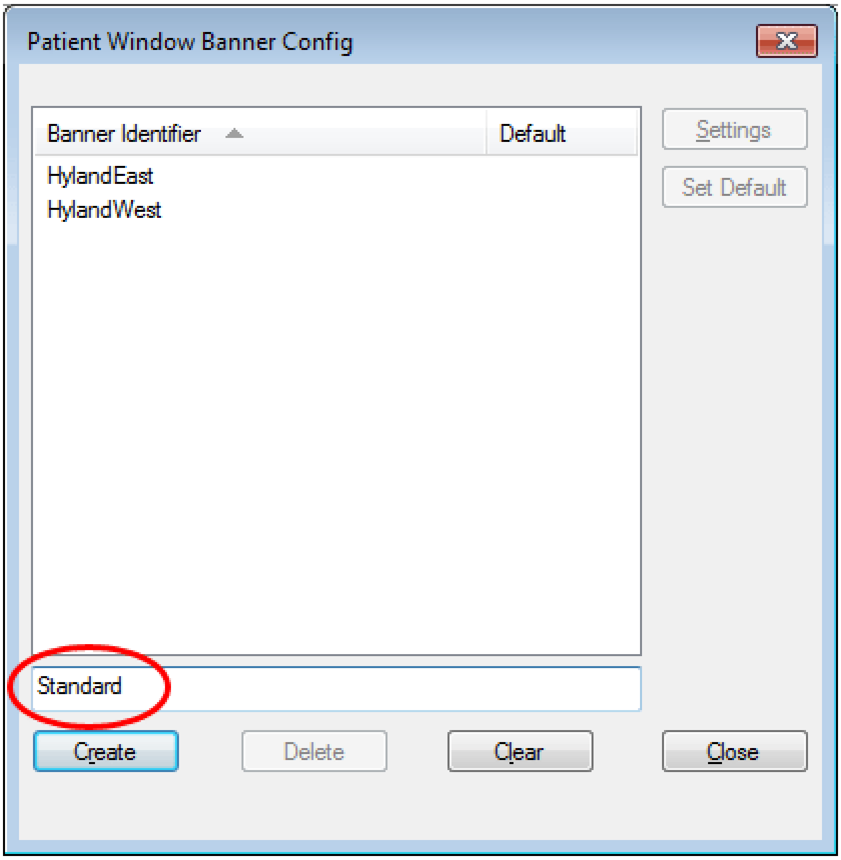
To configure the banner's settings:

1. Select **Medical | User Interface Settings | Patient Window | Banner Configuration**. If this option is unavailable, make sure Configuration is running with the -MRMSINSTALL command line switch.

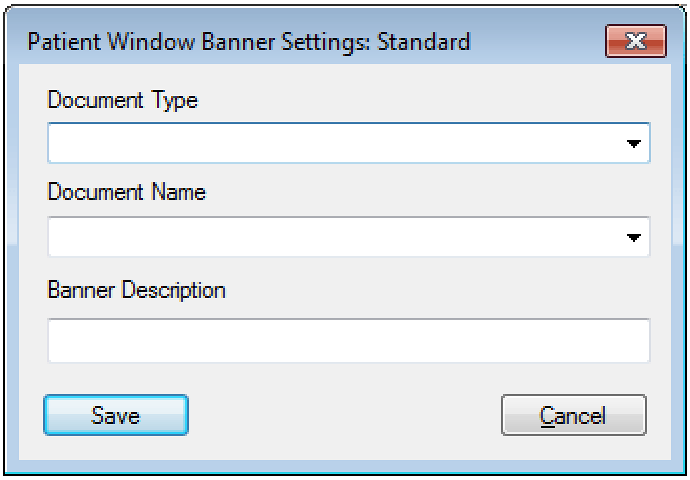
   The **Patient Window Banner Config** dialog box is displayed.



2. Type an identifier for the banner in the field provided.



3. Click **Create**. The **Patient Window Banner Settings** dialog box is displayed.



4. Provide the requested information as described in the following table:

Field	Description
Document Type	Select the OnBase Document Type where you imported the banner template.
Document Name	Select the banner template you imported.
Banner Description	Type a description for this banner. The description is displayed only within the **Patient Window Banner Settings** dialog box for administrative reference.

5. Click **Save**.
6. Repeat these steps as needed for additional banners.
7. Click **Close** when finished.

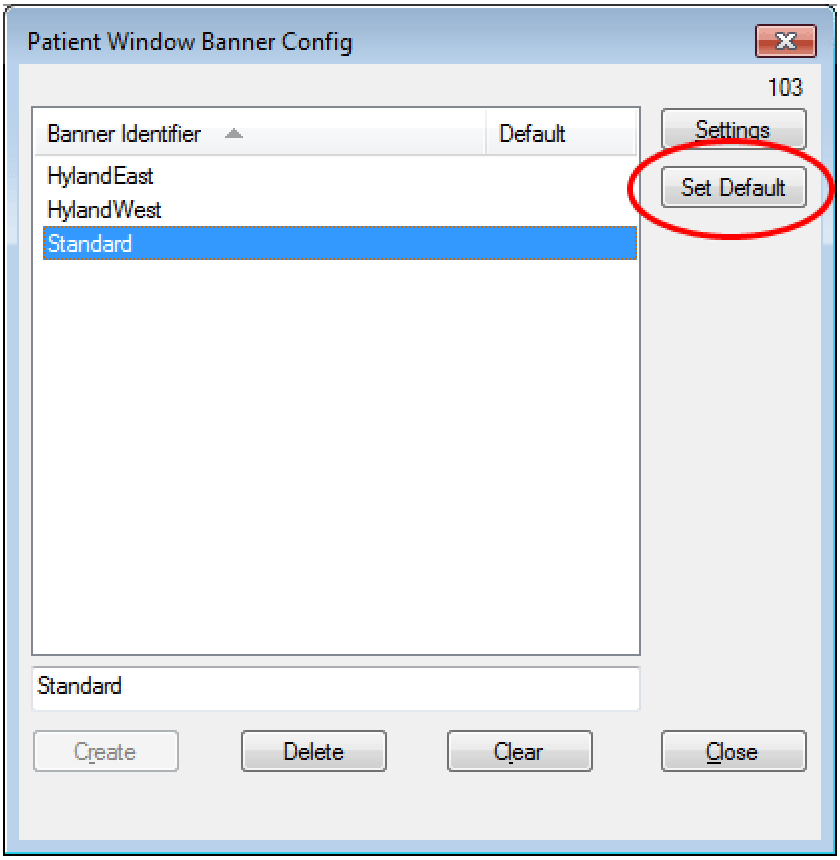
Setting the Default Banner

The default banner is the banner displayed when the query string does not contain any banner parameters. You can use a different banner as needed by including the **bannertype** parameter in the query string.

Note: If banners are configured in your system but no default banner is specified, then query strings must either specify the appropriate **bannertype**, or they must contain the **banner=false** parameter to hide the banner portion of the screen.

1. In OnBase Configuration, select **Medical | User Interface Settings | Patient Window | Banner Configuration**.
2. Select the banner you want to set as the default.

3. Click **Set Default**.



An **X** is displayed in the **Default** column indicating the system's default banner.

4. Click **Close** when finished.

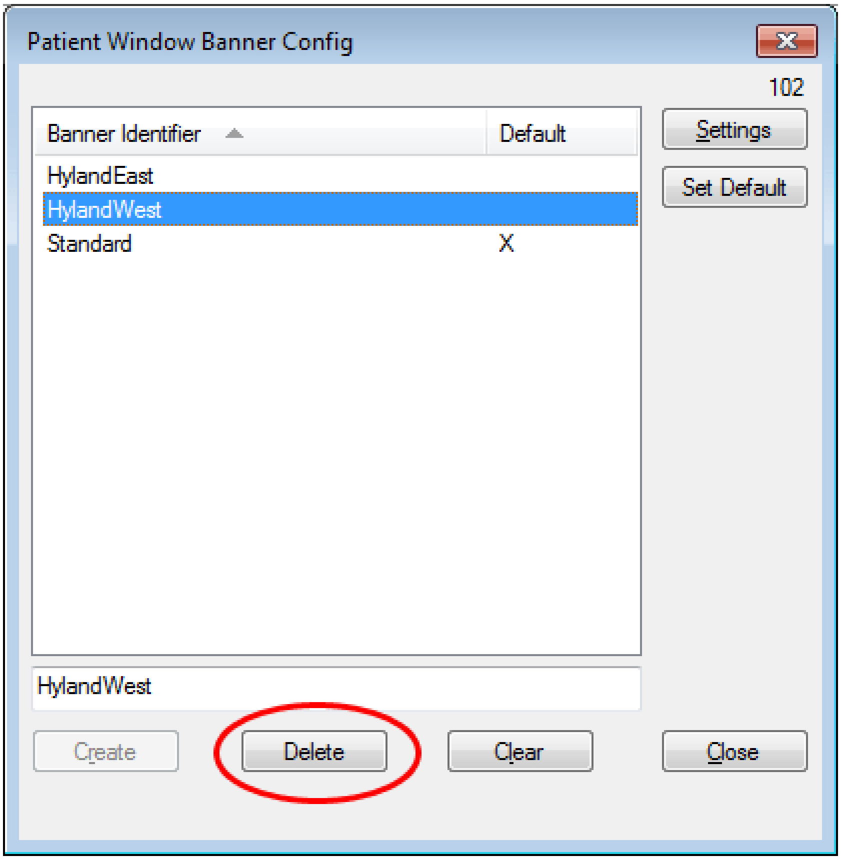
Deleting a Banner's Configuration

If a banner is not needed, you can delete its configuration as described in the following steps. These steps do not remove the banner template from OnBase. The template remains accessible from the Document Type where it is stored.

To delete a banner's configuration:

1. In OnBase Configuration, select **Medical** | **User Interface Settings** | **Patient Window** | **Banner Configuration**.
2. Select the banner you want to delete.

3. Click **Delete**.



4. Click **Yes** to confirm the deletion when prompted.
5. Click **Close** when finished.

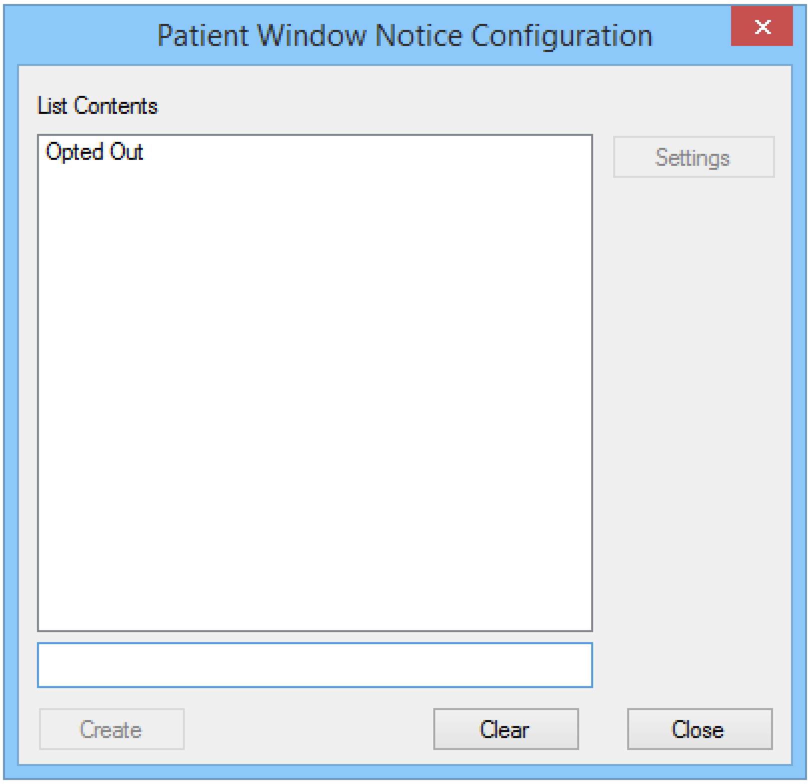
Notice Configuration

Notices provide a way of displaying special considerations for a patient on a facility-by-facility basis. For example, the OnBase Patient Window may display a notice for patients who have opted out of allowing their records to be viewed within a specific facility.

Once notices are configured, users with the **Administration** medical records privilege can assign them to specific patients using Patient Search or Scheduled Patient Search.

When a user views a patient's assigned notices, the **View Notices** dialog box displays each notice's name, description, and the facility for which the notice was applied.

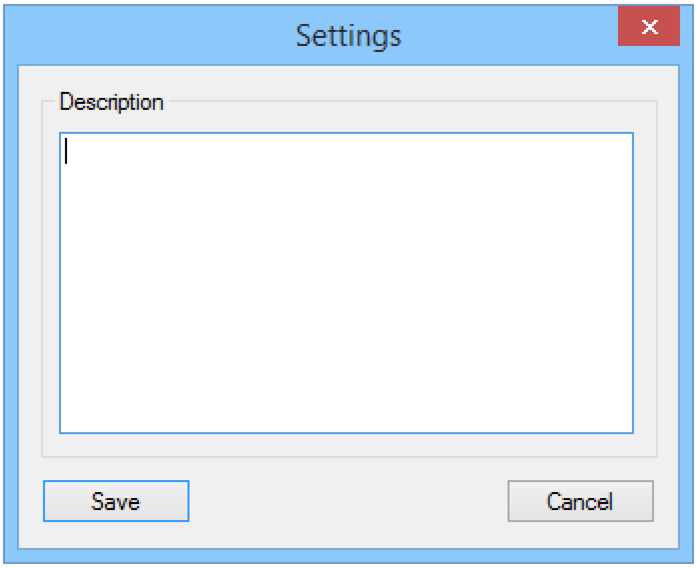
1. In OnBase Configuration, select **Medical | Patient Window Security | Notices**. The **Patient Window Notice Configuration** dialog box is displayed.



2. In the field provided, type a name for the notice.

   This is the value displayed when an administrator assigns notices to a patient. It also is displayed to users who view the notice in the **Patient Notices** dialog box.

3. Click **Create**. The **Settings** dialog box is displayed.



4. In the field provided, type a description for the notice.
   This value is displayed to users who view the notice in the **Patient Notices** dialog box.
5. Click **Save**.

Document Corrections

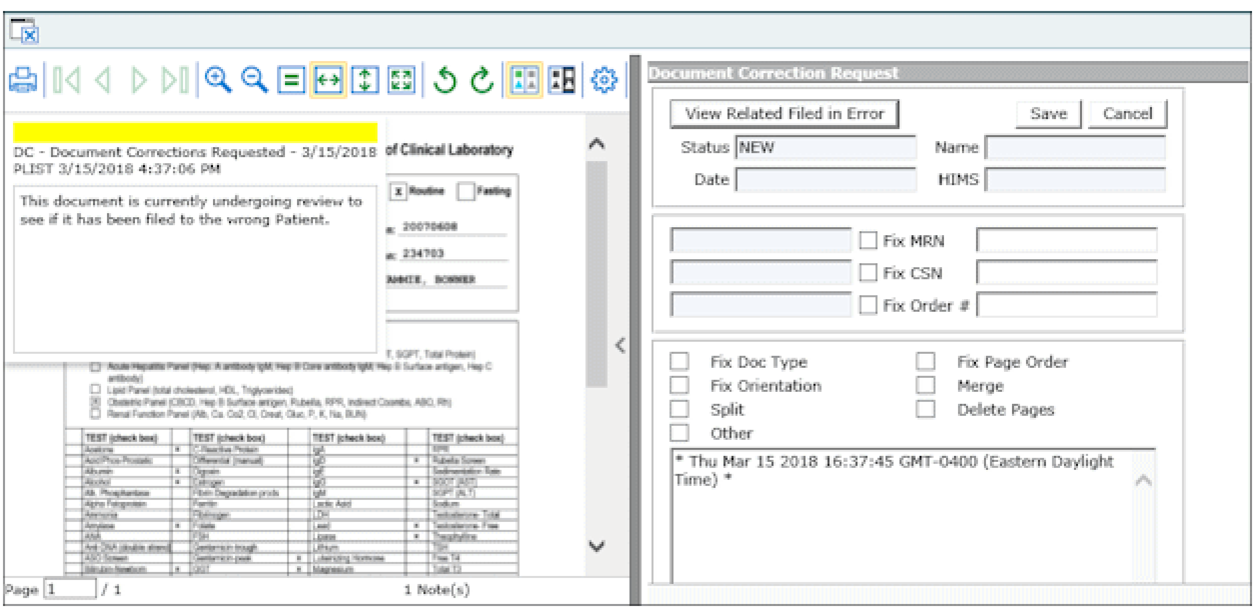
Document corrections allow users to send documents to OnBase Workflow using the OnBase Patient Window. This feature provides centralized administration for document corrections, and it can help ensure OnBase remains synchronized with third-party EHR systems.

Designing a Correction Process

The following are a few examples of document correction processes. You can model your process off one or more of these examples, or you can design your own approach.

- When users submit a document for correction, display a form requesting additional information about the necessary changes. OnBase Workflow can use the values to route both the form and the submitted document to the appropriate queue.
- When users submit a document for correction, prompt them with a note requesting an explanation for the submission. The note also can serve to notify other users that the document has been submitted for correction.
- Create multiple correction actions, each one dedicated to a specific type of correction (for example, correcting the MRN, or reordering pages). Map each action to a Workflow life cycle dedicated to that type of correction.

In the following example, the OnBase Patient Window presents the user with a form requesting the correction reason. A note has been automatically created by Workflow to indicate the document has been submitted.



Continue to the following topics for more information:

- Configuring Document Types for Correction Forms on page 211
- Configuring HL7 for Corrections on page 212
- Configuring Life Cycles for Corrections on page 213

- Creating the Healthcare Document Correction Action on page 213

Configuring Document Types for Correction Forms

When a user submits a document for correction, the OnBase Patient Window can automatically display an E-Form or Unity Form to prompt the user for more information. If your solution will be driven using an E-Form or Unity Form, make sure the form template and Document Type are properly configured.

- Form Template Configuration on page 211
- Document Type Settings on page 212

Note: Unity Forms cannot be displayed in the OnBase Client. If users will address correction requests using Workflow in the OnBase Client, then you must use an E-Form for the correction request.

Form Template Configuration

Use the following guidelines to configure the correction request form template:

1. For E-Forms, use the **OBBtn_SaveAndClose** button to allow users to submit the form and automatically exit corrections mode. Label this button **Save and Close** to make it clear to users that the form must be complete before it is submitted.

   Do not use the **OBBtn_Save** button for submitting correction E-Forms.
2. Be sure the form template asks users to specify the reason for submitting the document. For example, the template may provide check boxes for indicating the following issues:
   - Incorrect patient
   - Incorrect encounter
   - Incorrect order number
   - Pages out of order

   The template may also include a **Comments** field to capture additional information.
3. To configure and store the form template, see the E-Forms or Unity Forms documentation for detailed information.

Note: Do not use Unity Forms if users will address correction requests using the OnBase Client. The OnBase Client cannot display Unity Forms. Unity Forms can be displayed in the Unity Client and Web Client.

Document Type Settings

The following table outlines the required configuration settings for the correction request form's Document Type. For more information about Document Type configuration, see the **System Administration** module reference guide.

Document Type Configuration	Description
Document Type Group	The request form must not belong to a medical record Document Type Group. In Document Type Group configuration, ensure **Contains Medical Record Document Types** is not selected.
Settings	For E-Forms, set the **Default File Format** to **Electronic Form**. For Unity Forms, set the **Default File Format** to **Unity Form**.
Keyword Types	Ensure the **Document Handle** Keyword Type is assigned. OnBase Workflow can use this Keyword Type to link the request form to the submitted document. The **Document Handle** Keyword Type must also be assigned to the Document Types of documents that may be submitted for corrections. **Note:** Ensure the **Document Handle** Keyword Type (#19) is named **Document Handle**. If this Keyword Type has a different name, the document corrections process will not work.
User Group	Users who need to create and submit forms must have **Create** and **Modify** privileges. Users do not need explicit privileges to the form Document Type. Document Type privileges are required for users who need to access the forms through standard document retrieval in one of the OnBase clients.
E-Form	For E-Forms only, select the form template you imported into the **SYS HTML Forms** Document Type. Do not configure this setting for Unity Forms.

Configuring HL7 for Corrections

OnBase can send HL7 messages to notify third-party electronic medical record (EMR) systems when a document is created, updated, or deleted. Make sure Workflow and the OnBase HL7 Module are configured to generate and send these messages to the appropriate export destinations for your third-party systems.

Note: Different systems may require different values to be present in document notification HL7 messages. Work with your EMR administration team to determine which message types, document values, and properties must be sent.

Configuring Life Cycles for Corrections

To use the document correction process, you must configure at least one Workflow life cycle to receive and route submitted documents.

Correction actions send documents to the initial queue of the target life cycle. If additional routing is needed, configure system work for the initial queue to route documents to other queues.

For detailed information about configuring OnBase Workflow, see the **Workflow** module reference guide.

If you are using a form to submit correction requests, also do the following:

1. Configure the initial queue of the life cycle to create the correction request form.
    - For E-Forms, use the **Create New Form** action type.
    - For Unity Forms, use the **Create Unity Form** action type.

Note: Do not use Unity Forms if users will access this life cycle using the OnBase Client; the OnBase Client cannot display Unity Forms. Unity Forms can be displayed in the Unity Client and Web Client.

2. Enable the **Fill Document Handle Keyword(s)** option for the action that will create the correction form.

    For this setting to work, the **Document Handle** Keyword Type must be assigned to the Document Types of both the document submitted for correction and the correction request form.
3. Create a work folder to display the related document based on the **Document Handle** Keyword Type.

    Depending on the design of your solution, the related document may be either the document submitted for correction or the correction request form.

Creating the Healthcare Document Correction Action

To allow users to submit documents for correction, you must configure a correction action to send documents to the appropriate Workflow life cycle. Healthcare document correction actions can be accessed through the following modules:

- The OnBase Patient Window
- The OnBase Integration for Epic Viewer
- The Signature Deficiencies for Epic Analysis window
- The OnBase Web Server (using DocPop Document Correction)

Note: The ability to display a form for additional input is not available in DocPop Document Correction.

Before you begin, configure the necessary life cycles and queues in OnBase Studio.

Note: Users do not need privileges to an action's life cycle or queue to be able to execute the action; users only need privileges to the action, as described later in this topic. Similarly, actions can send documents from any Document Type to a life cycle; Document Types do not have to be assigned to the life cycle.

Continue to the following topics:

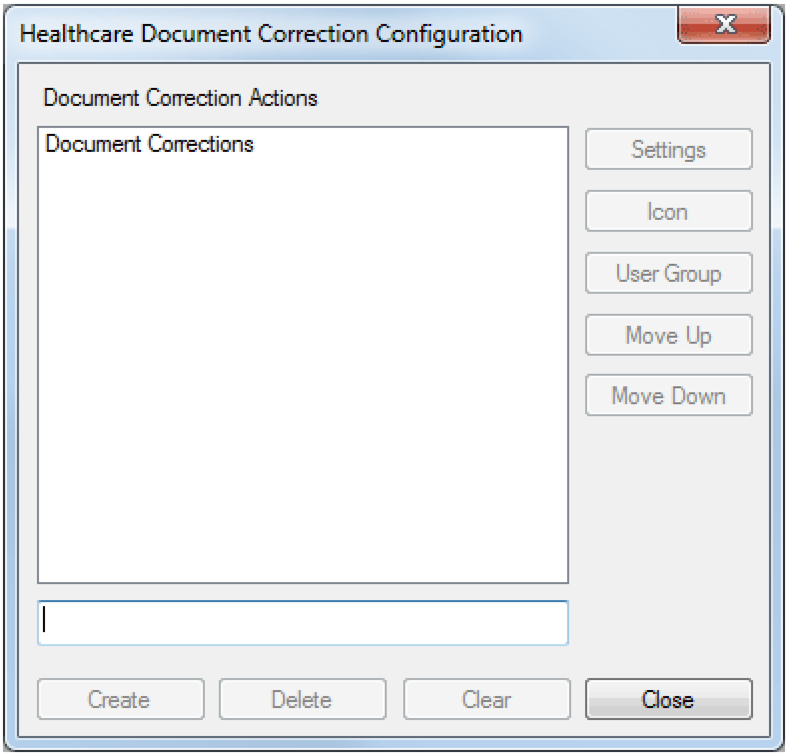
- Creating an Action on page 214
- Assigning an Icon on page 215
- Assigning User Group Privileges on page 217
- Re-ordering Actions on page 217

Creating an Action

Complete the following steps to create the document correction action. If the action should present users with an E-Form or Unity Form, do the following:

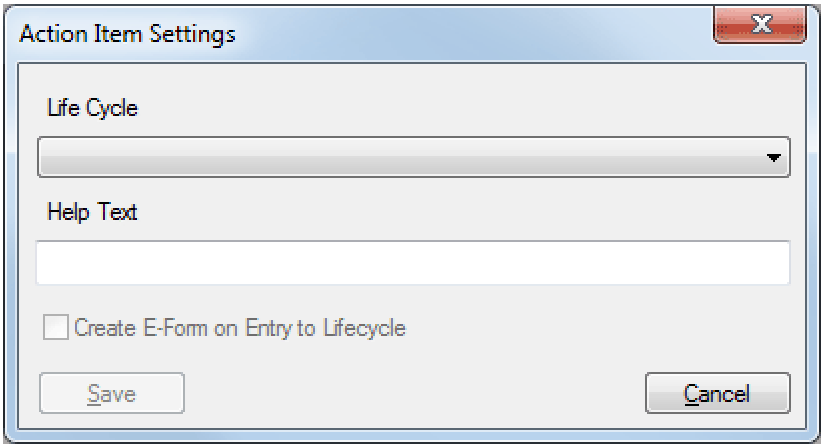
- Make sure the action is assigned to the life cycle that creates the request form.
- Make sure **Create E-Form on Entry to Lifecycle** is selected in the action's settings.

1. In OnBase Configuration, select **Medical | Healthcare Document Correction**. The **Healthcare Document Correction Configuration** dialog box is displayed.



2. In the field provided, type the name for an action.

3. Click **Create** to add the action to the list.
4. Click **Settings**. The **Action Item Settings** dialog box is displayed.



5. From the **Life Cycle** drop-down list, select the life cycle where documents should be routed initially.
6. In the **Help Text** field, type the tool tip to display when a user places the mouse pointer over the button.
7. Select **Create E-Form on Entry to Lifecycle** if both of the following are true:
   - The selected **Life Cycle** is set up to create a form when a document is submitted.
   - The form should be automatically displayed to users who submit documents using the OnBase Patient Window, the Integration for Epic Viewer, the Integration for Epic Web Viewer, or the Signature Deficiencies for Epic Analysis window. The form allows users to provide additional information about the requested corrections.

Note: Forms are not displayed when documents are submitted for correction through DocPop Document Correction.

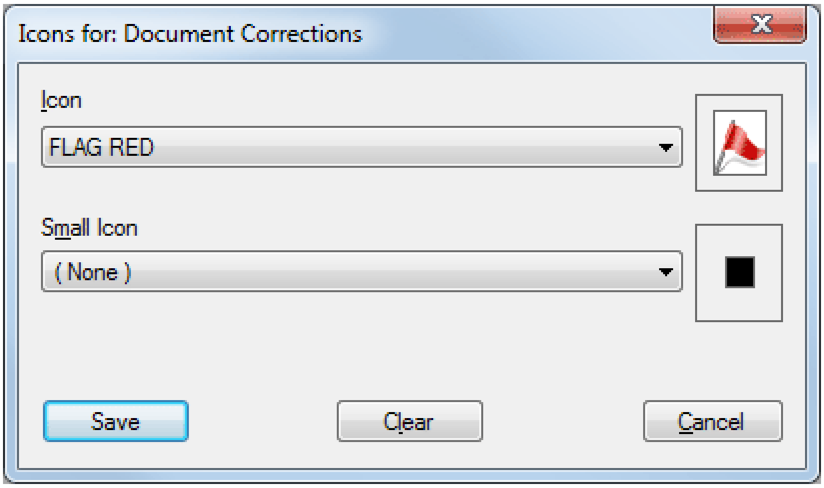
8. Click **Save**.
9. Continue to the following tasks:
   - Assigning an Icon on page 215
   - Assigning User Group Privileges on page 217
   - Re-ordering Actions on page 217

Assigning an Icon

Follow these steps to assign an icon that will be displayed on the document correction button.

1. Select an action from the **Healthcare Document Correction Configuration** dialog box.
2. Click **Icon**. The **Icons for** dialog box is displayed.

3. From the **Icon** drop-down list, select the icon to be displayed for the action in the OnBase Patient Window or the DocPop Document Correction viewer.



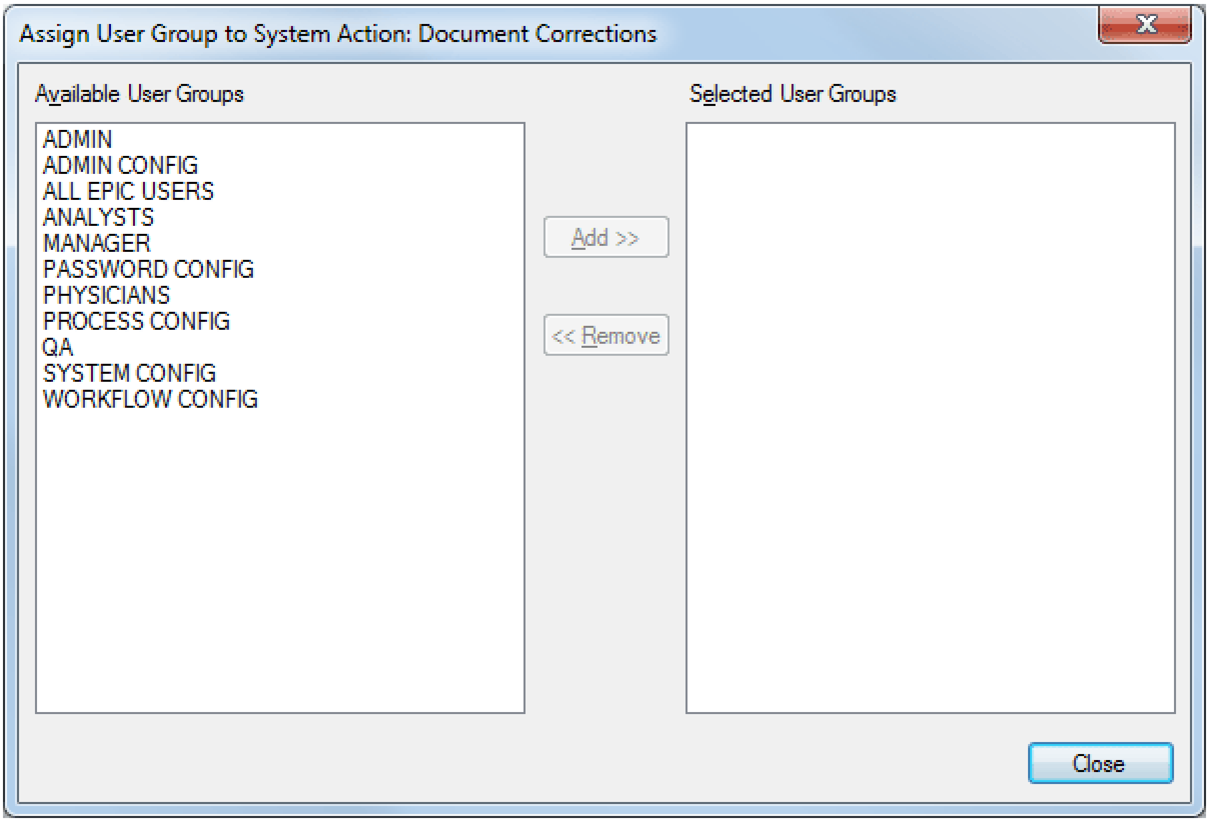
   The **Small Icon** is used only by the Epic integrations. It is not required by the OnBase Patient Window.

4. Click **Save**.
5. Continue to the following tasks:
   - Assigning User Group Privileges on page 217
   - Re-ordering Actions on page 217

Assigning User Group Privileges

To access an action, a user must belong to a User Group assigned to the action. Users do not need privileges to an action's life cycle or queue to be able to execute the action.

1. Select an action from the **Healthcare Document Correction Configuration** dialog box.
2. Click **User Group**. The **Assign User Group to System Action** dialog box is displayed.



3. Select the User Groups who need to see and use the action. To select multiple groups, press **CTRL** as you select each group.
4. Click **Add**.
5. Click **Close** when finished.
6. Continue to Re-ordering Actions.

Re-ordering Actions

Follow these steps to change the order in which buttons are displayed above the viewer.

1. Select an action from the **Healthcare Document Correction Configuration** dialog box.
2. Click **Move Up** or **Move Down**.
3. Repeat for each action as needed.

Deleting Medical Record Configurations from OnBase

Because deleting medical record configurations can adversely affect your system, you may need to satisfy additional criteria, like password confirmation, before being allowed to delete a configuration item.

Items configured in the following places can be deleted as necessary:

- Delinquency Letters
- Nursing Stations
- Patient Data Access Request Reasons
- Print Templates

Password Confirmation Required

Items configured in the following places can be deleted when a confirmation password is provided. Contact Technical Support for the password if you need to delete any of these items.

- Coding Queues
- Coding Life Cycles
- External Integrations
- External Integration Queries
- Provider Specialties

Password Confirmation and -MRMSINSTALL Switch Required

The following medical system components require special configuration privileges and the -MRMSINSTALL command line switch in order to be able to delete configured items:

- Admit Types
- Clinical Document Tabs (Facility and Cross-Facility Level)
- Departments
- Facilities
- Non-Physician Groups
- Payors
- Physician Information (for deleting a physician or assigning a different user account to an existing physician)
- Physician Medical Groups
- Service Codes
- Units

In addition, a password is required. Deleting items used by existing charts can adversely affect your system. Contact Technical Support if you need to delete any of these items. See the Installation information for details on the -MRMSINSTALL command line switch and its functions.

Troubleshooting

The following topics provide troubleshooting information for OnBase Patient Window. If you need additional assistance, contact your first line of support.

- Logging to the Diagnostics Console on page 219
- Cannot Access Patient Window on page 219
- Epic Users Cannot Log On on page 222
- Error Messages on page 222
- Notes, Redactions, Burned Markups, and Deficiencies on Documents with Overlays on page 225
- Scrolling Unavailable in Timeline Mode on page 226

Logging to the Diagnostics Console

Both OnBase Patient Window and Application Server will log error messages to the OnBase Diagnostics Console without requiring additional configuration. You can modify logging settings using the **Hyland.Logging** section in the Web.config file of the respective application.

For detailed information, see the **Diagnostics Service and Diagnostics Console** module reference guide.

Cannot Access Patient Window

Users may be unable to access OnBase Patient Window due to configuration errors. For information about possible problems, see the following topics:

- Custom Query Cannot Find Chart ID Keyword Type on page 219
- Custom Query Does Not Include an MPI Keyword Type on page 220
- Custom Query Includes Medical Documents on page 220
- Failed to Identify Assigning Authority on page 221
- Filter Not Configured on page 221
- MPI Not Found on page 221

Custom Query Cannot Find Chart ID Keyword Type

When a user attempts to access OnBase Patient Window, the following error may be displayed, and the user cannot access the patient record:

- Medical Records Patient Documents custom query does not include a KeywordType mapped to ChartMetaDataType.**ChartNumber**

This error indicates the medical records custom query (specified under **Medical | User Interface Settings | Client Settings**) cannot display records correctly due to a missing chart data field mapping.

To address this issue, ensure the **Chart ID #** chart data field is mapped to a Keyword Type. This Keyword Type does not need to be assigned to the medical records custom query, but the chart data field still must be mapped for OnBase Patient Window to display records correctly.

Note: Chart data fields may be renamed to reflect your system's terminology. For example, the The **Chart ID #** field may be renamed **Encounter #** or **Account #**.

Custom Query Does Not Include an MPI Keyword Type

When a user attempts to access OnBase Patient Window, the following error may be displayed, and the user cannot access the patient record:

- Medical Records Patient Documents custom query does not include a KeywordType mapped to ChartMetaDataType.**MPINumber**

This error indicates the medical records custom query (specified under **Medical | User Interface Settings | Client Settings**) is unable to retrieve adequate information due to a missing MPI Keyword Type. The medical records custom query must be assigned a Keyword Type that is mapped to the **MPI Number** chart data field.

To address this issue, do the following:

- Ensure the **MPI Number** chart data field is mapped to a Keyword Type.
- Ensure the Keyword Type is assigned as a retrieval keyword for the custom query.

Note: Chart data fields may be renamed to reflect your system's terminology. For example, the The **MPI Number** field may be renamed **MPI**.

Custom Query Includes Medical Documents

When a user attempts to access OnBase Patient Window, the following error may be displayed, and the user will be unable to access the patient record:

- One or more document types configured for the patient documents custom query is a member of a medical records document type group.

This error indicates the medical records custom query (specified under **Medical | User Interface Settings | Client Settings**) is configured incorrectly. This custom query must be configured to retrieve only non-medical record Document Types. If the custom query is configured to retrieve Document Types that belong to a medical record Document Type Group, then users will not be able to log on to OnBase Patient Window.

For information about configuring the medical records custom query, see Medical Records Custom Query Configuration on page 118.

Failed to Identify Assigning Authority

When a user attempts to access OnBase Patient Window, the following error may be displayed, and the user will be unable to access the patient record:

- Failed to identify the specified assigning authority

This error indicates the **mpi** or **mrn** value in the query string contains an invalid assigning authority. If the **mpi** or **mrn** parameter includes an assigning authority in its value, the assigning authority must match either the HL7 code or the friendly name of an assigning authority configured in OnBase.

To address this issue, make sure the assigning authority specified in the query string is correctly configured. Assigning authorities are configured in OnBase Configuration under **Medical | HL7 | Assigning Authority**. For more information, see the OnBase **HL7 Module** documentation.

Filter Not Configured

When a user attempts to access OnBase Patient Window, the following error may be displayed, and the user will be unable to access the patient record:

- Value cannot be null. Parameter name: No keyword type filter found for keyword type.

This error indicates the URL query string contains a filter parameter that cannot be applied because the associated Keyword Type is not configured as a filter in OnBase Configuration.

To address this issue, either remove the filter parameter from the URL, or configure the associated Keyword Type as a filter under **Medical | User Interface Settings | Patient Window | Filter Criteria**. For information about configuring filter criteria, see Filter Configuration on page 170.

MPI Not Found

When a user attempts to access OnBase Patient Window, the following error may be displayed, and the user will be unable to access the patient record:

- Master Patient Index was not found for given Medical Record Number

This error is displayed when the query string provides an invalid or non-unique MRN without another identifier (like MPI).

Non-unique MRNs may exist if OnBase is configured for overlapping MRNs and assigning authorities. If the **mrn** value in the query string matches multiple MRNs, then the query string must also include either the MRN's assigning authority or an **mpi** value to identify the correct patient record.

For more information about constructing URLs, see Creating URLs for OnBase Patient Window on page 42.

Epic Users Cannot Log On

When OnBase Patient Window users attempt to access records on a system configured for Epic authentication, the following error may be displayed:

- Failed to authenticate. Please contact your administrator.

To address this issue, make sure the Hyland.Oem.Epic.dll is installed in the **bin** folder of the Application Server's virtual directory, and make sure both OnBase and Epic are configured to use the correct authentication credentials.

Error Messages

The following topics describe possible error messages and their causes.

- Another session is currently active on page 222
- Applied saved filter is not compatible on page 223
- Failed to convert filter value on page 223
- Failed to identify the default selected document on page 223
- Invalid filter item values on page 224
- The expandedMode parameter was detected on page 224
- The platter for this document is currently unavailable on page 224

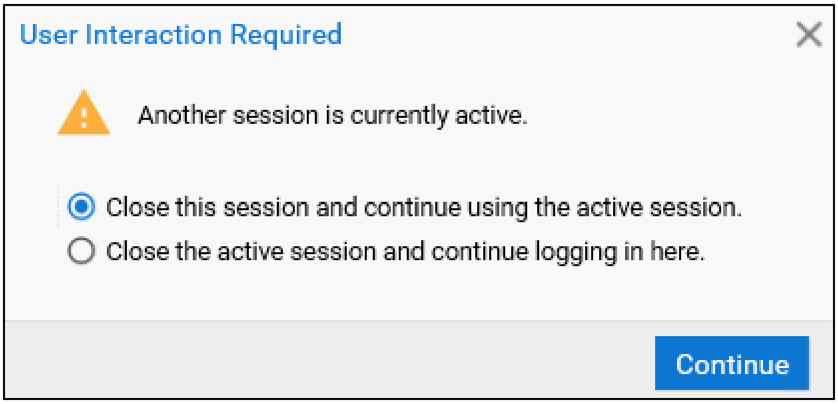
Another session is currently active

When a user who already has OnBase Patient Window open tries to access the application again in another window or tab, the **User Interaction Required** dialog box may display the following message:

- Another OnBase session is currently active.

In Internet Explorer and Firefox, the user can choose from the following options:

- **Close this session and continue using the active session**. This option stops the second OnBase Patient Window instance from loading and leaves the original session open.
- **Close the active session and continue logging in here**. This option closes the original session and continues loading OnBase Patient Window with a new session.



In Safari, the only available option is **Close this session and continue using the active session.**

This behavior occurs because OnBase Patient Window detects another active session and prevents the user from logging in multiple times.

Applied saved filter is not compatible

When a user attempts to apply a saved filter in OnBase Patient Window, the following error may be logged to the Diagnostics Console:

- Applied saved filter [ID] is not compatible with this version of the application.

The user must log in to OnBase Patient Window again to continue.

This error is displayed because the saved filter was created in an earlier version of OnBase, and it contains one or more filter types that are based on chart data fields. To resolve this issue, the owner of the saved filter must delete it and create a new filter using the available filter types.

Failed to convert filter value

When a user accesses OnBase Patient Window through a URL, the following error may be displayed:

- Failed to convert [Filter Name] [Filter Value]
  Please contact your administrator.

This error is displayed because the URL the user accessed contained an invalid value for one of the filter parameters. For some filter parameters, the value must match the display name configured for the corresponding item in Configuration. For example, the **facility** filter must specify the configured display name for a facility, not the facility's HL7 field specifier.

If a display name contains spaces, make sure the spaces are replaced with plus signs (+) in the URL query string.

Failed to identify the default selected document

When a user accesses OnBase Patient Window through a URL, the following error may be displayed:

- Invalid filter item values
  Details:
  Failed to identify the default selected document.
  Please contact your administrator.

This error is displayed because OnBase Patient Window cannot display the document specified in the URL query string. For example, the document may be on a secure tab or protected by a confidentiality code that the user cannot access.

This error also is displayed if the specified document does not exist in OnBase or does not belong to the record or chart specified in the query string.

When this error occurs, the user can continue loading the specified record, but the specified document will not be displayed by default.

Invalid filter item values

When a user accesses OnBase Patient Window through a URL, the following error may be displayed:

- Warning

  The following filter items have invalid values that could not be used to limit the document results:

  FilterName: Value

  Please contact your administrator.

This error is displayed because the URL the user accessed contained an invalid value for one of the filter parameters. The user can continue loading the specified record, but the invalid filter parameter will not be applied. Double-check the URL to make sure query string parameters are being specified correctly.

If this error is displayed when a user attempts to perform a full-text search, ensure the full-text service is configured and running. For more information, see the **Full-Text Search** documentation.

The expandedMode parameter was detected

When a user accesses OnBase Patient Window through a URL, the following message may be displayed:

- Message from webpage

  The expandedMode parameter was detected, but requires a default document to be specified using either the docID or studyUID parameter.

OnBase Patient Window then loads normally.

This message is displayed because the URL contains the **expandedMode** parameter, but the URL does not specify the document to open in expanded mode. The **expandedMode** parameter applies only to URLs that specify a valid **docID** or **studyUID**.

For information about the **expandedMode** and **docID** parameters, see Banner & Display Parameters on page 48. For information about the **studyUID** parameter, see one of the **Integration for Medical Imaging Viewer** module reference guides.

The platter for this document is currently unavailable

When the platter for a document cannot be reached, the document viewer displays the following error:

- The platter for this document is currently unavailable.

This error may be displayed because the platter is detached from OnBase, as might be the case with network storage, or because the platter is configured with an invalid UNC path. If this message is received for only one document, then the document may have been removed from the disk group.

Notes, Redactions, Burned Markups, and Deficiencies on Documents with Overlays

Notes, redactions, burned markups, and deficiencies on documents that have an overlay applied may encounter unexpected behavior. The position of notes, redactions, burned markups, and deficiencies may shift when the document is rendered.

The position shift may occur in the following instances:

- Text documents that contain overlays with an offset configured
- Text documents accessed using modules that render text documents as an image for display
- Image documents with overlays that do not have the same DPI or dimensions as the document

Caution: If a redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected. Saving or signing the document will permanently place the redaction, burned markup, or deficiency in the shifted position. In some instances, the location of a signature can only be changed by a system administrator.

When setting up overlays for documents that may also include notes, redactions, burned markups, or deficiencies:

- Ensure the dimensions of the overlay match the dimensions of the document.
- Do not use offsets with overlays since the document may contain notes, redactions, burned markups, or deficiencies.
- For text documents, use 96 DPI for overlays.
- For image documents, ensure the DPI of the overlay matches the DPI of the document.

A position shift can be corrected through the following methods:

- For text documents, recreate the overlay to match the dimensions of the document instead of using an offset. For example, add an empty space to the margin of the overlay instead of using an offset to account for this space.
- For text documents, the best practice is to set the DPI of the overlay to 96 DPI. Some OnBase modules render text documents as an image for display, and in most cases, the image is rendered at 96 DPI.
- For image documents, recreate the overlay to match the DPI and dimensions of the document.

If the issue still occurs, contact your first line of support.

Scrolling Unavailable in Timeline Mode

When OnBase Patient Window is embedded in another application, scrolling may not be available in timeline mode. This issue typically is caused by a limitation of the control used to embed OnBase Patient Window.

To address this issue, you need to update the Windows registry on the workstations or Citrix servers running the host application.

For more information, see Supporting Embedded Timeline Mode on page 55.

The following topics provide security configuration information for OnBase Patient Window.

Note: The following topics describe only security settings that affect OnBase Patient Window. Some of these settings may affect other modules, as indicated by the **Affected Clients** table in each topic. Make sure you understand how security configuration affects your entire solution.

- User Group Privilege Requirements on page 227
- Medical Records Privileges on page 229
- Emergency Access on page 237
- Secure Tabs on page 240
- Confidentiality Codes on page 240
- VIP Chart Security on page 247
- Document Type Security on page 247
- Security Keywords on page 248

User Group Privilege Requirements

The following topics outline the basic requirements for users to perform tasks using OnBase Patient Window:

- View Patient Records
- View Patient Custom Query Documents
- Search for Patient Records
- Search for Charts
- Submit a Document for Workflow-Based Corrections

View Patient Records

To access records using OnBase Patient Window, users must have the **Patient Window** medical records privilege.

Users' ability to view documents may be restricted by confidentiality codes or VIP chart security. For more information, see the following topics:

- Confidentiality Codes on page 240
- VIP Chart Security on page 247

View Patient Custom Query Documents

Tabs configured using the **Patient Custom Query** tab type can display non-medical record documents within the context of a patient's record. New Patient Custom Query tabs cannot be configured for OnBase Patient Window, but a Patient Custom Query tab may be available if the system has been upgraded from a prior version of OnBase.

To view Patient Custom Query documents, users must have the following:

- The **Patient Window** medical records privilege. For more information, see Patient Window Privilege on page 229.
- Privileges to the custom query Document Types.
- Privileges to the **Medical Records Custom Query** configured in Medical Client Settings.

Search for Patient Records

To conduct a general search for records based on patient information or inpatient status, Patient Window users must have the following:

- The **Patient Window** medical records privilege. For more information, see Patient Window Privilege on page 229.
- The **Patient Search** medical records privilege. For more information, see Patient Search Privilege on page 232.

To search for records based on scheduled appointments, Patient Window users must have the following:

- The **Patient Window** medical records privilege. For more information, see Patient Window Privilege on page 229.
- The **Scheduled Patient Search** medical records privilege. For more information, see Scheduled Patient Search Privilege on page 232.

Search for Charts

To search for charts using OnBase Patient Window, users must have the following:

- The **Patient Window** medical records privilege. For more information, see Patient Window Privilege on page 229.
- The **Chart Search** medical records privilege. For more information, see Chart Search Privilege on page 230.

Submit a Document for Workflow-Based Corrections

To send a document to OnBase Workflow for corrections, users with Patient Window access must have privileges to the healthcare document correction action configured for the corrections life cycle.

See Document Corrections on page 210 for more information.

Medical Records Privileges

Medical records privileges determine the functionality available to Patient Window users. The topics in this section describe only the privileges that affect OnBase Patient Window.

For help understanding the availability of patient search and list features, see Diagram: Search and List Privileges on page 235.

To change the medical records privileges for a User Group:

1. In the OnBase Configuration module, select **Users | User Groups / Rights**.
2. Select a User Group.
3. Click **Medical Rec Privileges**.
4. Select the **Patient Window** medical records privilege on the **Product** tab. Users must have this privilege in order to access OnBase Patient Window.

   For information about other privileges that affect OnBase Patient Window, see the following topics:

   - Patient Window Privilege on page 229
   - Administration Privilege on page 230
   - Chart Search Privilege on page 230
   - Printing Privilege on page 231
   - Allow Confidentiality Code Override Access Privilege on page 231
   - Patient Search Privilege on page 232
   - Scheduled Patient Search Privilege on page 232
   - Patient Lists Privilege on page 233
   - Public Lists Privilege on page 233
   - Public Cases Privilege on page 234

Patient Window Privilege

Assign the **Patient Window** medical records privilege to all users who need to log on to OnBase Patient Window. Users cannot log on to OnBase Patient Window without this privilege.

This privilege is found on the **Product** tab in the **Medical Records Privileges** dialog box.

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
		X	

Administration Privilege

Medical record administrators, such as HIM administrators, need elevated privileges to perform additional tasks beyond record retrieval. In addition to the **Patient Window** medical records privilege, administrators need the **Administration** medical records privilege.

Assign the **Administration** privilege to allow administrators to do the following in OnBase Patient Window:

- Assign confidentiality codes to patients, charts, and documents
- Assign notices to patients
- Assign users access to specific patient records

  This privilege provides the ability to assign patient record access only within OnBase Patient Window. The assigned access applies only to records viewed using OnBase Patient Window.
- Provide public access to saved filters
- Build and edit filters using the Filter Editor

For information about how the **Administration** privilege affects the Medical Records Unity Client, see the **Medical Records Unity Client** module reference guide.

Chart Search Privilege

Clinicians may need (or prefer) to search for specific charts rather than an entire record. The chart search privileges allow Patient Window users to search for charts based on patient or chart information.

Patient Window users can search for charts as long as they have any one of the following privileges:

- **Restricted Facility Search**
- **Facility Search**
- **Global Search**

In OnBase Patient Window, it does not matter which level of search privilege is enabled. Any level will provide access to Chart Search, and OnBase Patient Window will use its own security model to control access to chart documents.

For information about how these levels affect searching in the OnBase Client or Medical Records Unity Client, see the **Medical Records Unity Client** module reference guide.

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
X	X	X	

Printing Privilege

In some systems, users may need to print patient documents on an ad hoc basis.

Assign the **Printing** medical records privilege to users who need to print documents in medical contexts. In OnBase Patient Window, this privilege allows the user to print any document the user can access.

Note: Other privileges can enable printing in OnBase Patient Window. If a user has the standard **Print** privilege for a specific Document Type, the user can print documents that belong to that Document Type without requiring the **Printing** medical records privilege.

OnBase Patient Window allows users to print only one document at a time. To print multiple chart documents with a single print job, users should use the Medical Records Unity Client.

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
	X	X	X

Allow Confidentiality Code Override Access Privilege

Confidentiality codes can be used to restrict access to specific patients, charts, or documents. The **Allow Confidentiality Code Override Access** privilege allows users of OnBase Patient Window to access these highly confidential records in emergency situations.

Caution: In OnBase Patient Window, users who have this privilege are given the option to access content protected by confidentiality codes. When a user exercises this option for a specific patient record, the user gains immediate access to content within that patient record that is protected by confidentiality codes, regardless of whether the user has rights to the confidentiality codes in effect.

To change the duration of confidentiality code override access, configure the **Emergency Access Duration (Hours)** setting as described under Configuring Emergency Access Privileges on page 237. The default duration is 24 hours.

To require users to specify why they are requesting override access, see Patient Window Settings on page 189.

For more information about confidentiality codes, see Confidentiality Codes on page 240.

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
		X	

Patient Search Privilege

Clinical staff may need Web-based access to search for patient records residing in OnBase. For example, at inpatient facilities, clinical staff may need a way to quickly retrieve records for current inpatients.

In OnBase Patient Window, the Patient Search context allows users to search for patient records based on patient information and inpatient status.

Patient Search is available to a Patient Window user if any of the following are true:

- The user has both the **Patient Search** and **Patient Lists** medical record privileges.
- The user has both the **Patient Search** and **Administration** medical record privileges.
- The user has the **Patient Search** privilege, and the **EnablePatientSearch** Web.config setting is **true**.

If none of these conditions is true, then a user with the **Patient Search** privilege cannot use Patient Search in OnBase Patient Window.

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
		X	

Scheduled Patient Search Privilege

At outpatient clinics, clinical staff may need to retrieve records for patients who have upcoming appointments. For example, physicians may want to quickly access records for patients they are scheduled to see that day.

If the HL7 Appointment Processor is configured to store patient appointment information in OnBase, then Patient Window users may be able to use the Scheduled Patient Search context to find patients with scheduled appointments.

Scheduled Patient Search is available to a Patient Window user if any of the following are true:

- The user has both the **Scheduled Patient Search** and **Patient Lists** medical record privileges.
- The user has both the **Scheduled Patient Search** and **Administration** medical record privileges.
- The user has the **Scheduled Patient Search** privilege, and the **EnablePatientSearch** Web.config setting is **true**.

If none of these conditions is true, then a user with the **Scheduled Patient Search** privilege cannot use Scheduled Patient Search in OnBase Patient Window.

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
		X	

Patient Lists Privilege

Clinicians may want the ability to quickly access records for a group of patients. For example, a physician may want a single location to review records for patients who are coming in the following week. In another example, a researcher may want to maintain a list of patients who share a specific chronic condition. The **Patient Lists** privilege can help address these use cases.

The **Patient Lists** privilege is available only if either the **Patient Search** or **Scheduled Patient Search** privilege is enabled.

The **Patient Lists** privilege allows Patient Window users to do the following:

- Create both personal patient lists and system patient lists
- Delete patient lists they have created
- Search for patient records
- Add patients to personal patient lists they have created
- Remove patients from personal patient lists they have created

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
		X	

Public Lists Privilege

Users who have the **Patient Lists** privilege may want to share lists they have created. For example, a group of physicians making rounds may use the same list to review records for the appropriate patients. In another example, an administrator may want to share a list of all current inpatients. The **Public Lists** privilege can help address these use cases.

The **Public Lists** privilege is available only if the **Patient Lists** privilege is enabled. The **Public Lists** privilege allows users to mark patient lists they have created as **Public**. A public list is available to all users who have patient list privileges, but only the user who created the list can modify or delete it.

Public patient lists do not change how OnBase Patient Window grants users access to documents. If a user opens a record through a public patient list, OnBase Patient Window displays only the documents the user is allowed to view.

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
		X	

Public Cases Privilege

OnBase Patient Window allows all users to create cases. A case is a custom tab that allows a user to organize documents in a specific record. By default, a case is visible only to the user who created it, but some users may need the ability to make a case visible to other users. For example, a physician requesting a consult may want to share a case with the consulting physician. The **Public Cases** privilege can help address this situation.

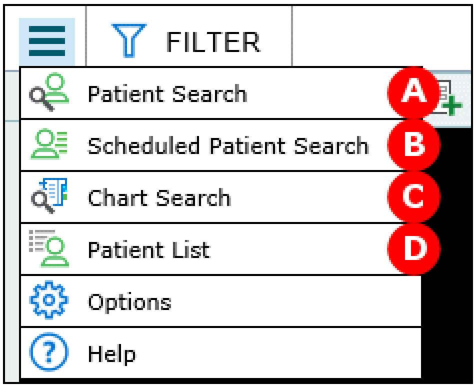
The **Public Cases** privilege allows users to mark cases they have created as **Public**. A public case is visible to all users who view the associated patient record, but only the user who created the case can modify or delete it. Other users cannot add or remove documents from the case.

Public cases do not change how OnBase Patient Window grants users access to documents. If a user views a public case, OnBase Patient Window displays only the documents the user is allowed to view.

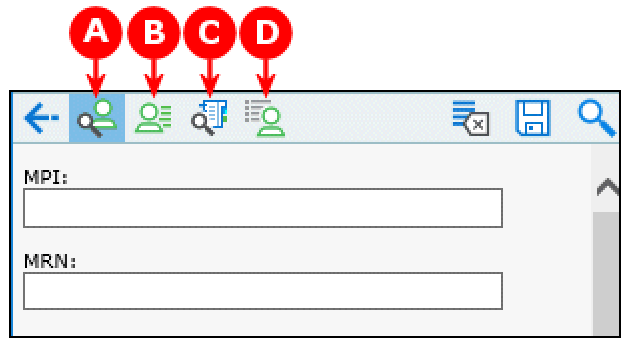
OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
		X	

Diagram: Search and List Privileges

In OnBase Patient Window, the availability of search and list functionality is controlled by medical records privileges. The following diagram shows the buttons for these features and matches them to their associated privileges.



Main Menu



Search Pane

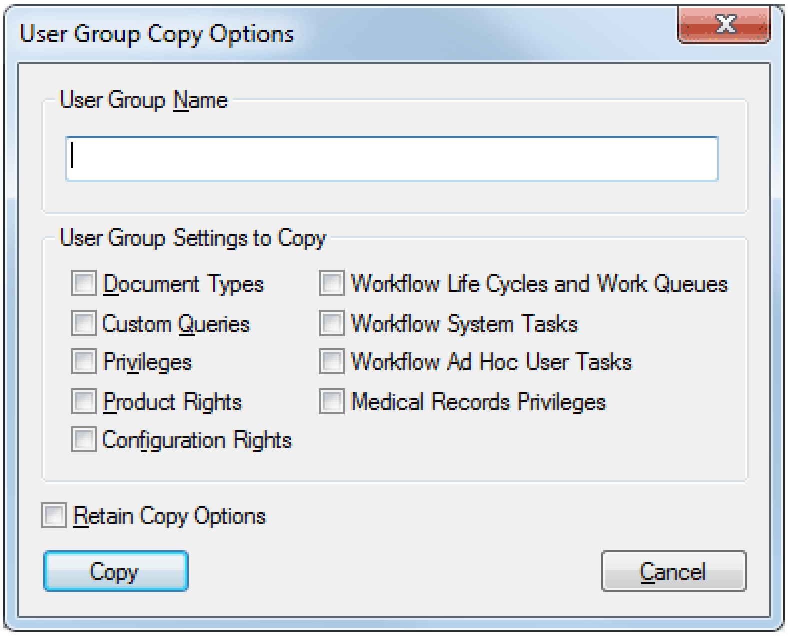
Feature	Availability
A: Patient Search	Available if any of the following are true: • User has both of the following medical records privileges: **Patient Search** and **Patient Lists**. • User has both of the following medical records privileges: **Patient Search** and **Administration**. • User has the **Patient Search** medical records privilege, and **EnablePatientSearch** is set to true in web.config.
B: Scheduled Patient Search	Available if any of the following are true: • User has both of the following medical records privileges: **Scheduled Patient Search** and **Patient Lists**. • User has both of the following medical records privileges: **Scheduled Patient Search** and **Administration**. • User has the **Scheduled Patient Search** medical records privilege, and **EnablePatientSearch** is set to true in web.config.
C: Chart Search	Available if user has any **Chart Search** medical records privilege (**Restricted Facility Search**, **Facility Search**, or **Global Search**).

Feature	Availability
D: Patient Lists	Available if either of the following are true: • User has both of the following medical records privileges: **Patient Lists** and **Patient Search**. • User has both of the following medical records privileges: **Patient Lists** and **Scheduled Patient Search**.

Copying Medical Privileges to New User Groups

When you create a new User Group, you can copy the medical record privileges from an existing User Group. To create a new User Group with inherited privileges, do the following:

1. Select **Users | User Groups/Rights**. The **User Groups & Rights** dialog box is displayed.
2. Select the User Group whose privileges you want to copy.
3. Click **Copy**. The **User Group Copy Options** dialog box is displayed.



4. Enter the name of the new User Group that will inherit settings from the existing User Group.
5. Select the **User Group Settings to Copy** from the existing group to the new group.

   The **Medical Records Privileges** setting includes all privileges in the **Medical Records Privileges** dialog box except for Release of Information privileges.
6. Select **Retain Copy Options** to have the current settings automatically selected the next time you access this dialog box.
7. Click **Copy**. The new User Group is created with the selected rights and privileges.

Emergency Access

Certain users may need immediate access to patient records under emergency circumstances, even if the users lack privileges to those records under normal circumstances.

You can assign emergency access privileges to users who may need to immediately access documents that are normally restricted by VIP chart security. When users request emergency access, OnBase Patient Window displays a warning and prompts users to confirm that they want to proceed. All cases of emergency access are logged.

Note: Emergency access does not give users access to documents restricted by confidentiality codes. To view these documents, users either must have rights to the assigned confidentiality codes, or they must have the **Allow Confidentiality Code Override Access** privilege. For more information, see Allow Confidentiality Code Override Access Privilege on page 231.

To configure settings for emergency access, see the following topics:

- Configuring Emergency Access Privileges on page 237
- Emergency Access Notifications on page 239
- Prompt for Emergency Access Reason on page 190

Affected clients:

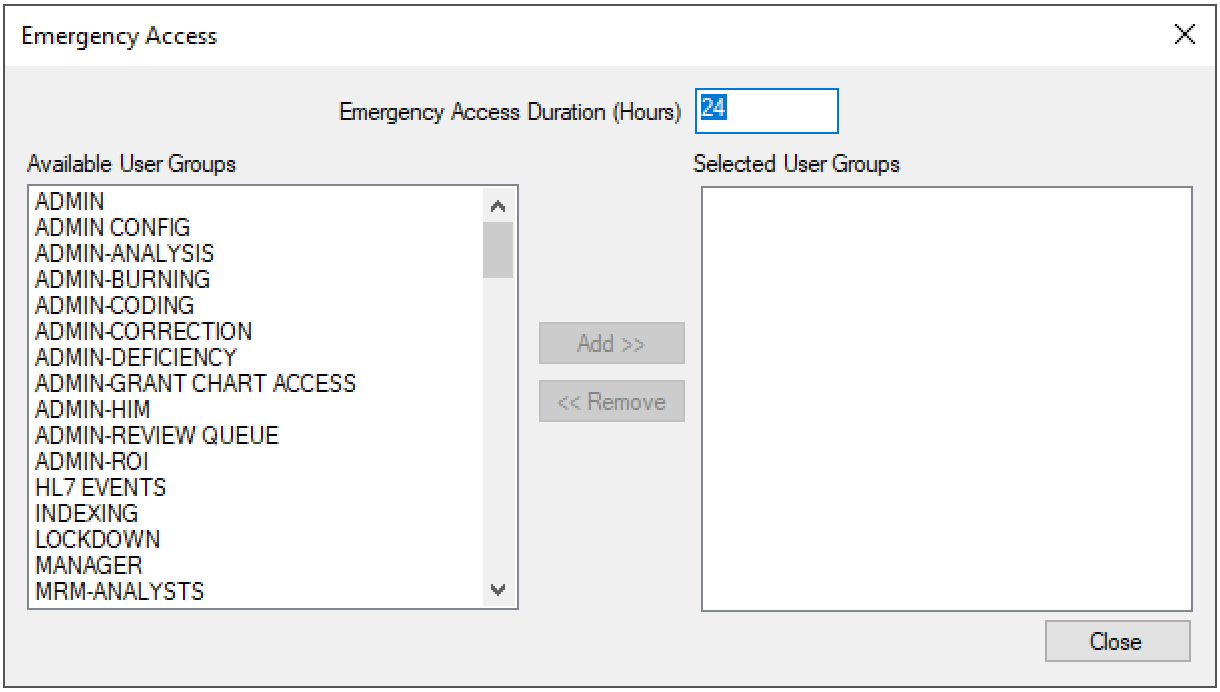
OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
X	X	X	

Configuring Emergency Access Privileges

You can grant emergency access privileges to specific User Groups in the OnBase Configuration module.

To configure emergency access privileges:

1. In the OnBase Configuration module, select **Medical | Healthcare Clients | Emergency Access**. The **Emergency Access** dialog box is displayed.



2. In the **Emergency Access Duration (Hours)** field, enter the number of hours a user should be allowed to view restricted documents after obtaining emergency access.

Note: The **Emergency Access Duration (Hours)** setting does not apply to emergency access in the OnBase Client or the Medical Records Unity Client. In these clients, emergency access is always 24 hours.

   After a user obtains emergency access, the user can view restricted documents in applicable healthcare clients only for the duration entered in this field. Once the duration elapses, the user cannot view the documents without requesting emergency access again. The default **Emergency Access Duration (Hours)** value is **24** hours.

3. Designate the User Groups that should be able to gain emergency access to patient records.
   a. Under **Available User Groups**, select one or more User Groups.
   b. Click **Add**.
      To remove an assigned group, select it from the **Selected User Groups** list, and then click **Remove**.
4. Click **Close**.

Emergency Access Notifications

When a user obtains emergency access to a patient's record using OnBase Patient Window, the Hyland Distribution Service can notify an administrator that access has been granted.

Emergency access notifications are enabled at the facility level. If a facility is configured to notify one or more administrators, then those administrators will receive an email notification whenever a Patient Window user gains emergency access to documents from that facility.

Emergency access notifications include the following information:

- The user's OnBase user name and number
- The medical record number and name of the patient
- The date and duration of allowed access
- Facilities associated with the requested documents
- Type of emergency access requested (**VIP Chart Security** or **Confidentiality Codes**)
- Reason for access (if **Prompt for Emergency Access Reason** is selected in Patient Window Settings)

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
		X	

Configuring Emergency Access Notifications

Access notifications allow an administrator to be notified whenever OnBase Patient Window gives a user emergency access to documents at a specific facility. If a user gains emergency access to a record containing documents from multiple facilities, the administrators configured for each facility are notified.

Before using this functionality, ensure the following requirements are met:

- The Distribution Service must be installed and configured as described in the **Hyland Distribution Service** module reference guide.
- The **Use Email Distribution Service for automated emails** setting must be selected on the **Email** tab under **Users | Global Client Settings**.
- Each user account configured to receive a notification must have an email address configured under **Users | User Names / Passwords**.

To configure emergency access notifications for a facility:

1. In the OnBase Configuration module, select **Medical | Facilities | Facility Configuration**.
2. Select a facility.
3. Click **PW Access Notification**.
4. Select the user or users who should receive an email notification when OnBase Patient Window gives a user emergency access to documents from this facility.

5. Click **Add**.
6. Click **Close** when finished.

Secure Tabs

Some records may contain restricted documents that only a limited set of users should be permitted to view. Examples include behavioral health documents, registration documents, and certain business documents.

Use **Secure Documents** tabs to assign sensitive Document Types to specific tabs protected by User Group security. For more information, see Secure Documents Tabs on page 109.

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
X	**X**	**X**	

Confidentiality Codes

Confidentiality codes can protect patient information that is considered sensitive or taboo, such as a malignancy that should be discussed with a patient only by the physician assigned to the patient's case. Use confidentiality codes to restrict users from accessing confidential data in OnBase Patient Window.

Confidentiality codes can be assigned to a specific document, chart, or an entire patient record. When a confidentiality code is applied, only users with rights to the confidentiality code can view the associated information. When multiple codes are in effect, only users with rights to all assigned codes can view the confidential information.

For more information, see Security Flowcharts on page 249.

Confidentiality codes can be assigned in the following ways:

- In OnBase Patient Window or the Medical Records Unity Client, by users who have the **Administration** medical record privilege
- By incoming HL7 messages that contain confidentiality codes in the HL7 field mapped to a **Confidentiality Code** chart data field
- During document indexing, if chart data fields have been configured to use confidentiality code keywords

Affected clients:

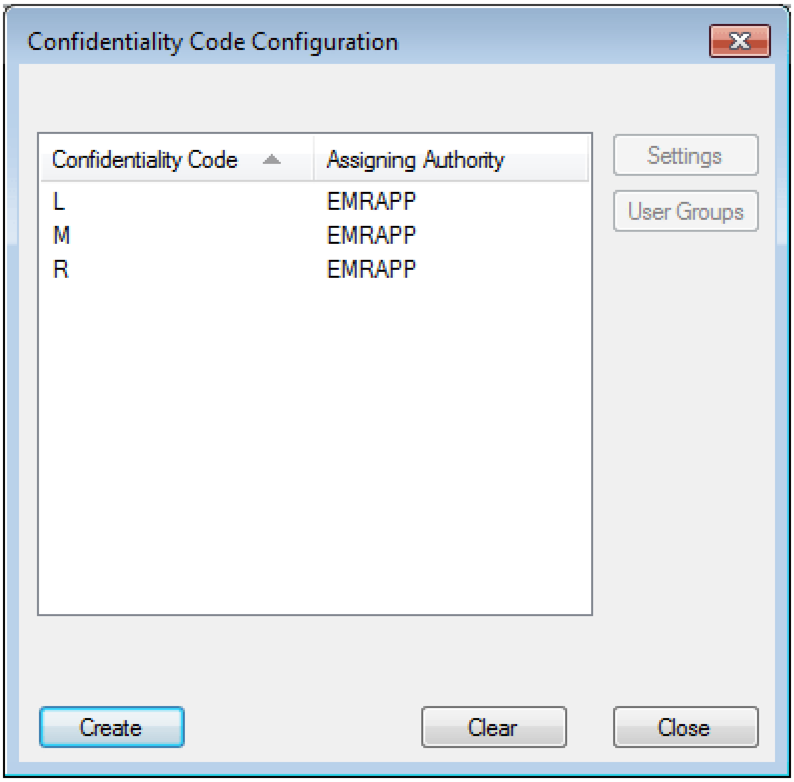
OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
	X[a]	**X**	

a. The Medical Records Unity Client respects confidentiality codes only if confidentiality codes are enabled in Unity Settings under **Medical | User Interface Settings | Unity | Settings**.

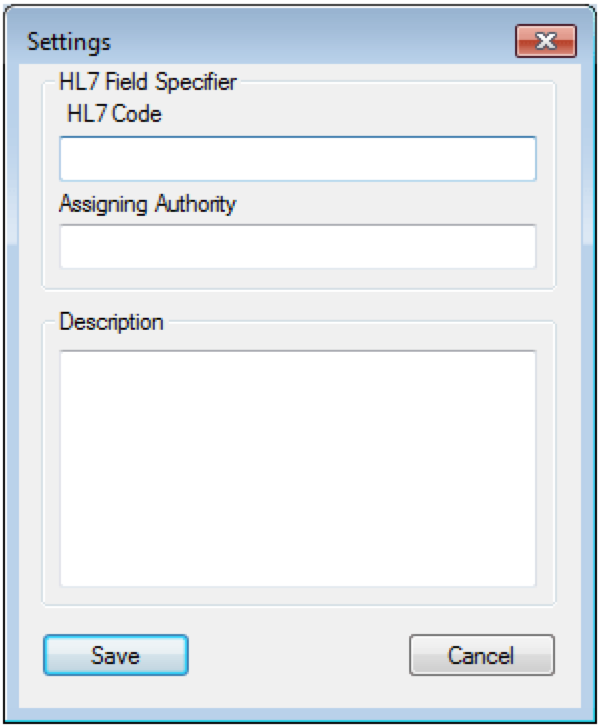
Configuring Confidentiality Codes

To create a confidentiality code, complete the following steps in OnBase Configuration:

1. Select **Medical | Confidentiality Codes**. The **Confidentiality Code Configuration** dialog box is displayed.



2. Click **Create**. The **Settings** dialog box is displayed.



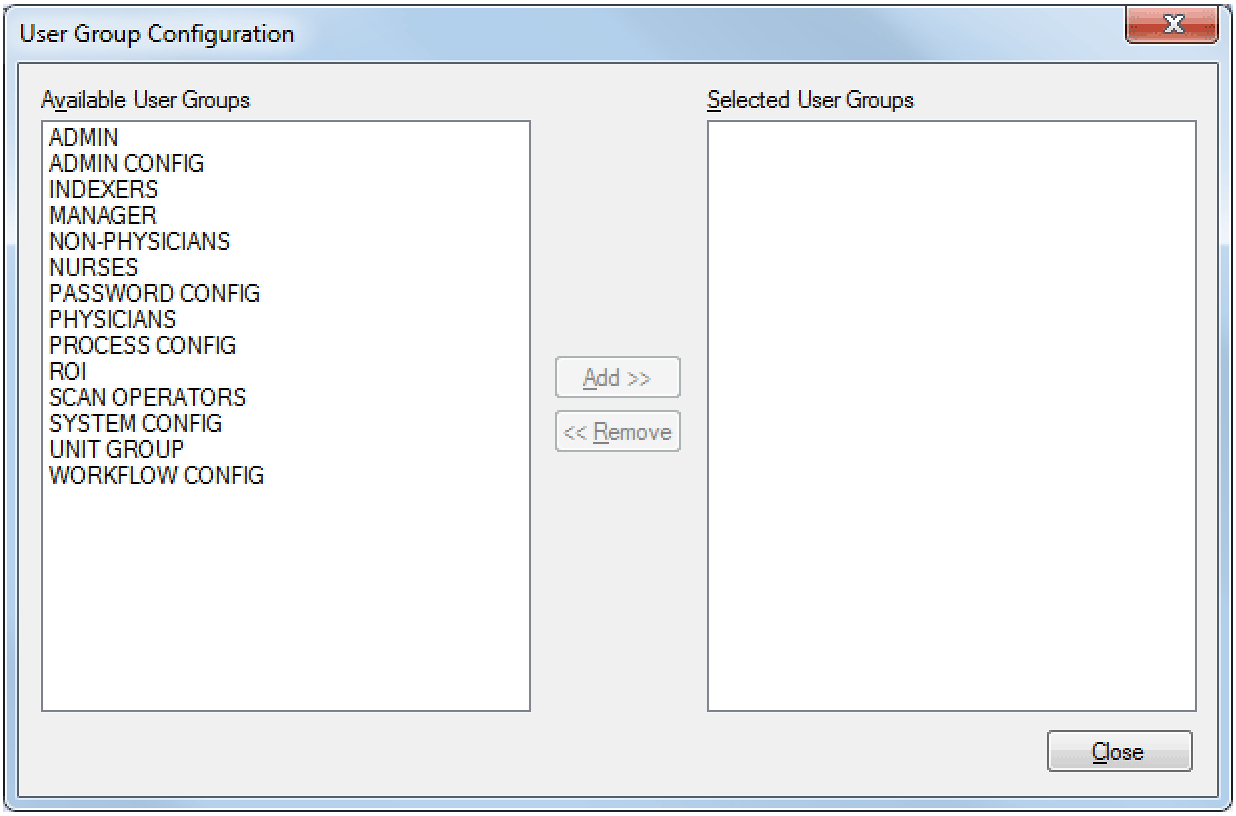
3. Type the HL7 code for the confidentiality code in the **HL7 Code** field. The maximum length is 80 characters.
4. If applicable, type the assigning authority in the **Assigning Authority** field. The maximum length is 120 characters.
   - For the confidentiality code to be applied to patients automatically using HL7, the **Assigning Authority** value must match the assigning authority provided for the code in HL7 messages. For more information, see Assigning Authorities for Confidentiality Codes on page 244.
   - For confidentiality codes to be applied to documents automatically using a confidentiality code keyword, the **Assigning Authority** value must be blank. See Applying Document-Level Confidentiality Codes Automatically on page 245.

Note: Make sure the **HL7 Code** and **Assigning Authority** values are entered correctly. Once you click **Save**, these values cannot be changed without the -MRMSINSTALL command line switch and password verification.

5. Type a description in the **Description** field. The maximum length is 255 characters.

   The description is the display name for the code. When assigning confidentiality codes in the OnBase Patient Window or Medical Records Unity Client, administrators see only the descriptions, not the HL7 codes.
6. Click **Save**.

7. Click **User Groups**. The **User Group Configuration** dialog box is displayed.



8. Select the user groups who should be able to view records protected by this code.
9. Click **Add**.

   To remove an assigned group, select it from the **Selected User Groups** list, and then click **Remove**.
10. Click **Close** when finished.

Applying Confidentiality Codes Automatically

Confidentiality codes can be automatically applied to patient records and charts by the following OnBase HL7 import processes:

- Medical Records Chart
- Patient Record Processor

When either message action receives an HL7 message containing a confidentiality code in a designated field, it will apply the code to the MPI or chart specified in the message. If the code does not yet exist in OnBase, it will be created. To allow patient- and chart-level confidentiality codes to be automatically applied, do the following:

1. Assign either the **Patient Confidentiality Code** or **Chart Confidentiality Code** chart data field to the appropriate HL7 field as a chart field override in the message template.

Note: If the message template uses a processing code, the confidentiality code must be assigned to a field in the same segment.

2. Configure one or both of the following HL7 import message actions to process messages containing confidentiality code information:
   - Medical Records Chart
   - Patient Record Processor
3. Ensure HL7 messages provide the confidentiality code in the field you mapped to the **Confidentiality Code** chart data field. Values should be provided in one of the following formats:

```
Confidentiality Code^Description^Assigning Authority
Confidentiality Code^Description
```

For example, if the following value is provided in the confidentiality code field, the patient will be assigned the **R** confidentiality code. If the **R** confidentiality code does not already exist in OnBase, it will be created with a description of **RESTRICTED** and an assigning authority of **EMRAPP**.

```
R^RESTRICTED^EMRAPP
```

Assigning Authorities for Confidentiality Codes

The Medical Records Chart and Patient Record Processor message actions uniquely identify confidentiality codes based on both their HL7 code and assigning authority. For a confidentiality code to be applied automatically by one of these message actions, the values provided in the HL7 message must match the HL7 code and assigning authority configured for the confidentiality code.

The assigning authority is the value located in the third component of the HL7 field containing the **Confidentiality Code** value. This location is not configurable. If a value is provided in this location, it will be used as the assigning authority for the specified confidentiality code.

Automatically Removing Confidentiality Codes

By default, when the Medical Records Chart or Patient Record Processor message action processes a confidentiality code, the message action will assign the code to the chart or patient record. To allow these message actions to remove confidentiality codes from a chart or patient record, do the following:

1. Ensure the **Processing Code**[1] chart data field is assigned to a field in the same segment containing the confidentiality code. This can be done either as a chart field override or using the HL7 reference field in Chart Data Fields Configuration.

Tip: It is considered a best practice to map the **Processing Code** chart data field to the HL7 message template as a chart field override. As an alternative, you can configure the **HL7 Reference Field** on the **Processing Code** chart data field, but this value will be ignored if the **Processing Code** is mapped as a chart field override anywhere in the message template.

2. Send in a value of **CR** for the field mapped to the **Processing Code** chart data field. The specified confidentiality code will be removed from the chart or patient record.

Applying Document-Level Confidentiality Codes Automatically

Confidentiality codes can be automatically applied to documents upon indexing if a keyword has been mapped to a chart data field that has the **Confidentiality Code** keyword setting applied. This method of assigning confidentiality codes applies to the following:

- Chart documents
- Clinical patient documents
- Non-medical record documents whose Document Types are assigned to the Medical Records Custom Query

1. This field may be named **Allergy - Processing Code** if OnBase was upgraded from an earlier version. The internal ID number for this field is 162.

When any of these documents is indexed with a confidentiality code keyword value that matches the HL7 code for a configured confidentiality code, the confidentiality code will be automatically applied. Confidentiality codes applied in this fashion are removed from the document if it is re-indexed with a different keyword value for the configured confidentiality code keyword.

Caution: If the confidentiality code is configured with an **Assigning Authority** value, the confidentiality code cannot be automatically applied to documents through indexing.

Note: It is recommended to create a new keyword to be used specifically with confidentiality codes. It is strongly recommended to use Keyword Data Sets for mapping keywords to confidentiality codes. Confidentiality codes will only be applied if there is an exact match between the indexed keyword and the confidentiality code's name. For more information on configuring keyword data sets, see the **System Administration** module reference guide.

1. Select **Medical | Charts | Data Fields**.
2. Select the chart data field that will be used for confidentiality codes and click **Settings**.
3. In the **Key Value** drop-down list, select the keyword which will be used for confidentiality codes.
4. Select the **Confidentiality Code** check box.

   This option will enable confidentiality codes to be automatically applied to documents upon indexing, using the keyword specified in the **Key Value** drop-down list. When documents are indexed with a valid confidentiality code name in the configured keyword field, the confidentiality code will be automatically applied to the document.

   The indexed keyword value must exactly match the HL7 code of a confidentiality code.

Logging Confidentiality Code Assignment

OnBase tracks when confidentiality codes are assigned or unassigned from documents, charts, and patients. System administrators can review this activity using the Transaction Log in the OnBase Client module. See the **System Administration** module reference guide for detailed information about running transaction reports.

When you create a report using the **Confidentiality Code** Transaction Log, you can view information about the following actions:

Action	Description
Chart Confidentiality Code	Displays information about the assignment or removal of confidentiality codes at the medical chart level.
Document Confidentiality Code	Displays information about the assignment or removal of confidentiality codes at the document level.
Patient Confidentiality Code	Displays information about the assignment or removal of confidentiality codes at the patient level.

The report indicates the source of the confidentiality code activity using the following:

- **(PW Admin)** or **(PV Admin)** means the code was explicitly added or removed by an administrator.
- **(HL7)** means the code was added or removed using HL7.
- **(keyword)** means the code was added or removed as the result of a document keyword value.

VIP Chart Security

VIP chart security provides a restricted access model for classified charts. For example, a chart may be classified as VIP if the patient is a high-ranking government official. In this case, chart access should be limited to the patient's care providers. Other users must be granted access by an administrator.

In OnBase Patient Window, VIP charts can be retrieved only by the following users:

- The Admitting, Attending, and Primary Care Physicians on the chart.
- A Physician who has Consulting Physician access to the chart, and access has not expired.
- A user who has been granted non-emergency access by a Patient Window administrator, and access has not expired.
- A user who has obtained emergency VIP access to the chart, and access has not expired.

Affected clients:

OnBase Client	Medical Records Unity Client	OnBase Patient Window	DeficiencyPop
X	X	X	

Document Type Security

Document Type security has a limited role within OnBase Patient Window. In most situations, users with access to a patient record can view all documents within the record regardless of Document Type privileges, provided the documents are neither assigned exclusively to a secure tab nor protected by confidentiality codes.

Users of OnBase Patient Window require Document Type privileges in the following situations:

- To view non-medical record documents, users must be assigned to both the Medical Records Custom Query and the Document Types retrieved by the query. For more information, see Medical Records Custom Query Configuration on page 118.
- To create Unity Forms, users must have the **Create** privilege for the Document Types the Unity Forms belong to. These Document Types also must be configured as described under Clinical Form Configuration on page 184.

- To delete pages from revisable documents, users must have privileges to the associated Document Types.

Security Keywords

Security keywords can be used to limit users' access to certain documents. For example, a user in the Cardiology department should be able to access only documents that are indexed with a value of **Cardiology**.

Depending on the client, security keywords affect document access in different ways:

- In OnBase Patient Window, security keywords apply only to documents that are not part of a medical record Document Type Group. Security keywords can prevent users from viewing Patient Custom Query documents, but they cannot prevent users from viewing medical record documents.
- In the OnBase Client, when documents are accessed through Chart Search, security keywords apply only to documents that are not part of a medical records Document Type Group. If chart documents are accessed using other methods, such as folders or Document Retrieval, then security keywords are applied regardless of whether the documents are in a medical record Document Type Group.

Security Flowcharts

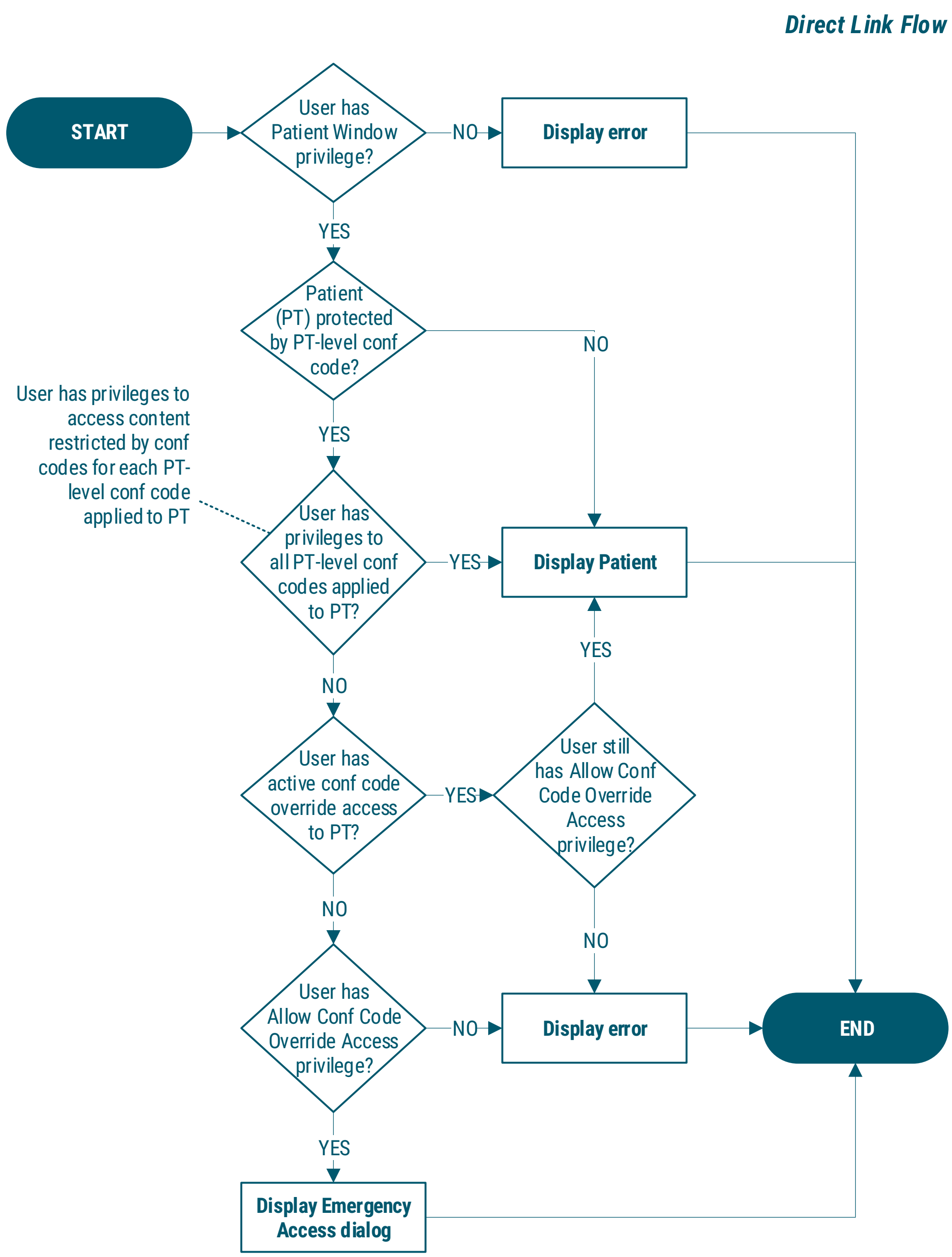
Users may be able to retrieve patient records using a direct link, a search context, or a patient list. Use the following flowcharts to determine whether a user can access a specific patient record using these methods.

- Direct Link to Patient Record on page 250
- Patient Search or Patient List on page 251
- Chart Search on page 252

Note: Even if a user can access a patient record, security measures may be configured to prevent the user from accessing certain documents within the record. For information about security measures that affect OnBase Patient Window, see Security Configuration on page 227.

Direct Link to Patient Record

Use the following flowchart to determine whether a user can access a specific patient record directly through a URL or link.



Patient Search or Patient List

Use the following flowchart to determine whether a user can access a specific patient record using Patient Search, Scheduled Patient Search, or a patient list. In this flowchart, it is assumed the user has sufficient privileges to conduct the search or access the patient list.

Patient Search and Patient List Flow

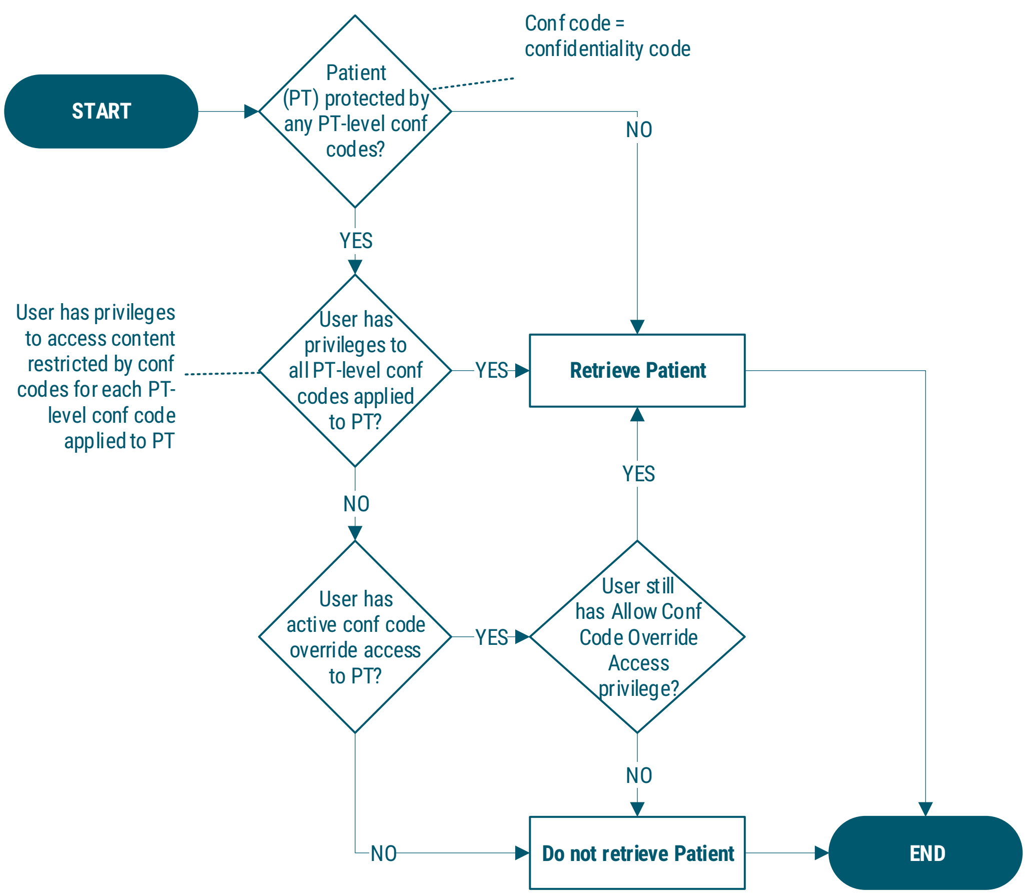
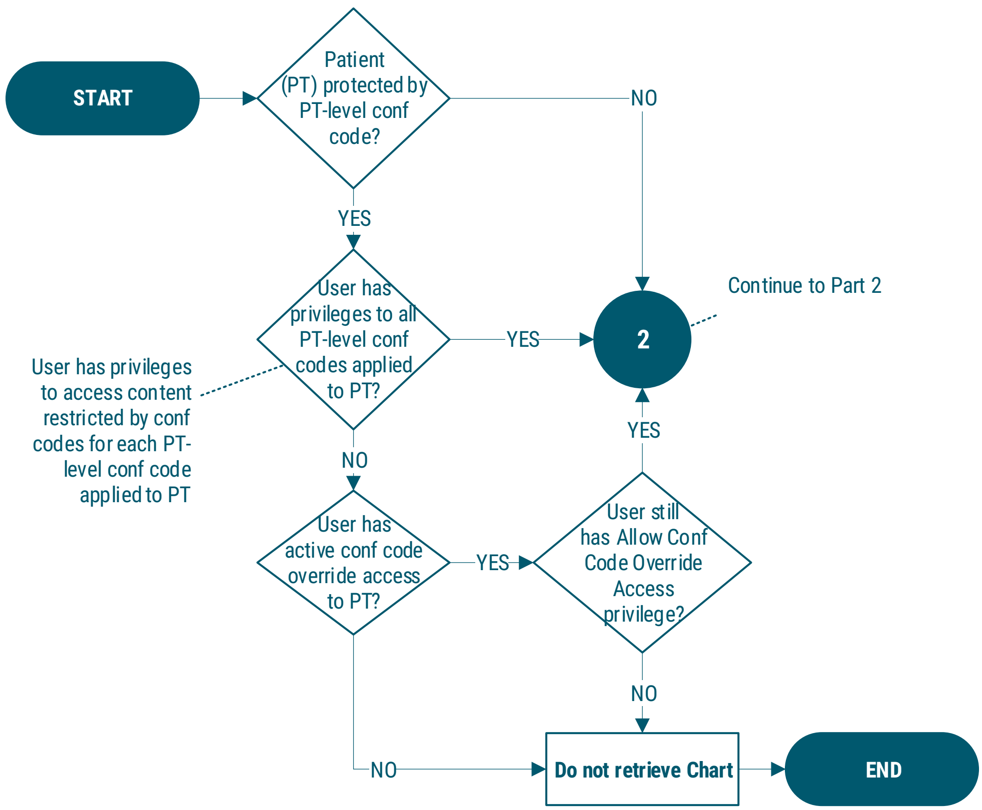


Chart Search

Use the following flowchart to determine whether a Patient Window user can access a specific patient record using the Chart Search context. In this flowchart, it is assumed the user has sufficient privileges to access the Chart Search context.

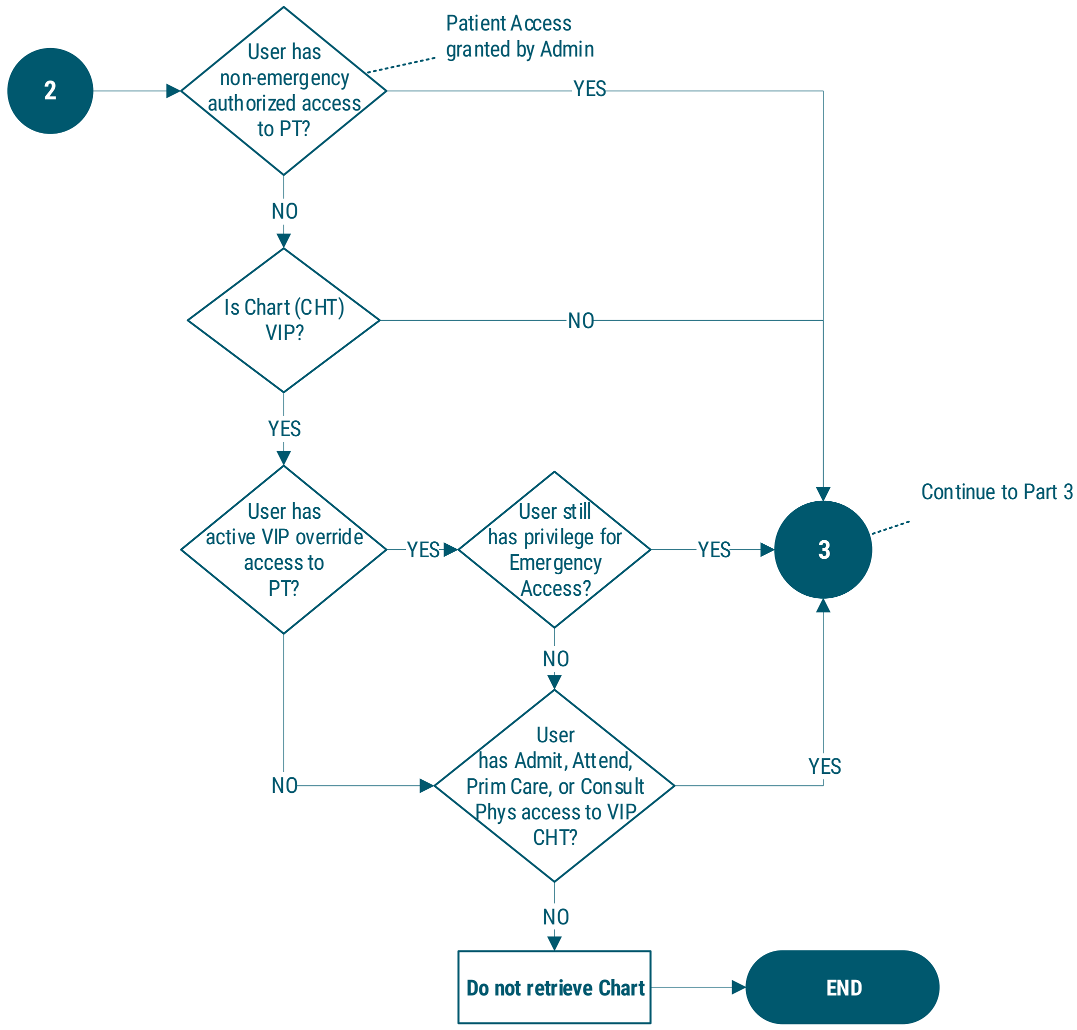
This flowchart has been separated into multiple parts. In Part 1, patient-level confidentiality codes are checked.

Chart Search Flow (Part 1)



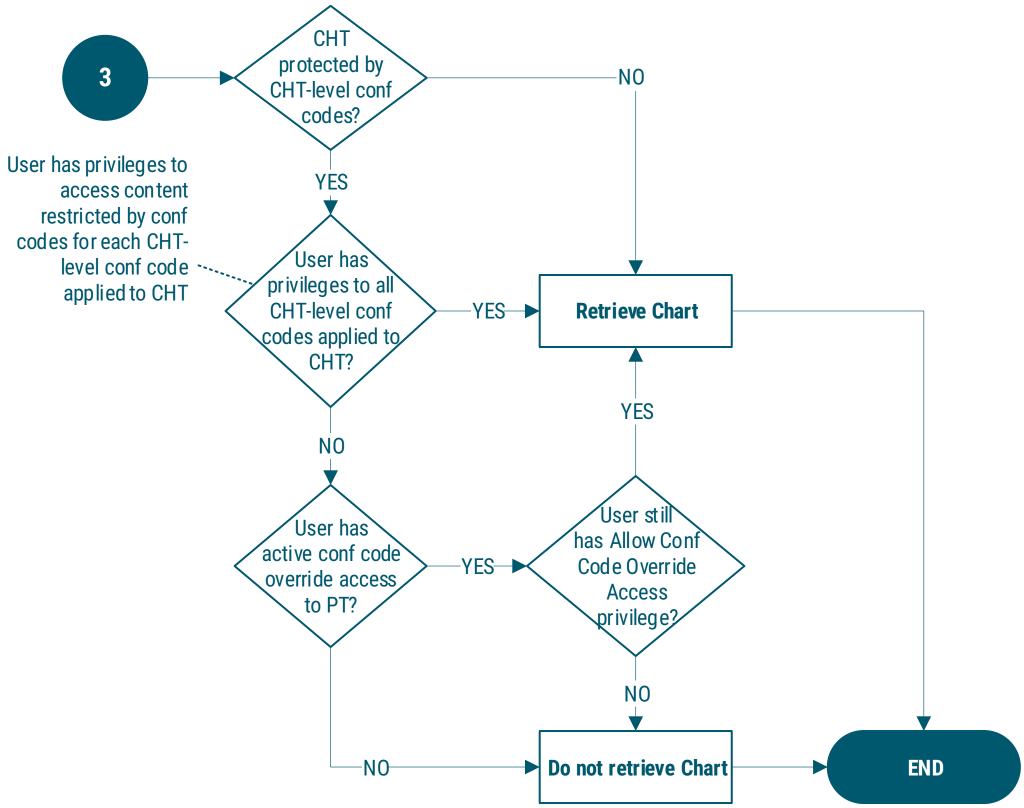
In Part 2, non-emergency access and the chart's VIP status are checked.

Chart Search Flow (Part 2)



In Part 3, chart-level confidentiality codes are checked.

Chart Search Flow (Part 3)



Patient Window Columns, Fields, and Filters

Column and Field Descriptions

The OnBase Patient Window displays information about records, charts, and documents within various columns. The following topics describe these columns and their corresponding search fields (if applicable).

- Allergy Information Columns
- Chart Search Fields and Columns
- Document List Columns
- Medical Alert Columns
- Patient List Columns
- Patient Search Fields and Columns

Note: Column and field names are configurable. The names used by your organization may vary from the names used in the following topics. See your system administrator for more information.

Allergy Information Columns

The following table describes columns associated with allergies.

Allergy Column	Description
Allergy - Allergy Indicator Code	The code indicating whether the patient is allergic to this drug.
Allergy - Allergy Type	The allergy category (drug, food, pollen, etc.).
Allergy - Allergy1	The code used to uniquely identify the allergy.
Allergy - Allergy2	Pending future development.
Allergy - Date Recognized	The date the allergy was identified.
Allergy - Drug Detail	The drug dose, unit, and intake frequency.
Allergy - Drug Type	Indicates whether the drug is suspected or concomitant.
Allergy - End Date	The date the patient stopped taking the drug.

Allergy Column	Description
Allergy - Info Source Code	The code indicating the source of this information.
Allergy - Onset Date	The onset date of the allergy.
Allergy - Probability	The likelihood of the patient being allergic to this drug.
Allergy - Processing Code	Do not use this column as a display column. Processing codes are used by the HL7 module to determine whether an allergy should be added, updated, or removed from the patient's record.
Allergy - Reaction Code	The code identifying the allergic reaction.
Allergy - Reaction Text	A description of the allergic reaction (e.g., flushing, wheeze, rash).
Allergy - Reporter Name	The name of the person who reported this allergy.
Allergy - Route Code	The code indicating how the drug is administered (e.g., oral).
Allergy - Severity	The severity of the allergy (e.g., severe/moderate/mild). May also be used to indicate whether the reaction is serious (e.g., yes/no).
Allergy - Start Date	The date the patient started taking the drug.
Allergy - Update Reason	The reason for updating or inactivating this allergy.

Chart Search Fields and Columns

The following table describes fields and columns that may be available for chart searches.

Chart Search Field / Column	Description
Admit Date	The date the patient was admitted.
Admit Source	The source of admission.
Admit Type	The type of admission.
Admitting Physician	The physician who admitted the patient.

Chart Search Field / Column	Description
Attending Physician	The attending physician for the visit.
Chart ID #	The chart number, also called the account number, episode number, visit number, or encounter number. If a chart ID is associated with an assigning authority, then the column displays the assigning authority in brackets next to the chart ID. For example, if chart #125 is associated with the EMR assigning authority, then it is displayed as **125 [EMR]**. Assigning authorities differentiate charts that have the same ID number. If a chart has been merged, then the previous chart ID is displayed in parentheses next to the current one. For example, if chart 123 has been merged into chart 124, then the chart ID # is displayed as **124 (123)**.
Chart Title	The chart's auto-name in OnBase.
Consulting Physician	A consulting physician on the chart.
Dept. Name	The department where the patient was treated.
Diagnosis Code	The diagnosis codes associated with the chart.
Discharge Date	The date the patient was discharged.
Disposition	The patient's disposition after treatment.
Facility Name	The facility where the patient was treated.
Financial Class	The patient's primary financial class.
Medical Record #	The medical record number (MRN). When used for searching, this field allows you to retrieve charts by their current or previous MRN. If an MRN is associated with an assigning authority, then the column displays the assigning authority in brackets next to the MRN. For example, if MRN 125 is associated with the EMR assigning authority, then it is displayed as **125 [EMR]**. Assigning authorities differentiate MRNs that have the same value. If an MRN has been merged, then the previous MRN is displayed in parentheses next to the current one. For example, if a record with an MRN of 123 has been merged into MRN 124, then the MRN is displayed as **124 (123)**.
Medical Service	The treatment the patient received.

Chart Search Field / Column	Description
MPI Number	The master patient index (MPI). When used for searching, this field allows you to retrieve charts by their current or previous MPIs. If an MPI is associated with an assigning authority, then the column displays the assigning authority in brackets next to the MPI. For example, if MPI 125 is associated with the EMR assigning authority, then it is displayed as **125 [EMR]**. Assigning authorities differentiate MPIs that have the same value. If an MPI record has been merged, then the column displays the previous MPI in parentheses next to the current one. For example, if a record with an MPI of 123 were merged into MPI 124, then the MPI column would display **124 (123)** for that record.
Patient DOB	The patient's date of birth.
Patient First Name	The patient's first name.
Patient Last Name	The patient's last name.
Patient Middle Name	The patient's middle name.
Patient SSN	The patient's Social Security Number.
Payor	The associated DRG Payor, such as Medicare (M) or Managed Care Organization (G).
Primary Care Physician	The patient's primary care physician (PCP).
Procedure Code	The procedure codes associated with the chart.
Referring Physician	The referring physician for the patient visit.
Total Charges	The total visit charges.

Document List Columns

Columns in the document list display information about individual documents. Available columns vary depending on your system's configuration.

- For information about columns that represent chart data, see Chart Search Fields and Columns on page 256.
- For information about columns that represent patient data, see Patient List Columns on page 259.

Medical Alert Columns

The following table describes columns associated with medical alerts:

Medical Alert Column	Description
MedAlert - Abnormal Flag	Indicates whether the patient has the reported condition.
MedAlert - Alert ID	The code used to uniquely identify the medical condition.
MedAlert - Date Recognized	The date the condition was recognized.
MedAlert - End Date	The end time when the medical condition no longer exists.
MedAlert - Remarks	Additional remarks about the alert.
MedAlert - Responsible Observer Num	The identification number for the person who observed or reported the alert.
MedAlert - Start Date	The start time when the medical condition was reported.
MedAlert - Update Reason	The reason for updating or inactivating this alert.

Patient List Columns

The following table describes columns that may be available for patient lists.

Both personal lists and system lists use the same set of columns; however, columns for system lists display information only for the charts that match the system list search criteria.

Tip: If a column displays the word **Multiple**, then the column has multiple values for the patient. For example, the patient may have charts residing in multiple departments. Rest your pointer over the word **Multiple** to display the values.

Patient List Column	Description
Admit Date	The date the patient was admitted.
Admit Type	The type of admission for a specific episode or visit.

Patient List Column	Description
Attending Physician	The patient's attending physician for a specific episode or visit.
Dept. Name	The patient's assigned department for a specific episode or visit.
Discharge Date	The date the patient was discharged.
Facility Name	The name of the facility where the patient was treated for a specific episode or visit.
Medical Record #	The patient's medical record number (MRN). If an MRN is associated with an assigning authority, then the column displays the assigning authority in brackets next to the MRN. For example, if MRN 125 is associated with the EMR assigning authority, then it is displayed as **125 [EMR]**. Assigning authorities differentiate MRNs that have the same value. If an MRN has been merged, then the previous MRN is displayed in parentheses next to the current one. For example, if a record with an MRN of 123 has been merged into MRN 124, then the MRN is displayed as **124 (123)**.
MPI Number	The patient's master patient index (MPI). If an MPI is associated with an assigning authority, then the column displays the assigning authority in brackets next to the MPI. For example, if MPI 125 is associated with the EMR assigning authority, then it is displayed as **125 [EMR]**. Assigning authorities differentiate MPIs that have the same value. If an MPI record has been merged, then the column displays the previous MPI in parentheses next to the current one. For example, if a record with an MPI of 123 were merged into MPI 124, then the MPI column would display **124 (123)** for that record.
Patient Deceased Date	The patient's date of death.
Patient DOB	The patient's date of birth.
Patient First Name	The patient's first name.
Patient Last Name	The patient's last name.
Patient Middle Name	The patient's middle name.
Patient Sex	The patient's sex.
Patient SSN	The patient's Social Security Number.

Patient Search Fields and Columns

The following table describes fields and columns that may be available for Patient Search and Scheduled Patient Search. Columns display values only for the charts or records that match your search criteria.

Tip: If a column displays the word **Multiple**, then the column has multiple values for the patient. For example, the patient may have matching charts residing in multiple departments. Rest your pointer over the word **Multiple** to display the values.

Patient Search Field / Column	Description
Admit Date	The date the patient was admitted. When **Current Inpatients** is selected in the search pane, this field becomes unavailable.
Admit Type	The type of admission for a specific episode or visit.
Attending Physician	The patient's attending physician for a specific episode or visit.
Current Inpatients	Restricts the search to return current inpatients only. When this check box is selected in the search pane, the **Admit Date** and **Discharge Date** fields are unavailable.
Dept. Name	The patient's assigned department for a specific episode or visit.
Discharge Date	The date the patient was discharged. When **Current Inpatients** is selected in the search pane, this field becomes unavailable.
Duration	The dates and length of the patient's visit. **Note:** To make the **Current Inpatients** check box available in Patient Search, ensure **Duration** is designated as a search field in Configuration. In Patient Search field configuration, **Duration** corresponds to the **Current Inpatients** check box. In Patient Search column configuration, **Duration** corresponds to a column displaying the duration of the patient's visit.
Facility Name	The name of the facility where the patient was treated for a specific episode or visit.

Patient Search Field / Column	Description
Medical Record #	The patient's medical record number (MRN). When used for searching, this field allows you to retrieve patient records by their current or previous MRN. If an MRN is associated with an assigning authority, then the column displays the assigning authority in brackets next to the MRN. For example, if MRN 125 is associated with the EMR assigning authority, then it is displayed as **125 [EMR]**. Assigning authorities differentiate MRNs that have the same value. If an MRN has been merged, then the column displays the previous MRN in parentheses next to the current one. For example, if a record with an MRN of 123 were merged into MRN 124, then the MRN column would display **124 (123)** for that record.
MPI Number	The patient's master patient index (MPI). When used for searching, this field allows you to retrieve patient records by their current or previous MPI. If an MPI is associated with an assigning authority, then the column displays the assigning authority in brackets next to the MPI. For example, if MPI 125 is associated with the EMR assigning authority, then it is displayed as **125 [EMR]**. Assigning authorities differentiate MPIs that have the same value. If an MPI record has been merged, then the column displays the previous MPI in parentheses next to the current one. For example, if a record with an MPI of 123 were merged into MPI 124, then the MPI column would display **124 (123)** for that record.
Patient DOB	The patient's date of birth.
Patient First Name	The patient's first name.
Patient Last Name	The patient's last name.
Patient Middle Name	The patient's middle name.
Patient Sex	The patient's sex.
Patient SSN	The patient's Social Security Number.
Scheduling - Appointment Date	The date for the patient's scheduled appointment.
Scheduling - Location	The location scheduled for the patient's appointment.
Scheduling - Personnel	The physician scheduled for the patient's appointment.
Unit Name	The patient's assigned unit for a specific episode or visit.

Filter Descriptions

The OnBase Patient Window allows users to filter the document list. Available filters vary depending on your system's setup.

The following table describes a subset of medical record filters that may be available. Filters not listed here may be document keywords selected by your administrator.

Note: Filter names are configurable. The names used by your organization may vary from the names used in the following table. See your system administrator for more information.

Filter	Description
Admit Date	The date the patient was admitted.
Admit Source	Where the patient was admitted.
Admit Type	The type of admission.
Admitting Physician	The physician who admitted the patient.
Attending Physician	The attending physician for the visit.
Chart ID #	The chart number, also called the account number, episode number, or visit number. The admit and discharge dates on the associated chart also are displayed if applicable. If a chart ID is associated with an assigning authority, then the assigning authority is displayed in brackets next to the chart ID. For example, if chart #125 is associated with the EMR assigning authority, then it is displayed as **125 [EMR]**. Assigning authorities differentiate chart IDs that have the same value.
Clinically Relevant Date	The clinically relevant date of a document.
Consulting Physician	A physician with consulting access. Filtering on this field will only return documents on charts to which the specified physician currently has consulting access. If the physician does not currently have consulting access, documents from the chart are not returned.
Dept. Name	The patient's assigned location.
Diagnosis Code	The diagnosis codes associated with the patient's charts.
Discharge Date	The date the patient was discharged.
Disposition	The patient's disposition after treatment.
Document Type	The document's Document Type.

Filter	Description
Facility Name	The name of the facility where the patient was treated.
Financial Class	The patient's primary financial class.
Full Text Search	Allows users to conduct full-text searches, provided OnBase is licensed and configured for a full-text search module. For this filter to function, users must have the **Full-Text Search** privilege. For more information, see the **Full-Text Search** documentation.
Medical Record #	The patient's MRN. If an MRN is associated with an assigning authority, then the assigning authority is displayed in brackets next to the MRN. For example, if MRN 125 is associated with the EMR assigning authority, then it is displayed as **125 [EMR]**. Assigning authorities differentiate MRNs that have the same value.
Medical Service	The treatment the patient received.
Payor	The associated DRG Payor, such as Medicare (M) or Managed Care Organization (G).
Primary Care Physician	The patient's primary care physician (PCP).
Procedure Code	The procedure codes associated with the patient's charts.
Referring Physician	The referring physician for the patient visit.
Total Charges	The total visit charges.

Patient Window

User Guide

Foundation EP5

Patient Window Usage

For information about using OnBase Patient Window, see the following topics:

- Diagrams on page 266
- Customizing the Layout on page 270
- Patient Demographics on page 274
- Document Navigation on page 280
- Timeline Mode on page 288
- Filters on page 293
- Form Creation on page 301
- Document Comparison on page 302
- Printing Documents on page 305
- Document Corrections on page 308
- Patient Cases on page 311
- Search on page 316
- Patient Lists on page 327
- Hosted Content on page 337
- Emergency Patient Record Access on page 337
- User Options on page 339
- Document Viewer Usage on page 362
- Patient Window Administration on page 384

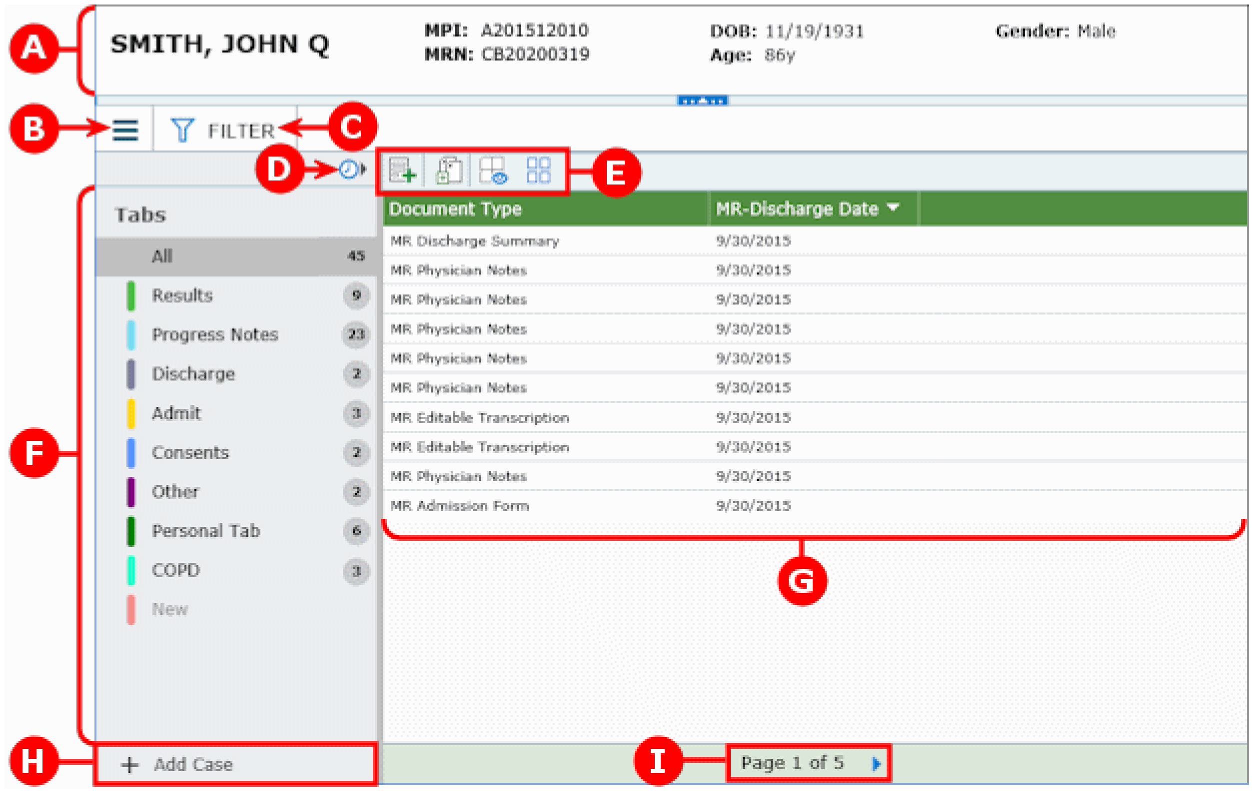
Diagrams

Components of OnBase Patient Window are illustrated in the following diagrams:

- Patient Record Diagram on page 267
- Timeline Mode Diagram on page 269

Patient Record Diagram

The following diagram shows a patient record displayed in OnBase Patient Window.



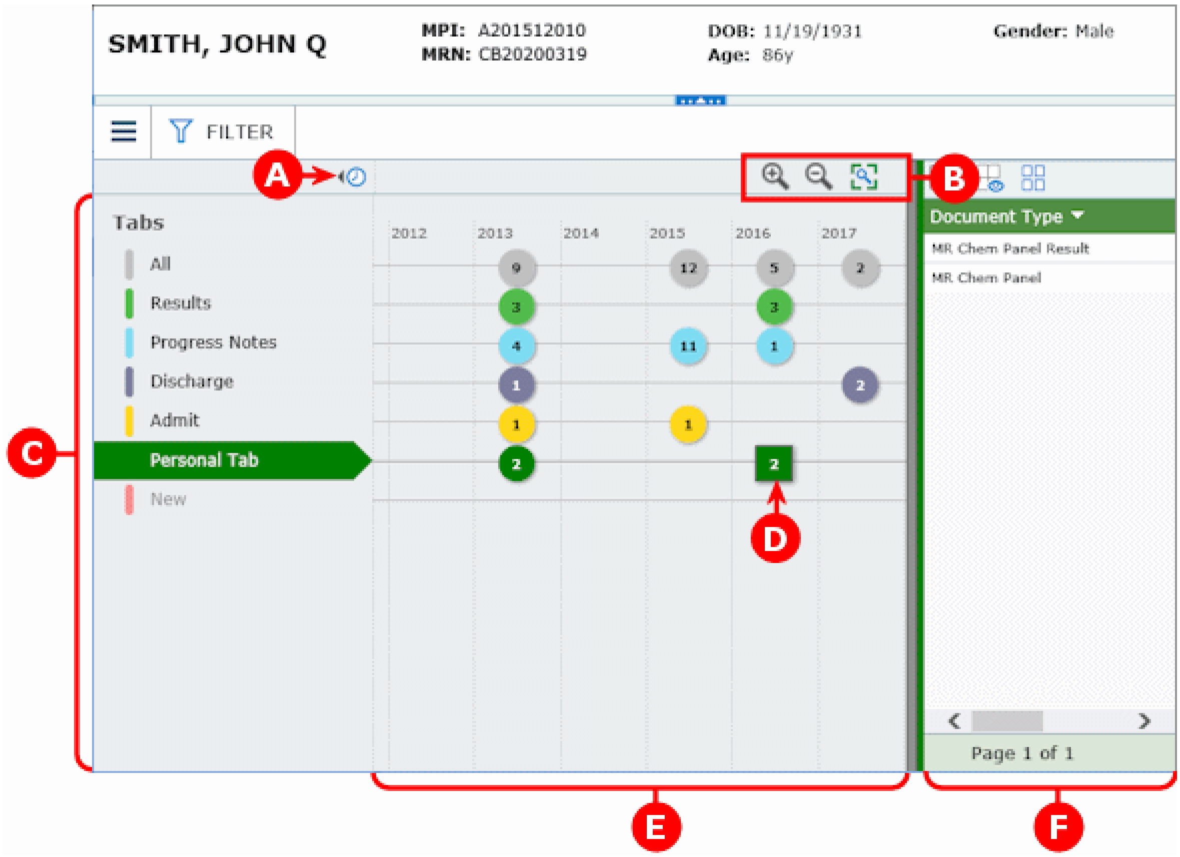
Components are described in the following table:

Label	Description
A	**Banner** If present, the banner provides patient demographic information, which may include the patient's name, MPI, MRN, date of birth, age, and sex. Other information may include race, allergies, medical alerts, and contact information. For more information, see Patient Demographics on page 274.
B	**Main Menu** Depending on your rights, the main menu may allow you to access search options, patient lists, or administrative functions.
C	**Filter Button** The **Filter** button allows you to filter the current record to display a subset of documents. Available filters vary depending on your system's settings and the contents of the record. Filters in effect are displayed to the right of the **Filter** button. For more information, see Filters on page 293.

Label	Description
D	**Show Timeline Mode Button** The **Show Timeline Mode** button opens the timeline view, which allows you to browse the patient's record using a timeline. For more information, see Timeline Mode on page 288.
E	**Document List Toolbar** The document list toolbar includes tools to help you manage and browse documents in the document list.
F	**Tabs Pane** Tabs help organize documents into different categories, similar to tabs on a physical chart. Click a tab to view its contents in the document list. The tabs pane is collapsed when a document is open. The tabs pane is expanded again when the document is closed. To view the tabs pane while a document is open, rest your pointer over the collapsed pane.
G	**Document List** The document list shows documents assigned to the currently selected tab, excluding any documents that have been filtered out. The document list may display documents as a multi-column list or as thumbnails. For more information, see Enabling Thumbnail View on page 271. To open a document, double-click it from the document list. The document is displayed in the document viewer, and the documents list moves to the left side of the window.
H	**Add Case Button** The **Add Case** button allows you to add a case tab to the current patient's record. A case tab can act as a point of reference for documents concerning a specific issue. Once you have created a case tab, you can choose documents for the tab to display. Case tabs can be private or public. For more information, see Patient Cases on page 311.
I	**List Paging Toolbar** A paging toolbar is displayed below every list, allowing you to see which page of the list you are viewing and to navigate to other pages in the list. For more information, see Navigating Lists of Results on page 283.

Timeline Mode Diagram

The following diagram shows a patient record displayed in timeline mode.



Timeline mode components are described in the following table:

Label	Description
A	**Exit Timeline Mode Button** The **Exit Timeline Mode** button closes the timeline.
B	**Zoom Toolbar** The zoom toolbar allows you to zoom in and out of the current date range. For example, if you are browsing by year, you can zoom in to browse by month. For more information, see Zooming In or Out on page 289.
C	**Tabs Pane** Tabs help organize documents into different categories, similar to tabs on a physical chart. Click a tab to view its contents in the document list.

Label	Description
D	**Documents Badge** Badges indicates the number of documents in a tab that meet the filter criteria for a particular time period. Click a badge to display the corresponding document set in the document list. The badge changes from a circle to a square to indicate the document set is currently selected.
E	**Timeline** The timeline graphs the contents of the patient record by clinically relevant date (if available) or document date. Click and drag the timeline to move it forward or backward.
F	**Document List** The document list shows the documents in the currently selected tab based on your filter criteria and the selected time period. Documents that do not meet the specified criteria are omitted. The document list may display documents in a multi-column list or as thumbnails. For more information, see Enabling Thumbnail View on page 271. To open a document, double-click it from the document list. The document is displayed in the document viewer, the timeline is hidden, and the document list moves to the left side of the window.

Customizing the Layout

To customize components in OnBase Patient Window, see the following topics:

- Resizing a Pane on page 270
- Enabling Thumbnail View on page 271
- Enabling Row View on page 272

Tip: To reset the layout to its original state, see Resetting the Default Layout Options on page 358.

Resizing a Pane

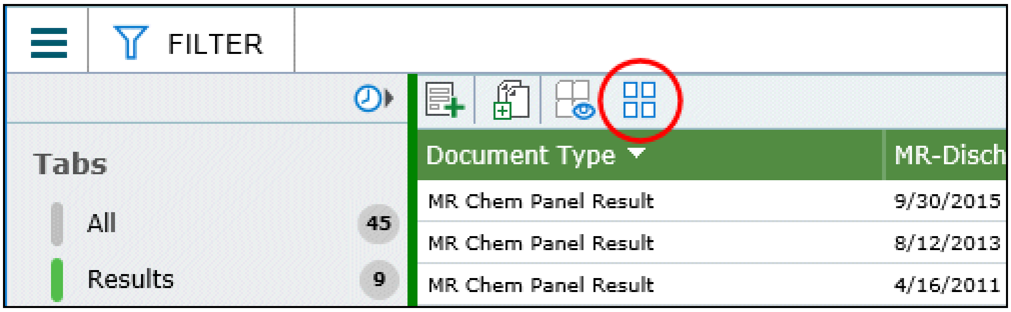
Some panes can be resized to display more information.

To resize a pane:

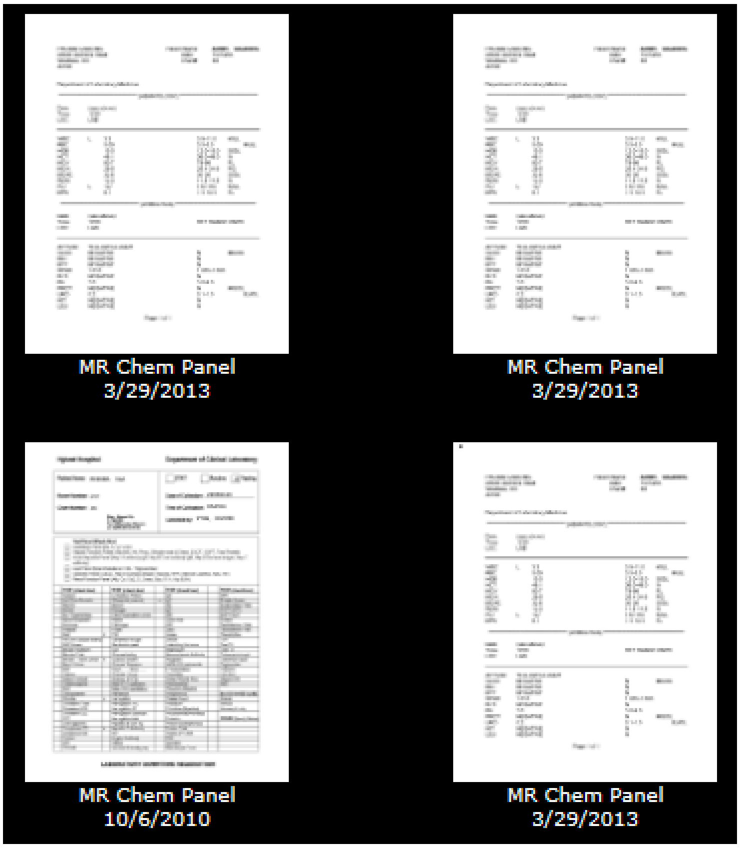
1. Position your pointer over the border between two panes.
2. Click and drag the border to the preferred width or height.

Enabling Thumbnail View

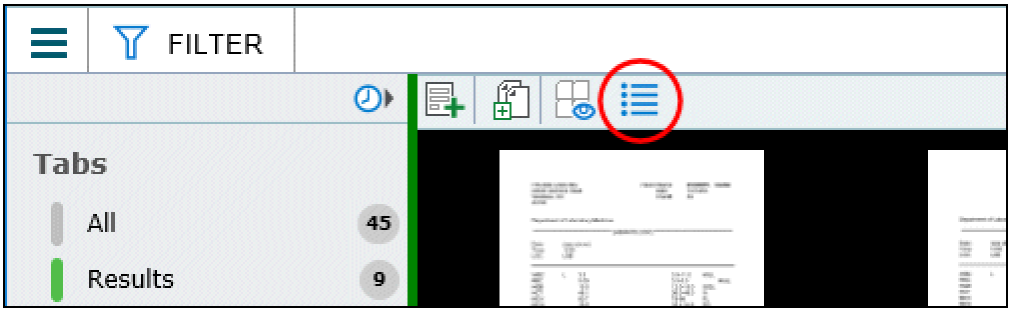
The document list can display documents either in a multi-column list or as thumbnails. To enable thumbnail view, click the **View Thumbnails** button in the document list toolbar. Your preference (thumbnail vs. list) is preserved on a per-tab basis.



In thumbnail view, each thumbnail shows the first page of the document it represents. If a file format cannot be displayed as a thumbnail, a default thumbnail image is displayed. The label under each thumbnail displays the Document Type and a date. The date represents either the clinically relevant date (if available) or the document date.



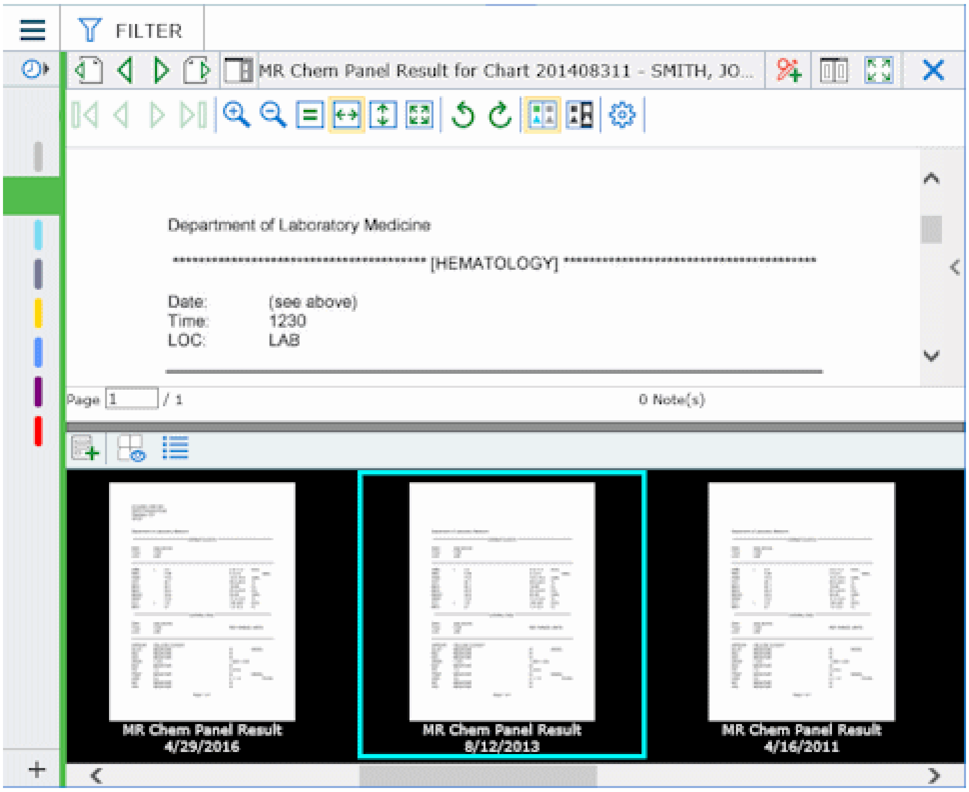
To view documents as a list, click the **View Document List** button in the document list toolbar.



Enabling Row View

OnBase Patient Window can display information in column view (the default) or row view. Row view displays components horizontally as rows.

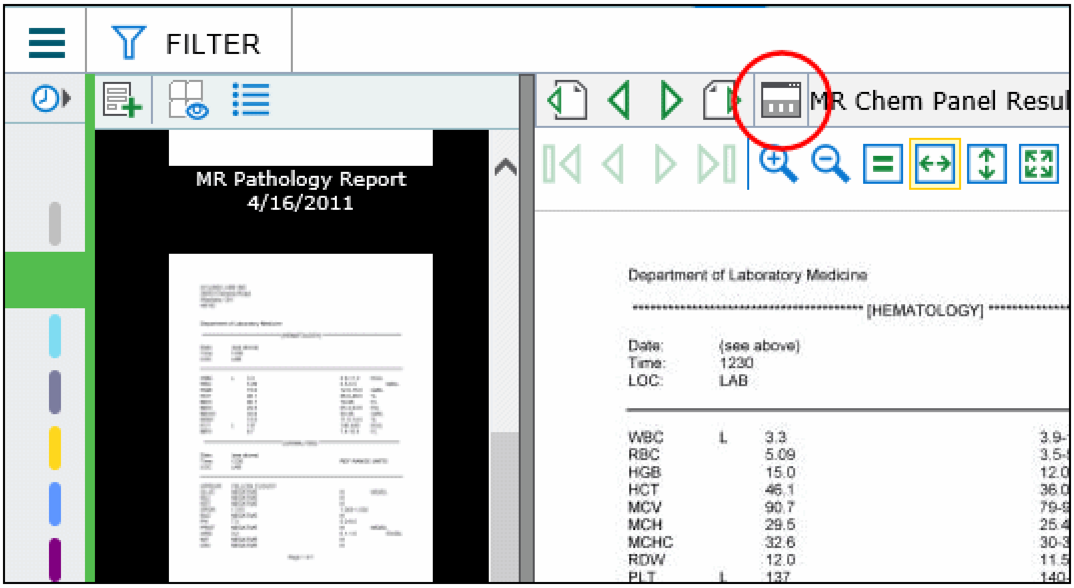
When combined with thumbnail view, row view allows for filmstrip-style navigation. This style of navigation may be helpful when you are viewing open documents.



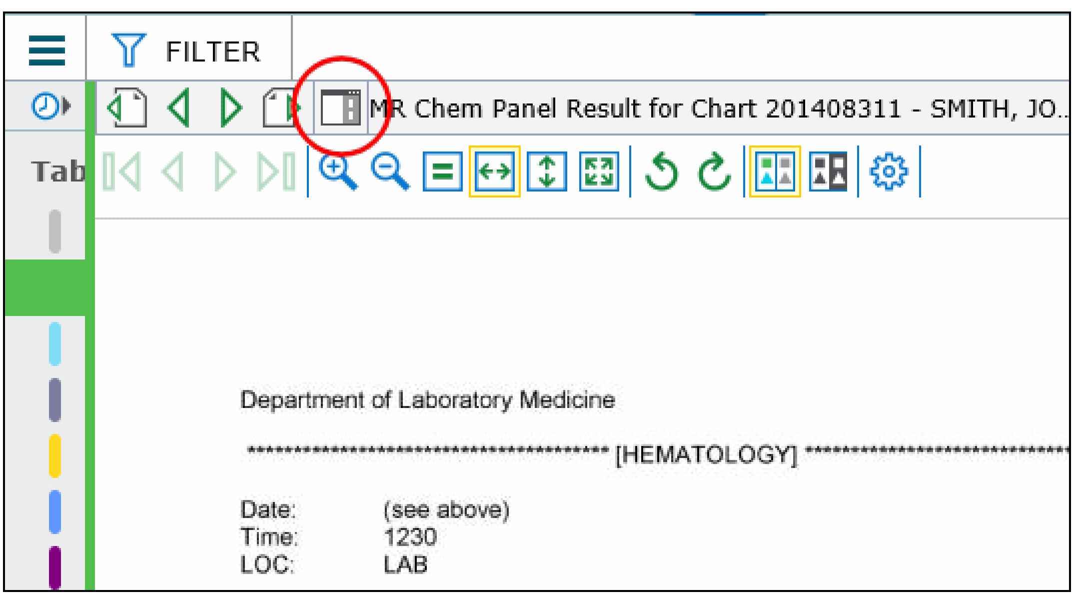
Tip: Resize panes by clicking and dragging the borders between them.

To enable row view:

1. Click the **Change List Orientation** button above the document viewer.

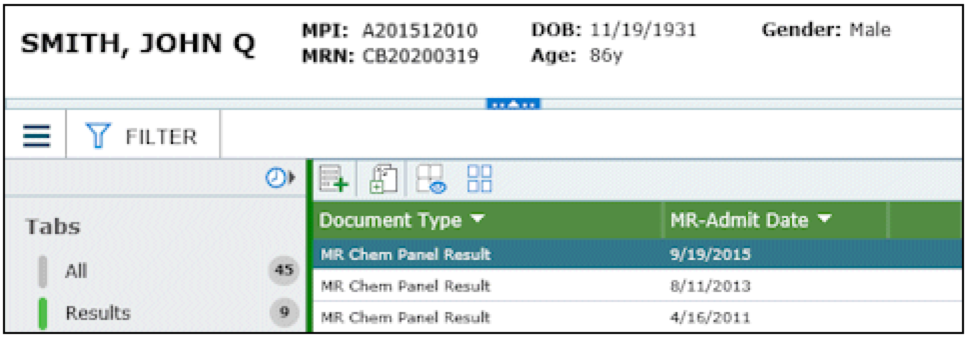


2. For filmstrip-style navigation, ensure the document list is in thumbnail view. See Enabling Thumbnail View on page 271.
3. To return to column view, click the **View document list (or thumbnails) in column orientation** button above the document viewer.



Patient Demographics

Depending on your system's setup, OnBase Patient Window may display a banner containing patient demographics, contact information, and medical alerts.



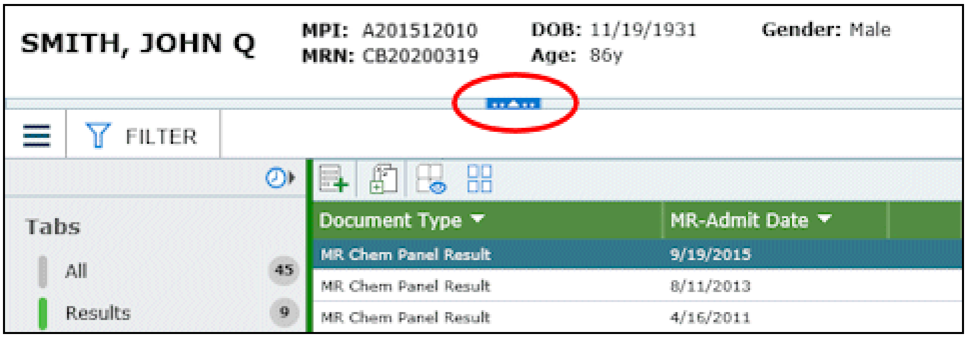
The banner is configurable, and its design varies per system. OnBase Patient Window may display different banners depending on the patient's status, or it may not display a banner at all. A banner may even provide the option to show or hide additional information.

See the following topics for additional information:

- Hiding the Banner on page 274
- Viewing Patient Allergy Information on page 275
- Viewing Patient Medical Alerts on page 276
- Viewing Patient Addresses on page 277
- Viewing Patient Contact Information on page 278
- Viewing Patient Notices on page 278

Hiding the Banner

To hide the banner, click the collapse button on the border below it.

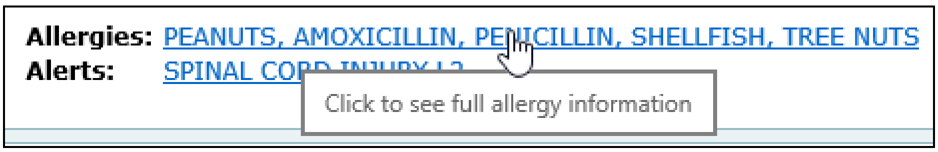


Viewing Patient Allergy Information

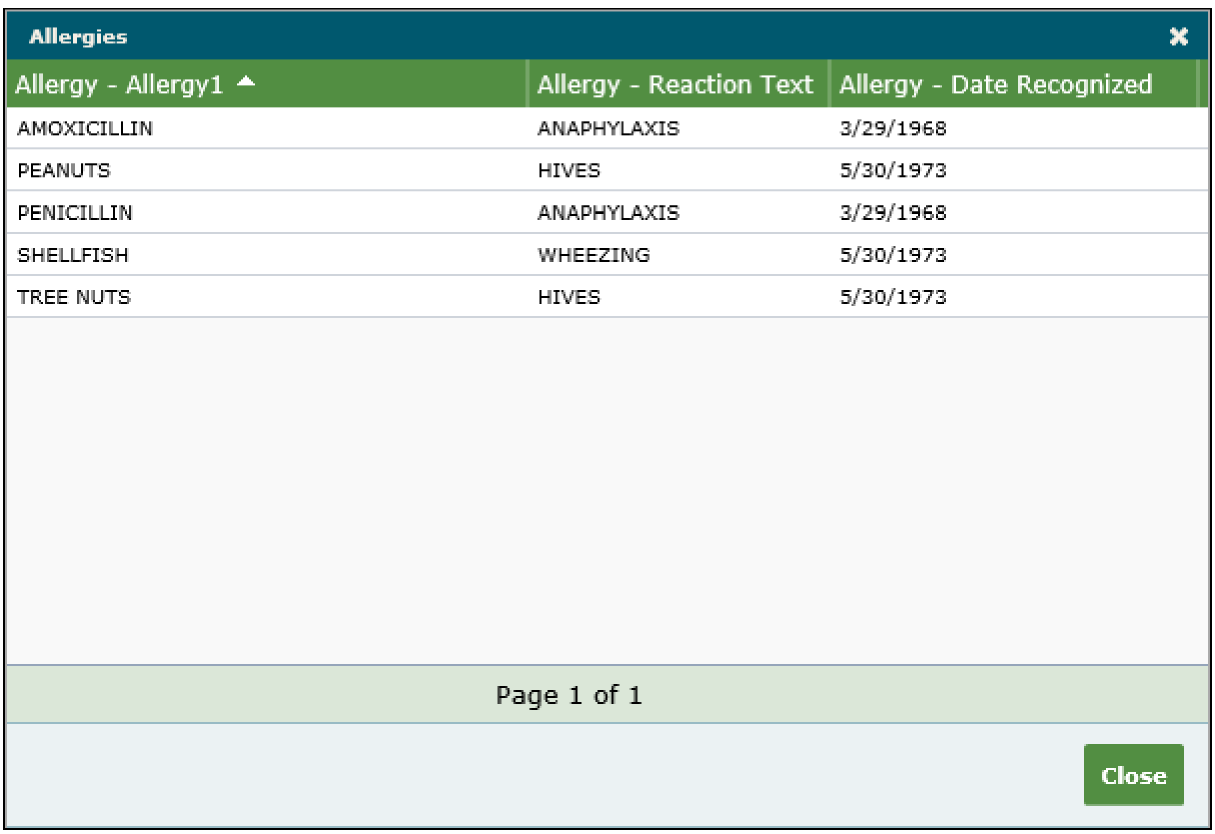
If the banner is set up to show the patient's allergies, then you can access full details about all allergies recorded for the patient.

Tip: For descriptions of available columns, see Allergy Information Columns on page 255.

1. Do one of the following:
   - Click the **View All** allergies link (if available).
   - Click the name of any allergy in the banner.



   The **Allergies** dialog box is displayed.



2. If necessary, do the following to display more information:
   - Resize the columns.
   - Scroll left or right to view additional columns, if applicable.

- Scroll up or down as needed to view all allergies for the patient. If there are multiple pages of allergies, click the **Next** button to view the next page.

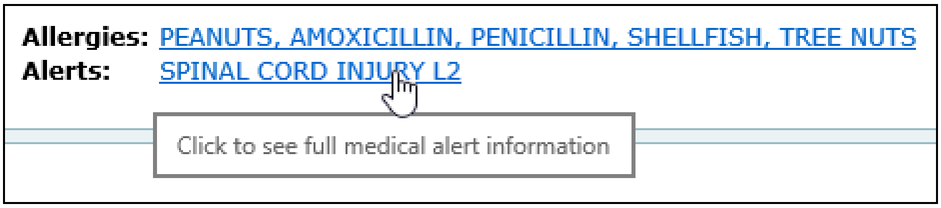
3. When you are finished, click **Close**.

Viewing Patient Medical Alerts

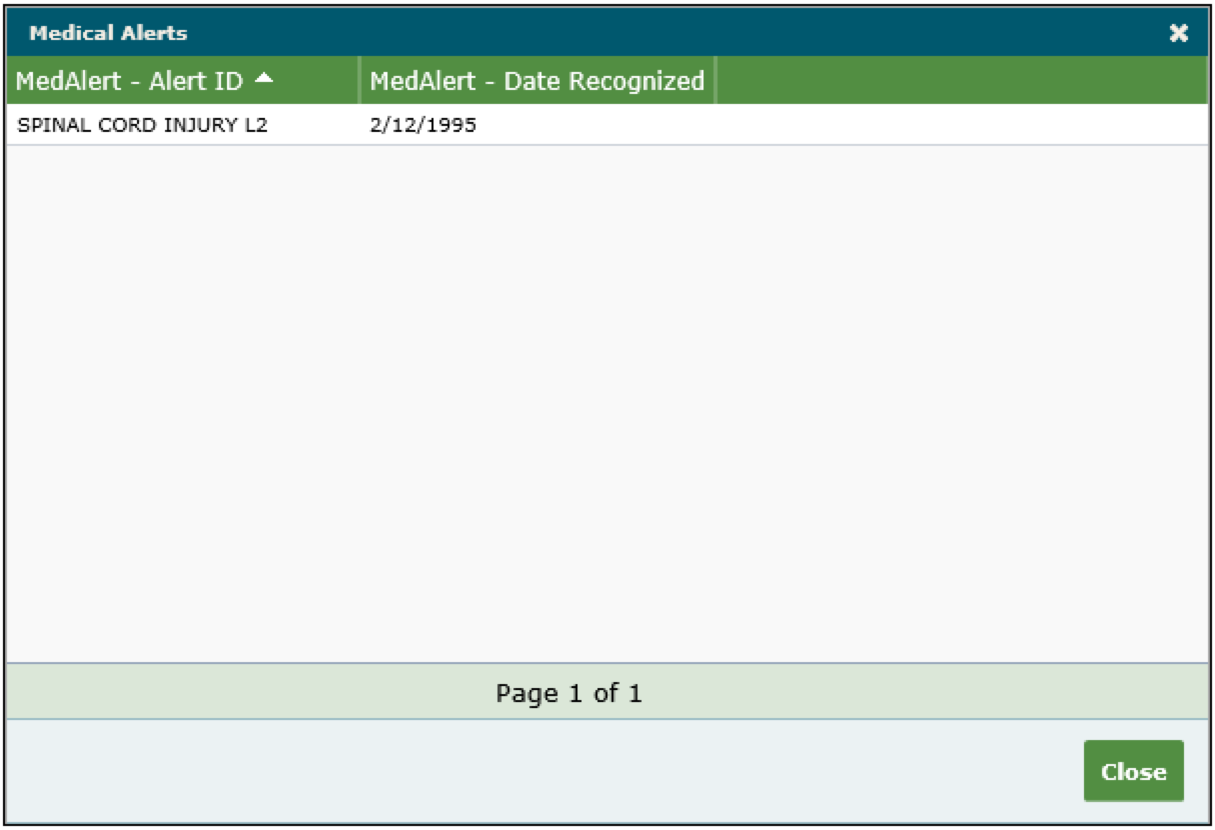
If the banner is set up to display patient alerts, then you can access full details about the alerts.

Tip: For descriptions of available columns, see Medical Alert Columns on page 259.

1. Click the name of any alert in the banner.



The **Medical Alerts** dialog box is displayed.

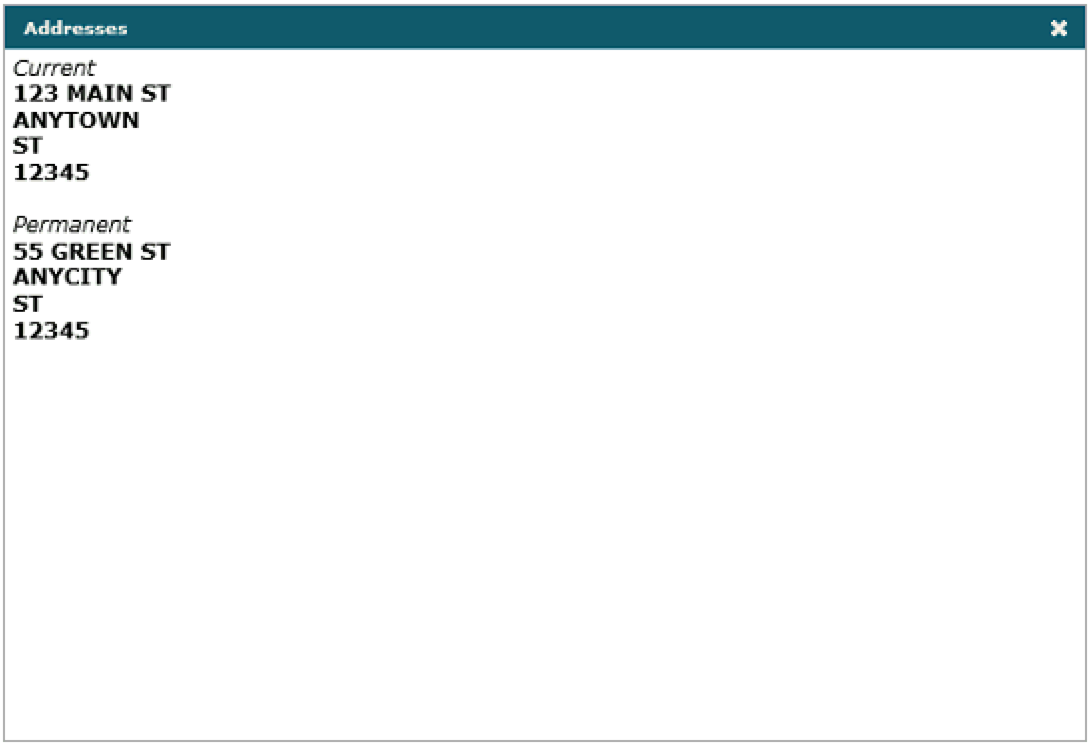


2. If necessary, do the following to display more information:
   - Resize the columns.
   - Scroll left or right to view additional columns, if applicable.
   - Scroll up or down as needed to view all alerts for the patient. If there are multiple pages of alerts, click the **Next** button to view the next page.
3. When you are finished, click **Close**.

Viewing Patient Addresses

If the banner is set up to display the patient's address, then you may be able to view all active addresses for the patient.

If the banner displays a **View All** link for address information, click the link. The **Addresses** dialog box displays all active addresses recorded for the patient.



Viewing Patient Contact Information

If the banner is set up to display the patient's contact information, then you may be able to view all active phone numbers and email addresses for the patient.

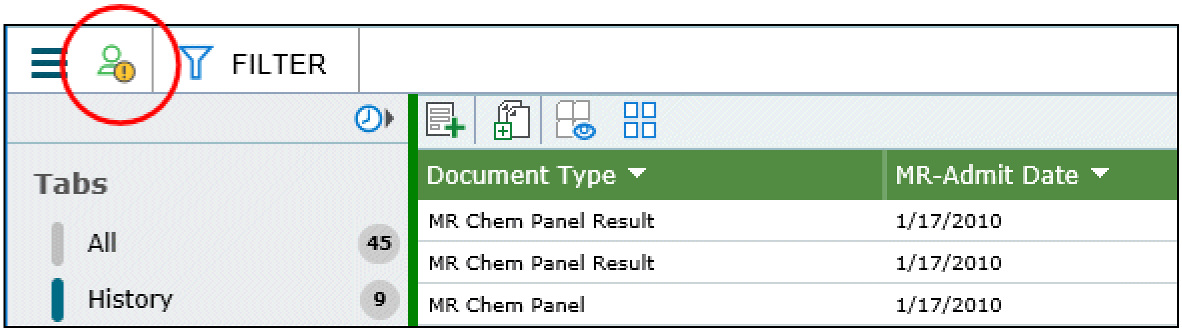
If the banner displays a **View All** link for contact information, click the link. The **Contact Info** dialog box displays all active phone numbers and email addresses recorded for the patient.

Viewing Patient Notices

Notices are special considerations provided for a patient on a facility-by-facility basis. For example, some patients may have opted out of allowing their records to be viewed within a specific facility.

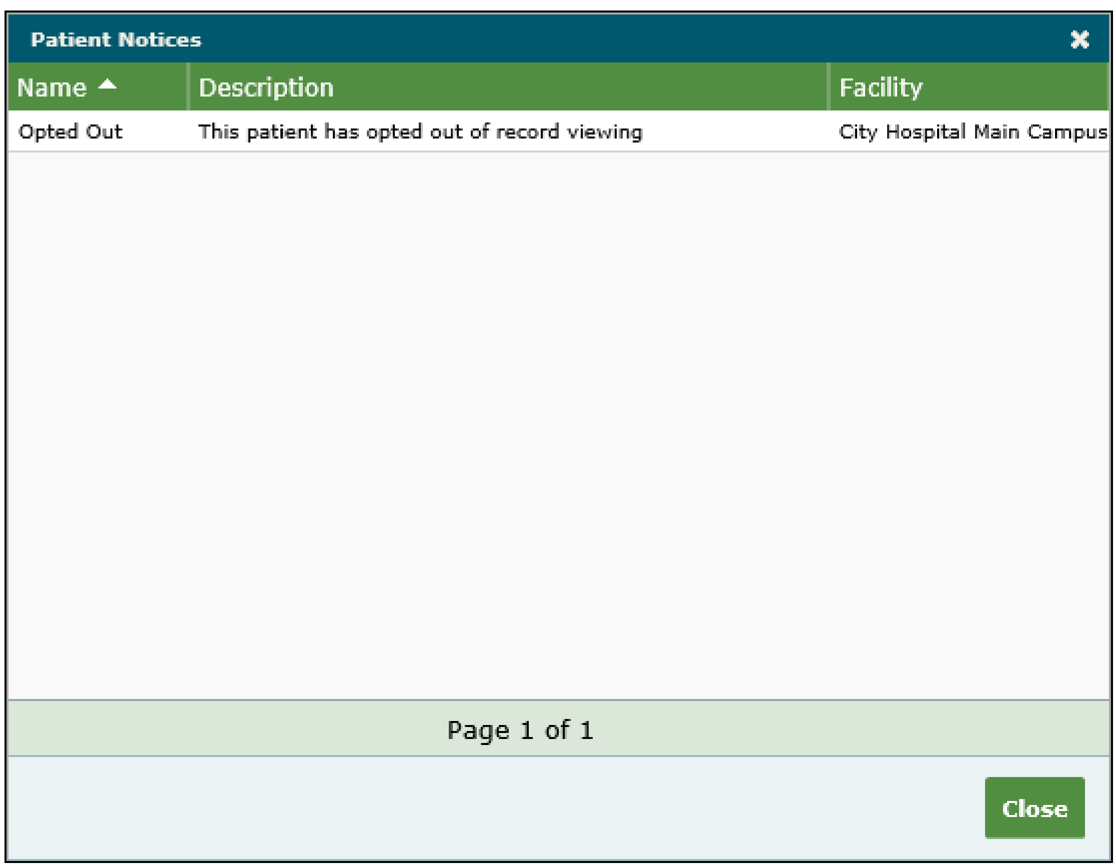
Note: If you are a medical record administrator, you can assign notices to patients using Patient Search or Scheduled Patient Search. See Assigning Patient Notices on page 410.

If a patient has any notices assigned, the **Patient Notices** button is displayed in the main toolbar.



To view the notices for a patient:

1. Click the **Patient Notices** button. The **Patient Notices** dialog box displays the name, description, and facility associated with each notice.



2. Click **Close** to close the **Patient Notices** dialog box.

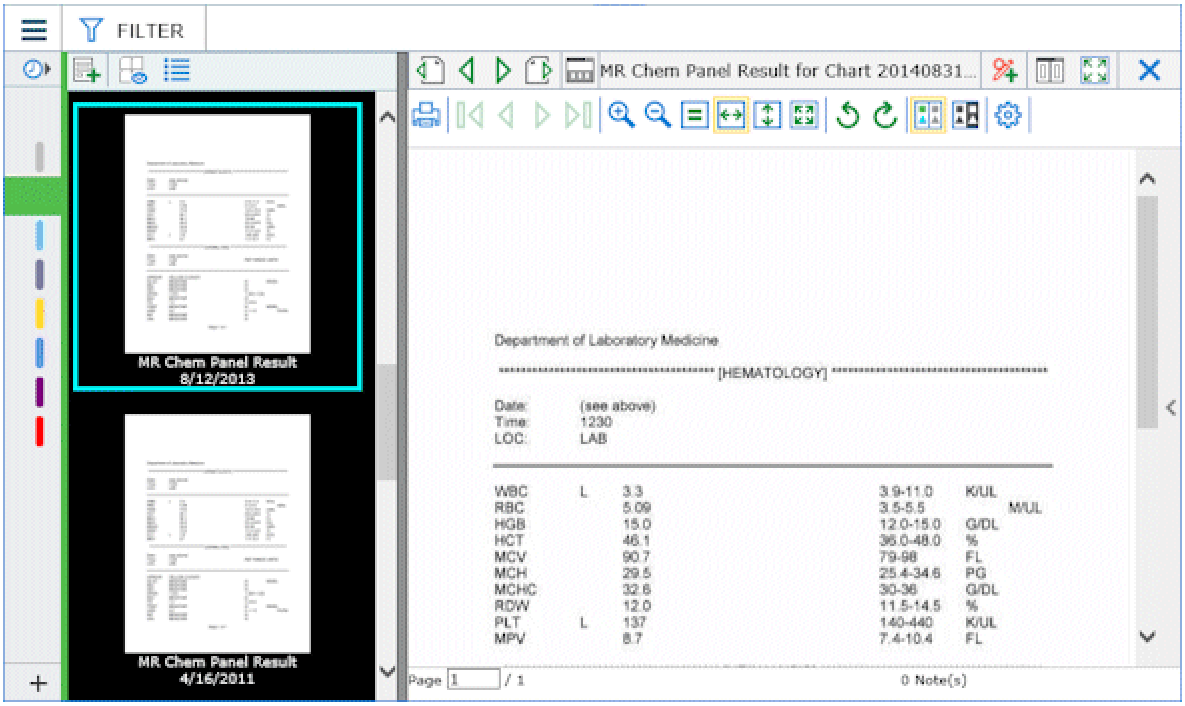
Document Navigation

The following topics describe how to navigate documents in OnBase Patient Window.

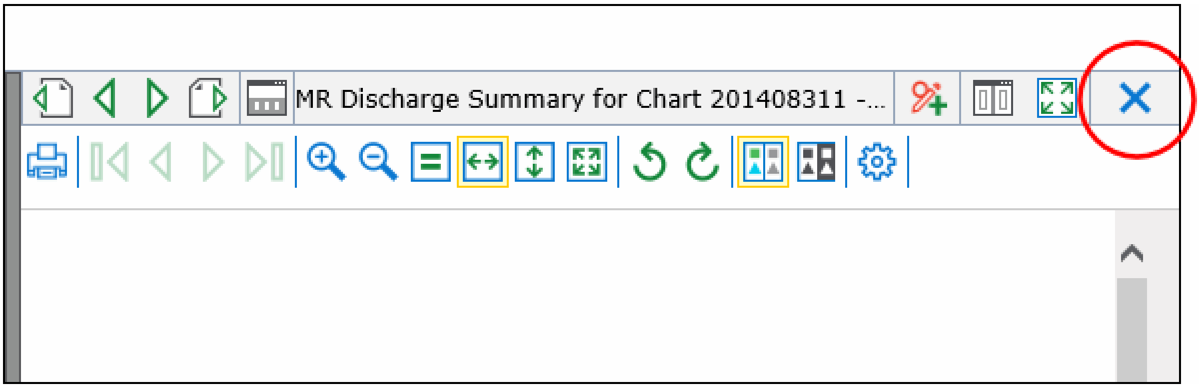
- Opening a Document on page 280
- Expanding the Viewer on page 282
- Navigating Lists of Results on page 283
- Sorting Lists on page 284
- Browsing Document-by-Document on page 285
- Browsing Page-by-Page on page 285
- Browsing by Tab on page 286

Opening a Document

To open a document, double-click it from the document list. The document is displayed in the viewer, and the document list moves to the left side of the window.



To close the document, click the **Close** button in the upper-right corner of the viewer.



Opening Sensitive Documents

Some documents may contain images of a sensitive nature. If a document belongs to a Document Type that is set up for sensitive content, the following warning is displayed when you attempt to open the document:

Warning: You are about to view sensitive content which should not be viewed in open environments.

Do one of the following:

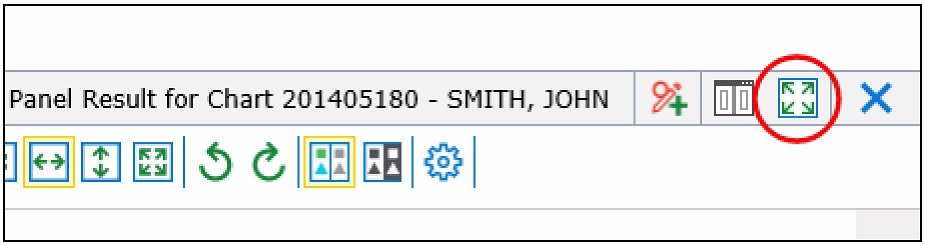
- To close the viewer without opening the document, click **Cancel**.
- To proceed with opening the document, click **Acknowledge and Proceed**.
- To suppress the warning, select **Do not show again for this session** and then click **Acknowledge and Proceed**. You will not be warned when opening sensitive documents for the remainder of your session. Suppressing the warning also removes the overlay displayed for sensitive documents in thumbnail view.

Expanding the Viewer

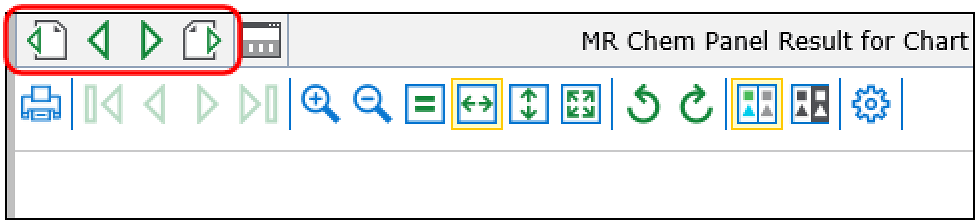
To increase the document viewing area, use the **Expanded Mode** button. In expanded mode, only the viewer is displayed; other components are hidden. If you want to always open documents in expanded mode by default, see Enabling Expanded Mode By Default on page 357.

To view documents in expanded mode:

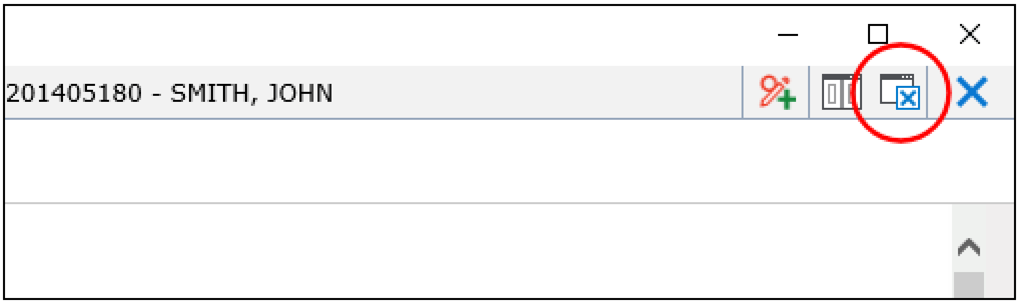
1. Open the document you want to view.
2. Click the **Expanded Mode** button above the document viewer.



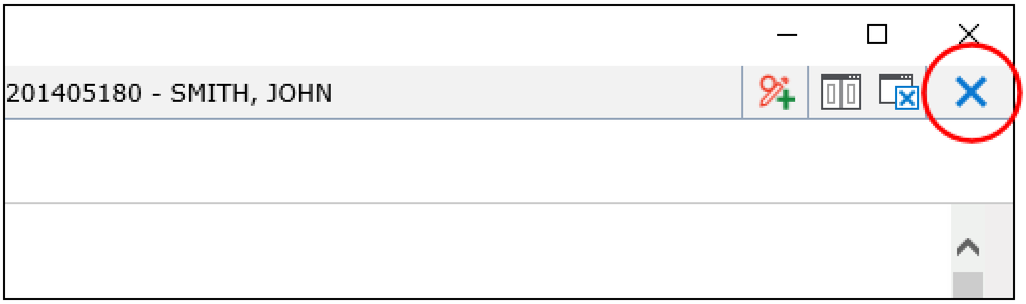
3. Use the navigation buttons above the viewer to navigate to other documents in the record.



4. To exit expanded mode, do one of the following:
   - To keep the current document open, click the **Exit Expanded Mode** button in the upper-right corner of the viewer.



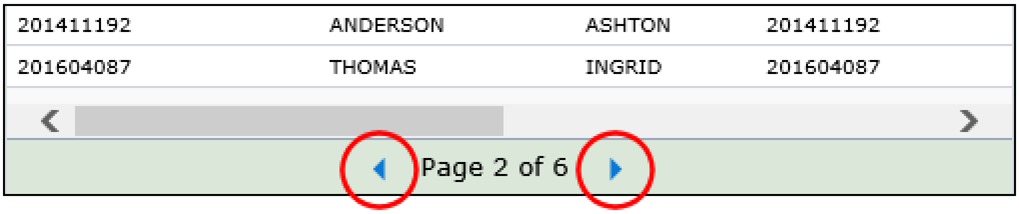
- To return to the document list, click the **Close** button.



Navigating Lists of Results

If a list of results or documents contains a large number of items, then the list may be split across several pages.

- To navigate to the next page, click the **Next** button at the bottom of the current pane.
- To navigate to the previous page, click the **Previous** button at the bottom of the current pane.



Sorting Lists

You can sort lists in ascending or descending order by column. Available columns vary depending on your system's setup.

Tip: For information about available columns, see Patient Window Columns, Fields, and Filters on page 255.

Note: To sort documents, first make sure the document list is displayed as a list. Click the **View Document List** button in the document list toolbar.

1. To sort items by a specific column, click the column heading.
   - For example, to sort a list in ascending order by Admit Type, click the **Admit Type** column heading.
   - Click the heading again to sort the list in descending order.

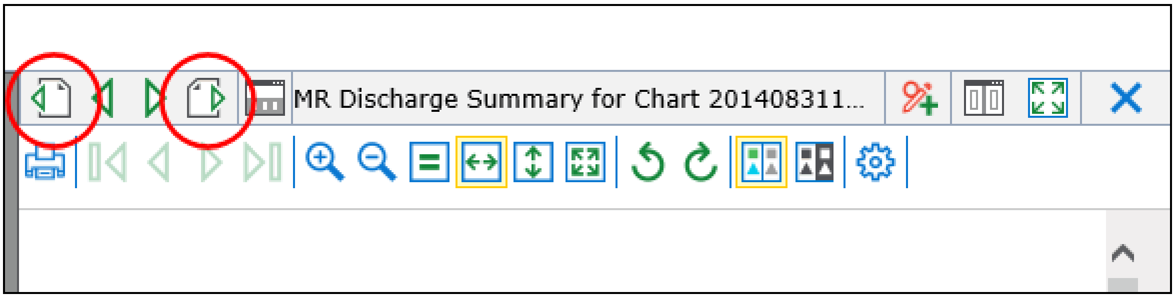
Admit Type	Admit Date	Discharge Dat
Outpatient A	6/12/2013	6/12/2013
Outpatient A	3/22/2010	3/28/2010
Outpatient A	6/19/2013	6/19/2013
Emergency AC -	1/25/2009	1/28/2009
Emergency AC -	6/12/2013	6/12/2013
Emergency AC -	6/10/2013	6/10/2013
Elective C - NL	7/5/2009	7/6/2009
Clinic N	7/9/2013	7/9/2013

2. To sort by more than one column, press **Ctrl** as you click the heading of each secondary column you want to sort by.
   - For example, if the list is currently sorted by Admit Type, you can **Ctrl**-click the **Admit Date** column heading to sort items within each Admit Type by admit date.
   - **Ctrl**-click the heading again to sort in descending order.

Admit Type	Admit Date	Discharge Dat
Outpatient A	3/22/2010	3/28/2010
Outpatient A	6/12/2013	6/12/2013
Outpatient A	6/19/2013	6/19/2013
Emergency AC -	1/25/2009	1/28/2009
Emergency AC -	6/10/2013	6/10/2013
Emergency AC -	6/12/2013	6/12/2013

Browsing Document-by-Document

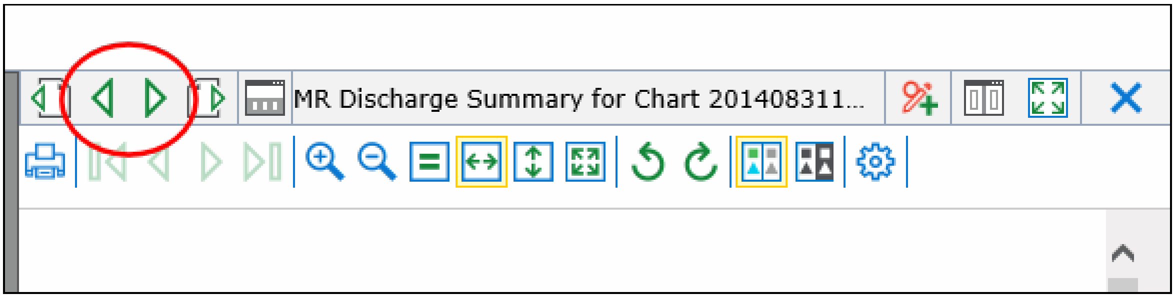
To open the previous or next document in the list, click the **Previous Document** or **Next Document** button above the viewer.



Typically, navigating past the first or last document in the list will allow you to navigate to documents on different tabs. If you opened the current document from timeline mode, then you cannot navigate beyond the first or last document in the document list.

Browsing Page-by-Page

To view the previous or next page in a text or image document, click the **Previous Page** or **Next Page** button above the viewer.

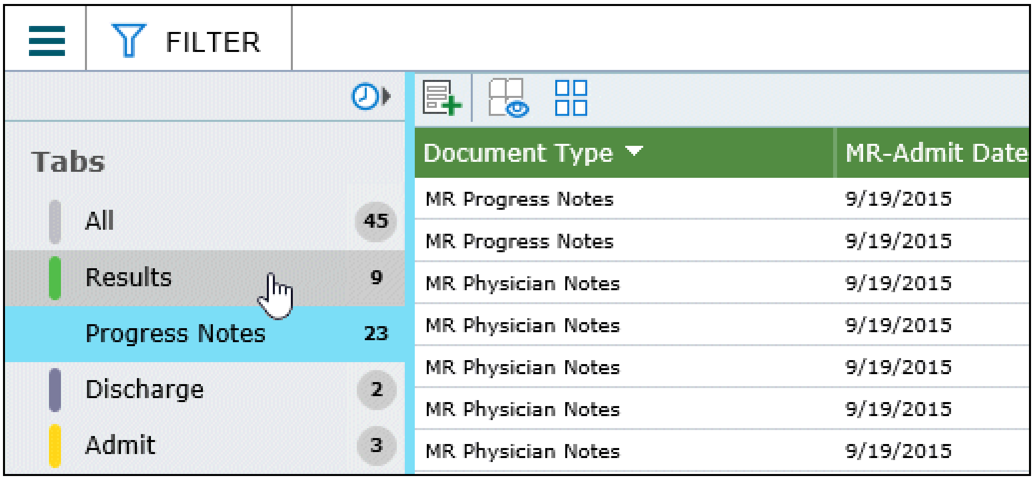


- If you are on the first page of a document, click **Previous Page** to view the previous document. Multi-page text and image documents will be opened to the last page.
- If you are on the last page of a document, click **Next Page** to view the next document.

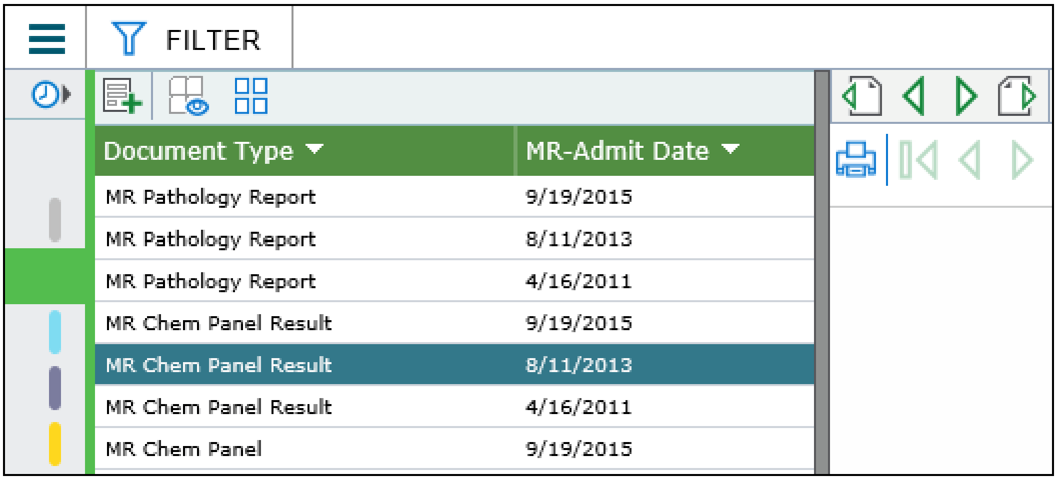
Browsing by Tab

OnBase Patient Window displays a list of tabs on the left side of the window. Like tabs on physical charts, tabs in OnBase Patient Window organize documents into different categories.

Click a tab to display its contents in the document list. If a filter is currently applied, then only documents that satisfy the filter criteria are displayed.



If you open a document, the tabs pane is collapsed. Rest your pointer over the tabs pane to display available tabs.



Tab Document Counts

Depending on your system's settings, each tab may display the number of documents it contains. The document count is not displayed for empty tabs.

Empty Tabs

Depending on your system's settings, OnBase Patient Window may display only tabs that contain documents. If empty tabs are displayed, then their names and colors are faded to differentiate them from tabs that contain documents.

If you select a tab containing zero documents, then the document list displays the message **No Documents**.

Note: Tabs containing documents may appear empty if all documents have been filtered out. See Filters on page 293 for more information.

Personal Tab

The green Personal Tab provides quick access to Document Types you work with frequently. For example, if you work with documents that usually occur on different tabs, you can set up the Personal Tab to display all the documents in one location.

The Personal Tab is available only after you set it up in User Options. To create a Personal Tab and specify the Document Types it should contain, see Customizing the Personal Tab on page 339.

New Documents Tab

The red New tab allows you to quickly view documents that have been added to the record since you viewed it last. These documents also are displayed in their respective tabs.

The New tab is emptied only after you have viewed the New tab and logged out. When you log in and view the record again, the New tab will display only documents that have been added since the last time you viewed it.

If you have never viewed the New tab for a patient's record, then the New tab displays all documents in the record.

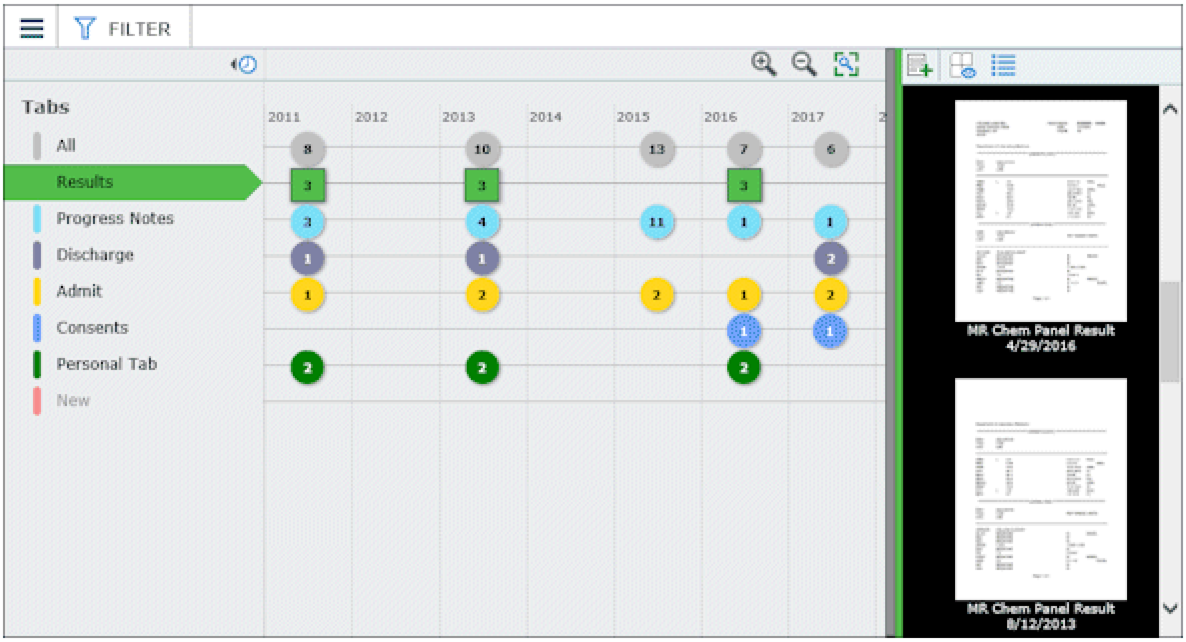
Note: As other tabs do, the New tab omits documents that do not satisfy the current filter criteria, and it omits documents that are restricted based on your privileges and system security settings.

Reference Tab

Depending on your system's settings, a red Reference tab may be available. This tab displays documents in the record that should never be filtered out, even when they do not satisfy the applied filter criteria.

Timeline Mode

Timeline mode plots documents on a timeline using either the clinically relevant date (if available) or the document date.

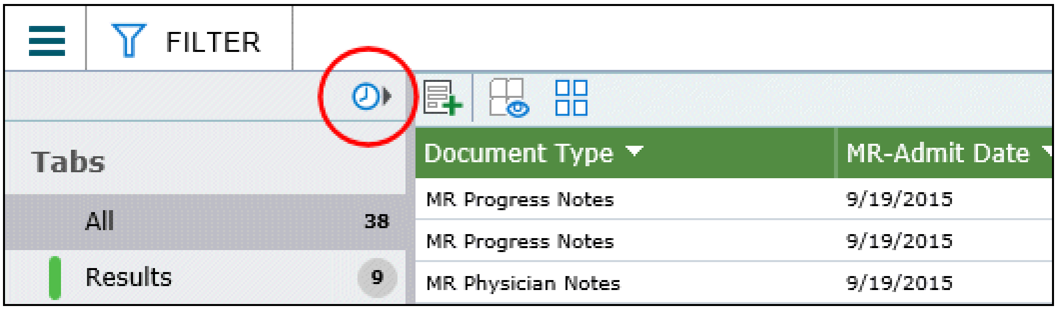


See the following topics for more information:

- Timeline Mode Diagram on page 269
- Accessing Timeline Mode on page 289
- Navigating in Timeline Mode on page 289
- Exiting Timeline Mode on page 292

Accessing Timeline Mode

To access timeline mode, click the **Show Timeline Mode** button.



Note: If the last record you viewed was displayed in timeline mode, the next record you view is also displayed in timeline mode. OnBase Patient Window preserves timeline mode as a preference across login sessions.

For a diagram of timeline mode, see Timeline Mode Diagram on page 269.

Navigating in Timeline Mode

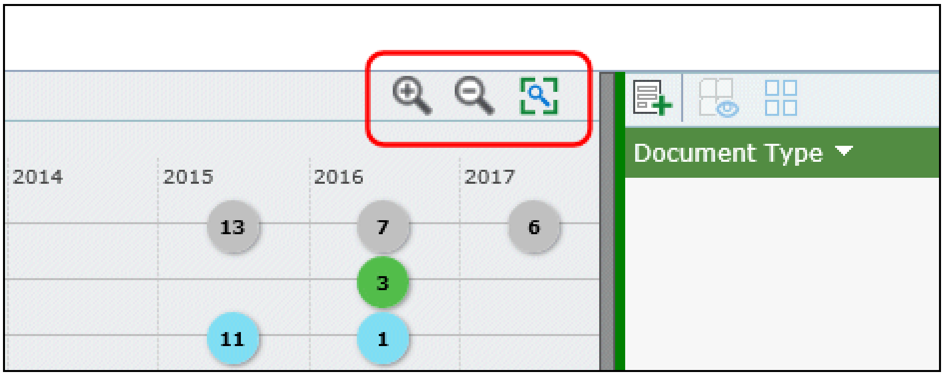
The timeline allows you to navigate date ranges by zooming and scrolling.

See the following topics:

- Zooming In or Out on page 289
- Moving Forward or Backward on page 290
- Displaying Documents on page 291
- Browsing by Tab on page 292
- Filtering Documents on page 292

Zooming In or Out

Use the toolbar above the timeline to change the zoom level.

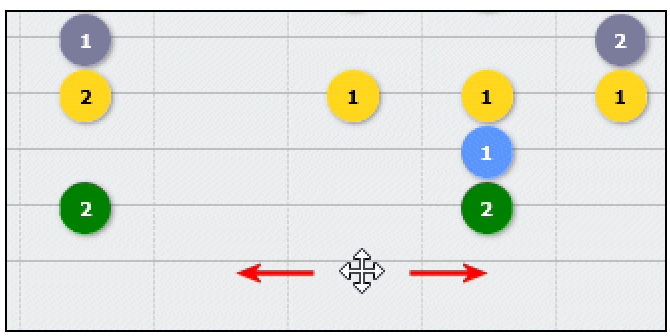


Available buttons are described in the following table:

Button	Description
Zoom In	Click to zoom in within the current date range. You can also zoom in by pressing **Ctrl** as you scroll up with your mouse wheel. For example, if you are browsing the record by year, zooming in allows you to browse by month.
Zoom Out	Click to zoom out of the current date range. You can also zoom out by pressing **Ctrl** as you scroll down with your mouse wheel. For example, if you are browsing the record by month, zooming out allows you to browse by year.
Zoom to Fit	Click to see a date range that includes all documents that satisfy the current filter criteria.

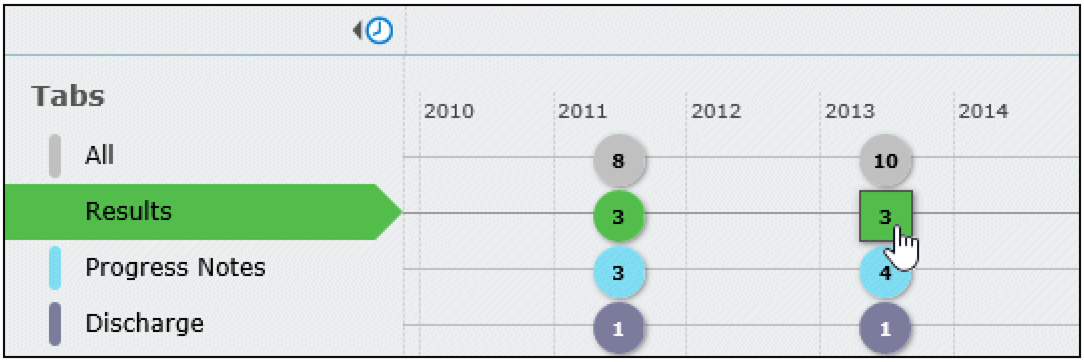
Moving Forward or Backward

To scroll the timeline forward or backward, click and drag the timeline to the left or right.

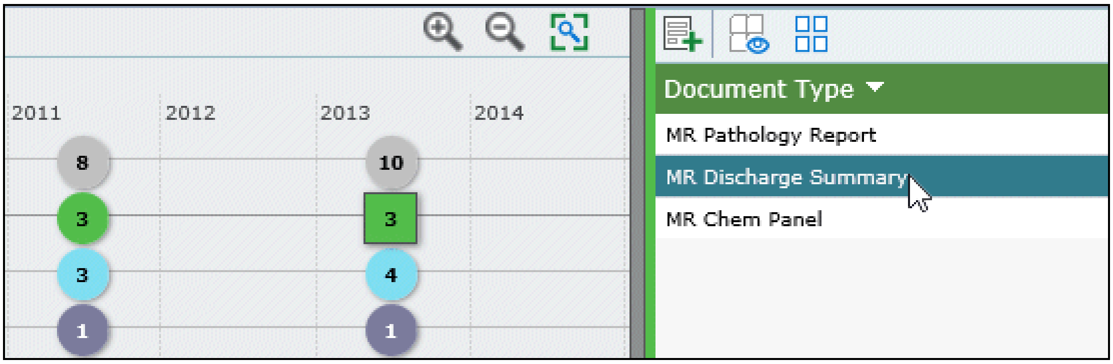


Displaying Documents

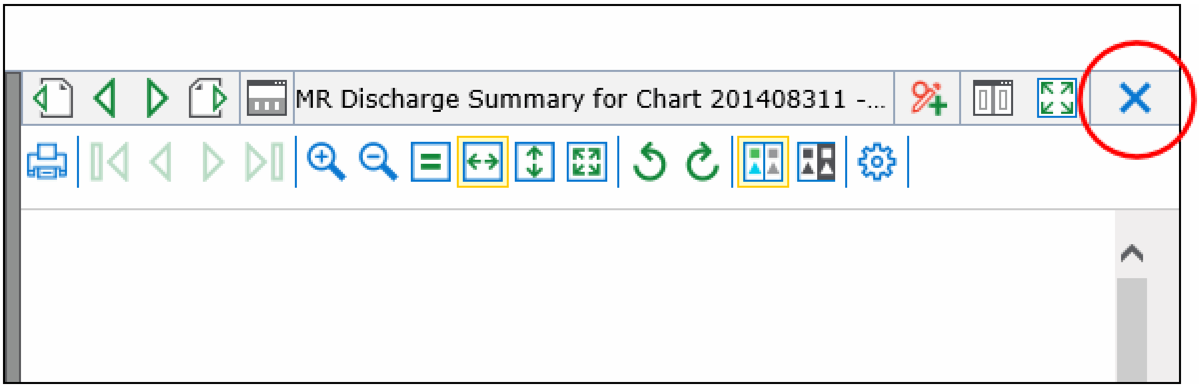
To display the documents within a tab for a date range, click the badge where the tab and date range meet. A square badge indicates the associated documents are currently displayed in the document list.



To open a document, double-click it from the document list.

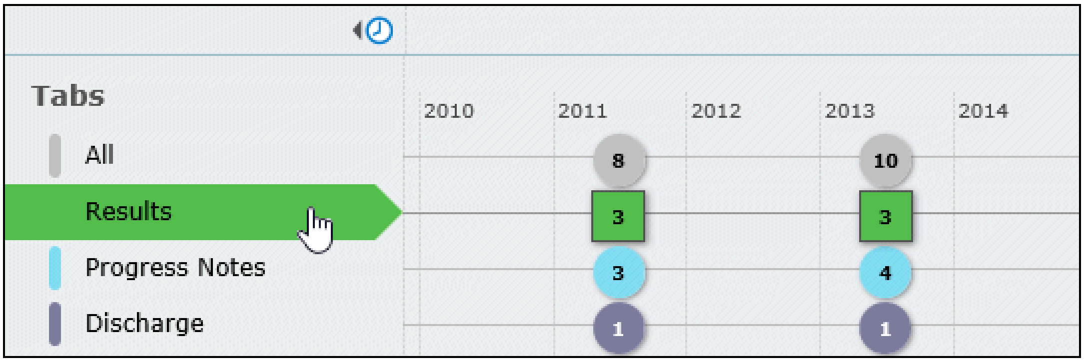


Close the document to return to timeline mode.



Browsing by Tab

To display the documents within a specific tab, click the tab from the tabs pane. The document list displays tab contents that meet the current filter criteria.

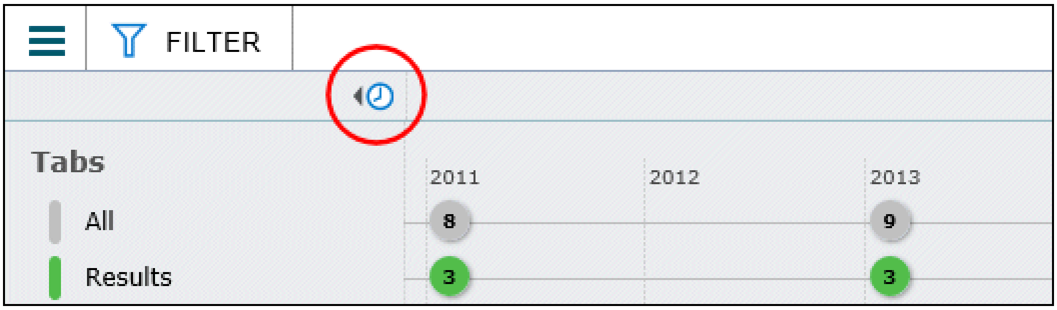


Filtering Documents

You can use the filter pane to filter documents in timeline mode. For more information, see Filters on page 293.

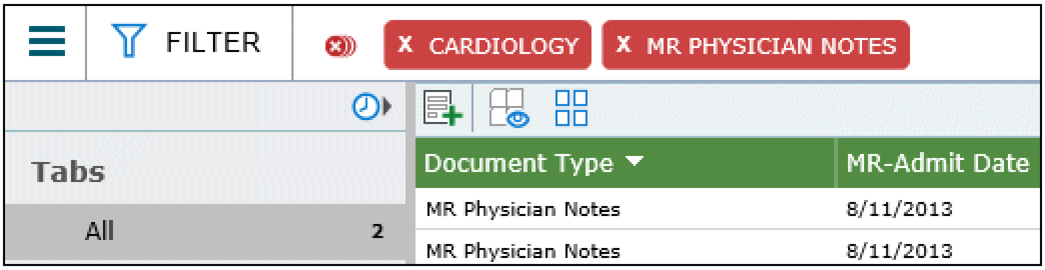
Exiting Timeline Mode

To exit timeline mode, click the **Exit Timeline Mode** button.



Filters

Use filters to view only documents that meet specific criteria. Currently applied filters are displayed next to the **Filter** button in the main toolbar.



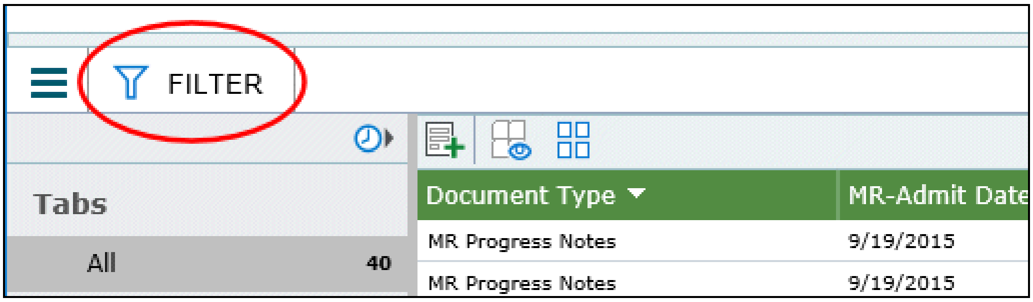
For more information, see the following topics:

- Filtering Documents on page 293
- Filtering by Date Range on page 295
- Collapsing Filters on page 296
- Saving a Filter on page 297
- Applying a Saved Filter on page 299
- Removing a Filter on page 300

Filtering Documents

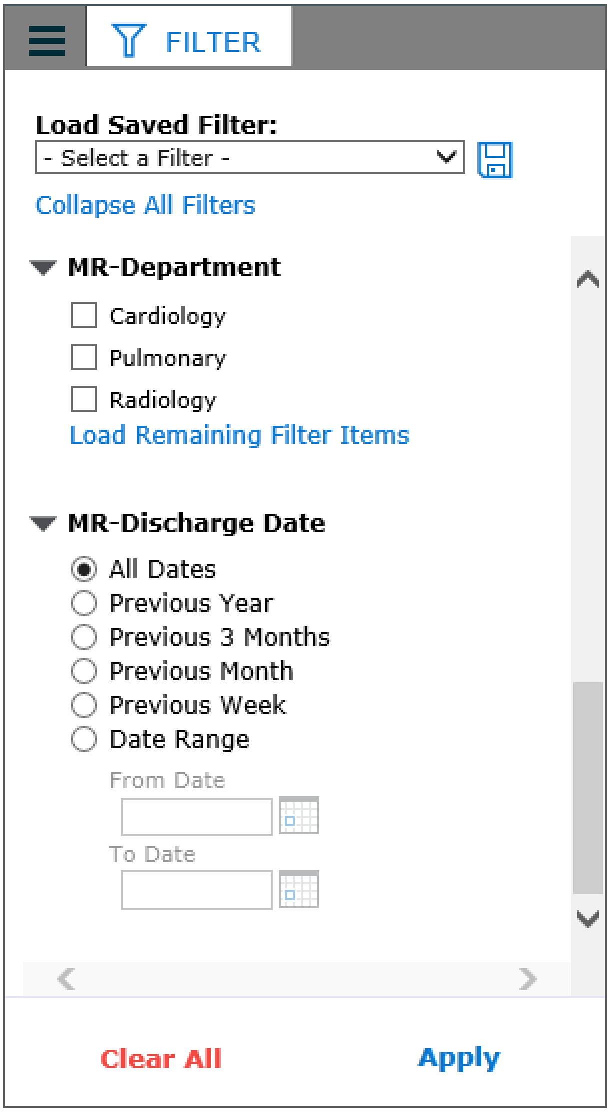
To filter documents in a record:

1. Click the **Filter** button in the main toolbar.



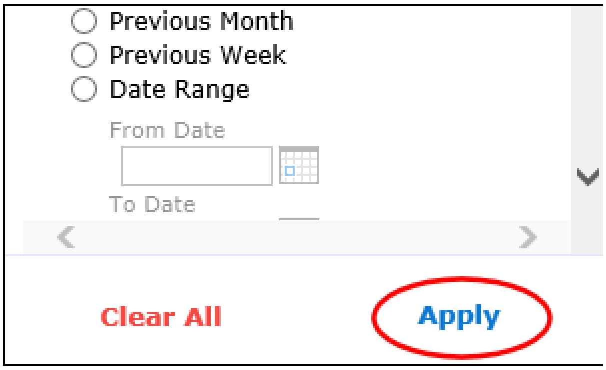
2. Using the filter pane, select the criteria to use in the filter. You may need to click the **Load Remaining Filter Items** link to display all available options for the current document set.

   For information about available filters, see Filter Descriptions on page 263.



Note: For filters that are not based on dates, available options include only values that exist within the current document set. For example, if the record is only showing documents from the cardiology department, then **Cardiology** is the only option available for the **Department** filter.

3. Click **Apply**.



- The document list is filtered to reflect the selected options.
- If **No Documents** is displayed in the document list, then you have filtered out either all documents in the current tab or all documents in the record.

Filtering by Date Range

Date-based filters provide the following options:

Option	Description
All Dates	Select to apply no date criteria for this filter.
Previous Year	Select to filter out documents where the date is older than one year.
Previous 3 Months	Select to filter out documents where the date is older than 3 months.
Previous Month	Select to filter out documents where the date is older than 1 month.
Previous Week	Select to filter out documents where the date is older than one week.
Date Range	Enter a custom date range. See Entering a Custom Date Range on page 295.

Entering a Custom Date Range

Use the **Date Range** option to enter a custom date range.

Note: The date format must match the standard date format for your locale. For example, if your workstation locale is set to English (United States), the expected format is mm/dd/yyyy or m/d/yyyy.

1. Select **Date Range**.
2. Click the calendar button next to the **From Date** or **To Date** field to display a calendar.

3. Select the desired date to enter it.

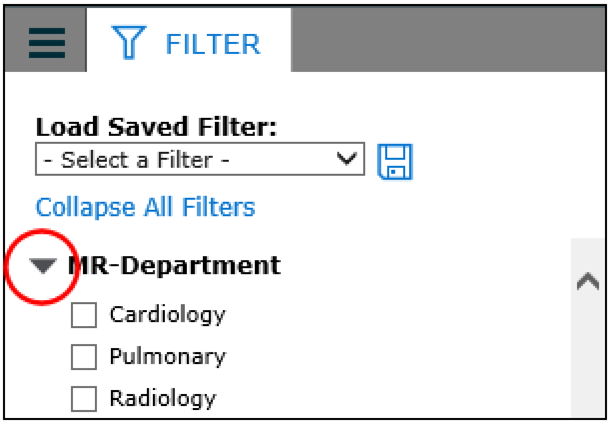
   If you entered a date into the **From Date** field, then the **To Date** field is automatically populated with the same date.

   The following examples illustrate how to achieve the intended date range.

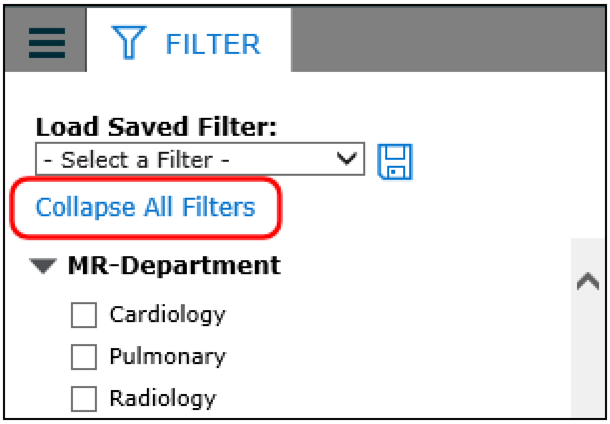
From Date	To Date	Effect
10/11/2019	10/11/2019	Show only documents with a date of 10/11/2019.
1/1/2019	10/11/2019	Show only documents with a date from 1/1/2019 up to and including 10/11/2019.
1/1/2019	[blank]	Show only documents with a date of 1/1/2019 and later.
[blank]	10/11/2019	Show only documents with a date of 10/11/2019 and earlier.

Collapsing Filters

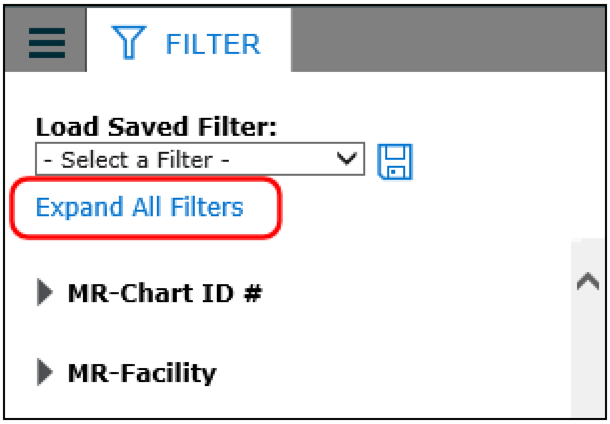
To collapse a filter, click the arrow to the left of the filter's name. Click the arrow again to expand the filter.



To collapse all filters, click **Collapse All Filters**. All filters are collapsed, and your preference for collapsed filters is saved.



To expand all filters, click **Expand All Filters**. All filters are expanded, and your preference for expanded filters is saved.



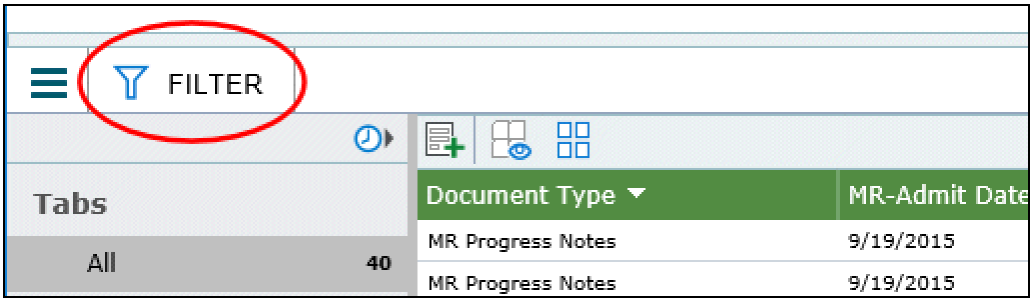
Saving a Filter

You can save filters for future use. Saved filters allow you to quickly access documents that satisfy specific criteria. If you have administrative rights, you can make saved filters public to all users.

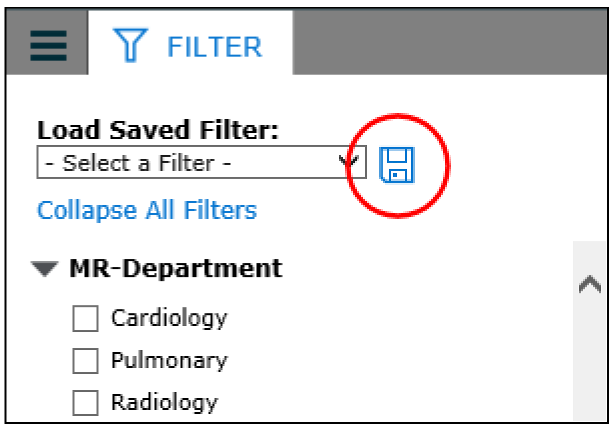
Note: You cannot save a filter if a specific chart number or MRN is currently selected in the filter pane. These values must be removed from the filter before the filter can be saved.

To save a filter:

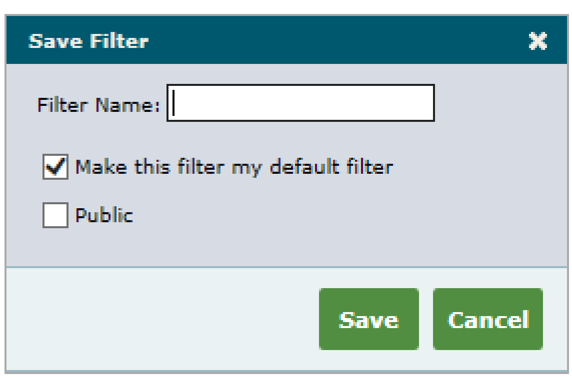
1. Filter the record using the criteria you want to save.
2. Click the **Filter** button.



3. Click the **Save** button.



4. Enter a name for the filter in the **Save Filter** dialog box.



Tip: Choose a descriptive name that reflects what the filter will display. For example, if the filter shows only outpatient chart documents from the Main Campus facility, you might name it **Main Campus - Outpatient**.

5. Clear the **Make this filter my default filter** check box, if necessary.
   - If this check box is available, it is selected by default. Clear it if you do not want this filter to be applied by default for each record you view.
   - To change your default filter, see Managing Your Saved Filters on page 345.
6. If you have administrative rights, the **Public** check box is available. Check this box if this filter should be publicly available to all users.
7. Click **Save**.

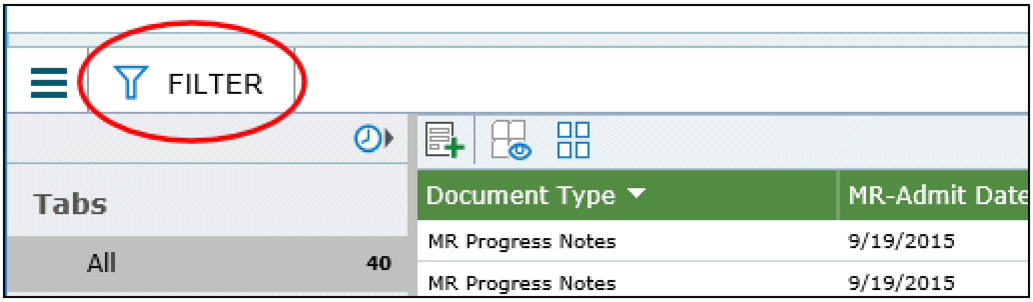
   To apply a saved filter, see Applying a Saved Filter on page 299.

Applying a Saved Filter

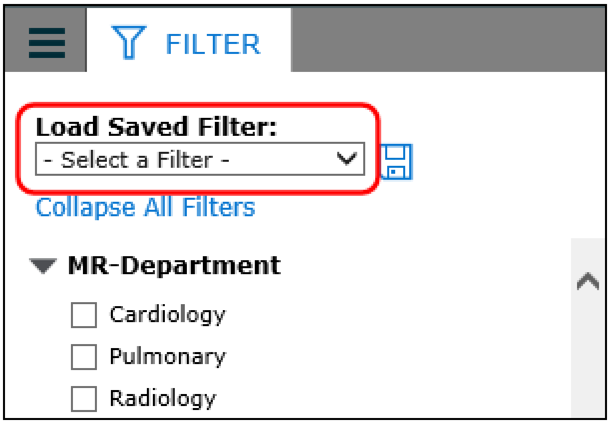
You may have access to filters that you have saved or that an administrator has made available to you. If you have access to any saved filters, the **Load Saved Filter** drop-down list is displayed at the top of the filter pane.

To apply a saved filter:

1. Click the **Filter** button to display the filter pane.

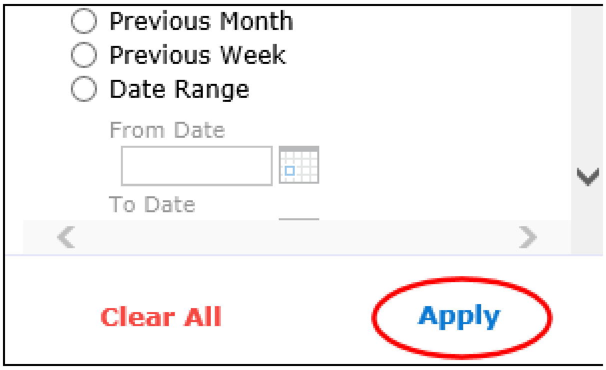


2. Select the filter from the **Load Saved Filter** drop-down list.



The filter pane displays the criteria that will be applied with the selected filter.

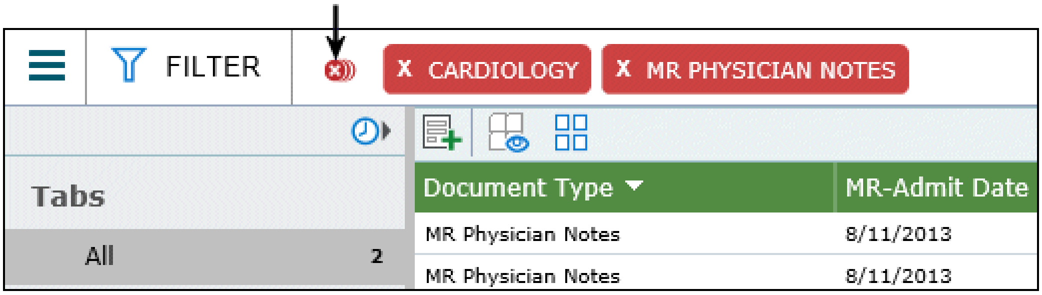
3. Click **Apply**.



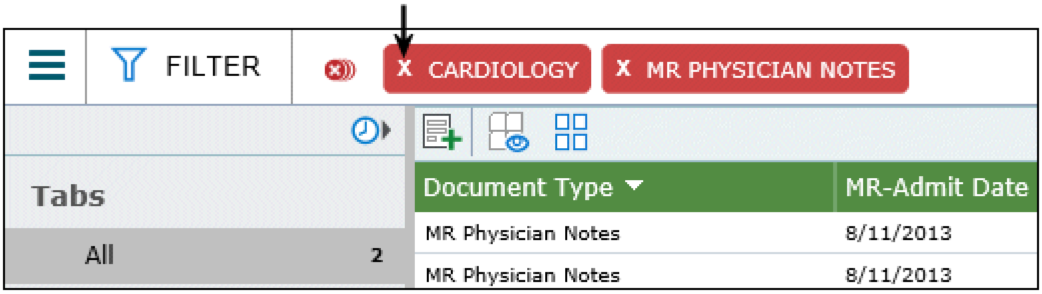
Removing a Filter

Once applied, a filter remains in effect until you either remove it or close the browser window.

- To remove all applied filters, click the **Clear All Filters** button in the **Current Filter** bar. This button is available only when two or more filter criteria are in effect.



- To remove a specific filter, click the **X** displayed to the left of the filter's name.



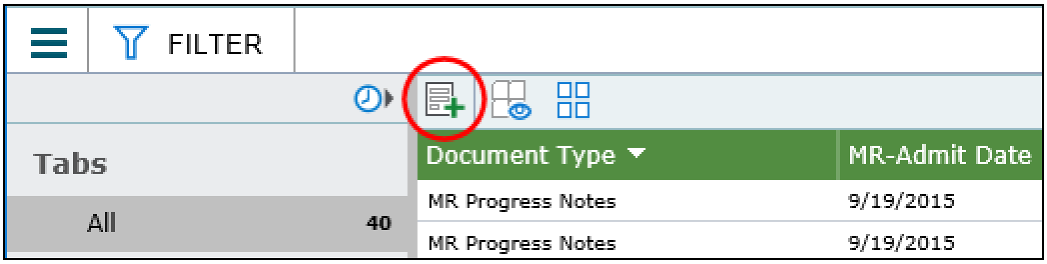
Form Creation

Depending on your system's setup, you may be able to create clinical forms and add them to the current patient record.

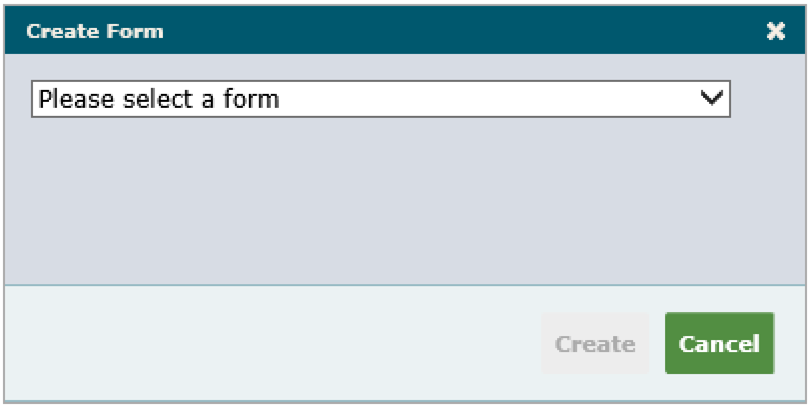
Note: If the patient record is currently filtered, the applied filters are removed automatically when a new form is created and displayed.

To add a form to the record:

1. Click the **Create Form** button in the document list toolbar.



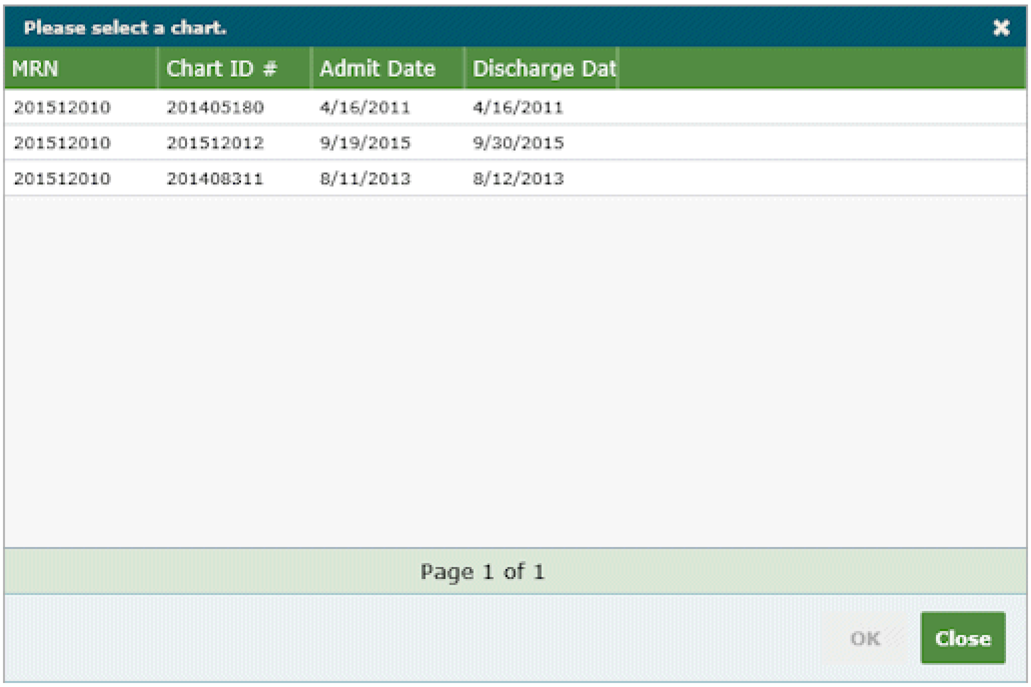
2. Select a form from the drop-down list in the **Create Form** dialog box.



3. If prompted, select the chart to add the form to, and click **OK**.

   To return to the **Create Form** dialog box without selecting a chart, click **Close**.

   This prompt is displayed only if the form is configured for chart attachment. If this prompt is not displayed, then the form will be attached to the patient record without being associated with a specific chart.



4. Click **Create** to create the form. The new form is displayed in the document viewer.
5. Complete or update the form as needed.
6. Click the **Submit** or **Save** button on the form to save your changes.

Document Comparison

OnBase Patient Window offers two options for comparing documents side-by-side. The following table describes these options:

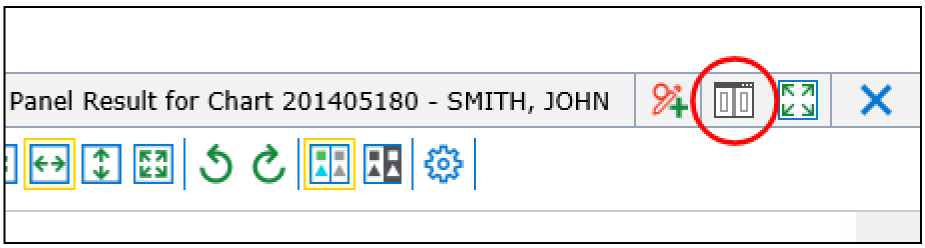
Option	Description
Split View	Retrieves and displays cross-referenced documents side-by-side. Split view allows you to view two documents at a time. See Opening Split View on page 303.
Multi-Document View	Displays enlarged thumbnail images of up to four documents side-by-side. You can scroll through the images horizontally. See Opening Multi-Document View on page 304.

Opening Split View

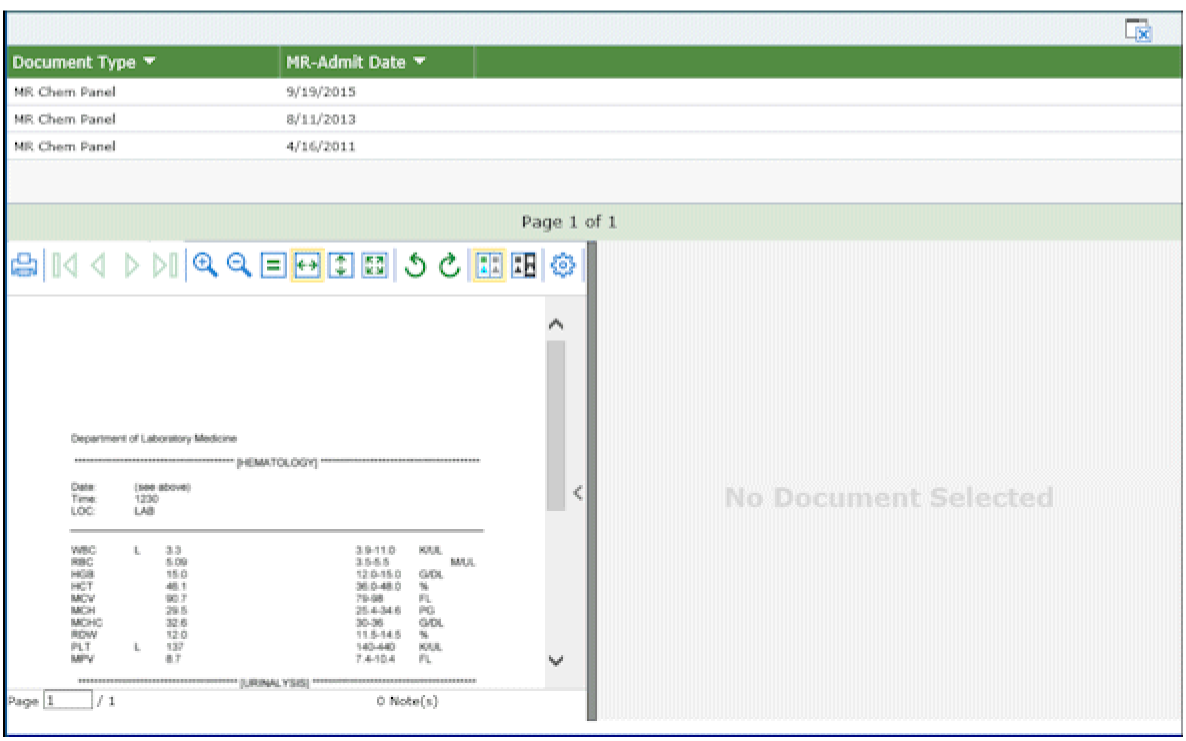
Split view allows you to retrieve cross-referenced documents and compare two of them side-by-side. This feature's availability depends on your system's configuration. Split view can only be used with documents that have cross-references.

To enable split view:

1. Open the document you want to compare.
2. Click the **Split View** button above the document viewer. This button is available only if split view is enabled for your system.



3. If the document has any cross-references, then OnBase Patient Window enters split view mode.



In split view mode, the window is divided into three panes:

- The top of the window displays a list of one or more cross-referenced documents.
- The lower-left pane displays the document you opened initially.

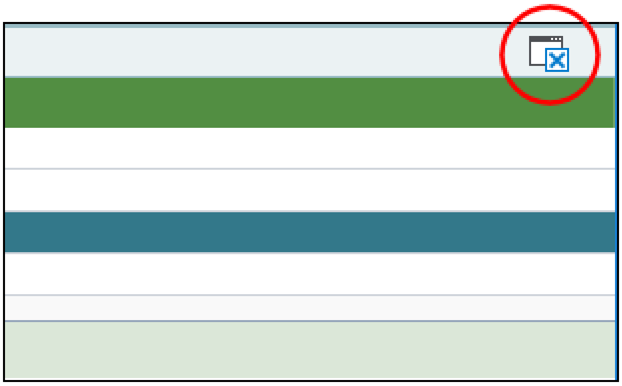
- The lower-right pane displays the cross-referenced document you opened from the list, if applicable.

Note: Any filters currently applied to the medical record are also applied to the list of cross-referenced documents.

4. Double-click a cross-reference from the list to display it in the lower-right pane. If only one document was returned, it is selected and displayed automatically.

Exiting Split View

Click the **Exit split view** button in the upper-right corner of the window to exit the split view and restore your previous view of the record.



Opening Multi-Document View

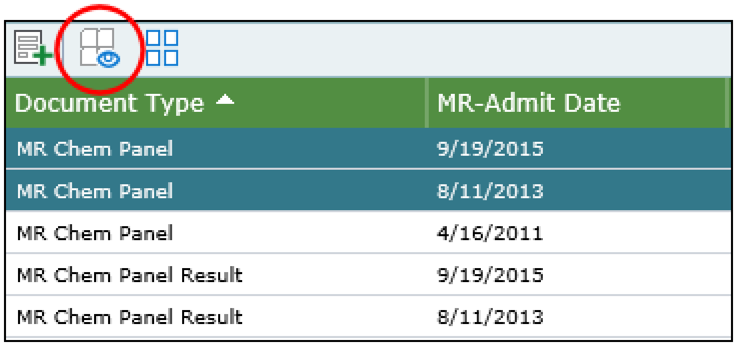
Multi-document view allows you to preview up to four documents side-by-side. This feature may be useful for quickly comparing photo images, such as wound photos.

Not all file formats can be displayed in this view. If a document has an unsupported file format, multi-document view displays a default image.

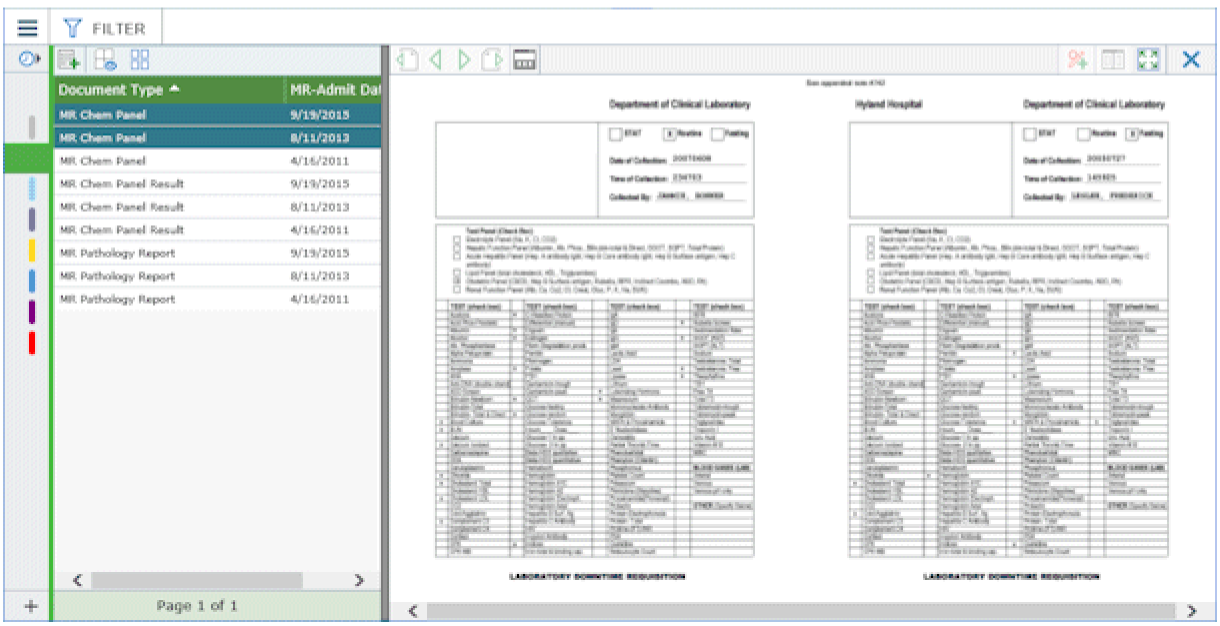
To enable multi-document view:

1. Select up to four documents in the document list.
   - To select multiple consecutive documents, select the first document, and then press **Shift** as you select the last document.
   - To select multiple documents individually, press **Ctrl** as you select each document.
   - If the document list is displayed as a list, click and drag your pointer over the documents.

2. Click the **Multi-Document View** button in the document list toolbar.



Multi-document view displays the first page of each selected document. To view any document in more detail, double-click it from the right pane.



Exiting Multi-Document View

To exit multi-document view, click the **Close** button in the upper-right corner of the viewer.

Printing Documents

If you have sufficient privileges, you can send medical record documents to a local printer or server print queue to be printed.

Note: OnBase Patient Window cannot print DICOM studies.

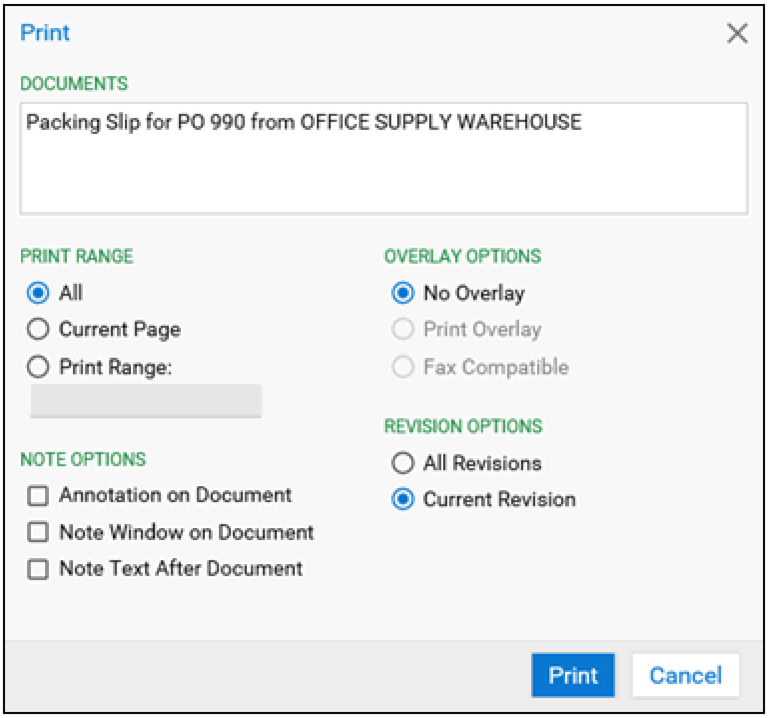
You can print documents using the HTML document viewer if you have sufficient privileges. Documents are first converted to a PDF, which you can then print using the PDF viewer's print option.

Note: If the document is open in an external application, such as Microsoft Word, use the print option in the external application. For example, select **File | Print** from the application. In this case, OnBase print options are not used.

To print a document using the HTML viewer:

1. From an open document, click the **Print** toolbar button.

   The **Print** dialog box is displayed.



2. Select the appropriate print options. See the following table for descriptions of the available print options.

Option	Description
Print Range	**All**: Prints all pages of the document(s). **Note:** The **All** Print Range option is the only option available when printing PDF documents, or when printing from a Document Search Results list. To print a range of pages for a non-PDF document, you must open the document and print using the **Print** toolbar button. **Current Page:** Prints the current page. **Print Range**: Prints a range of pages in the document. Enter page numbers and/or page ranges, separated by commas. For example: **1,3,5-12**. **Note:** If you enter a complex range into this field, the pages are printed in the order entered. For example, if you entered **5, 1-3, 9,** then page 5 of the document would be printed first, followed by pages 1, 2, 3, and 9. You cannot enter complex ranges when printing to a server print queue.
Overlay Options	**No Overlay:** Prints the document without the associated overlay. **Print Overlay**: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type. **Fax Compatible**: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type.
Note Options	**Annotation on Document**: Prints the note annotation (graphical representation of a note) on the document. **Note Window on Document**: Prints the title and text of any notes in that note's location on the document, the name of the user that created the note, the date and time it was created, and the Print Title configured for the selected Document Type. This option is not respected for HTML documents, OLE documents, or PDF documents. This option is not respected by Overlapped Text annotations. **Note Text After Document**: Prints the title and text of any notes, the name of the user that created the note, the date and time it was created, and the Print Title configured for the selected Document Type on a separate page. **Note:** Depending on your system's configuration, some note icons or text may not be printed no matter what **Notes Options** you have selected. See your system administrator for more information. **Note:** The **Annotation on Document** and **Note Window on Document** options do not apply to E-Forms, HTML forms, or XML documents.

Option	Description
Revision Options	These options are only respected if your database is licensed for EDM Services. For more information, see the **EDM Services** documentation. **Note:** The **Current Revision** option is automatically selected.

3. Click **Print**. A new window is displayed, containing a PDF version of the document with your page range selection applied.

   Depending on your configuration settings, your browser's print dialog box may also be displayed.
4. Click **Print** to continue printing the document.

Document Corrections

Depending on your system's setup, you may be able to submit medical documents for correction. Submitted documents are sent to OnBase Workflow, where they can be reviewed and routed for corrective action.

The correction process may be used to address multiple types of issues, including the following:

- Documents are filed to the wrong Document Type, patient, or encounter
- Duplicate documents need to be deleted
- Pages need to be deleted
- Pages are out of order
- Pages need to be rotated
- Documents need to be split
- Document image quality is poor

Tip: Available buttons and correction actions vary depending on your system's setup. For information about a correction action, rest your pointer over it. The action's help text is displayed. For additional information, contact your system administrator.

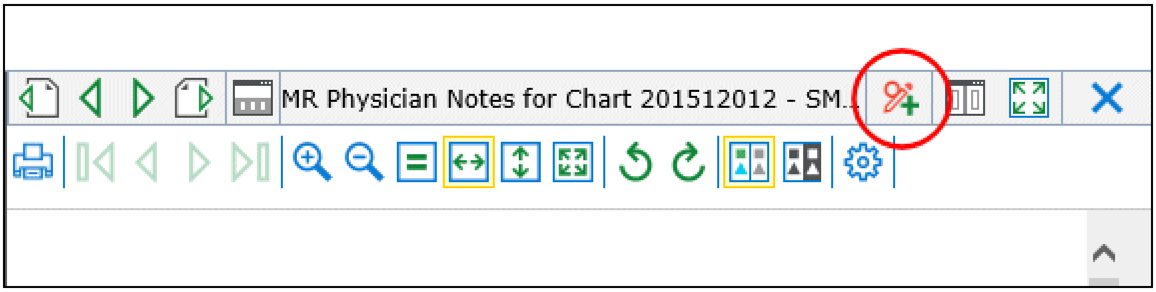
For more information, see Submitting a Document for Correction on page 309.

Submitting a Document for Correction

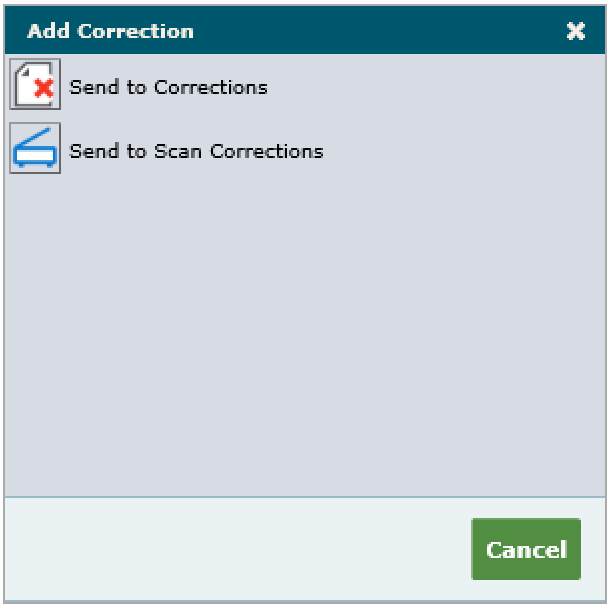
To send a document to corrections, complete the following steps.

1. Open the document you want to send to corrections.
2. Click the **Add Correction** button above the document viewer.

   This button's icon, name, and availability vary depending on your system's setup.



3. If the **Add Correction** dialog box is displayed, then you have access to multiple correction actions. Click the appropriate action for the type of correction needed.

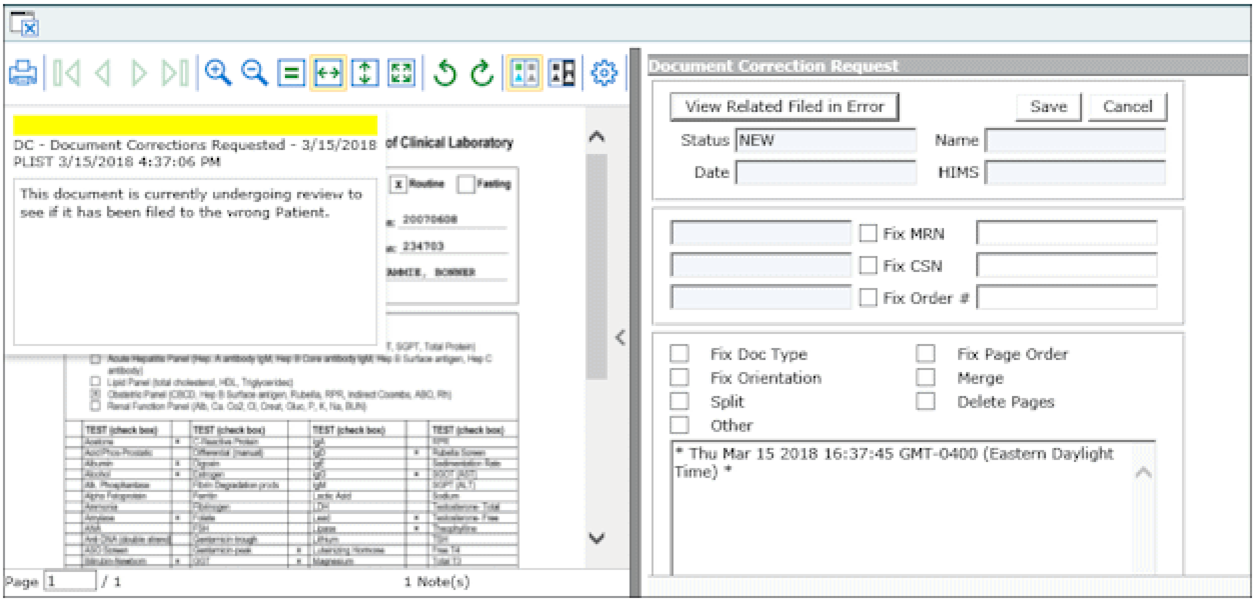


   The document is added to the corresponding Workflow corrections life cycle.

Note: If a correction form is displayed, continue to the following topic, Completing a Correction Request Form on page 310.

Completing a Correction Request Form

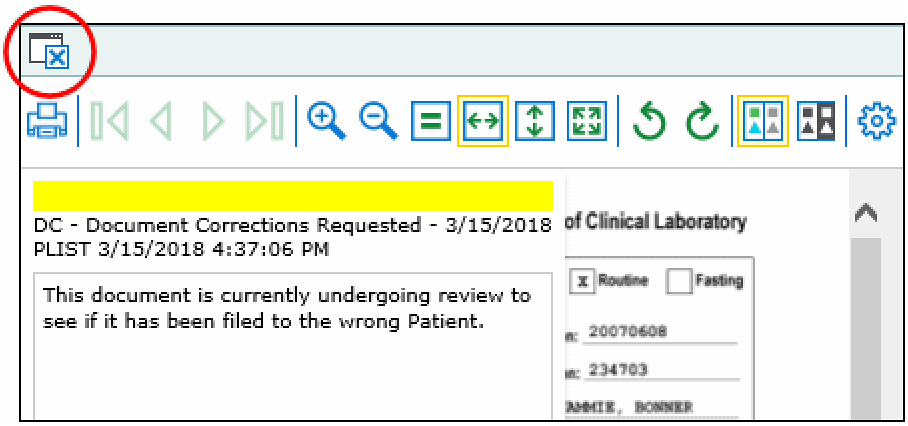
If the correction action triggers a correction request form, then OnBase Patient Window enters corrections mode. The left pane displays the document you are submitting for correction, and the right pane displays the correction request form.



Tip: If multiple correction forms have been submitted for this document, the top of the window lists the previously submitted forms. Double-click a form to display it in the right pane.

1. Fill out the form in the viewer's right pane. Clearly explain why you are submitting the document for correction.
2. If a correction note has been added to the document, you may be able to update the note text to describe your requested corrections. This note provides a visual indication that the document has been submitted for correction.
3. Click the save or submit button on the form.

4. If you do not exit corrections mode automatically, click the **Exit Corrections** button in the upper-left corner of the window.



5. When prompted, click **Yes** to confirm you have already saved or submitted your form. Otherwise, click **No** and save the form.

Patient Cases

Cases are tabs you can create to organize documents related to a specific case or condition. For example, if a patient has a history of arrhythmia, you could create an **Arrhythmia** tab to contain any documentation related to that condition. Each case shows up only in the record for which it was created. Cases can be made public (visible to other users) or private (visible only to their creator).

For information about creating and managing cases, see the following topics:

- Private vs. Public Cases on page 311
- Creating a Case on page 312
- Adding Documents to a Case on page 314
- Removing Documents from a Case on page 316
- Editing a Case on page 352
- Deleting a Case on page 357

Private vs. Public Cases

Cases can be private or public. A private case is visible only to the user who created it. A public case is visible to all users who can view the record. For both private and public cases, only the creator of the case can add or remove documents.

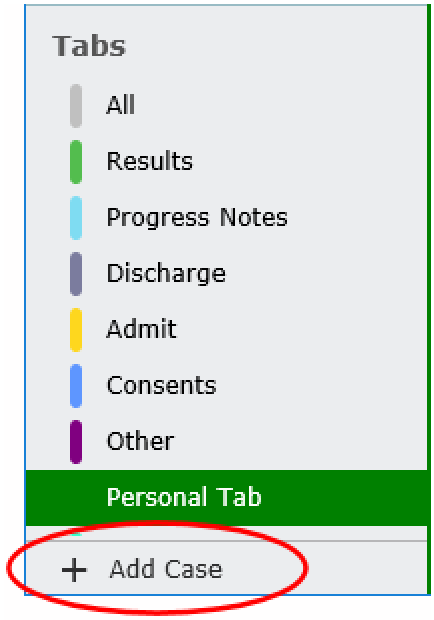
Cases are private by default. To make a case public, you must have sufficient privileges.

Creating a Case

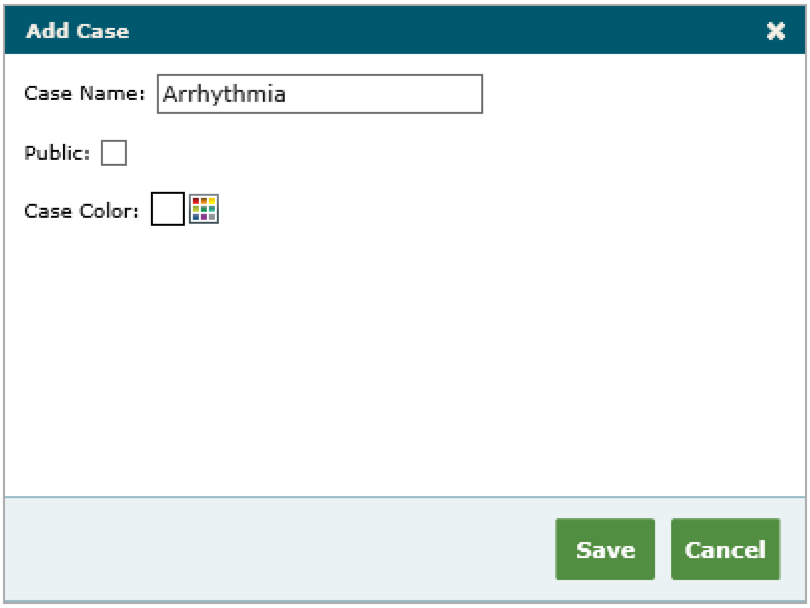
Cases are tabs that act as containers for documents surrounding a specific issue. Cases are private by default. You can create any number of private cases without affecting how other users see the record. If you have sufficient privileges, you can make cases viewable to other users.

To create a case, complete the following steps.

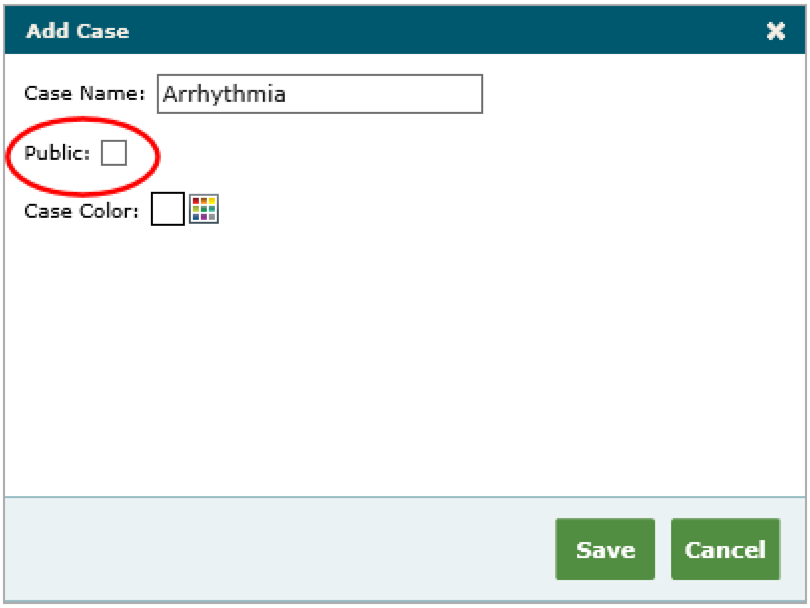
1. Click the **Add Case** button at the bottom of the tabs pane.



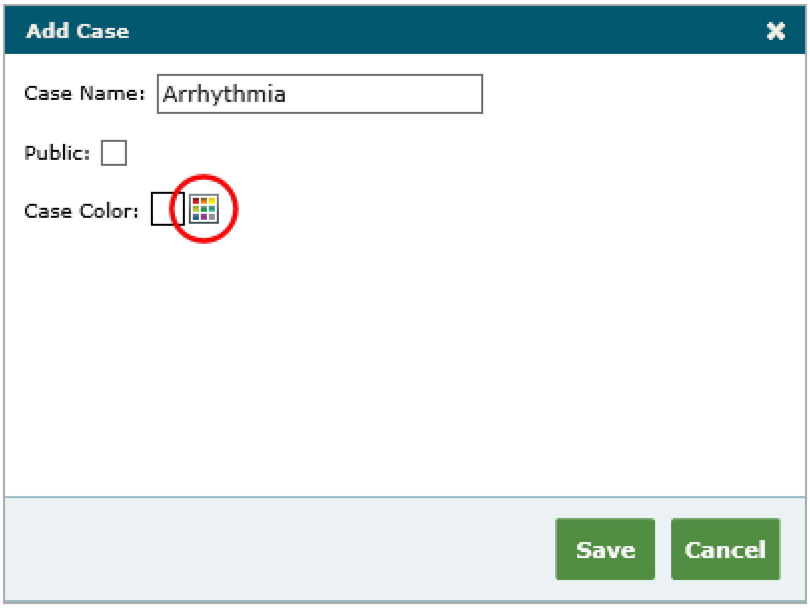
2. Type a name for the case in the **Case Name** field. This name will be the label on the tab.



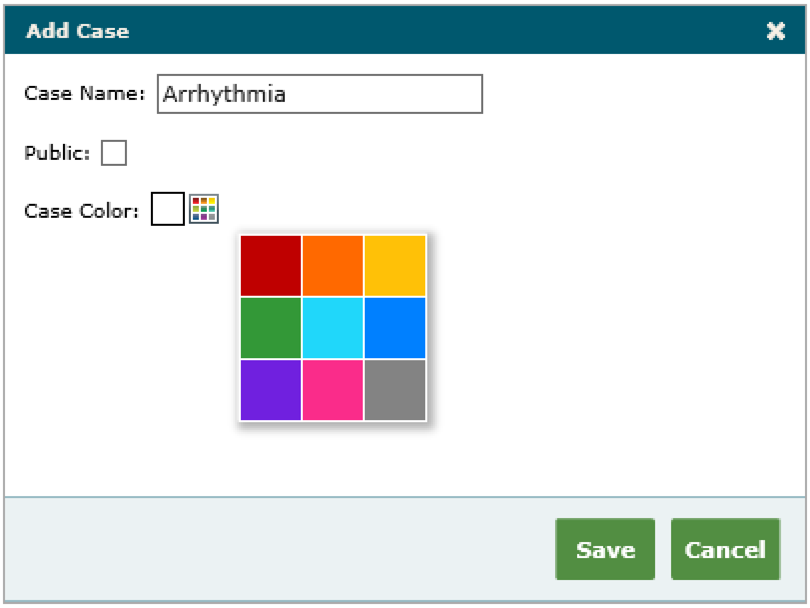
3. To make the case visible to all users who view the record, select the **Public** option.
   This option is available only to users who have privileges to make cases public. If this option is not available, the case will be private and visible only to you.



4. Click the color swatches button next to the **Case Color** box.



5. Select a color for the tab.



6. Click **Save**. The case is created and added to the tabs pane.
    - To add documents to the case, see Adding Documents to a Case on page 314.
    - To change the name or color of a case tab, see Editing a Case on page 352.
    - To delete a case, see Deleting a Case on page 357.

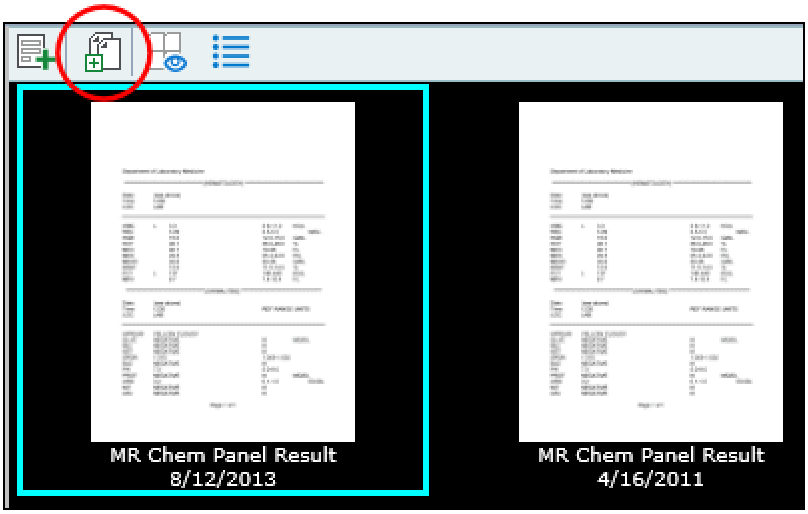
Adding Documents to a Case

After creating a case, you can add documents to it. When you add documents to a case, the documents are available in both the case tab and their original tabs.

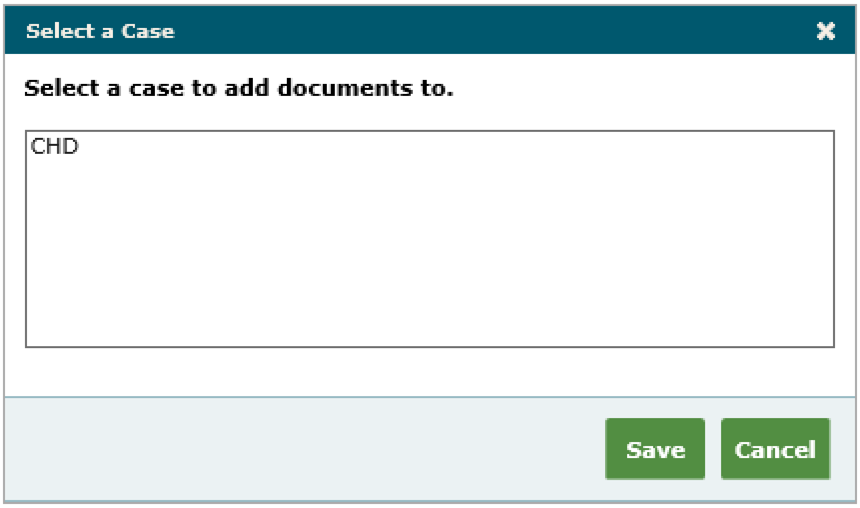
To add documents to a case:

1. From the document list, select the documents you want to add to the case.
    - To select multiple consecutive documents, select the first document, and then press **Shift** as you select the last document.
    - To select multiple documents individually, press **Ctrl** as you select each document.

2. Click the **Add Selected Documents to Case** button.



3. Select the case you want to add documents to from the **Select a Case** dialog box.



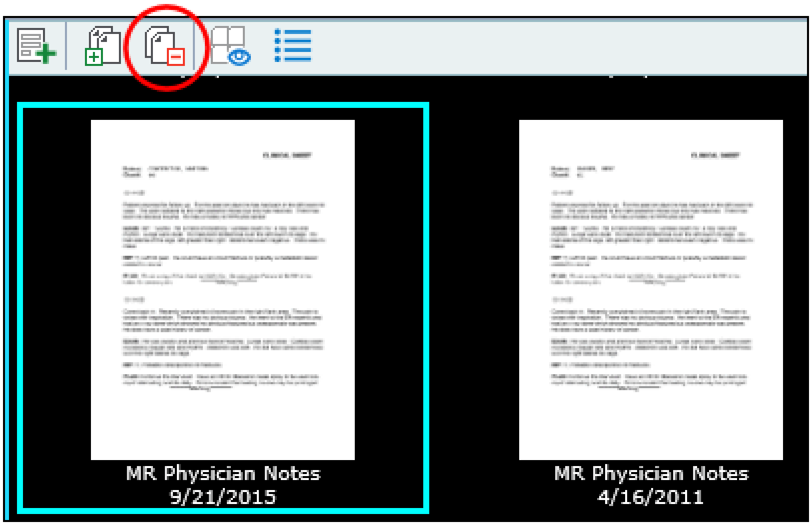
4. Click **Save**. A confirmation message is displayed.
5. Click **OK**.

Removing Documents from a Case

When managing your cases, you may need to remove case documents that are no longer relevant or that you added by mistake. After removing a document from a case, you can still access the document in its original tab in the patient's record.

To remove a document from a case you created:

1. Open the case tab to display its contents in the document list.
2. Using the document list, select the documents you want to remove from the case.
   - To select multiple consecutive documents, select the first document, and then press **Shift** as you select the last document.
   - To select multiple documents individually, press **Ctrl** as you select each document.
3. Click the **Remove Selected Documents From Case** button. This button is available only in case tabs.



4. Click **Yes** when prompted. A confirmation message is displayed.
5. Click **OK**.

Search

Depending on your system's setup, you may be able to search for patient records or charts using the following search contexts:

Context	Description
Patient Search	Search for records using patient demographics or inpatient status. See Searching for Patient Records.
Scheduled Patient Search	Search for records for patients who have appointments scheduled. See Searching for Patients by Appointment.

Context	Description
Chart Search	Search for charts (visits) using patient demographics and visit information. See Searching for Charts.

For more help with searches, see the following topics:

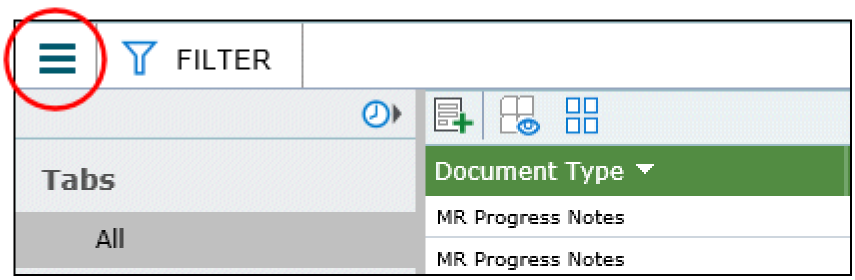
- Tips for Searching on page 323
- Navigating Results on page 325
- Clearing All Fields on page 326
- Returning to a Patient Record on page 326

Searching for Patient Records

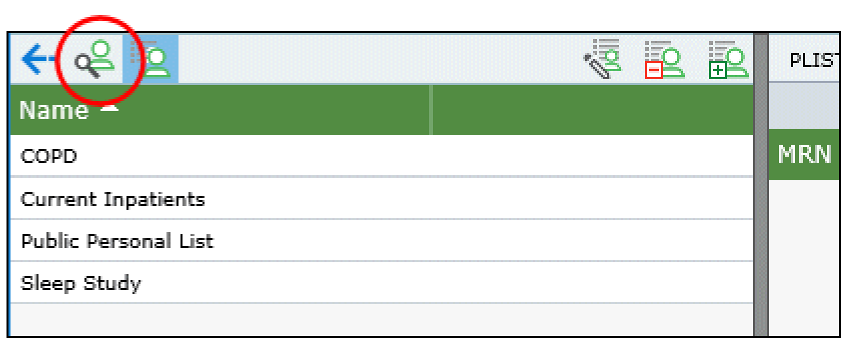
If you have sufficient privileges, you can search for patient records based on patient demographics and inpatient status.

To search for patient records:

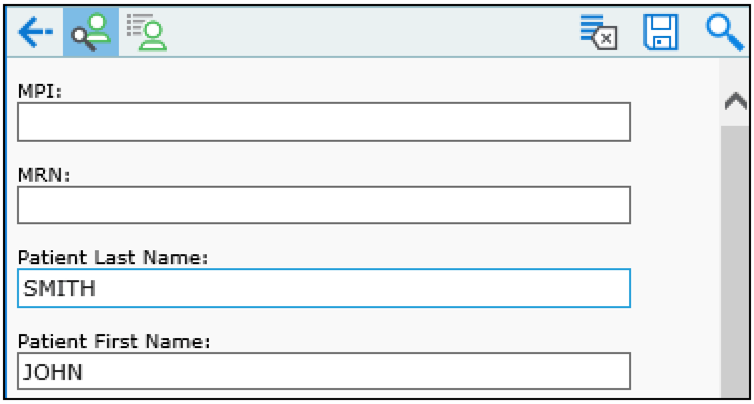
1. Do one of the following:
    - Rest your pointer over the main menu icon and click **Patient Search**.



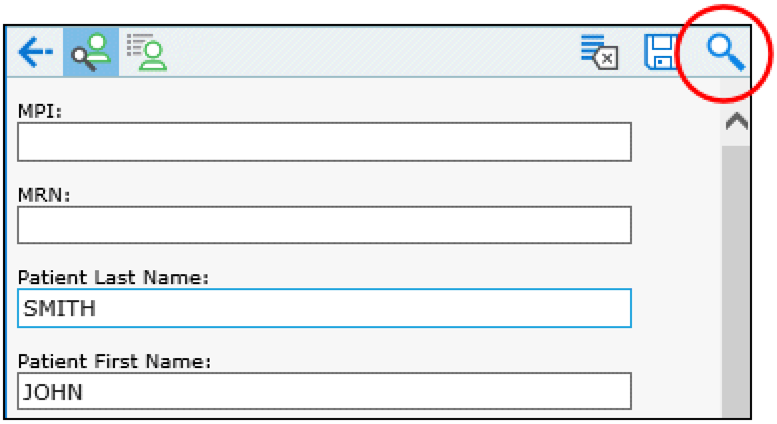
    - Click the **Patient Search** button.



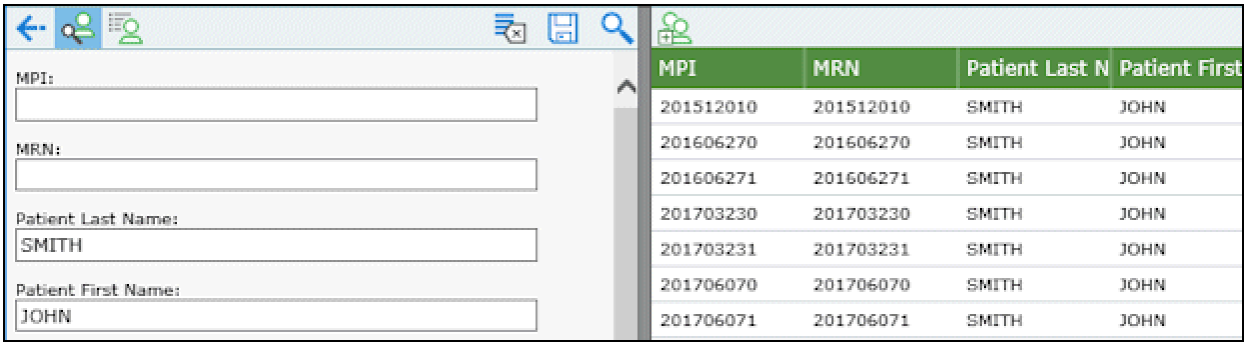
2. Type a value in at least one field. You cannot execute a search without entering at least one value.



3. Enter any additional criteria to narrow your search. For help entering values, see Tips for Searching on page 323.
4. Do one of the following:
   - Press **Enter**.
   - Click the **Search** button in the upper-right corner of the search pane.



5. Results are listed in the right pane.



If too many records meet your criteria, then OnBase Patient Window displays a message saying only a limited number of results are displayed. If you cannot find the record you need, refine your criteria and run the search again.

6. Double-click a record to open it and view its contents.

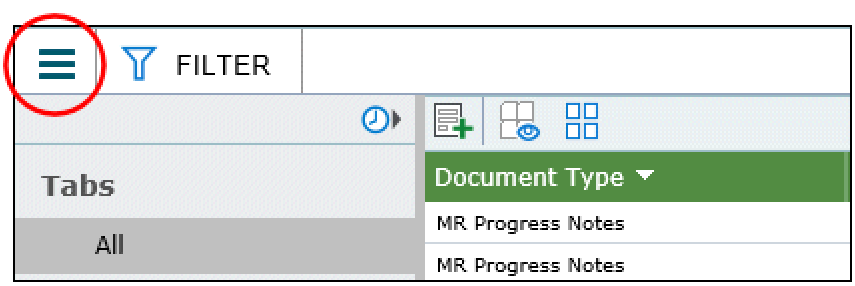
   If you return to Patient Search after opening a record, your search criteria and results are maintained.

Searching for Patients by Appointment

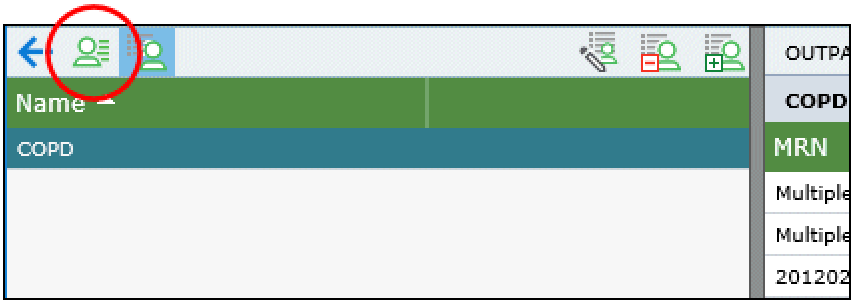
If you have sufficient privileges, you can search for patient records by appointment. Scheduled Patient Search allows you to retrieve records for patients who have appointment information stored in OnBase.

To search for patients by appointment:

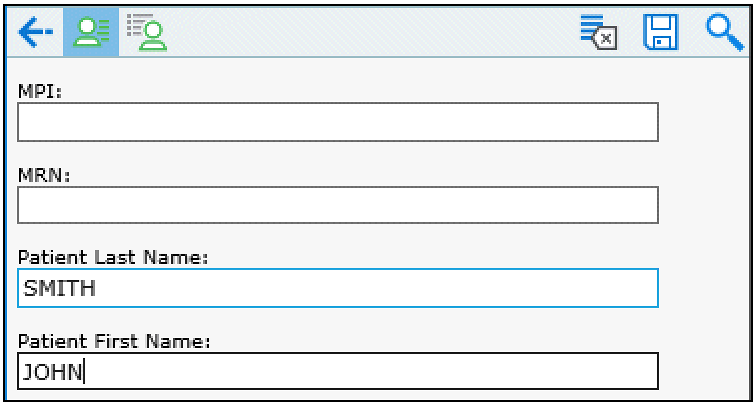
1. Do one of the following:
   - Rest your pointer over the main menu icon and click **Scheduled Patient Search**.



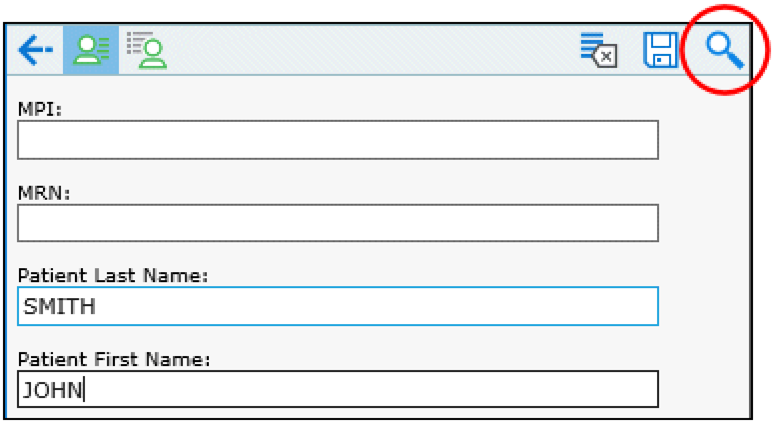
- Click the **Scheduled Patient Search** button.



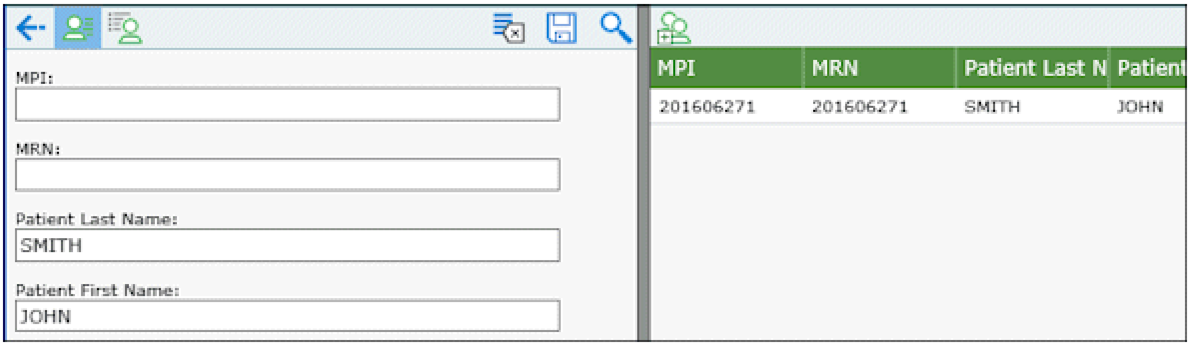
2. Type a value in at least one field. You cannot execute a search without entering at least one value.



3. Enter any additional criteria to narrow your search. For help entering values, see Tips for Searching on page 323.
4. Do one of the following:
   - Press **Enter**.
   - Click the **Search** button in the upper-right corner of the search pane.



5. Results are listed in the right pane.



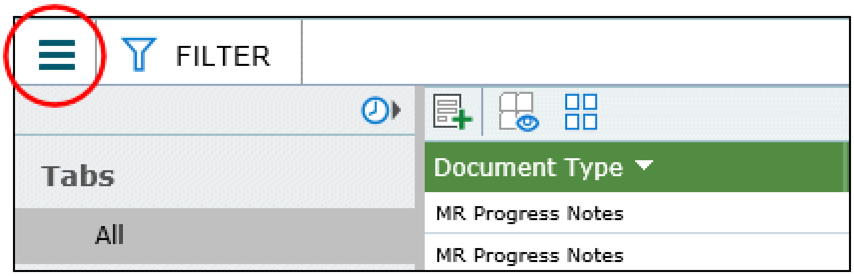
   If too many records meet your criteria, then OnBase Patient Window displays a message saying only a limited number of results are displayed. If you cannot find the record you need, refine your criteria and run the search again.
6. Double-click a record to open it and view its contents.
   If you return to Scheduled Patient Search after opening a record, your search criteria and results are maintained.

Searching for Charts

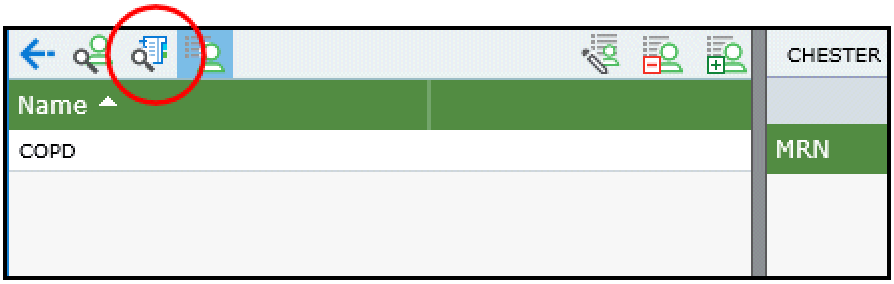
If you have sufficient privileges, you can search for charts. Use Chart Search to find charts using patient demographics and visit information.

To search for charts:

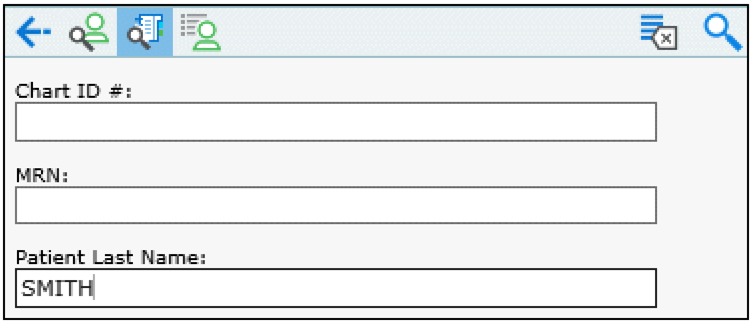
1. Do one of the following:
   - Rest your pointer over the main menu icon and click **Chart Search**.



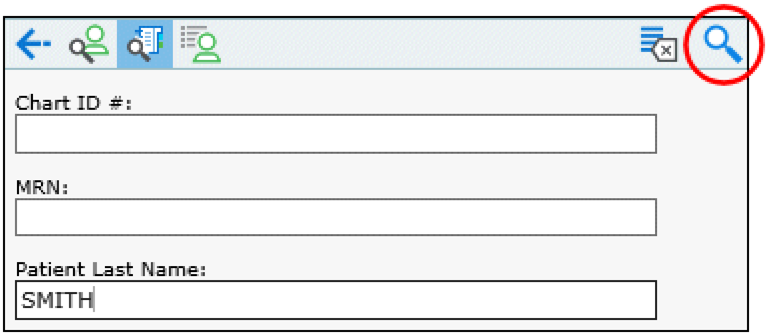
- Click the **Chart Search** button.



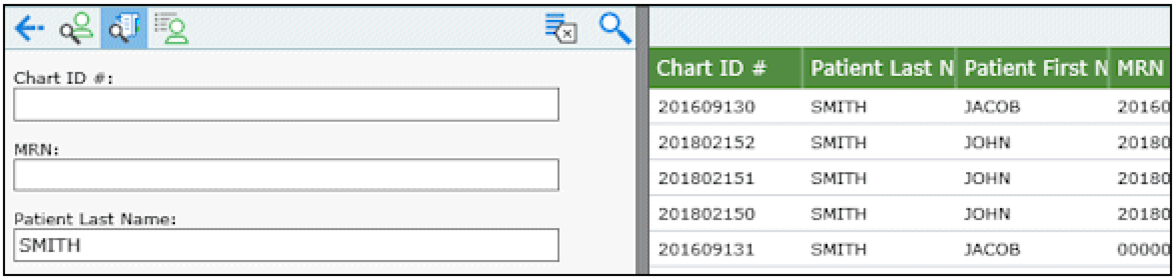
2. Type a value in at least one field. You cannot execute a search without entering at least one value.



3. Enter any additional criteria to narrow your search. For help entering values, see Tips for Searching on page 323.
4. Do one of the following:
   - Press **Enter**.
   - Click the **Search** button in the upper-right corner of the search pane.



5. Results are listed in the right pane.



6. Double-click a chart to open it. The patient's record is opened and filtered based on the chart you selected.

   If you return to Chart Search after opening a chart, your search criteria and results are maintained.

Tips for Searching

Available search fields may vary depending on your system's setup. For descriptions of search fields, see Patient Search Fields and Columns on page 261.

For information about searching with wildcards and dates, see the following topics:

- Using Wildcards on page 323
- Searching by Date on page 324

Using Wildcards

Wildcard characters (***** or **?**) can help you find records or charts when only part of a search value is known. Wildcards can also help you retrieve results that satisfy a range of values.

When entered into a search field, the following wildcard characters allow you to search with values containing one or more unspecified characters:

Wildcard	Description
*	The * wildcard character can replace several characters within a search value. For example, the value OLS* would retrieve all instances of Olsen, Olsted, and Olswood.
?	The **?** wildcard character can replace a single character within a search value. For example, the value SM?TH would retrieve instances of both Smith and Smyth.

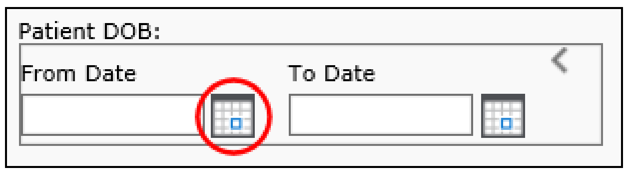
Searching by Date

To enter a date, either type it into the field using a valid shorthand date format, or use one of the available date selection tools.

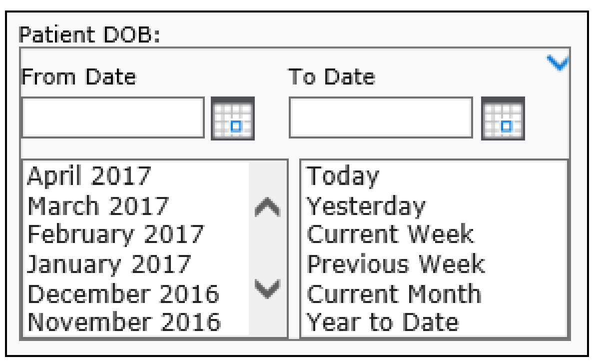
Note: The date format must match the standard date format for your locale. For example, if your workstation locale is set to English (United States), the expected format is mm/dd/yyyy or m/d/yyyy.

To select a date, use one of the following methods:

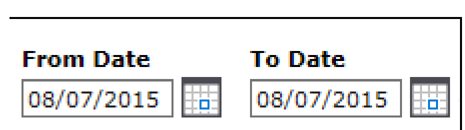
- Click the calendar button next to the **From Date** or **To Date** field to display a calendar. Use the calendar to find the desired date. Double-click the date to enter it.

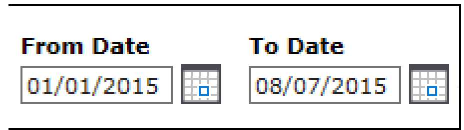
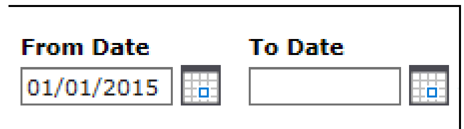
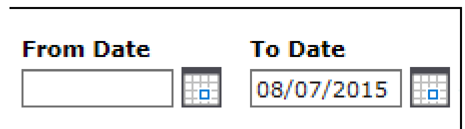


- Click the arrow to the right of the calendar buttons to display extended date options, as shown in the following illustration. Select the desired date range to populate the **From Date** and **To Date** fields.



The following examples illustrate how to use a date range to retrieve the intended results.

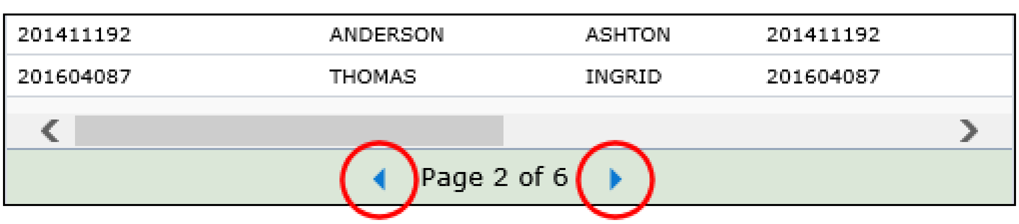
Desired Result	Sample Date Values
Find results that match the specified date. • **From Date**: desired date • **To Date**: same as From Date The sample values shown will include all results that match **08/07/2015**.	

Desired Result	Sample Date Values
Find results that fall within a specific date range. • **From Date**: start date • **To Date**: end date The sample values shown will include all results from **01/01/2015** through **08/07/2015**.	
Find results occurring on or after a specific date. • **From Date**: start date • **To Date**: blank The sample values shown will include all results occurring on or after **01/01/2015**.	
Find results occurring on or before a specific date. • **From Date**: blank • **To Date**: end date The sample values shown will include all results occurring on or before **08/07/2015**.	

Navigating Results

If your search returns a large number of results, then the results list may span several pages.

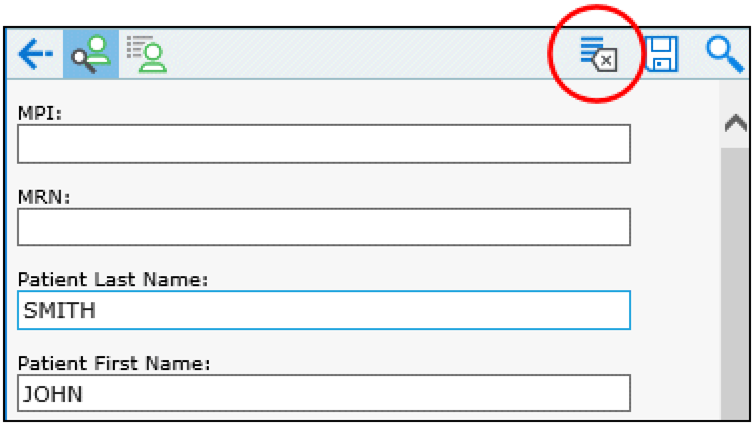
- To navigate to the next page of results, click the **Next** button at the bottom of the results pane.
- To navigate to the previous page of results, click the **Previous** button at the bottom of the results pane.



For help sorting results, see Sorting Lists on page 284.

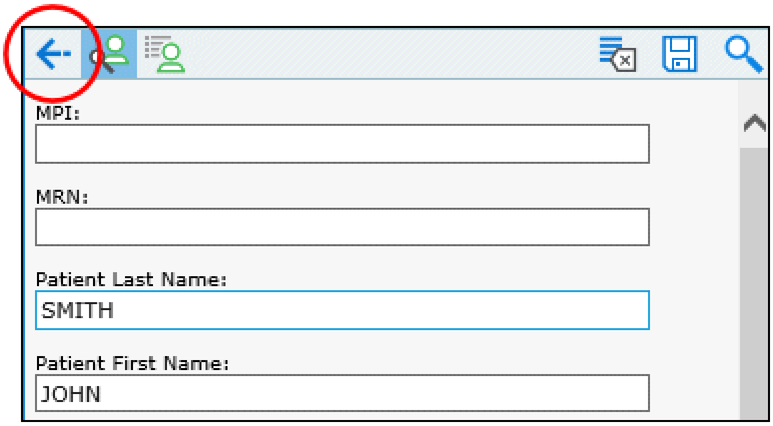
Clearing All Fields

To clear all values from the search fields, click the **Clear All Search Fields** button.



Returning to a Patient Record

To navigate from a search screen to the previous record you were viewing, click the **Return To Patient** button.



This button is available only if you have viewed a patient record this session.

Patient Lists

If you have sufficient privileges, patient lists allow you to quickly access records for a group of patients. For example, you may want to view all patients with upcoming appointments, or you may want to monitor patients who share a specific chronic condition. Patient lists allow you to access and sort these patients' records in a single location.

See the following topics:

- System Lists vs. Personal Lists on page 327
- Public Lists vs. Private Lists on page 327
- Viewing Patient Lists on page 327
- Saving a Search as a System List on page 329
- Creating a Personal Patient List on page 330
- Editing a Patient List on page 335
- Deleting a Patient List on page 336
- Returning to a Patient Record on page 336

System Lists vs. Personal Lists

Two types of patient lists are available: system lists and personal lists. The names used for these list types may vary depending on your system's settings.

- **System Lists**—System lists are populated dynamically based on saved search criteria. Each time you access a system list, the associated search is executed, and the matching patients are retrieved. Patients cannot be manually added to or removed from system lists.
- **Personal Lists**—Personal lists consist of a static set of patients. The creator of a personal list controls its contents by manually adding and removing patients.

Public Lists vs. Private Lists

Both system lists and personal lists can be made public. A public list is visible to all users who have patient list privileges. A private list is visible only to its creator. For both public and private lists, only the creator of the list can add or remove patients (for personal lists) or change the search criteria (for system lists).

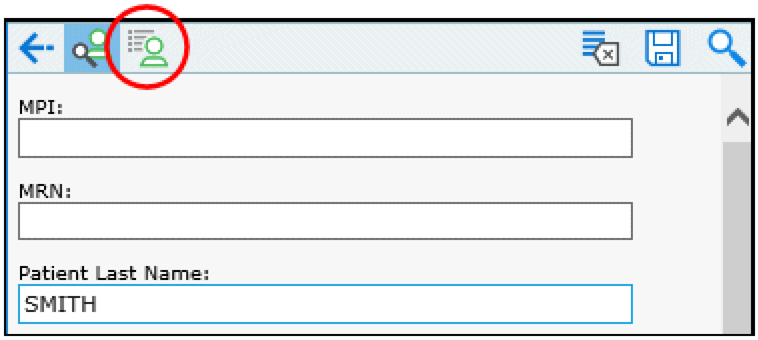
Patient lists are private by default.

Viewing Patient Lists

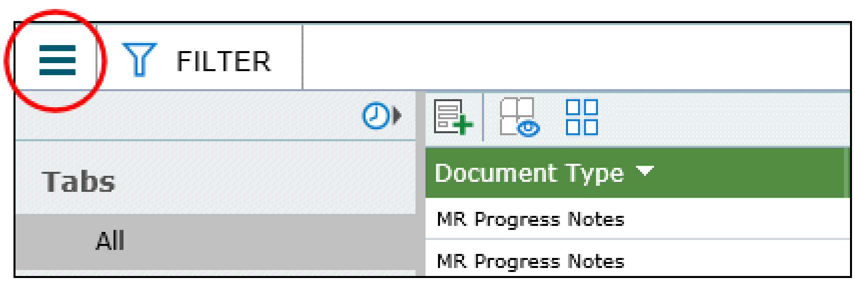
The Patient List screen allows you to view both personal lists and system lists. Available lists include all lists you have created and all lists that have been made public.

To view patient lists:

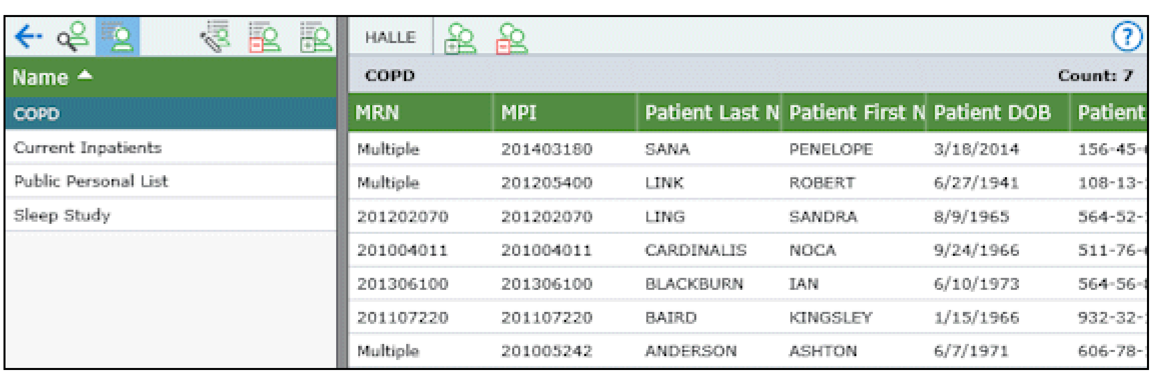
1. Open the Patient List screen using one of the following methods.
   - From Patient Search or Scheduled Patient Search: Click the **Patient List** button above the search pane.



   - From an open record: Rest your pointer over the main menu icon and click **Patient List**.



2. Select a list from the left pane. Its contents are displayed in the right pane.
   Above the list, the title bar displays the list name and the current number of records it contains.



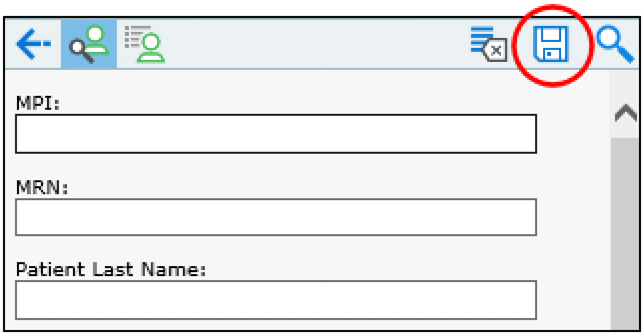
3. To open a patient record, double-click it from the right pane.

Saving a Search as a System List

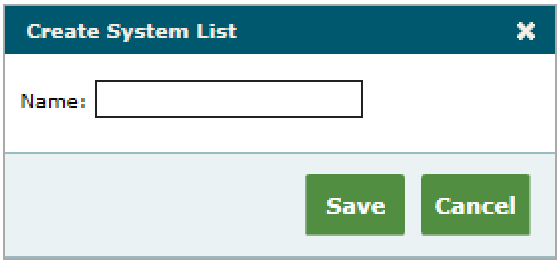
System lists allow you to retrieve a list of patients that satisfy specific criteria. For example, if your system is configured for Patient Search, you can create a system list composed of current inpatients.

For information about searching, see Search on page 316.

1. Access either the Patient Search or Scheduled Patient Search screen.
   For information about these search methods, see the following topics:
   - Searching for Patient Records on page 317
   - Searching for Patients by Appointment on page 319
2. Enter the criteria for your search.
3. Click the **Search** button if you want to execute your search before saving it.
   This step is optional.
4. Click the **Save as System List** button.

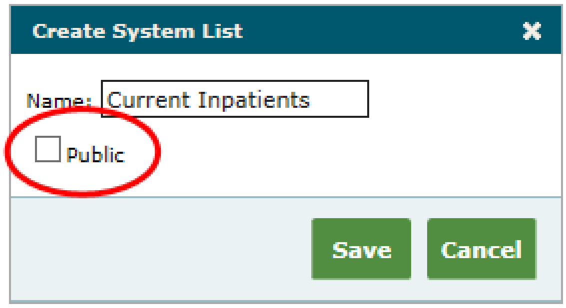


5. Enter a name for the list in the **Create System List** dialog box.



6. To make the list available to all users with patient list privileges, select the **Public** check box.

   The **Public** check box is available only to users who have privileges to make patient lists public. If this option is not available, the list will be private and visible only to you. For more information, see Public Lists vs. Private Lists on page 327.



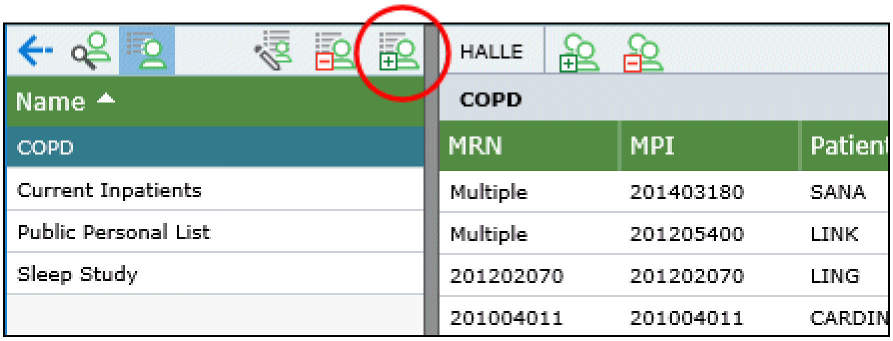
7. Click **Save**. A confirmation message is displayed.
8. To view your new list, click the **Patient List** button in the main toolbar. See Viewing Patient Lists on page 327.

Creating a Personal Patient List

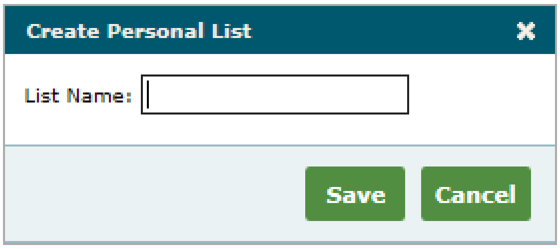
Using the Patient List screen, you can create new personal lists.

To create a personal list:

1. Click **Create Personal List**.

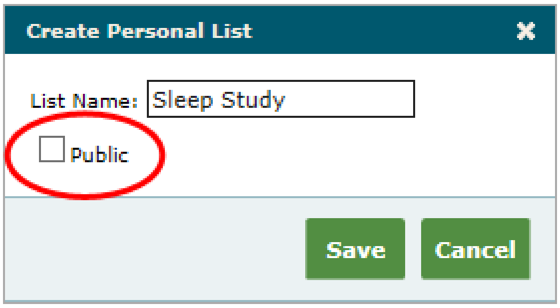


2. Type a name for the list in the **List Name** field.



3. To make the list available to all users with patient list privileges, select the **Public** check box.

   The **Public** check box is available only to users who have privileges to make patient lists public. If this option is not available, the list will be private and visible only to you. For more information, see Public Lists vs. Private Lists on page 327.



4. Click **Save**. The new list is created.
5. Add patients to the list using either of the following methods:
   - Adding Patients from Search on page 331
   - Copying Patients from One List to Another on page 333

   To remove patients from a personal list, see Removing Patients from a Personal List on page 334.

Adding Patients from Search

Using Patient Search or Scheduled Patient Search, you can add patients to any personal list that you created.

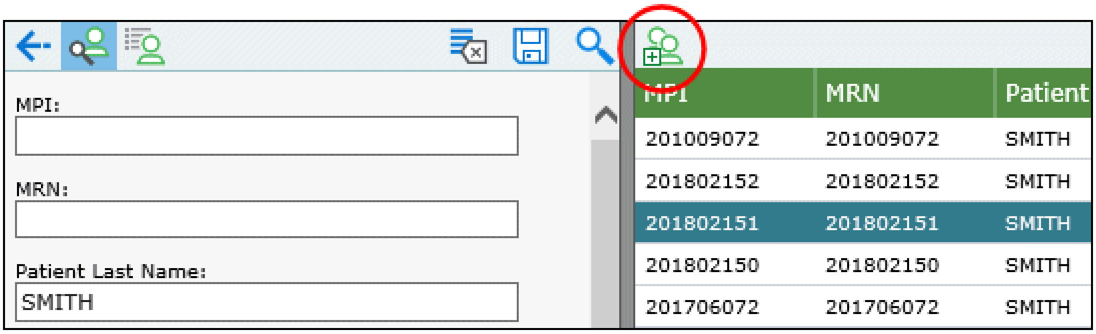
To add patients from the search results screen:

1. Retrieve patients using either Patient Search or Scheduled Patient Search.

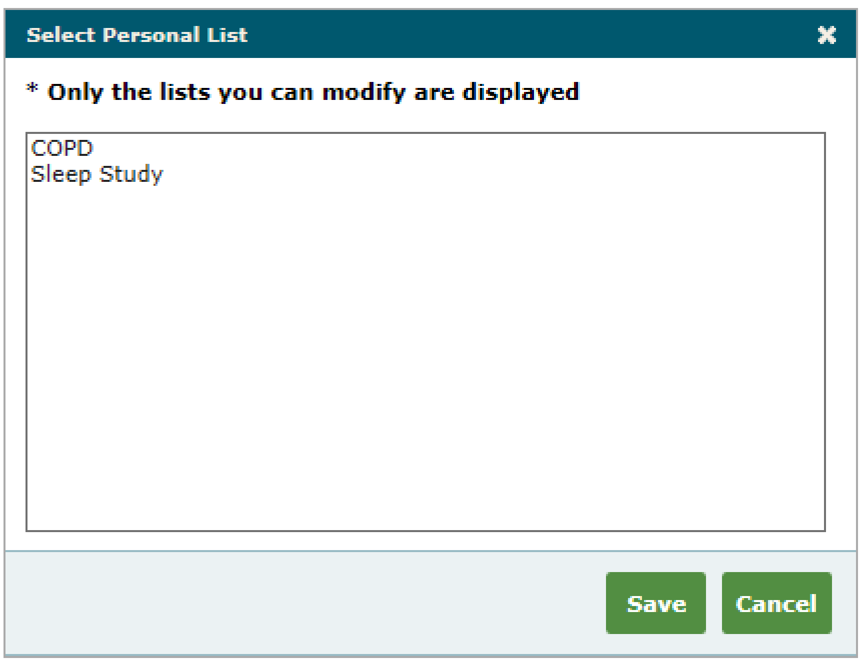
   For information about these search methods, see the following topics:
   - Searching for Patient Records on page 317
   - Searching for Patients by Appointment on page 319
2. From the search results, select the patients you want to add to a personal list.

Tip: To select multiple patients, press **Ctrl** as you select each one, or **Shift**-click to select multiple patients in a row. You can also click and drag your pointer to select multiple patients.

3. Click the **Add Patients to List** button.

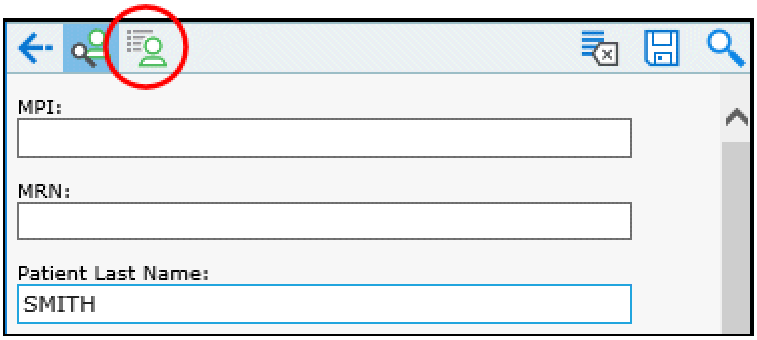


4. Select a list to add the patients to. You can add patients only to personal lists you created.



5. Click **Save**. A confirmation is displayed.

6. When finished, click the **Patient List** button to return to the Patient List screen.



Copying Patients from One List to Another

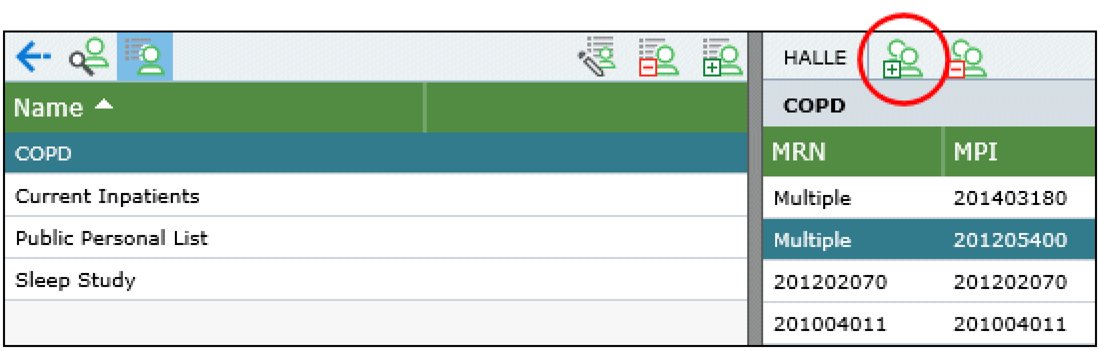
If multiple patient lists are available, you can add patients to a personal list by copying them from another list. You can add patients to any personal list you created.

To copy patients to a personal list:

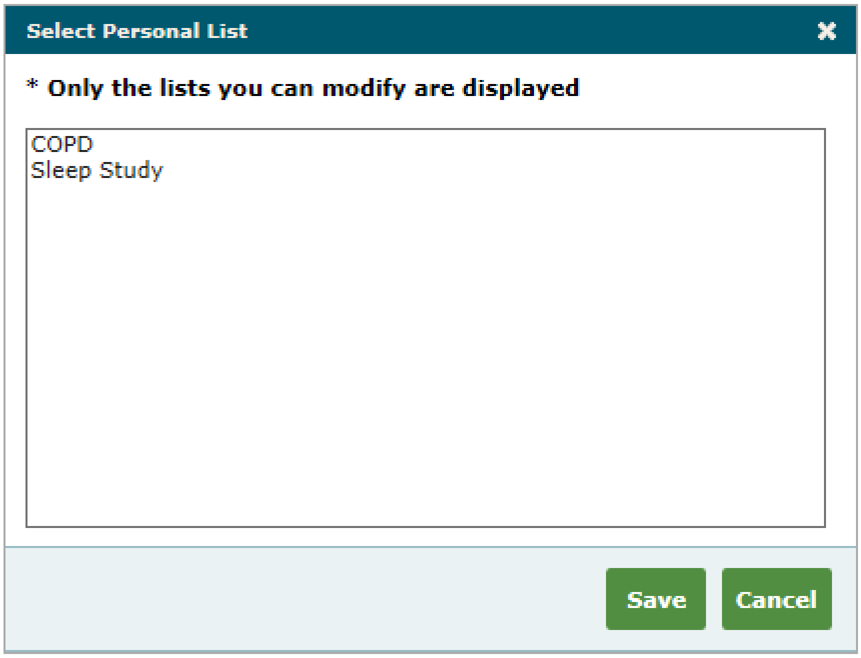
1. Open the list containing the patients you want to copy. This list can be a personal list or a system list.
2. Select the patients you want to copy to a personal list.

Tip: To select multiple patients, press **Ctrl** as you select each one, or **Shift**-click to select multiple patients in a row. You can also click and drag your pointer to select multiple patients.

3. Click the **Add Patients to Personal List** button.



4. Select a list to add the patient to. You can add patients only to personal lists you created.



5. Click **Save**. A confirmation is displayed.

Removing Patients from a Personal List

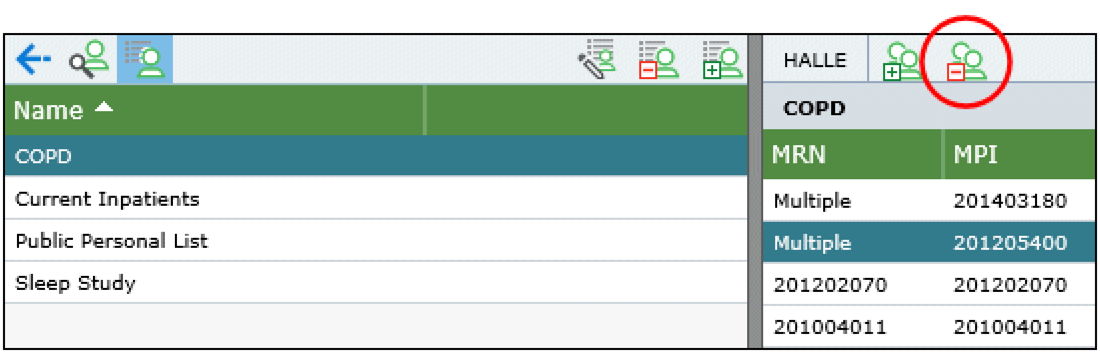
You can remove a patient from a personal list you created. You cannot remove patients from system lists or from lists created by other users.

To remove a patient from a personal list:

1. Select the patient from the list.

Tip: To select multiple patients, press **Ctrl** as you select each one, or **Shift**-click to select multiple patients in a row. You can also click and drag your pointer to select multiple patients.

2. Click the **Remove Patients from Personal List** button.



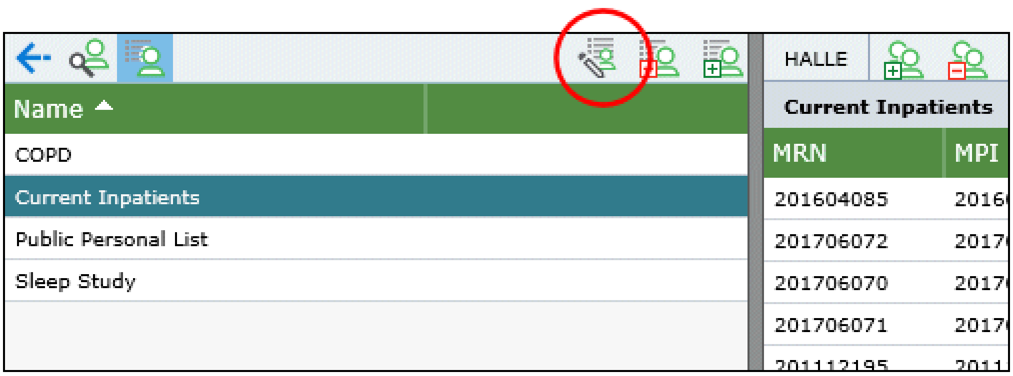
3. Click **Yes** to remove the patient from the current list. To keep the patient in the current list, click **No**.

Editing a Patient List

Using the Patient List screen, you can rename patient lists you created. If you have sufficient privileges, you also can change whether these lists are public or private.

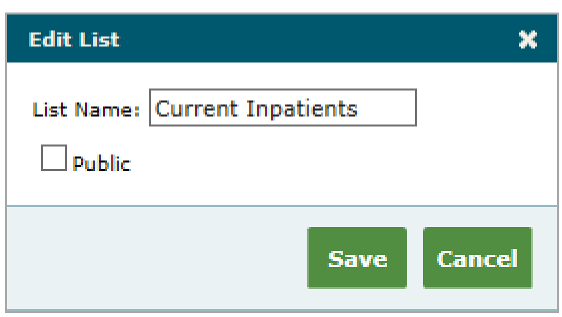
To edit a patient list:

1. Select the list you want to edit from the left pane.
2. Click the **Edit List** button.



3. Modify the settings in the **Edit List** dialog box.

   The **Public** check box is available only to users who have privileges to make patient lists public.



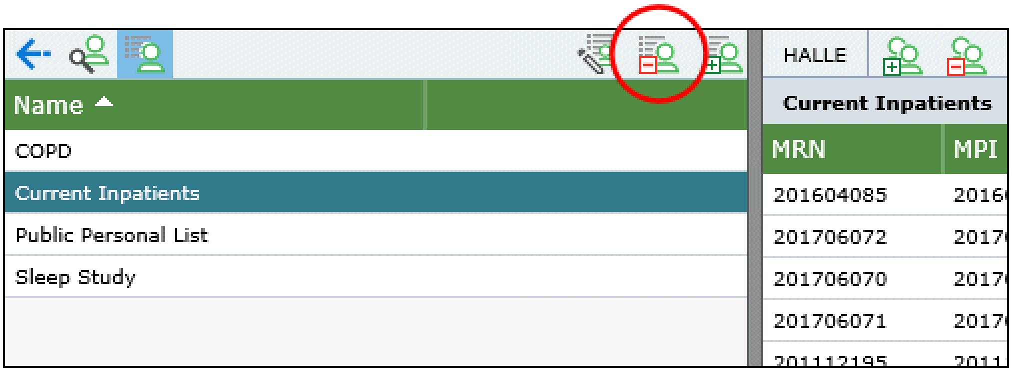
4. Click **Save**.

Deleting a Patient List

Using the Patient List screen, you can delete patient lists you created. You cannot delete public patient lists created by other users.

To delete a patient list:

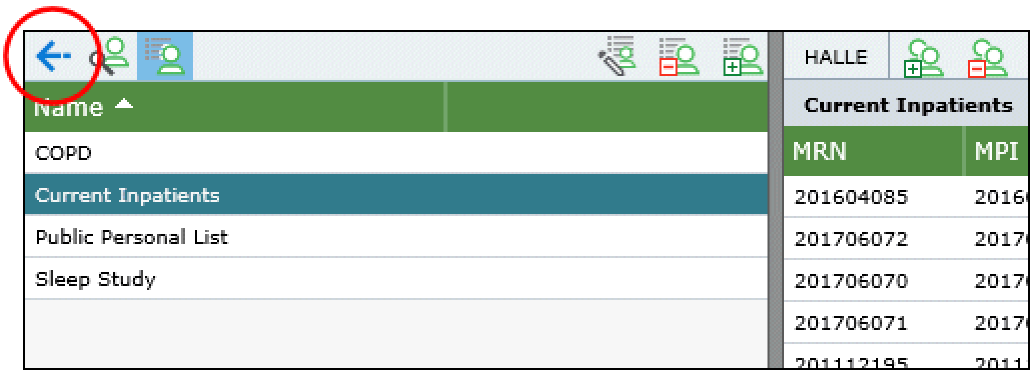
1. Select the list you want to delete from the left pane.
2. Click the **Delete List** button.



3. Click **Yes** when prompted to confirm. The list is deleted.

Returning to a Patient Record

To navigate from the Patient List screen to the previous record you were viewing, click the **Return To Patient** button.

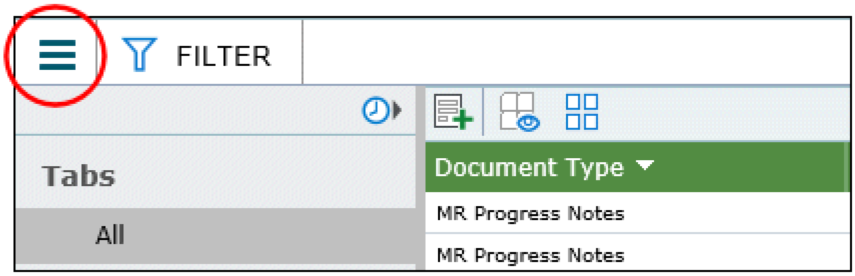


This button is available only if you have viewed a patient record this session.

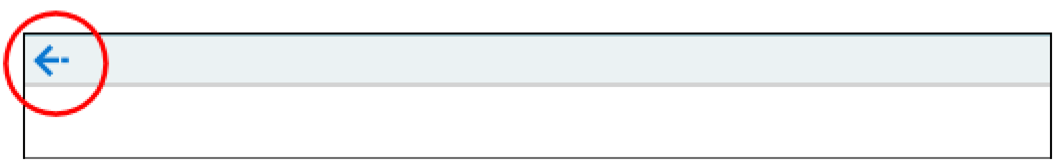
Hosted Content

Depending on your system's setup, OnBase Patient Window may allow you to access content through another Web application.

If configured, hosted content buttons are available from the main menu in the main toolbar. Icons and names used for these buttons may vary per system.



When you click a hosted content button, OnBase Patient Window displays the configured content. To return to the patient's record, click the **Return To Patient** button in the upper-left corner of the window.



Note: You may be required to filter the current record by chart or MRN before clicking a hosted content button. Contact your system administrator for more information.

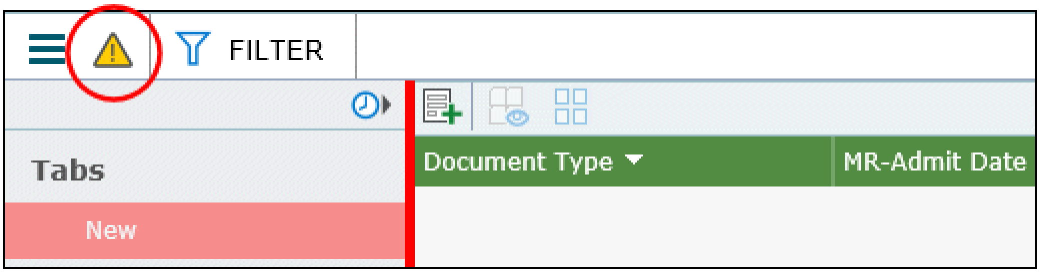
Emergency Patient Record Access

Depending on your user privileges, you may be able to gain temporary emergency access to a patient's record in the event of an emergency. When you gain emergency access to a patient's record, your access will be audit logged. If it is critical that you access a patient's record immediately, request emergency access.

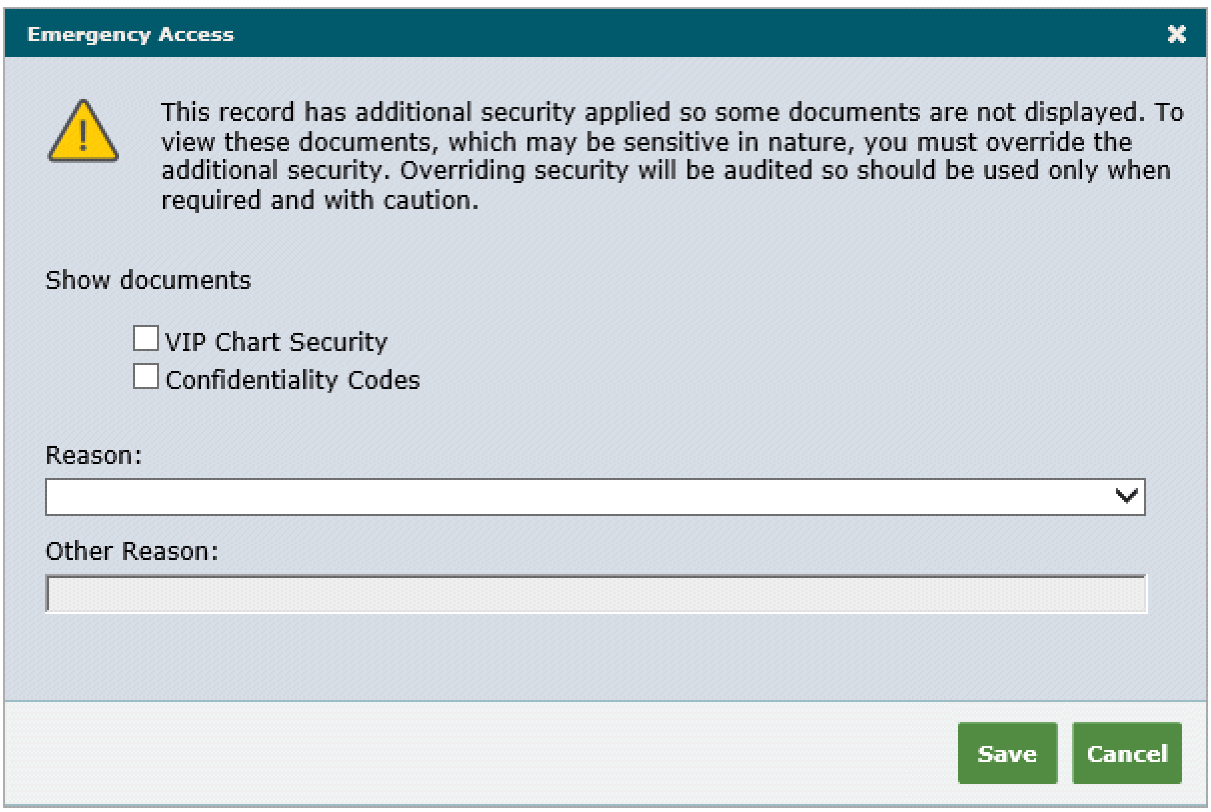
Note: If you have the patient's record open in multiple windows, only the window from which you request emergency access is refreshed to show the restricted content.

To request emergency access:

1. On the main toolbar, click the **Emergency Access** button.[1]



You are prompted to select which documents to show, and you may also need to select the reason you need to access these documents.



1. If you have emergency access privileges, this button is displayed if any documents that meet your filter criteria are hidden due to confidentiality codes or VIP chart security. If there are no restricted documents that meet your filter criteria, the button is not displayed.

2. Select one or more **Show documents** options. Available options may vary depending on your assigned privileges.
   - **VIP Chart Security** - You will be granted emergency access to VIP chart documents that are not restricted by confidentiality codes.
   - **Confidentiality Codes** - You will be granted emergency access to documents that are restricted by confidentiality codes.
3. Select a reason from the **Reason** drop-down list, if it is available.

Note: If the **Reason** drop-down list is available, you must select a reason. Otherwise, you will not be able to proceed.

4. Click **Save** to gain access.

   This action will be audit logged. A notification will be sent to the administrator, alerting the administrator that you gained access to these documents.

User Options

OnBase Patient Window allows you to customize a set of personal options, such as your Personal Tab contents, your default filter, and your case options. See the following topics for more information:

- Customizing the Personal Tab on page 339
- Managing Your Saved Filters on page 345
- Editing & Deleting Cases on page 351
- Enabling Expanded Mode By Default on page 357
- Resetting the Default Layout Options on page 358

Customizing the Personal Tab

The Personal Tab allows you to quickly access Document Types you refer to frequently. See the following topics:

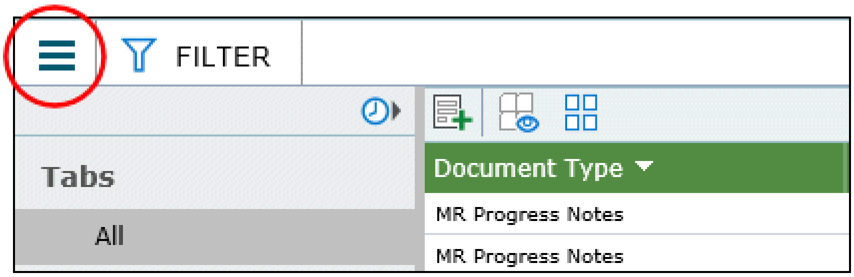
- Adding Document Types to the Personal Tab on page 340
- Removing Document Types from the Personal Tab on page 342
- Copying Personal Tab Settings to the New Documents Tab on page 343

Adding Document Types to the Personal Tab

For the Personal Tab to be available, you must configure it to contain one or more Document Types.

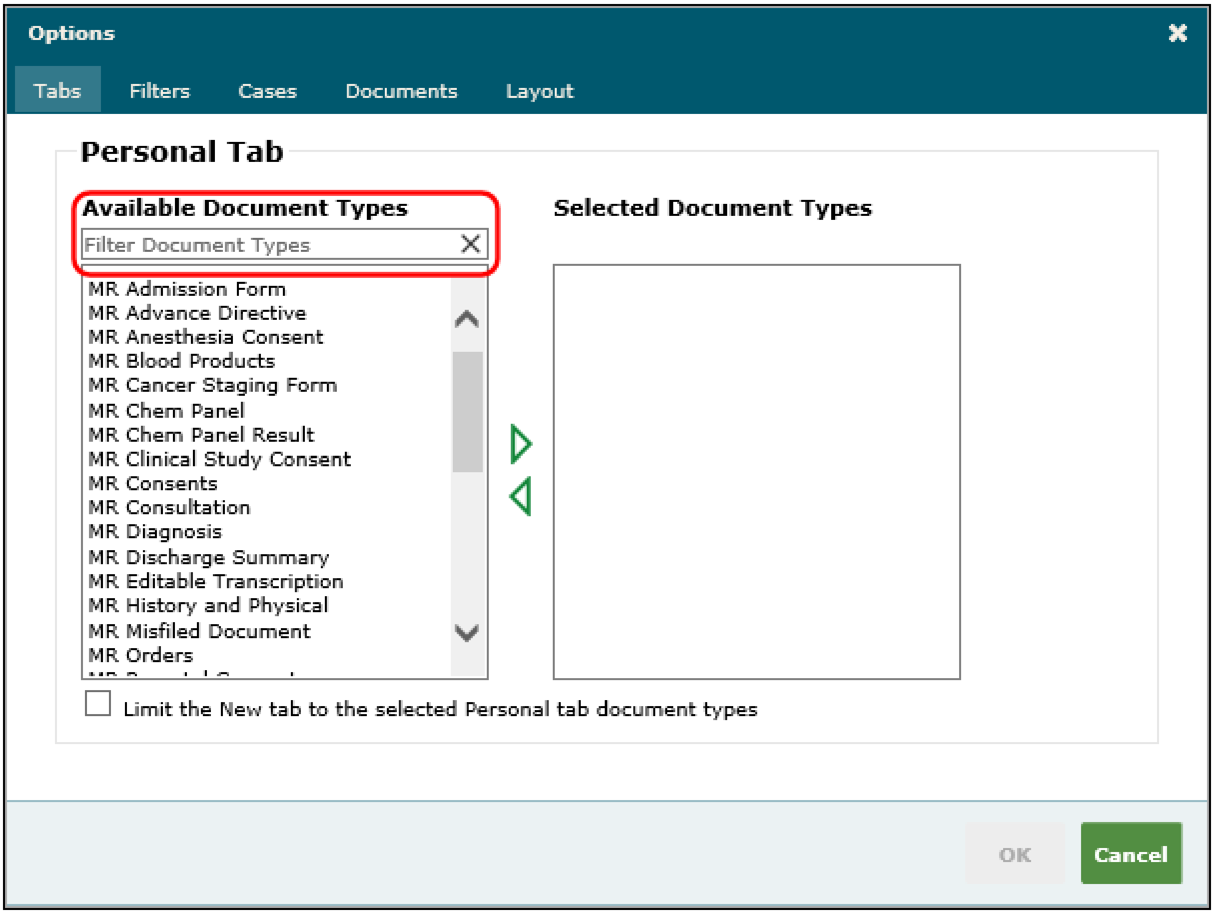
To add Document Types to your Personal Tab:

1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



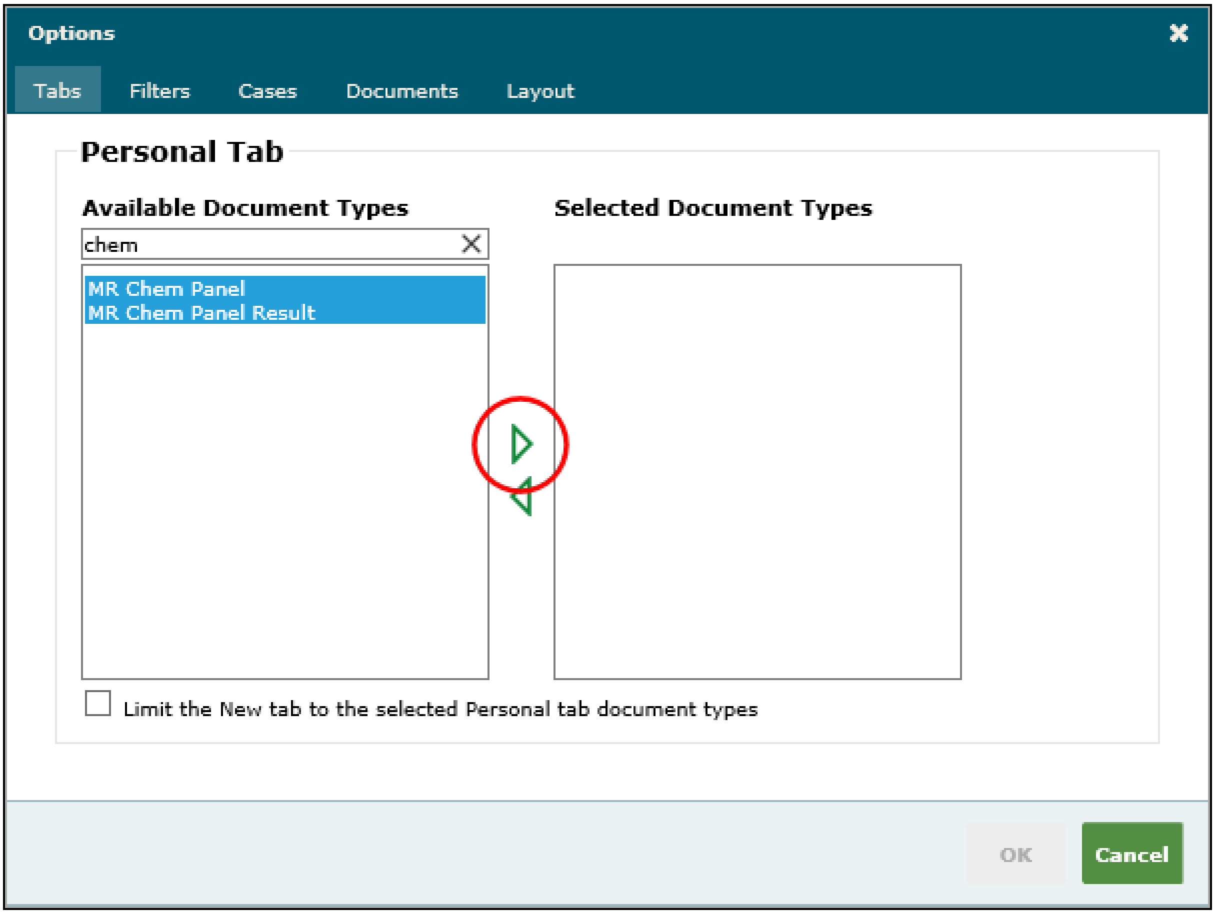
2. Select the Document Types you want to include in the Personal Tab from the **Available Document Types** list.

   To filter the list of available Document Types, type part of the Document Type name in the field above the list.



Tip: To select multiple Document Types, press **Ctrl** as you select each one, or **Shift**-click to select multiple Document Types in a row.

3. Click the **Add** button. The Document Types are added to the **Selected Document Types** list.

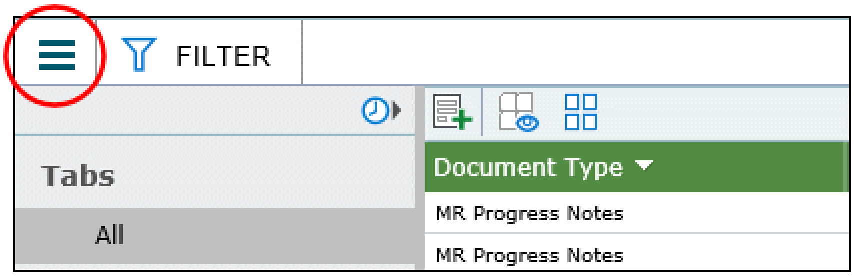


4. Click **OK** to save the new Personal Tab configuration.

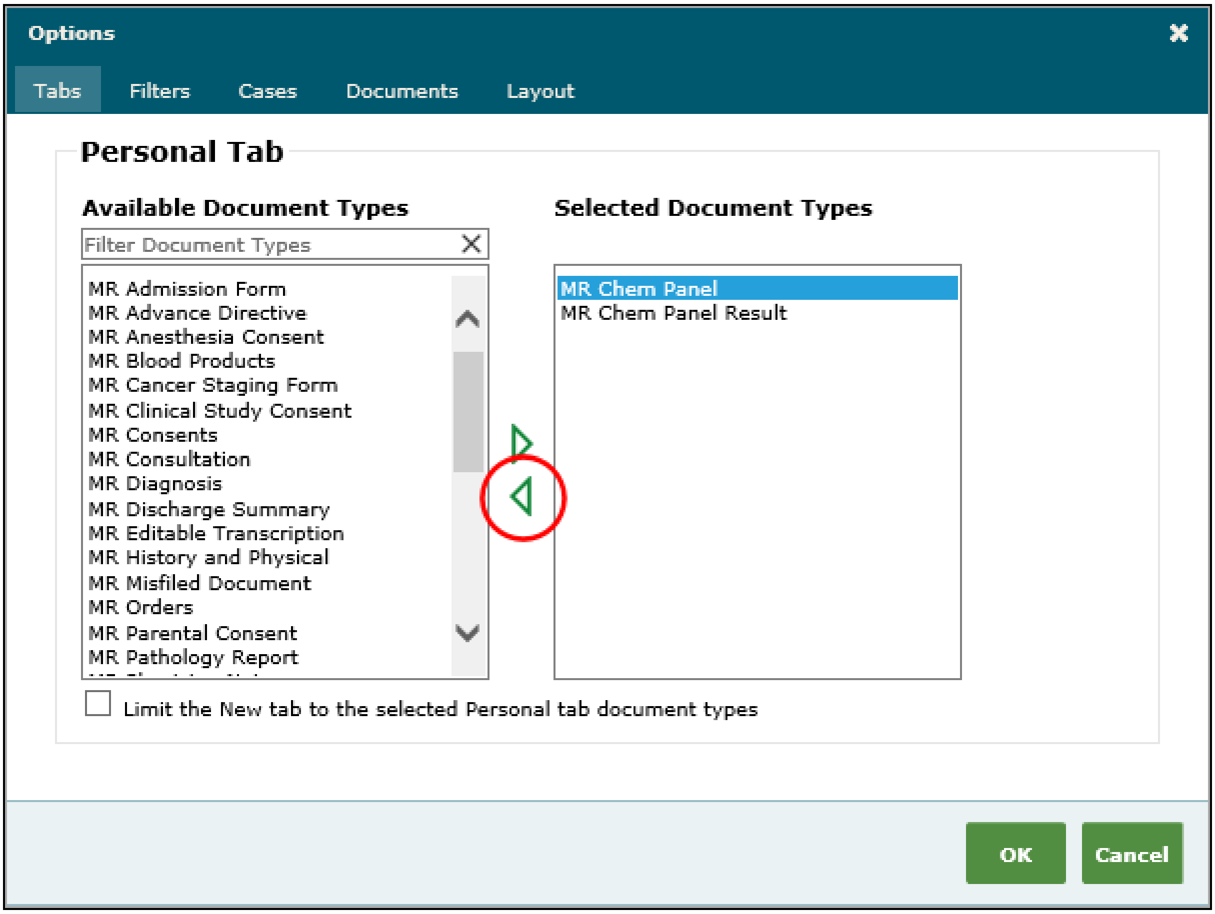
Removing Document Types from the Personal Tab

To remove a Document Type from your Personal Tab:

1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



2. Select a Document Type from the **Selected Document Types** list.
3. Click the **Remove** button.



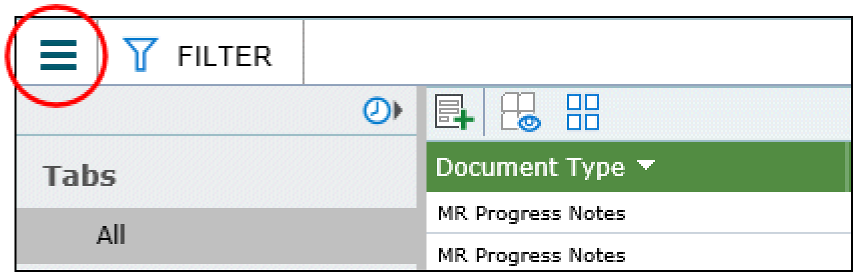
4. Click **OK** to save the new Personal Tab configuration.

Copying Personal Tab Settings to the New Documents Tab

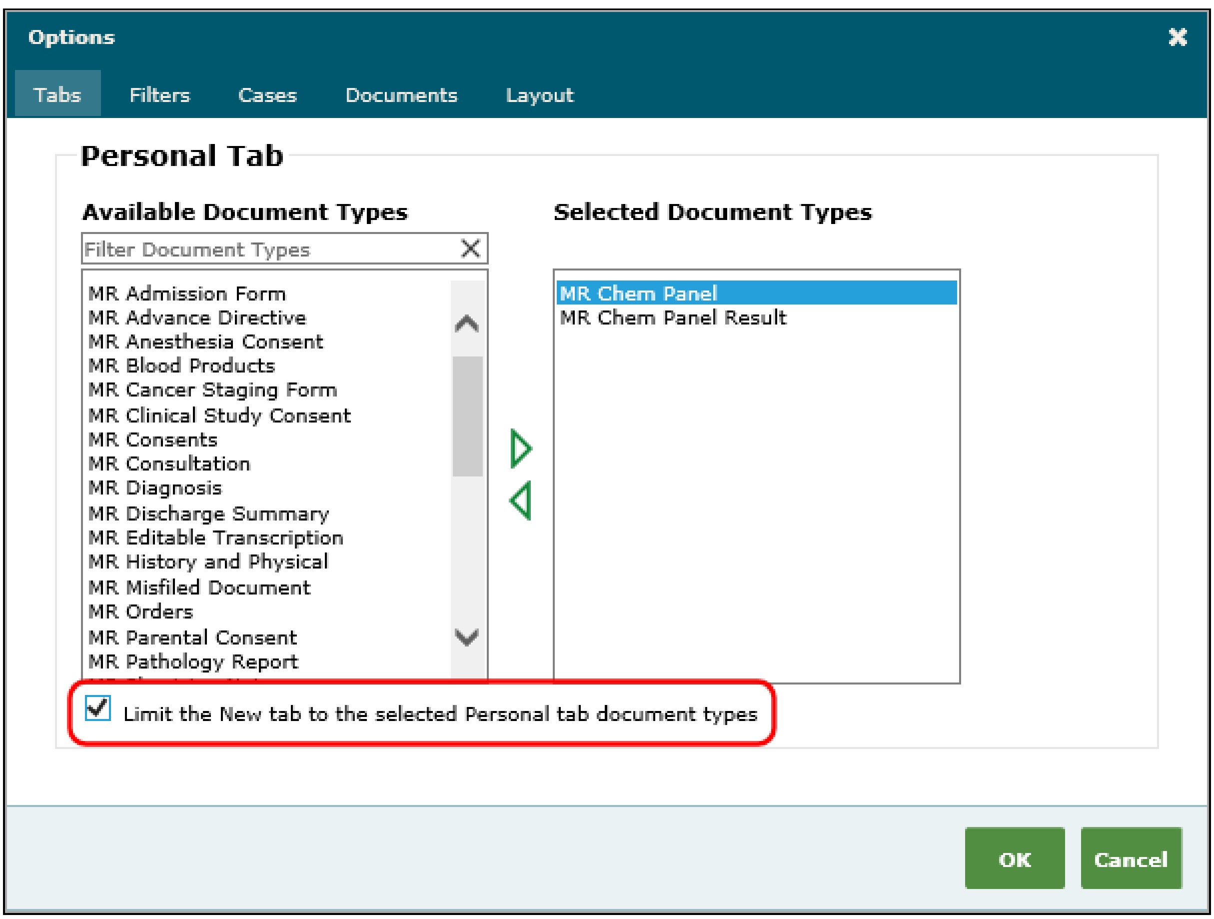
You can use your Personal Tab settings to limit the Document Types displayed on the New tab. Enable this feature if the New tab should display only new documents that belong to certain Document Types.

To limit the Document Types displayed on the New tab:

1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



2. Verify all Document Types you want to see in the New tab are assigned to the Personal Tab.
3. Select the option named **Limit the New tab to the selected Personal tab document types**.



4. Click **OK**.

Managing Your Saved Filters

To manage your saved filters, see the following topics:

- Setting a Default Filter on page 345
- Removing the Default Filter on page 346
- Renaming a Saved Filter on page 348
- Deleting a Saved Filter on page 350
- Sharing Filters on page 351

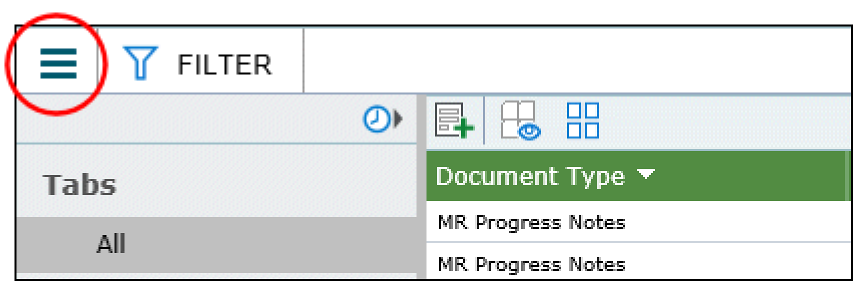
Setting a Default Filter

Depending on your system's settings, you may be able to set a saved filter as your default filter. Designate a saved filter as your default filter if it should be applied by default for each record you access.

Note: The default filter is not applied if you access OnBase Patient Window using a link that opens a specific document or chart. This behavior ensures you can view the documents you were meant to see.

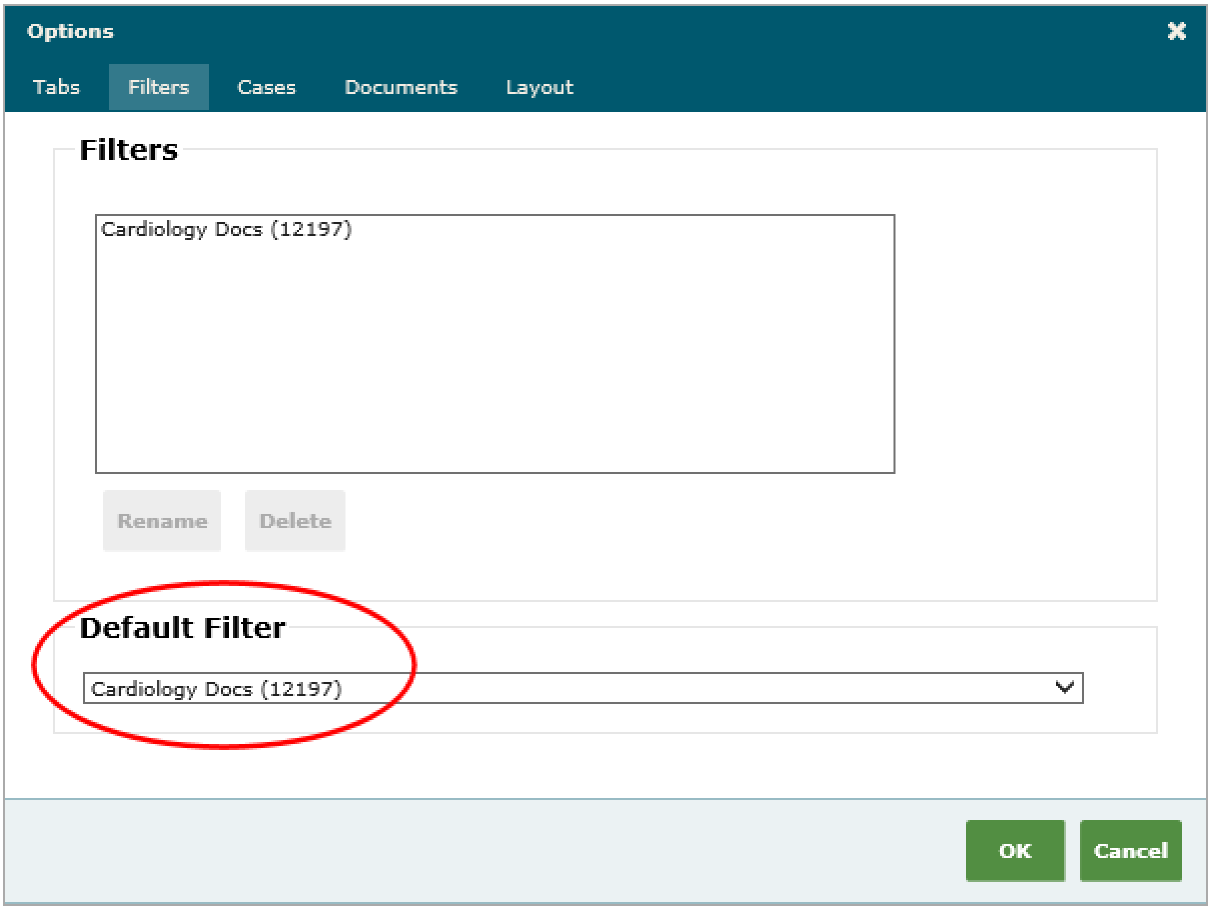
To designate or change your default filter:

1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



2. Click the **Filters** tab.

3. Under **Default Filter**, select the filter you want to use as your default filter.
   The number in parentheses is the internal filter ID. It is displayed for administrative purposes.



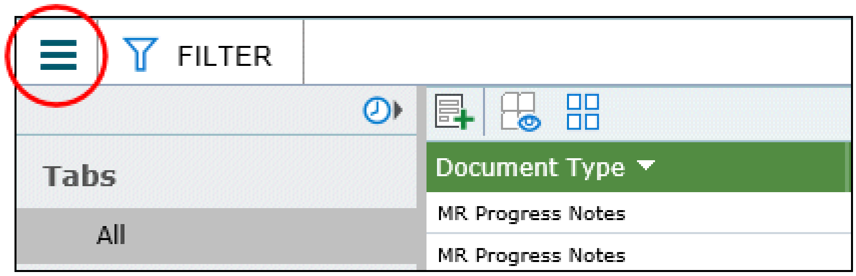
4. Click **OK** to save the change.

Removing the Default Filter

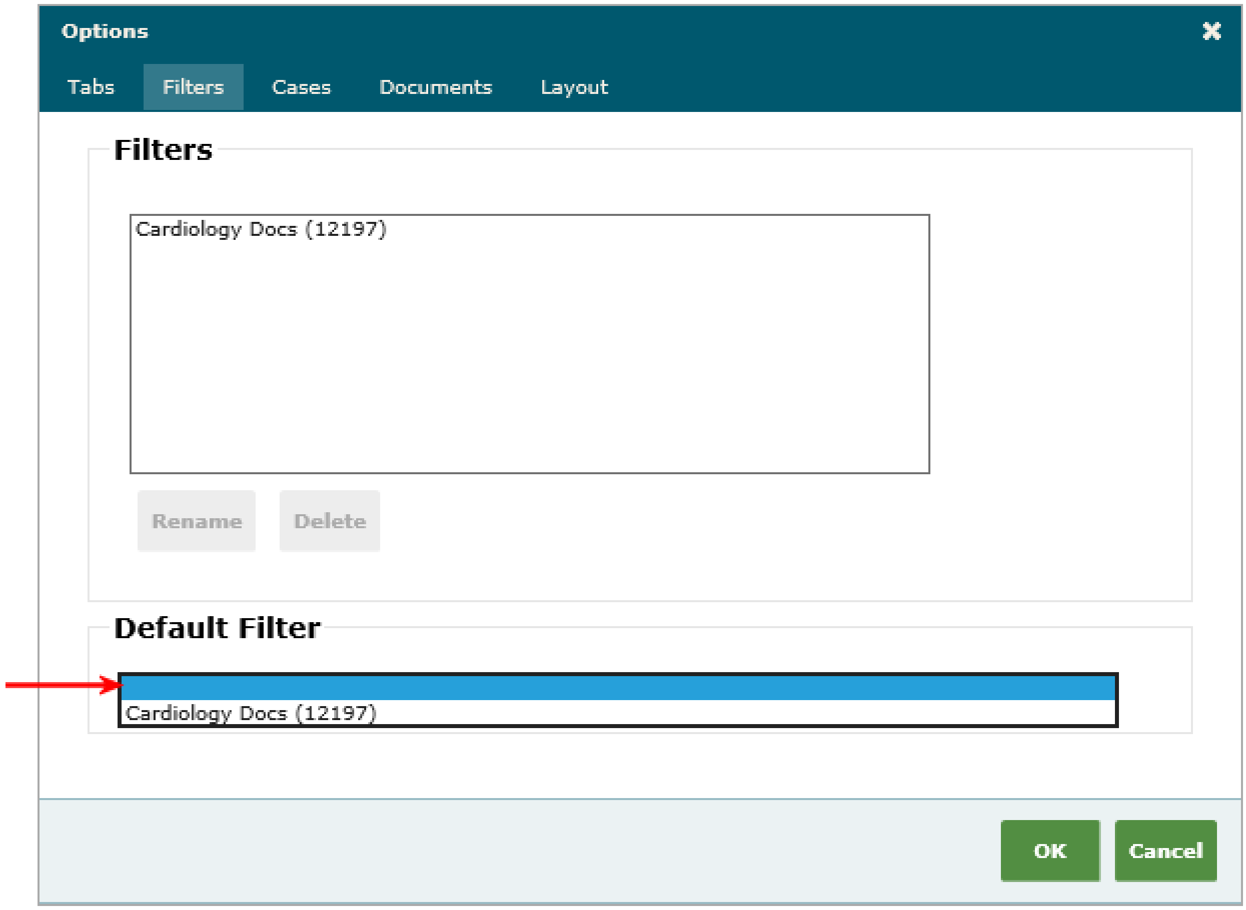
If you no longer want a default filter to be applied to each record, you can clear the default filter setting.

To clear the default filter setting:

1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



2. Click the **Filters** tab.
3. Under **Default Filter**, select the blank entry in the drop-down list.



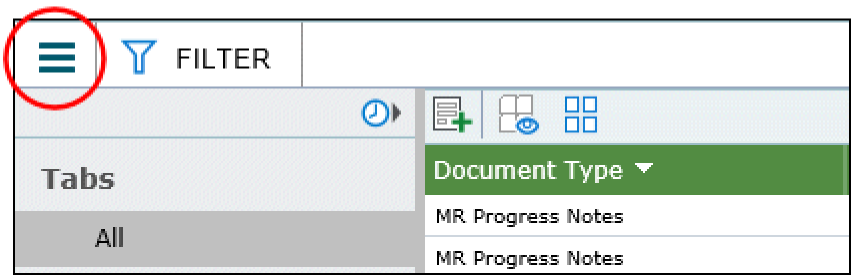
4. Click **OK** to save the change.

Renaming a Saved Filter

As you create and save new filters, you may need to update or refine the names of your existing filters.

To rename an existing filter:

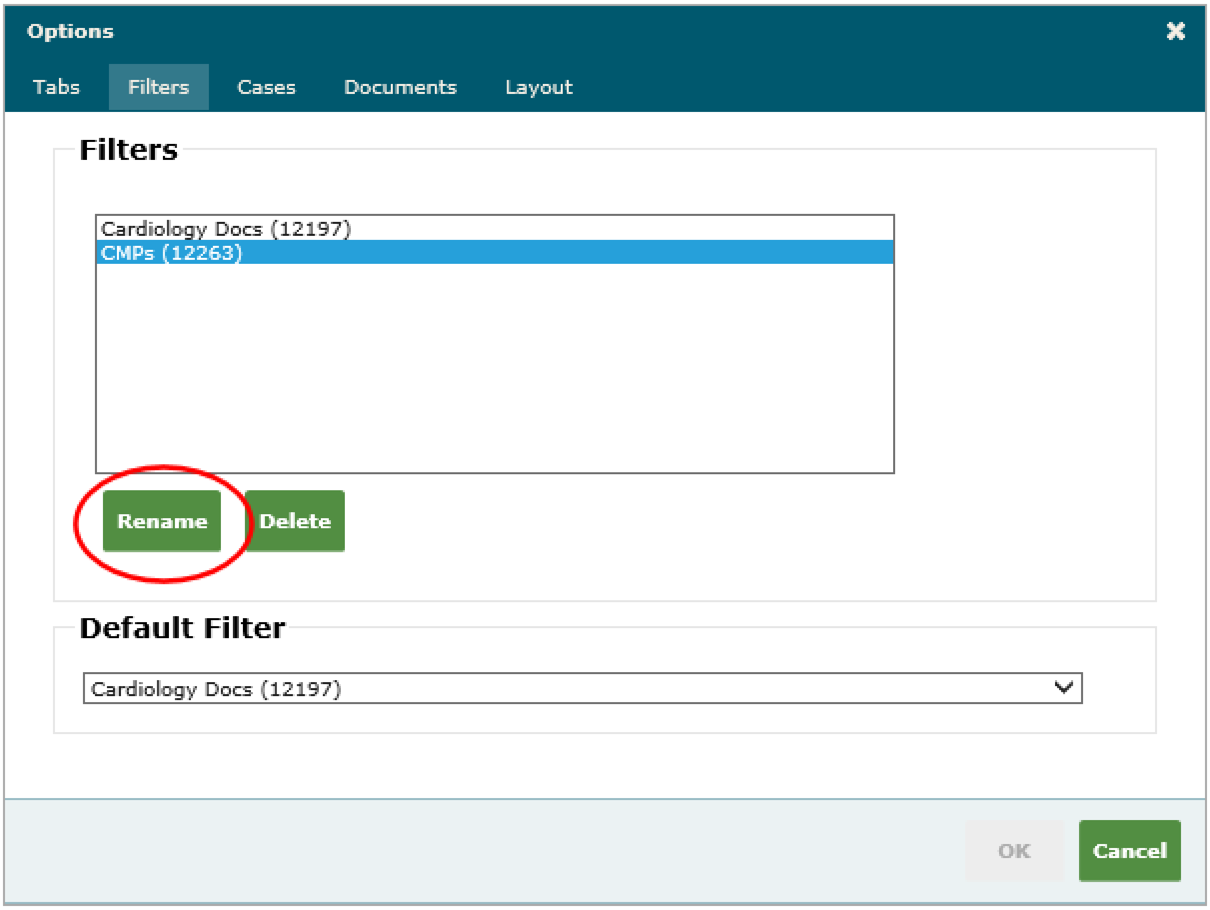
1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



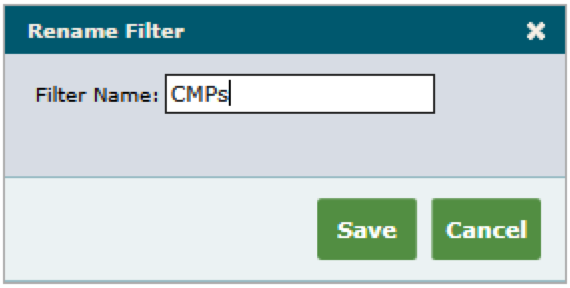
2. Click the **Filters** tab.
3. Select the filter you want to rename.

   Each filter displays a number in parentheses. This number is the internal filter ID. It is displayed for administrative purposes.

4. Click **Rename**.



5. Type a new name for the filter in the **Filter Name** field.



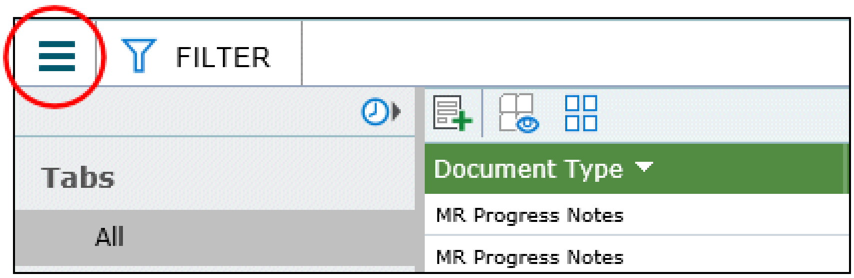
6. Click **Save**.
7. Click **OK** to save the change, or click **Cancel** to undo it.

Deleting a Saved Filter

If you no longer need a saved filter, you can delete it using the **Options** dialog box.

To delete a saved filter:

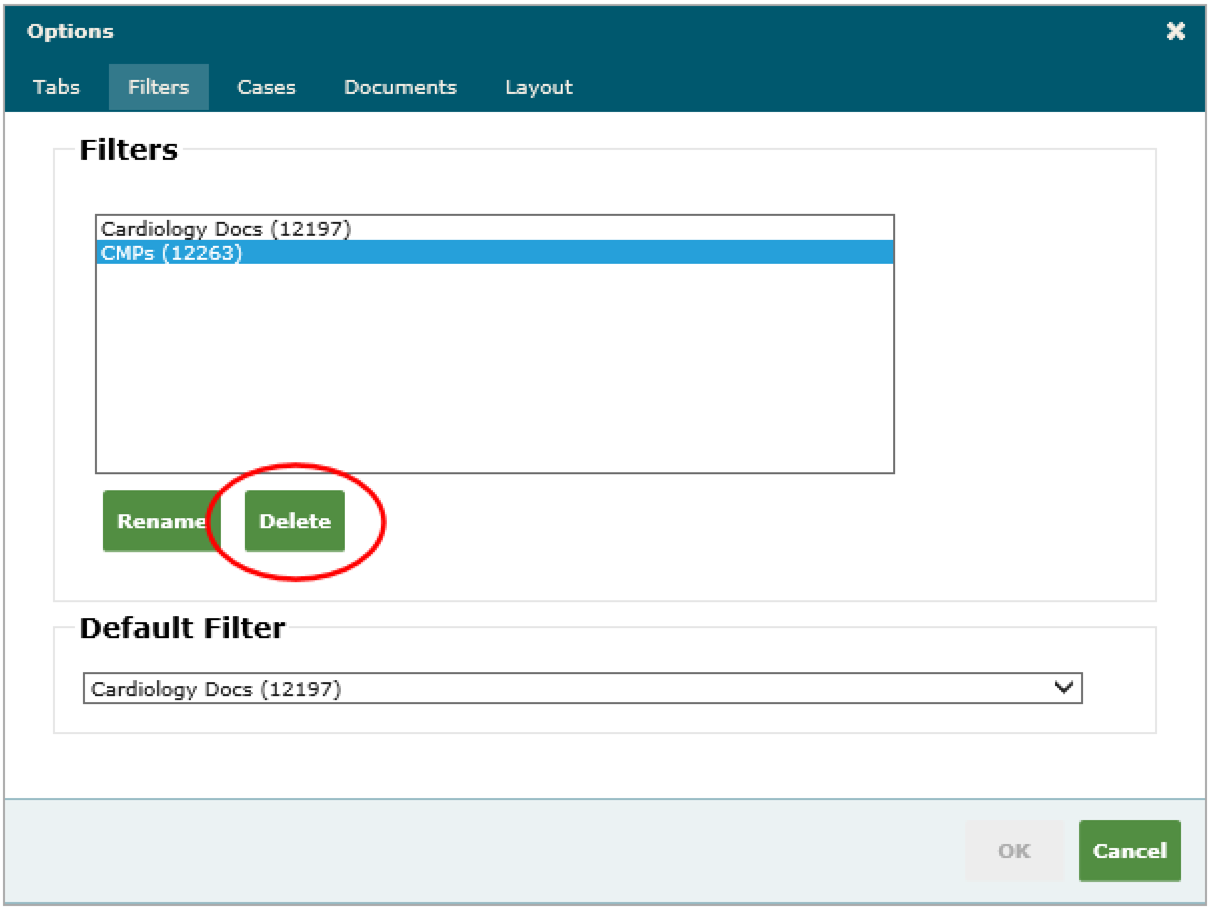
1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



2. Click the **Filters** tab.
3. Select the filter you want to delete.

   Each filter displays a number in parentheses. This number is the internal filter ID. It is displayed for administrative purposes.

4. Click **Delete**. The filter is removed from the list.



5. Click **OK** to save the deletion, or click **Cancel** to undo it.

Sharing Filters

If you have administrative privileges, you can make filters available to other users. See Public Filters on page 391.

Editing & Deleting Cases

Cases are tabs that allow you to organize documents surrounding a specific case or condition. You can edit or delete cases you have created. You cannot edit or delete cases that another user has created and made public.

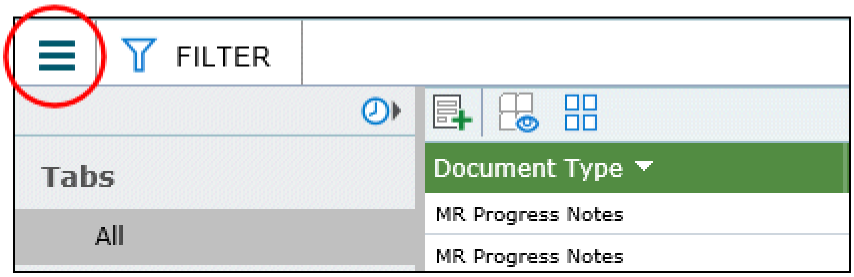
Cases are managed on a per-patient basis. Changes you make to a case are reflected only on the patient record you are currently viewing. Cases you have created on other patients' records are not affected.

Editing a Case

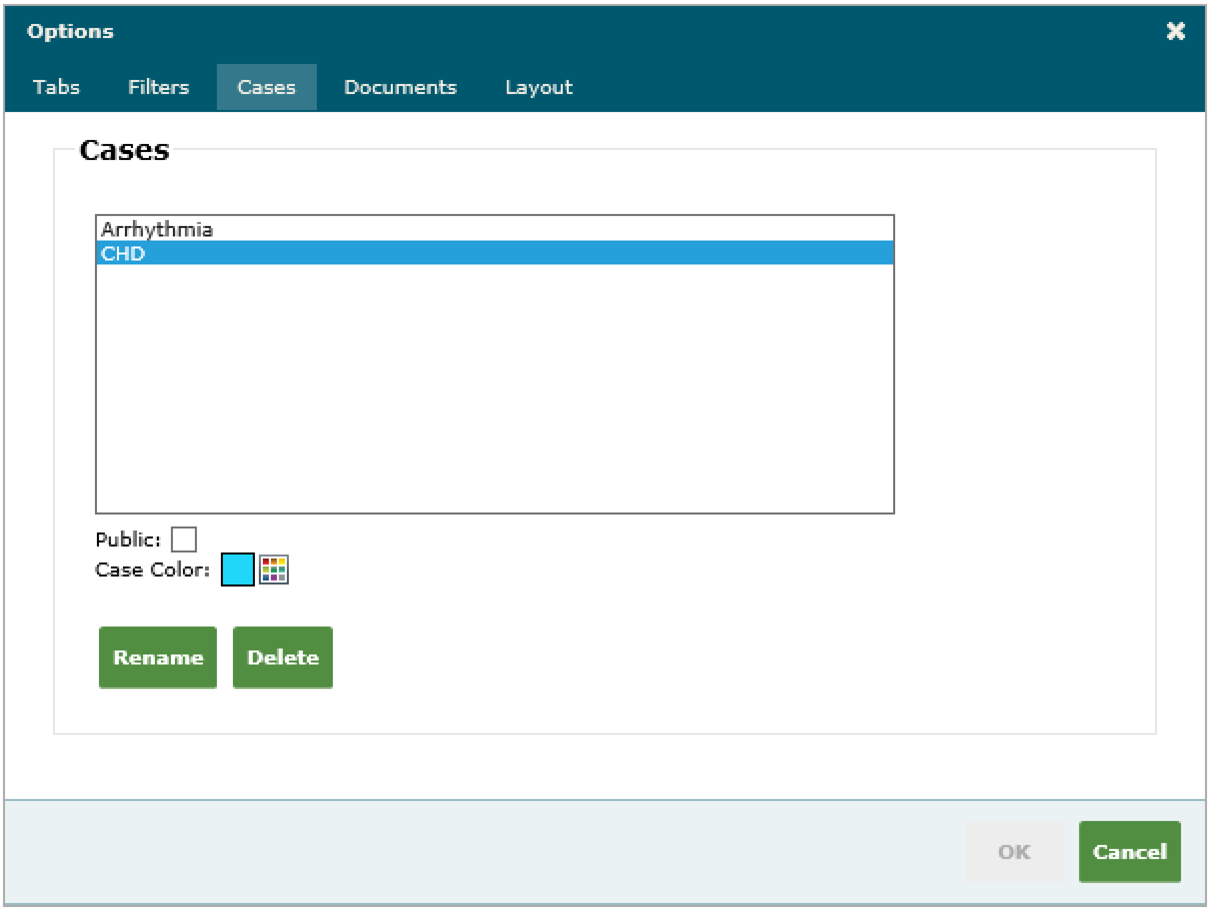
You can edit the name and color of any case tab you have created. If you have sufficient privileges, you can also change the case's availability to other users.

To edit a case tab:

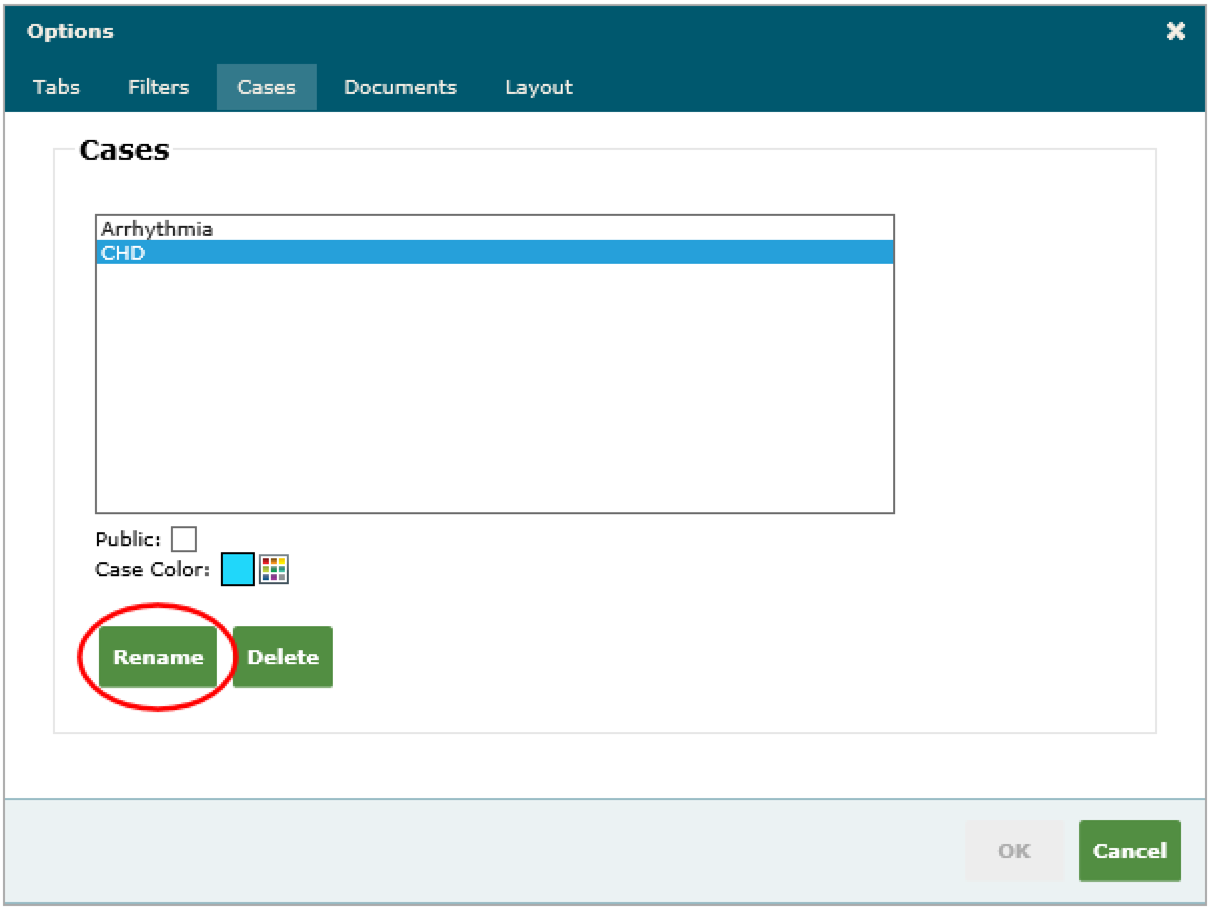
1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



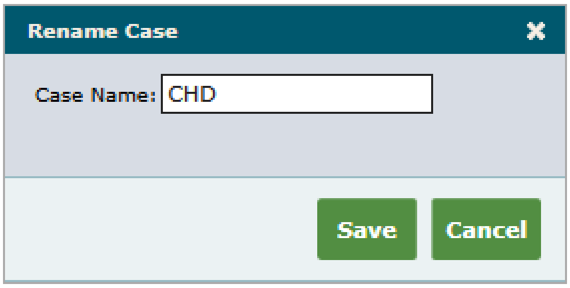
2. Click the **Cases** tab.
3. Select the case you want to edit.



4. To rename the case, click **Rename**.

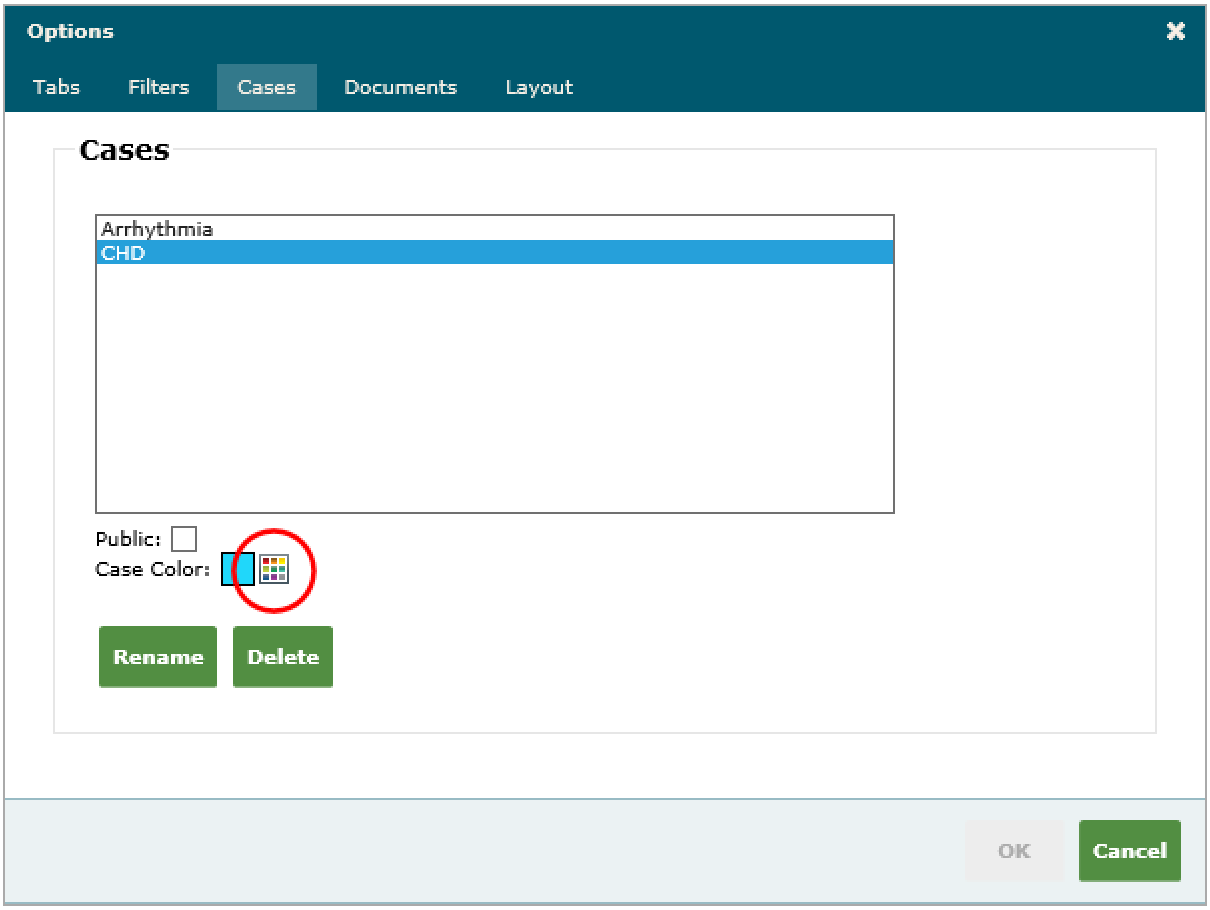


5. Type a new name in the **Case Name** field.

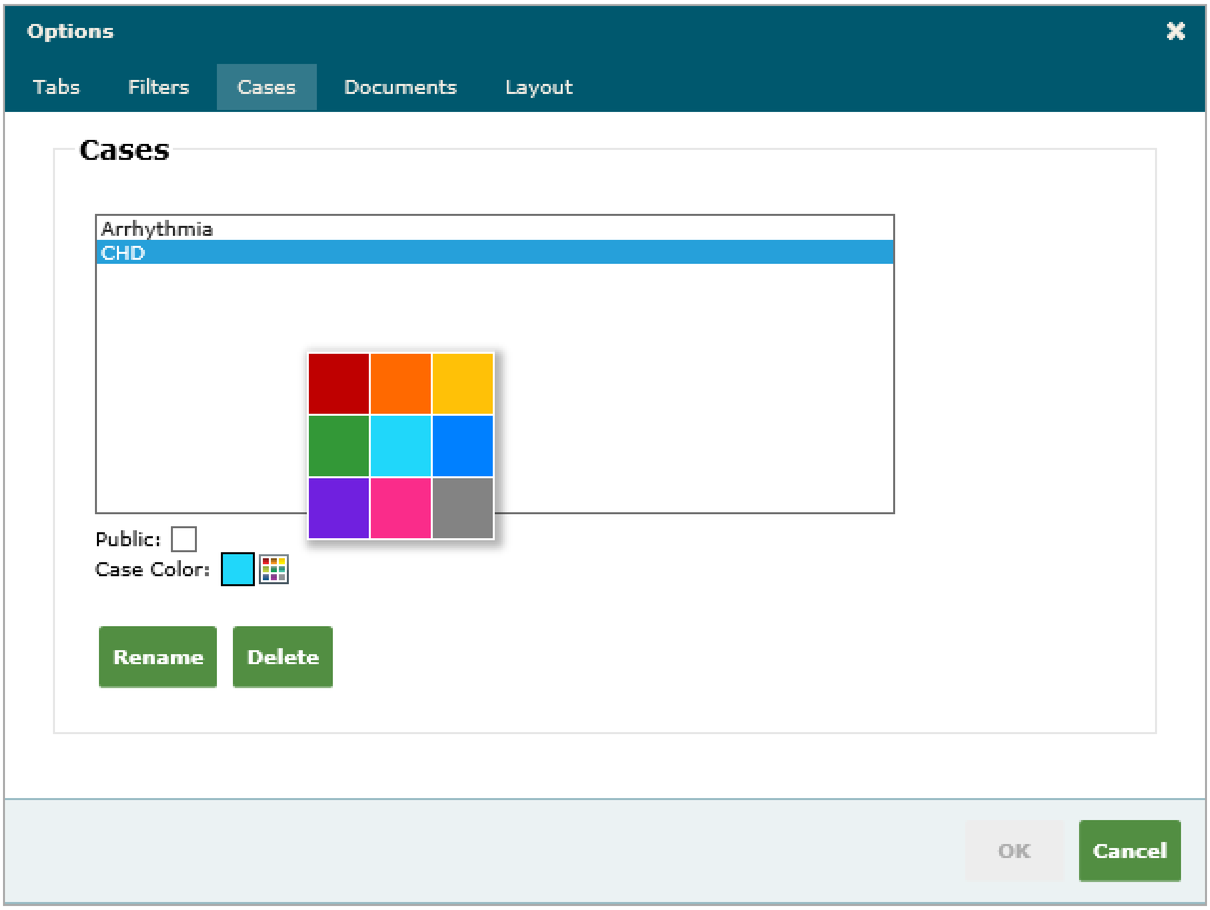


6. Click **Save**.

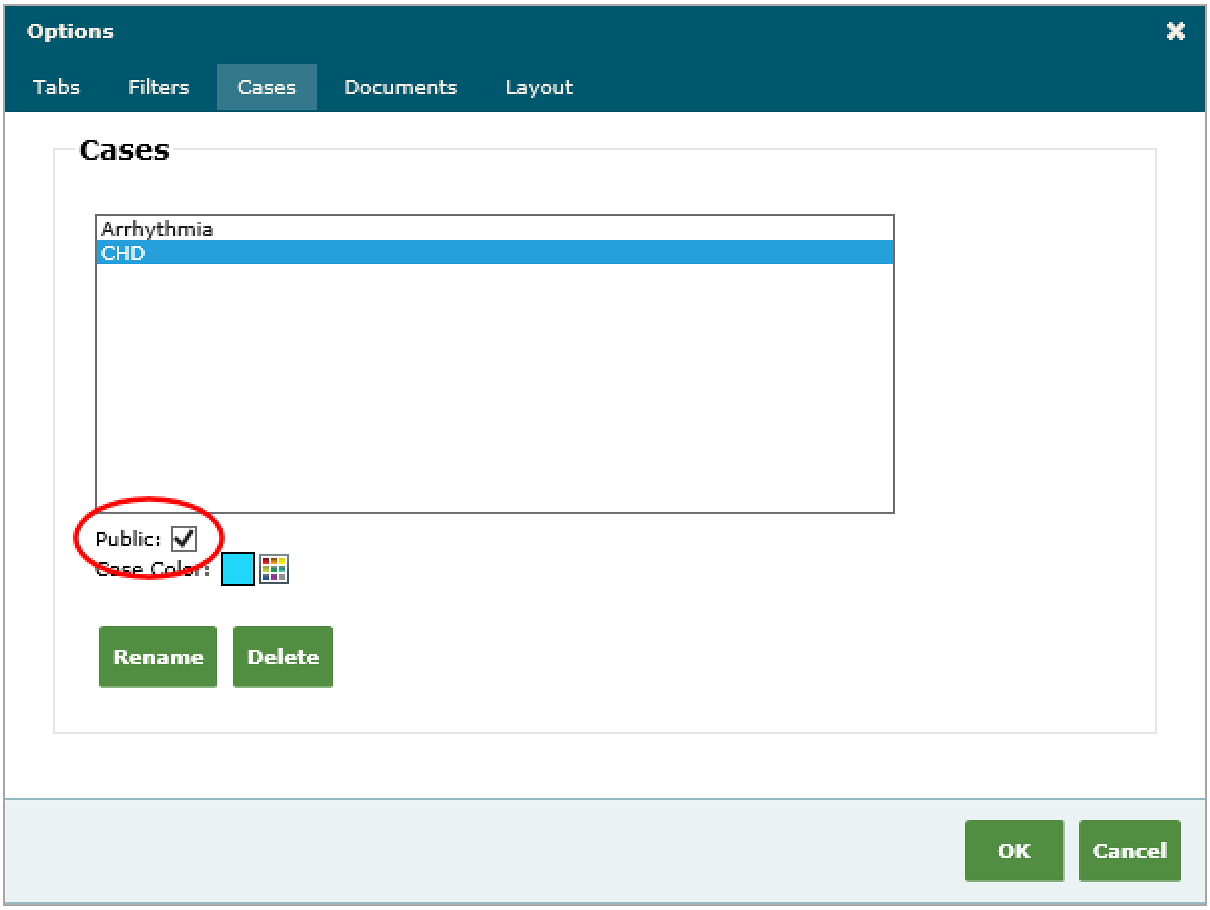
7. To change the tab color, click the color swatches button next to the **Case Color** box.



8. Select a new color for the tab.



9. To make the case visible to all users who view the current record, select the **Public** option. This option is available only to users who have privileges to make cases public.



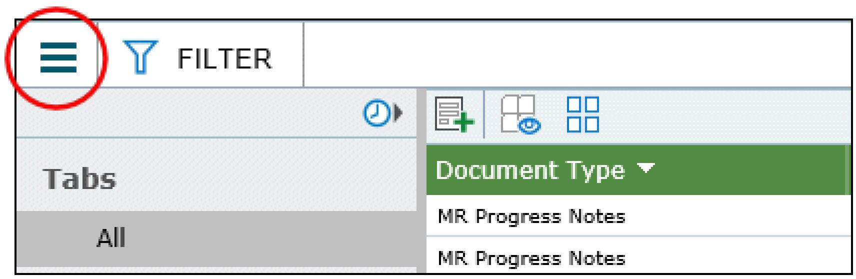
10. Click **OK** to save your changes, or click **Cancel** to undo them.

Deleting a Case

You can delete any case you have created. If the case contains documents, the documents remain available in the patient's record. Only the associated tab is removed.

To remove a case tab from the current record:

1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



2. Click the **Cases** tab.
3. Select the case you want to delete.
4. Click **Delete**. The case is removed from the list.
5. Click **OK** to save the deletion, or click **Cancel** to undo it.

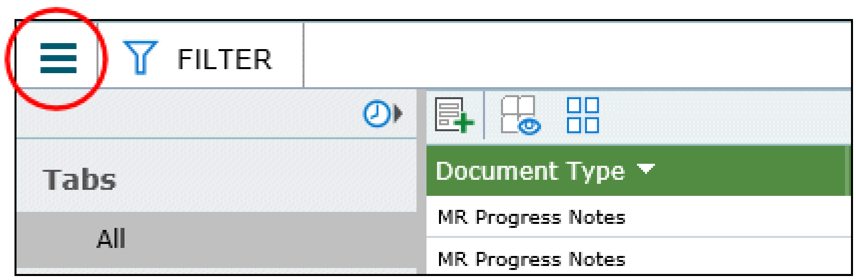
Enabling Expanded Mode By Default

If you prefer to view documents in expanded mode, you can set up OnBase Patient Window to always open documents in expanded mode by default. Use this setup if you want the viewer to enter expanded mode whenever you open a document.

For more information about expanded mode, see Expanding the Viewer on page 282.

To make expanded mode the default document view mode:

1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



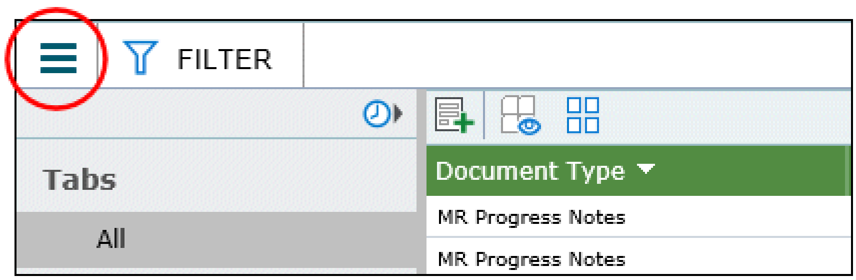
2. Click the **Documents** tab.
3. Select **Open Documents In Expanded Mode By Default**.
4. Click **OK**.

Resetting the Default Layout Options

If you have customized the layout of panes in OnBase Patient Window, you can reset the default appearance using the **Options** dialog box.

To reset the layout:

1. Rest your pointer over the main menu icon and click **Options**. The **Options** dialog box is displayed.



2. Click the **Layout** tab.
3. Click **Reset All**. The layout is reset, and the **Options** dialog box is closed.

System Interaction

The following sections describe other OnBase features and modules that interact with OnBase Patient Window. For more information about each module, please refer to the module's documentation.

Integration for Medical Imaging Viewer

The Integration for Medical Imaging Viewer provides users access to DICOM documents within OnBase modules such as OnBase Patient Window. This integration is supported with multiple third-party viewers. For more information, refer to the **Integration for Medical Imaging Viewer** module reference guide for your licensed viewer.

Finding More Studies

Depending on your integration's setup, OnBase Patient Window may provide federated searching for external DICOM archives.

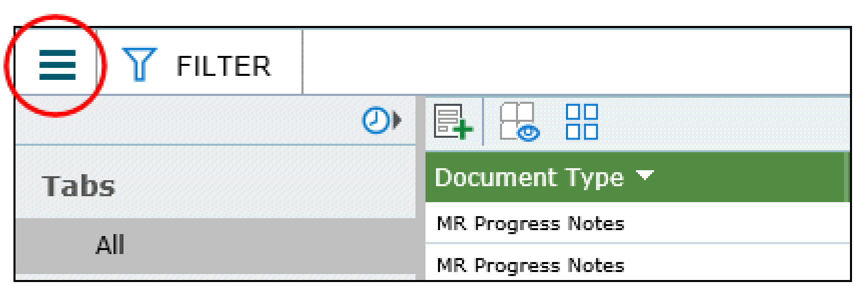
Note: Federated searching is not available for all medical imaging viewer integrations. Refer to your integration's module reference guide for information about supported features.

In addition to displaying DICOM documents that OnBase has record of, OnBase Patient Window also can retrieve and display external studies. External studies are DICOM studies OnBase is not aware of because their information has not been imported from the source DICOM system. The retrieval of external studies is called federated searching.

When the integrated viewer is configured for federated searching, the **Find More Studies** button is available when you view a patient's record.

To retrieve external studies:

1. Rest your pointer over the main menu icon.



2. Click **Find More Studies** to execute a federated search.
   - OnBase Patient Window retrieves external studies using the associated patient identifier.
   - If your system is integrated with multiple medical imaging viewers, the **Find More Studies** button can retrieve studies using each viewer configured for federated searching.
3. Review the matching external studies.

- OnBase Patient Window adds external studies to the **Other** tab.
- In timeline mode, external studies are organized according to the dates associated with them in the DICOM system. If no date is associated with the study, OnBase Patient Window uses the date from the Application Server at the time the study was retrieved.

4. Double-click an external study to open it.

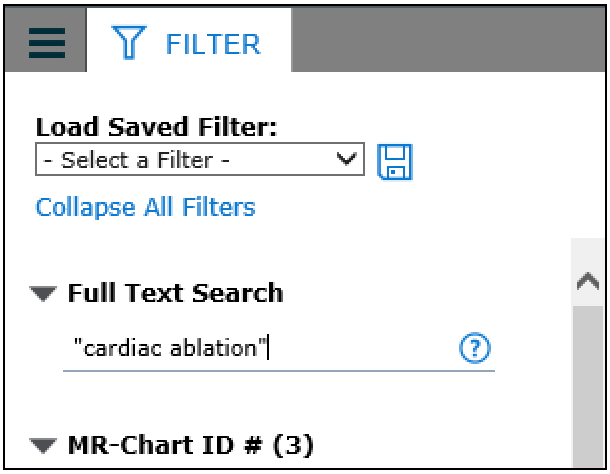
   If you return to a patient's record after viewing another record, you must click the **Find More Studies** button again to retrieve external studies.

Note: Some OnBase Patient Window features are not available for studies retrieved using the **Find More Studies** button. These studies cannot be added to cases, filtered from the document list, submitted for document corrections, or viewed in split view mode. Confidentiality codes are not applicable to external studies at the document or chart level. Clicking **Previous Page** or **Next Page** from an external study will display the previous or next document, respectively.

Full-Text Search

If OnBase is licensed and configured for Full-Text Search, users can execute full-text searches from OnBase Patient Window. Full-text searching allows users to search all indexed documents in the patient's record.

When enabled, the **Full Text Search** field is available in the filter pane. Depending on your system's setup, this field may be displayed at the bottom or top of the filter pane.



To execute a search:

1. Select any filter options you want to apply.
2. Type your search criteria in the **Full Text Search** field.
3. Click **Apply**.
4. Results are displayed in a document list.

Search Privileges

Users must have the **Full-Text Search** privilege to conduct full-text searches in OnBase Patient Window. Search results are filtered according to the OnBase Patient Window security model.

Medical Records Management

If OnBase is licensed and configured for the completion of medical records, then OnBase Patient Window may display document-level deficiencies in the document viewer. Deficiencies are displayed for visibility only. They cannot be resolved using OnBase Patient Window. For information about resolving deficiencies, see the OnBase documentation for your completion integration or solution.

Video

If OnBase is licensed and configured for OnBase Video, then OnBase Patient Window can use OnBase Video to stream media files stored in the Hyland Cloud.

For OnBase Video requirements and configuration steps, see the **Video** module reference guide.

Document Viewer Usage

Documents are displayed in the document viewer. Depending on your privileges, you may see different toolbars, icons, and other graphics that indicate the presence of notes or annotations.

See the following topics:

- Viewer Toolbars and Navigation on page 363
- Printing on page 395
- Notes and Annotations on page 371

Note: Documents generated by external applications, such as Microsoft Word documents, and stored in their native formats may open externally in their native applications, or they may open within the browser window using viewers based on those applications. See the application help for information on these types of documents and their options.

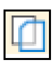
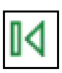
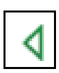
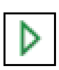
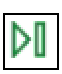
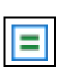
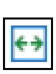
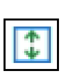
Viewer Toolbars and Navigation

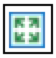
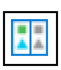
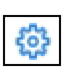
Several toolbars are available in the document viewer. Toolbar buttons are designed to make navigation and document management an easy, point-and-click operation.

- Viewer Control Toolbar on page 363
- Pages Toolbar on page 364

Viewer Control Toolbar

The Viewer Control toolbar allows you to view the document more efficiently. Use the buttons to navigate within the document, resize and reorient the page, and print.

Button	Description
	**Print** displays the **Print** dialog box if you have user rights to print the document.
	**Overlay** applies an overlay to the document if an overlay is present.
	**First Page** displays the first page of the document.
	**Previous Page** displays the preceding page of a multi-page document.
	**Next Page** displays the following page of a multi-page document.
	**Last Page** displays the last page of the document.
	**Zoom In** magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.
	**Zoom Out** reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one quarter.
	**Actual Size** displays the document in its actual size (as it is stored in OnBase). Clicking this button sets the magnification to 100%.
	**Fit Width** resizes the document page so that its width is the same as the width of the document display area.
	**Fit Height** resizes the document page so that its height is the same as the height of the document display area.

Button	Description
	**Fit Window** resizes the document page so that the entire page is displayed in the document display area.
	**Rotate Left** rotates the document 90 degrees counterclockwise.
	**Rotate Right** rotates the document 90 degrees clockwise.
	**Show Alternate Rendition** is available only for documents that are allowed to have multiple renditions. This button allows you to view a different rendition of a document when the document has multiple renditions. Click this button to view a list of available renditions. Then, select the rendition you want to view from the list.
	**Text Search** allows you to search for specific text strings within the document. For more information, see HTML Web Client Internal Text Search Toolbar on page 369.
	**Toggle Annotation** enables you to add one or more annotations to the document using the annotation type selected in the adjacent drop-down list. The **Toggle Annotation** button remains active until you click it again. For more information, see Adding Annotations on page 379.
	**Scale to Gray** softens the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-and-white images, making it helpful for reading scanned documents containing text that is too dark or too light.
	**Invert** inverts colors in the document viewer. For example, white pixels are displayed as black, and black pixels are displayed as white. For more information, see Inverting the Display on page 367.
	**Options** enables you to set viewer options.

Pages Toolbar

In the Document Viewer, the Pages toolbar displays the pages of the current document as thumbnails.

To open a specific page, double-click on the thumbnail for that page. If a document has a large number of pages, you can use the Pages toolbar to scroll through the page thumbnails.

Reordering Pages in a Document Using Thumbnails

If you have appropriate privileges, you can reorder the pages in an image document using thumbnails.

Note: You cannot reorder pages on a read-only document.

To reorder pages in an image document:

- Click on the thumbnail of the page you want to move, then drag the thumbnail to its new position and release it. When you release the thumbnail, the **Pages** toolbar is updated to reflect the new sequence.
- Rest your mouse pointer on the thumbnail of the page you want to reorder, and click the ellipsis icon in the upper-right corner of the thumbnail. Then select **Move Page To First** or **Move Page To Last** to move a page to the first or to the last position within a document.

Deleting Pages from a Document Using Thumbnails

If you have appropriate privileges, you can remove pages from an image document.

Note: You cannot delete pages from a read-only document.

To delete a page from an image document:

1. Rest your mouse pointer on the thumbnail of the page you want to delete.
2. Click the ellipsis icon on the upper-right corner of the thumbnail.
3. Select **Delete Page**. A confirmation prompt is displayed.
4. Click **Yes** to delete the page.

Suppressing Blank Pages

Depending on the document, you may be able to suppress the display of blank page thumbnails in the Pages toolbar. When this feature is enabled, the thumbnails of pages that have been marked as blank are not displayed in the Pages toolbar.

To suppress thumbnails of pages marked as blank:

1. Click the **Options** button in the Viewer Control toolbar. The **Viewer Options** dialog box is displayed.
2. Select **Suppress Blank Pages**.
3. Click **Apply**.

Document Viewer Shortcuts

The following keyboard shortcuts allow you to navigate a document. Some shortcuts may not be active until you click on the document in the viewer.

Shortcut	Action
Page Up	Quickly scrolls up the current page.
Page Down	Quickly scrolls down the current page.
Up Arrow	Slowly scrolls position on the current page up.
Down Arrow	Slowly scrolls position on the current page down.
Right Arrow	Slowly scrolls position on the current page right.
Left Arrow	Slowly scrolls position on the current page left.
Home	Navigates to the top of the current page.
End	Navigates to the bottom of the current page.
CTRL + Home	Navigates to the top of the first page.
CTRL + End	Navigates to the top of the last page.
CTRL + Up Arrow	Quickly scrolls up the current page.
CTRL + Down Arrow	Quickly scrolls down the current page.
CTRL + Right Arrow	Quickly scrolls position on the current page right.
CTRL + Left Arrow	Quickly scrolls position on the current page left.
+ (on numeric keypad)	Zooms in.
- (on numeric keypad)	Zooms out.

Viewing a Specific Page Number

You can navigate to a specific page in text and image documents.

To go to a specific page:

1. Click in the **Page** field at the bottom of the Document Viewer.
2. Type the page number you want to view.
3. Press **Enter**.

Saving Page Rotation

If you have rotated the pages of an image document, you can save the current rotation of all pages in the document.

To save page rotations, right-click in the Document Viewer and select **Process | Save Rotation**. A confirmation message is displayed.

Inverting the Display

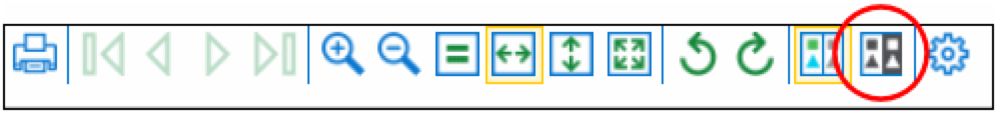
The document viewer allows you to display documents using inverted colors. For example, you may prefer to see white pixels as black and black pixels as white.

The **Invert** toolbar button allows you to set your preference for color inversion. The document viewer preserves your preference when you open different documents. If the last document you view before logging out is inverted, then the next document you view upon login will be inverted too.

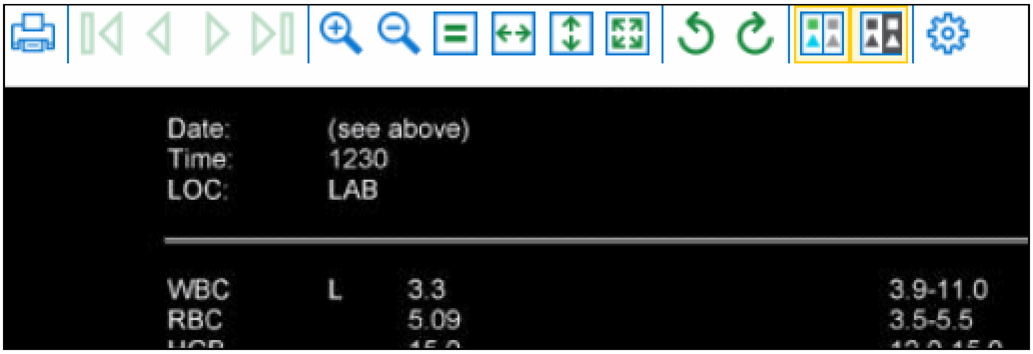
This method of inversion is different from the **Process | Invert** right-click option, which inverts colors only until you navigate away from the document.

To invert colors:

1. Open a document.
2. Click the **Invert** button in the viewer control toolbar.

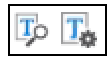


The document colors are inverted.



Click the **Invert** button again to revert the document to non-inverted colors.

HTML Web Client Internal Text Search Toolbar



From an open text-based document in the HTML Web Client, use the functions in the Internal Text Search toolbar to search for specific text strings within the document.

Note: You cannot execute an internal text search on a text document that has an overlay applied to it. Remove the overlay in order to execute the internal text search.

- You can limit the text string search to one or more consecutive columns (character positions).
- If the document is a COLD-processed document with one or more column indexes defined, then you can limit the search to the block of text defined by a column index. This is recommended for large documents to improve performance time when searching.

See the following topics for information about the available functionality for performing internal text searches in the HTML Web Client:

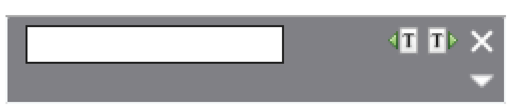
- Performing an Internal Text Search in the HTML Web Client on page 369
- Generating an Internal Text Search Report in the HTML Web Client on page 370

Performing an Internal Text Search in the HTML Web Client

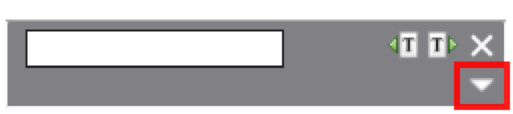
To perform an Internal Text Search in the HTML Web Client:

1. Click the **Text Search** button.

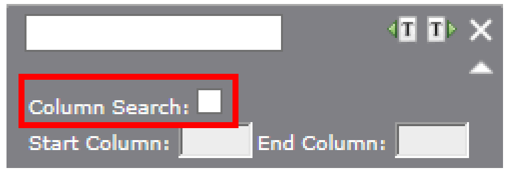
   The Text Search box is displayed.



2. Click in the text entry field and type the characters to search for. As you type, results that match the search string are highlighted on the document.
3. Click the **Find Next** button or press **Enter** to find subsequent occurrences of the text. Occurrences of the specified search string are highlighted on the document.
4. To limit the search between specific columns, click the **Expand** button:



5. Select **Column Search**.

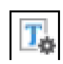


6. Specify values for the **Start Column** and **End Column**.
7. Click the **Find Next** button or press **Enter**. Occurrences of the specified search string are highlighted on the document.

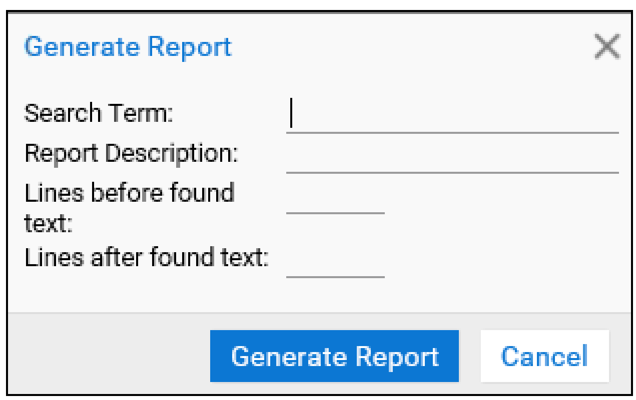
Generating an Internal Text Search Report in the HTML Web Client

You can generate a system report of internal text search results. This system report is stored as a document under the **SYS Search Reports** Document Type. To generate an internal text search report in the HTML Web Client, perform the following steps.

1. Click the **Generate Report** button:



   The **Generate Report** window is displayed.



2. Enter a search term in the **Search Term** field. This is the search term that will be searched on the document.
3. Enter a name for the report in the **Report Description** field. The text entered in this field will be used as the **Description** keyword value on the report.
4. If applicable, enter the number of lines of text to show above and below the found text in the **Lines before found text** and the **Lines after found text** fields.
5. Click the **Generate Report** button. The search report is created and stored as a document under the **SYS Search Reports** document type.

Notes and Annotations

Notes and annotations may be used to clarify, emphasize, or provide information on a document. Notes and annotations are based on Note Types, which are set up by an system administrator. Your ability to work with notes may vary depending on the privileges you have to the corresponding Note Types.

Caution: If a note, redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected by your system administrator. When the document is saved or signed, the pending redaction, burned markup, or deficiency is permanently placed in the shifted location. The shifting of notes that do not permanently alter the document can be corrected any time by your system administrator.

See the following topics:

- Opening a Note on page 371
- Adding Notes on page 375
- Editing Note Text on page 375
- Moving Notes on page 375
- Deleting Notes on page 376
- Viewing All Notes on a Document on page 376
- Adding Annotations on page 379
- Moving Annotations on page 380
- Deleting Annotations on page 381
- Changing the Note Type on page 381
- Redacting a Document on page 381

Opening a Note

Depending on the Note Type, a note may be displayed in an open state by default when the document is opened. Other notes may be closed by default.

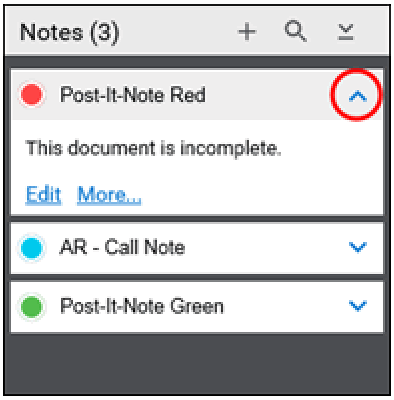
To open a closed note, double-click the note icon in the viewer.

Viewing Notes on an Office or PDF Document

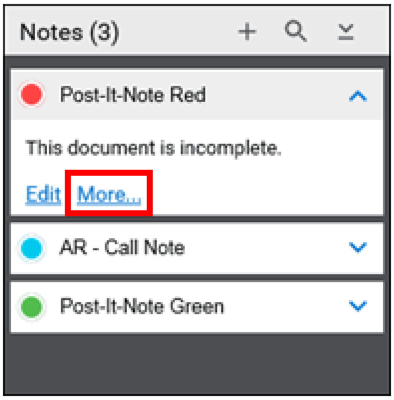
When you view a PDF or Microsoft Office document, the notes on the document are listed in the **Notes** pane of the Document Viewer. This pane displays all of the notes on the document.

The following functions are available in the **Notes** pane of the Document Viewer:

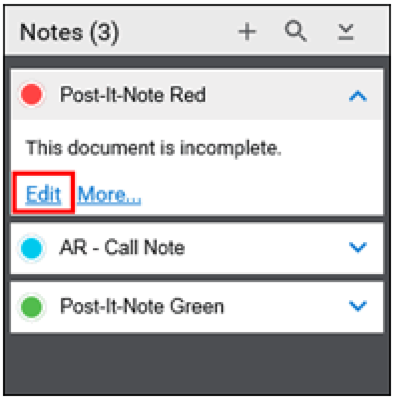
- To expand a note and view its contents, click the note in the **Notes** pane. Click the heading of the note again to collapse the note.



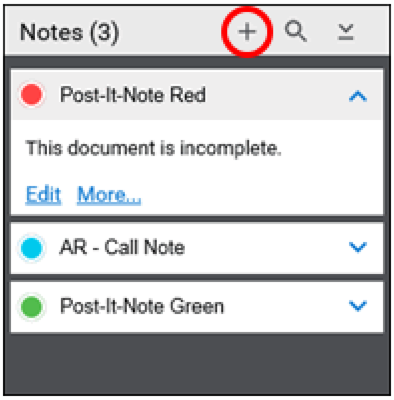
- To view additional information on a note, expand it and then click **More**. The note's icon, creation date and time, and creator's user name are displayed.



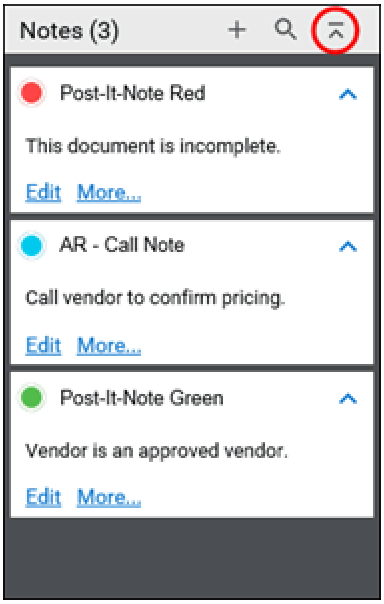
- To edit a note, expand the note and click **Edit**. The **Notes** dialog box is displayed, which allows you to edit the note.



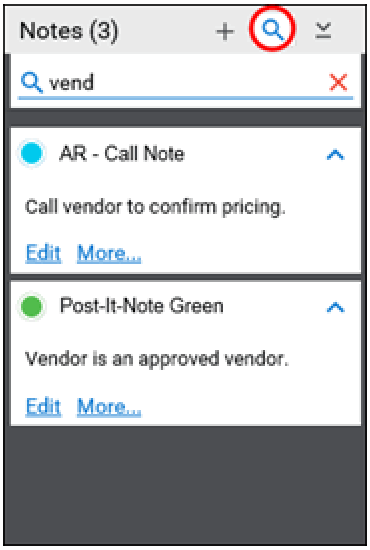
- To add a new note, click the **Add Note** button at the top of the **Notes** pane. The **Notes** dialog box is displayed, which allows you to create a new note.



- To expand all notes, click the **Expand All** button at the top of the **Notes** pane. Click the button again to collapse all notes.



- To filter the list of notes, click the filter button at the top of the **Notes** pane and enter search terms into the **Note Text** field. The list is filtered to display only the notes that contain matching text. Click the red **X** to remove the filter.



- To add a note, either click the **Add Note** button if it is displayed in the **Notes** pane, or click the **Note(s)** section of the status bar.

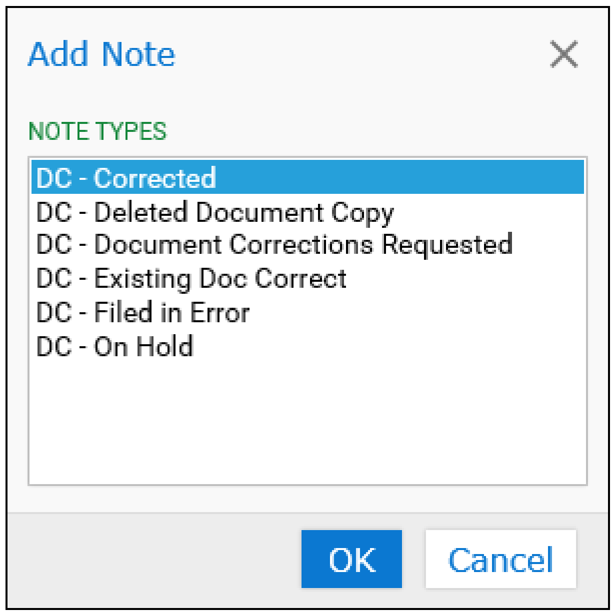
Adding Notes

If you have sufficient privileges, you can add notes to a document. Notes typically provide additional information about a document for other users to see.

Note: If you have privileges to create a note but lack privileges to modify it, then you can modify the text and position of the note immediately after you create it, but not after you navigate away from the document.

To add a note to a document:

1. Right-click on the open document and select **Notes | Add Note**. The **Add Note** dialog box is displayed.



2. Select a Note Type.
3. Click **OK**. The note is placed in the upper-left corner of the document. You can move the note by clicking and dragging the note icon on the document.
4. Update the note text as needed.

Editing Note Text

To edit a note, open the note and edit its contents. Changes are saved when you refresh the document or navigate away from it.

Moving Notes

If you have sufficient privileges to modify a note, you can move the note on a document.

To move a note, click and drag the note icon on the document. The new position is saved when you close or print the document.

Deleting Notes

Depending on your privileges, you may be able to delete notes from documents. If you cannot delete a note, you may lack privileges, or the document may be locked.

To delete a note in the HTML viewer:

1. Do one of the following:
   - Open the note, and click the X in the note title bar.
   - Click the **Notes** section of the status bar at the bottom of the viewer. Select the note you want to delete, and then click **Delete Note**.
2. Click **Yes** to confirm.

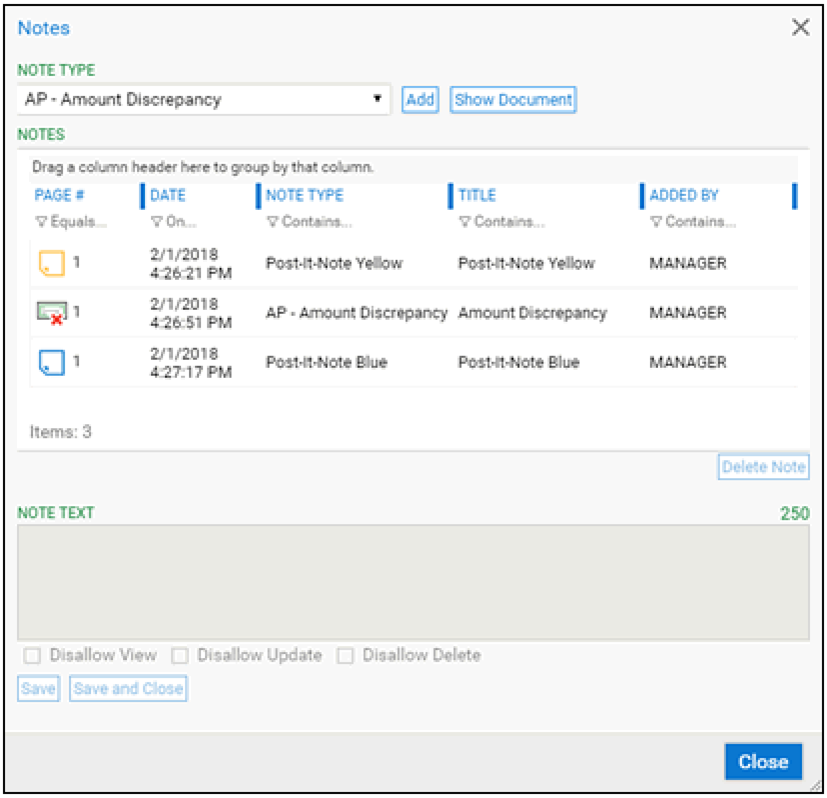
Viewing All Notes on a Document

If a document contains multiple notes, you may want to view all notes and their contents in one place. There are several ways to view all the notes on a document.

To view all notes on a document using the HTML viewer:

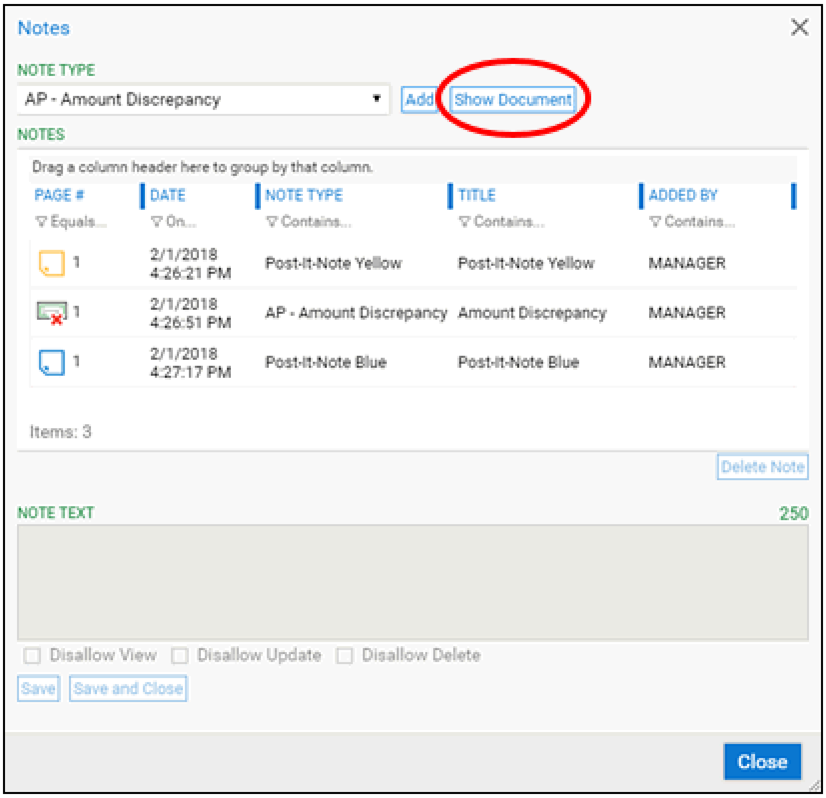
- Right-click on the open document and select **Notes | View Notes**.
- Click the **Notes** section of the status bar at the bottom of the viewer.

The **Notes** window is displayed. The **Notes** list provides information about all existing notes that you have privileges to view. Select a note to display its contents in the **Note Text** field. To filter existing notes, use the filter fields displayed under the column names.

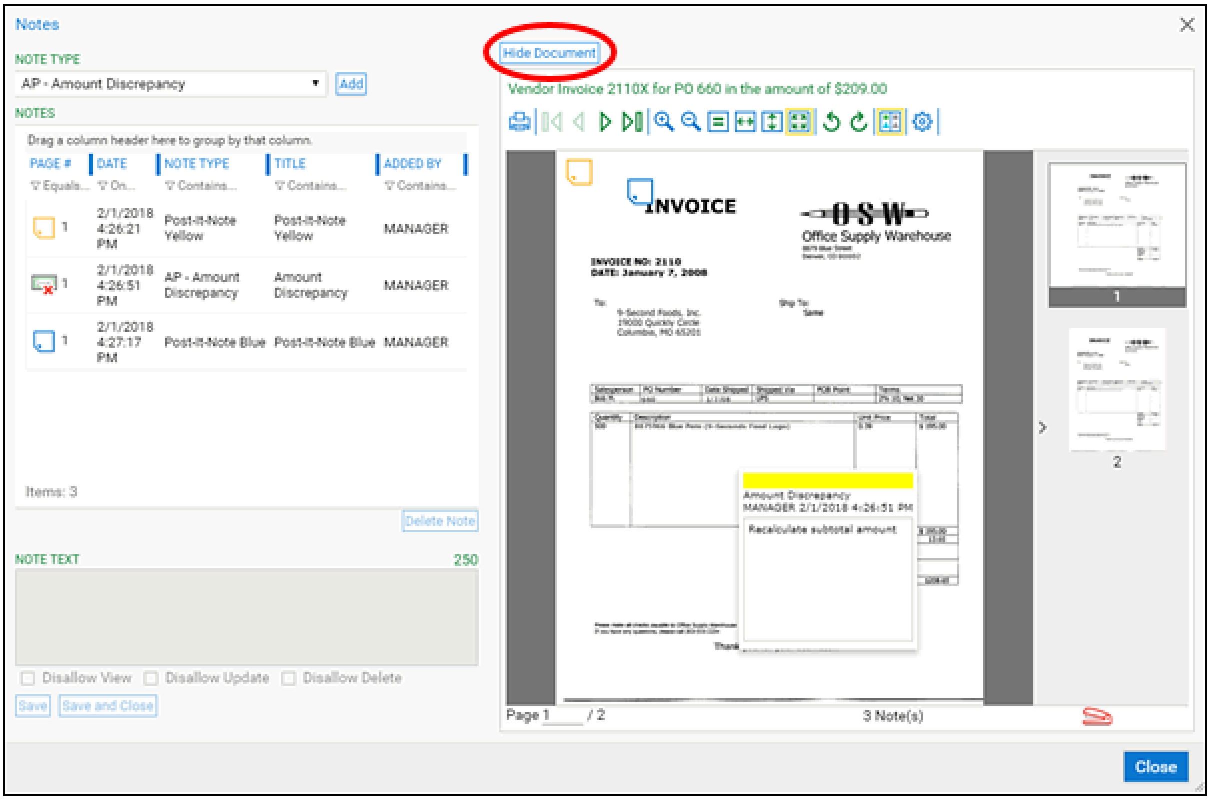


If necessary, you can use the **Notes** window to add, update, and delete notes on the document.

While working in the **Notes** dialog box, you can click the **Show Document** button to view the document alongside the notes in the dialog box.



Click **Hide Document** to hide the document and show only the notes in the dialog box.



Note the following limitations with viewing a document alongside notes in the **Notes** dialog box:

- Notes can only be added to the first page of a multi-page document in the **Notes** dialog box.
- Annotations cannot be drawn on a document being viewed in the **Notes** dialog box.

To accomplish any of these actions, perform them in the Document Viewer, not in the **Notes** dialog box.

Adding Annotations

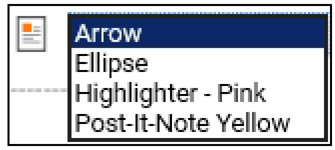
If you have sufficient privileges, you can annotate a document using the annotation toolbar. Annotations may include highlights, arrows, ellipses, and overlapped text.

If you have sufficient privileges, you can add annotations to text and image documents by using the Annotations toolbar.

Note: Depending on your system's configuration, redaction annotations may be available in the annotations list. Redaction annotations are not supported for creating permanent redactions, but they can be used to create temporary redactions for the purpose of printing a redacted document. To permanently redact a document, see Redacting a Document on page 381.

To create and place an annotation on a text or image document:

1. In the Document Viewer toolbar, select the type of annotation from the drop-down list:



2. Enable the selected annotation by clicking the **Toggle Annotation** button:

3. Using your mouse pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

Note: Ensure that the annotation is large enough to be visible. Annotations are required to be a certain size before they can be created and saved.

Moving Annotations

If you have appropriate privileges, you may be able to move annotations after placing them on a document.

Not all annotations are movable. You can only move annotations that are configured to be movable. As an alternative to moving an annotation, you may be able to delete the existing annotation and create a new one.

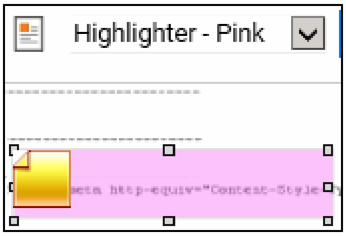
To move an annotation on a document, do one of the following:

- Click and drag the annotation to a new location.
- Double-click the annotation, then use the arrow keys on the keyboard to move the annotation to a new location.

Tip: When using the arrow keys on the keyboard to move an annotation, press and hold the **Ctrl** key while pressing the arrow keys to move the note more quickly.

To resize an annotation on a document, do the following:

1. In the Document Viewer, double-click the annotation you want to resize. The annotation is selected.



2. Click and drag the edges or corners of the annotation until the annotation is the correct size. The mouse pointer changes to indicate the direction in which the annotation can be resized.
3. When you are finished resizing the annotation, click a different area of the screen to deselect the annotation.

Deleting Annotations

Depending on your privileges, you may be able to delete annotations from documents. If you cannot delete an annotation, you may lack privileges, or the document may be locked.

To delete an annotation:

1. Click the **Notes** section of the status bar at the bottom of the viewer.
2. Select the annotation you want to delete from the **Notes** list.
3. Click **Delete Note**.
4. Click **Yes** to confirm.

Changing the Note Type

If necessary, you can change the Note Type of an existing note.

To change the Note Type:

1. Right-click on the note, and select **Change Note Type**.
2. Select another Note Type from the list.

Redacting a Document

A redaction is a special kind of annotation used to hide confidential information on an image or text document. A redaction is a permanent black or white rectangle that obscures an area of the document.

Redactions can be created and saved on image documents, text documents, and Image Rendered PDFs that belong to Document Types configured to allow redactions.

A redaction cannot be deleted (or undone) once it has been saved. When a redaction is saved, the redacted document may be stored as a new document in another Document Type, as a revision of the current document, or as a replacement for the current document. How the redacted document is stored depends on your system's configuration.

Caution: If a note, redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected by your system administrator. When the document is saved or signed, the pending redaction, burned markup, or deficiency is permanently placed in the shifted location. The shifting of notes that do not permanently alter the document can be corrected any time by your system administrator.

You can apply and save redactions to a document if all of the following conditions are met:

- You have sufficient privileges to modify the document.
- The document's file type supports redactions. Only image and text files can be redacted.
- The document's Document Type is configured to allow redactions.

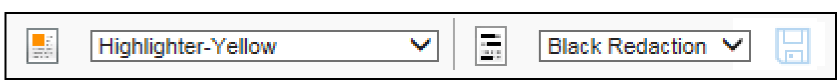
Applying a Redaction

The HTML viewer displays redaction options only for documents that allow redactions to be saved.

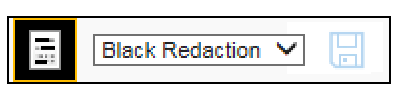
To redact a document in the HTML viewer:

1. From the redaction drop-down list in the toolbar, select **Black Redaction** or **White Redaction**.

   With a black redaction, the redacted area will be defined by an opaque black rectangle. With a white redaction, the redacted area will be defined by an opaque white rectangle.

2. Click the **Toggle Redaction** button from the toolbar. When this button is enabled, its background color changes to black or white depending on the type of redaction selected.

3. Define the location and size of the redaction by clicking and dragging the pointer over the area you want to redact. Repeat for each area you want to redact.
4. Save the redacted image by clicking the **Save Redaction** button.

   OnBase displays the message, **Your redaction has been saved successfully**, indicating that the redacted document has been created.

Removal of Unsaved Redactions

If a document is closed or refreshed before the redactions have been saved, a message box prompts you to save the redactions. If you choose not to save the redactions, then all redactions are removed.

If you have administrative privileges, you can perform additional tasks in OnBase Patient Window.

See the following topics:

- Filter Editor on page 384
- Public Filters on page 391
- Grant Record Access on page 394
- Confidentiality Codes on page 399
- Patient Notices on page 409

Filter Editor

The Filter Editor allows you to create filters using criteria that may not be available when you are viewing a patient record.

When viewing a patient record, you can only create filters using values pertaining to that record. The Filter Editor overcomes this limitation by allowing you to build filters using any possible filter value.

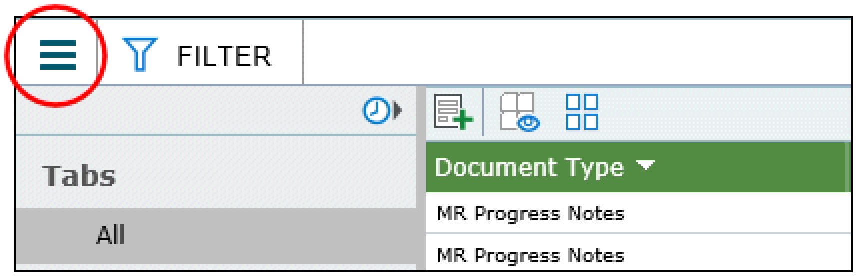
See the following topics:

- Accessing the Filter Editor on page 385
- Available Filters on page 385
- Creating a New Filter on page 386
- Copying an Existing Filter on page 386
- Editing an Existing Filter on page 387
- Editing Filter Parameters on page 387
- Deleting an Existing Filter on page 390
- Returning to the Patient Record on page 391

Accessing the Filter Editor

To access the Filter Editor:

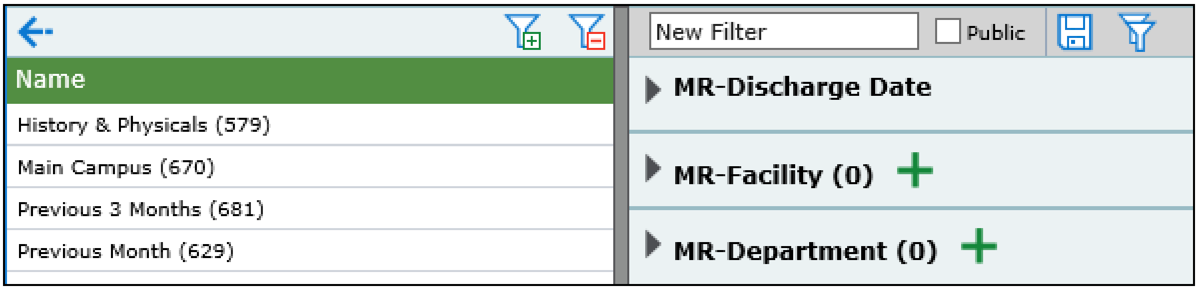
1. Open a patient record.
2. Rest your pointer over the main menu icon.



3. Click **Edit Filter**. The Filter Editor is displayed.

Available Filters

When you access the Filter Editor, the left pane lists the existing filters you are allowed to edit. This list includes public filters and your saved filters. A specific filter may be unavailable if it uses a filter type that the Filter Editor does not support.

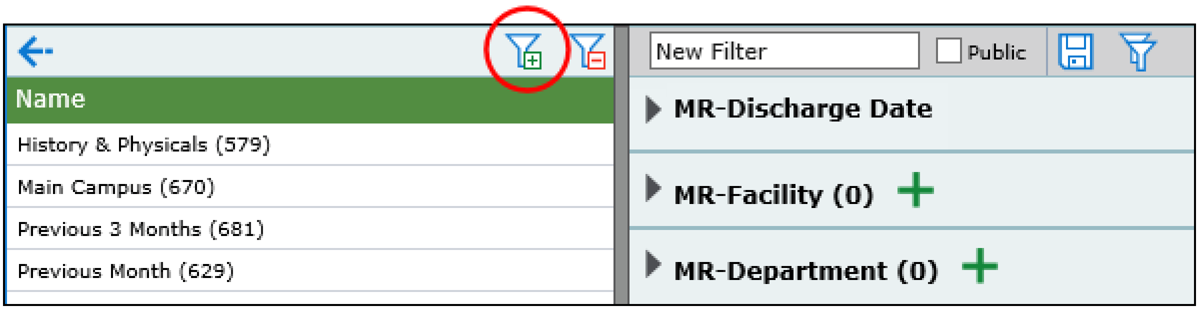


Creating a New Filter

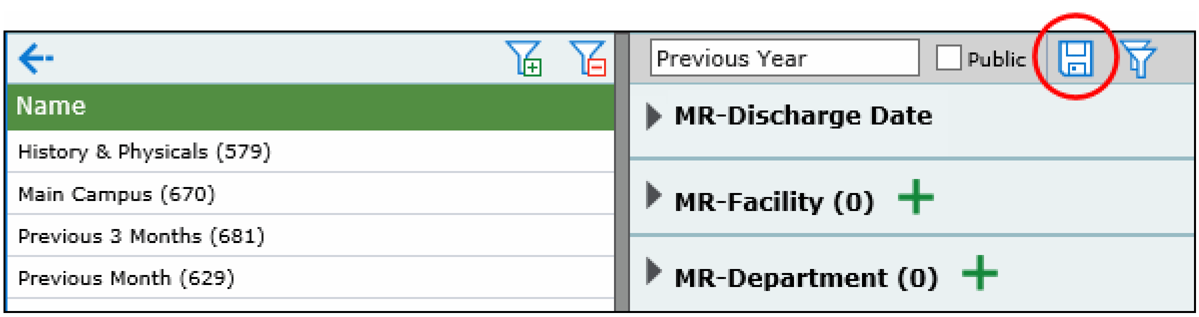
The Filter Editor allows you to create and save new filters for future use.

To create a new filter:

1. Access the Filter Editor.
2. Click the **New Filter** button.



3. Click in the filter name field in the right pane.
4. Type a name for the new filter.
5. To make the filter public, select the **Public** check box.
6. Add filter criteria as described under Editing Filter Parameters on page 387.
7. Click the **Save Filter** button.



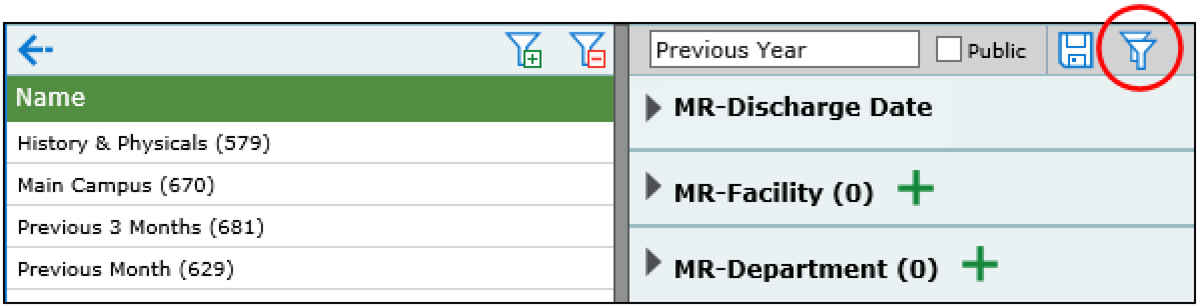
Copying an Existing Filter

The Filter Editor allows you to copy and customize an existing filter.

To copy an existing filter:

1. Access the Filter Editor.
2. From the left pane, select the filter you want to copy.
3. In the right pane, type a name for the new filter in the filter name field.

4. Click the **Copy Filter** button. The new filter is added to the list in the left pane. The original filter is left unchanged.



5. Edit the new filter as needed. See Editing an Existing Filter on page 387.

Editing an Existing Filter

The Filter Editor allows you to edit previously saved filters.

To edit an existing filter:

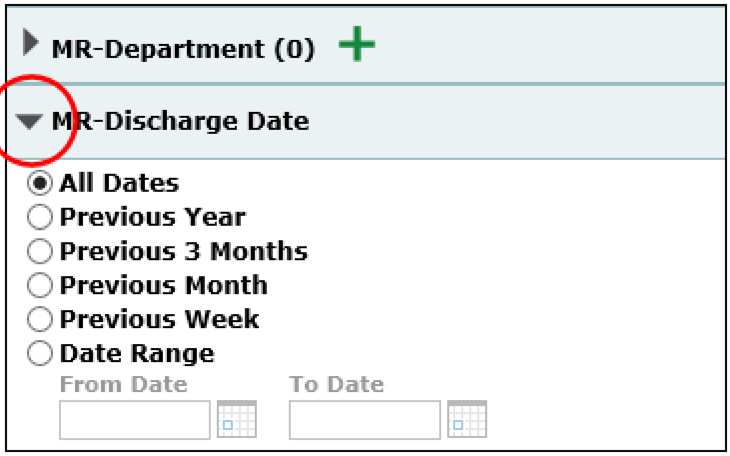
1. Access the Filter Editor.
2. From the left pane, select the filter you want to edit.
3. To rename the filter, type a new name in the filter name field in the right pane.
4. To change whether the filter is public, select or clear the **Public** check box.
5. Edit the filter parameters as needed. For more information, see Editing Filter Parameters on page 387.
6. Click the **Save Filter** button. The filter is updated to reflect the new settings.

Editing Filter Parameters

Depending on your system's configuration, the following types of filters may be available for editing:

- Date Ranges—See Dates on page 388.
- Keyword Values—See Keywords on page 389.
- Document Types—See Document Types on page 390.

To display the parameters for a filter type, click the **Expand** button.



When you select a saved filter, the Filter Editor automatically expands the filter types used by the filter.

Dates

Use dates to display documents from charts that satisfy a specific date range. Date-based filters provide the following options:

Option	Description
All Dates	Select to apply no date criteria for this filter.
Previous Year	Select to filter out charts where the date is older than one year.
Previous 3 Months	Select to filter out charts where the date is older than 3 months.
Previous Month	Select to filter out charts where the date is older than 1 month.
Previous Week	Select to filter out charts where the date is older than one week.
Date Range	Enter a custom date range. See Entering a Custom Date Range on page 388.

Entering a Custom Date Range

Use the **Date Range** option to enter a custom date range.

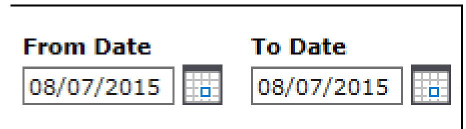
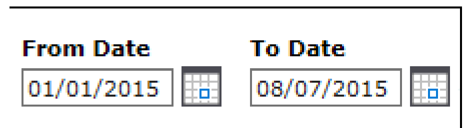
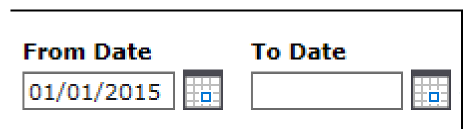
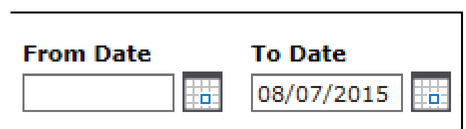
Note: The date format must match the standard date format for your locale. For example, if your workstation locale is set to English (United States), the expected format is mm/dd/yyyy or m/d/yyyy.

1. Select **Date Range**.
2. Click the calendar button next to the **From Date** or **To Date** field to display a calendar.

3. Select the desired date to enter it.

   If you entered a date into the **From Date** field, then the **To Date** field is automatically populated with the same date.

   The following examples illustrate how to achieve your intended date range.

Desired Result	Sample Date Values
Only display documents with the specified date. **From Date**: desired date **To Date**: same as From Date The sample values shown will include documents with a date of **08/07/2015**.	
Only display documents within a set of dates. **From Date**: start date **To Date**: end date The sample values shown will include documents from **01/01/2015** up to and including **08/07/2015**.	
Only display documents going back to a specific date. **From Date**: start date **To Date**: blank The sample values shown will include documents with a date of **01/01/2015** or later.	
Only display documents up to a specific date. **From Date**: blank **To Date**: end date The sample values shown will include documents with a date up to and including **08/07/2015**.	

Keywords

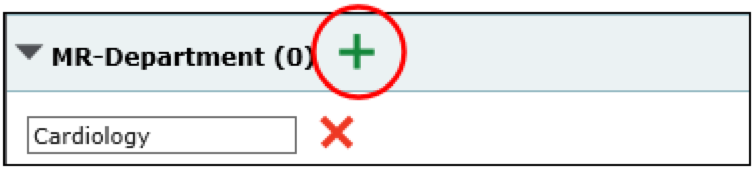
Some filter types allow you to filter based on values for Keyword Types. If a Keyword Type is associated with a chart data field, OnBase Patient Window will attempt to filter documents based on values provided for the associated chart. Otherwise, OnBase Patient Window will filter documents based on Keyword Type values.

To only display documents with a specific Keyword Value:

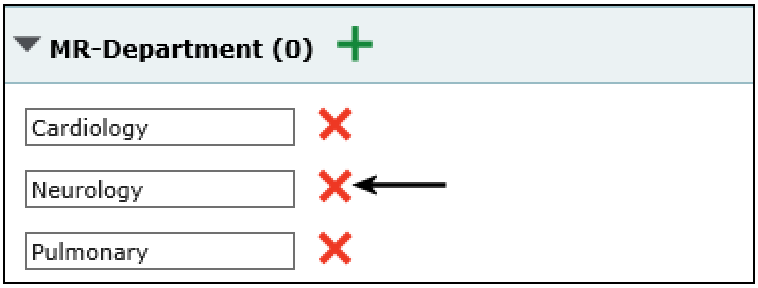
1. Click the **Expand** button next to the name of the Keyword Type.
2. In the field provided, enter the value you want to filter on.

   When the filter is applied, it will display only documents indexed with the specified Keyword Value.

3. To add another value to the filter, click the **Add Filter Value** button next to the name of the Keyword Type.



4. Type the additional value in the field that is added.
   - When multiple Keyword Values are specified, the filter will display all documents indexed with any of the configured Keyword Values.
   - To remove a Keyword Value from the filter, click the **Delete Filter Value** button to the right of the keyword field.



Document Types

Use the **Document Type** filter type to display only documents that belong to specific Document Types.

1. From the **Available Document Types** list, select the Document Types the filter should display documents from.
2. Click the **Add** button.

   To remove a Document Type from the **Selected Document Types** list, select the Document Type, and click the **Remove** button.

Deleting an Existing Filter

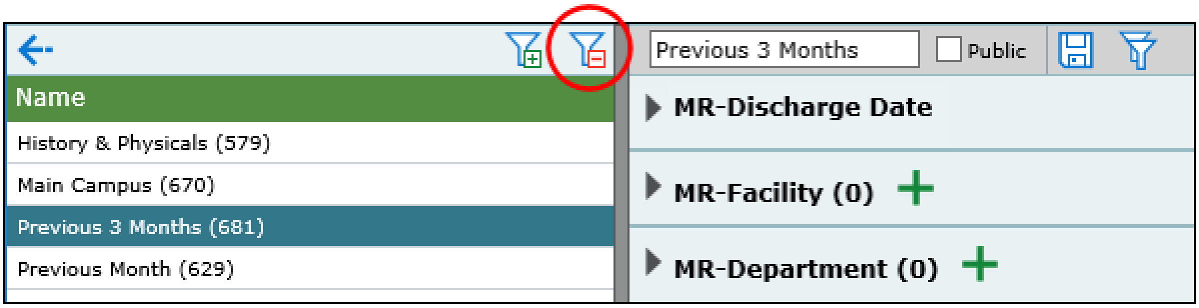
The Filter Editor allows you to delete public filters that you have created.

Note: You cannot delete a public filter that was created by another user.

To delete an existing filter:

1. Access the Filter Editor.
2. From the left pane, select the filter you want to delete.

3. Click the **Delete Filter** button.



4. Click **Yes** when prompted. The filter is deleted.

Returning to the Patient Record

To navigate from the Filter Editor to the previous record you were viewing, click the **Return To Patient** button.

Public Filters

If you have the **Administration** medical record privilege, you can make your saved filters available to other users.

See the following topics:

- Making a Filter Public on page 391
- Revoking Public Access to a Filter on page 393

Note: The OnBase Patient Window URL can specify the ID of a public filter to be applied by default. A filter ID is displayed in parentheses next to each filter in the **Options** dialog box. For more information, refer to the OnBase Patient Window installation documentation.

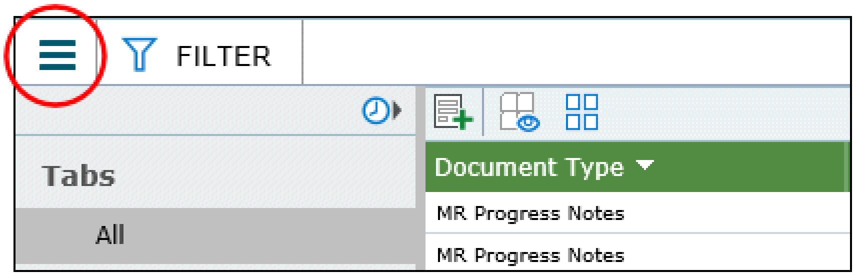
Making a Filter Public

As an administrator, you can provide public access to a previously saved filter. This will allow all users to have access to this filter.

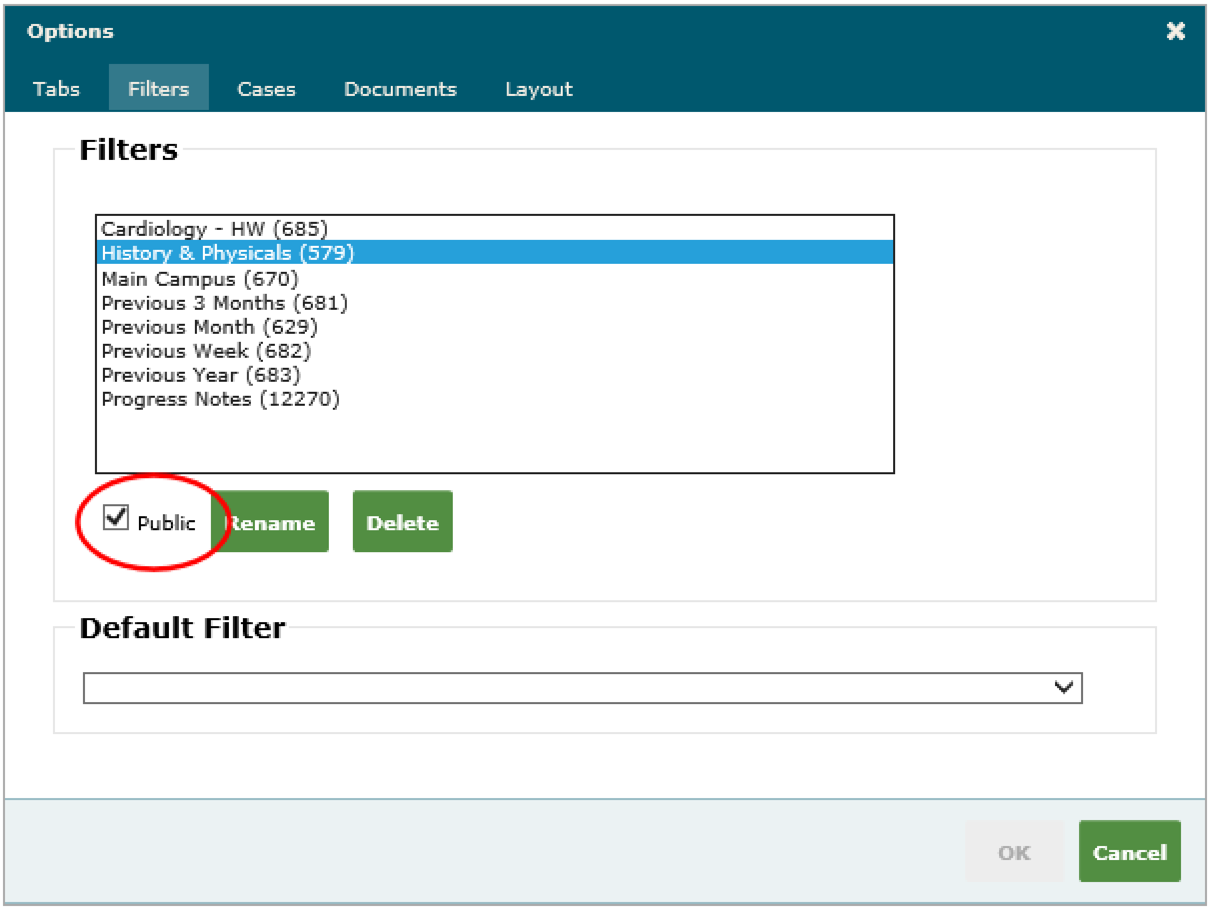
The following steps describe how to make a saved filter public using the **Options** dialog box. You can also use the Filter Editor as described under Editing an Existing Filter on page 387.

To make a filter public:

1. Rest your pointer over the main menu icon and click **Options**.



2. Click the **Filters** tab.
3. Select the filter you want to provide public access to.
4. Select the **Public** check box.



5. Click **OK** to save the change.

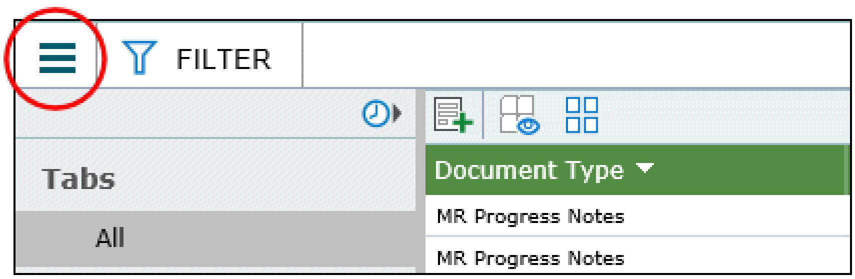
Revoking Public Access to a Filter

If you no longer want a filter to be publicly available to all users, with the appropriate user privileges, you can revoke public access to the filter.

The following steps describe how to make a saved filter private using the **Options** dialog box. You can also use the Filter Editor as described under Editing an Existing Filter on page 387.

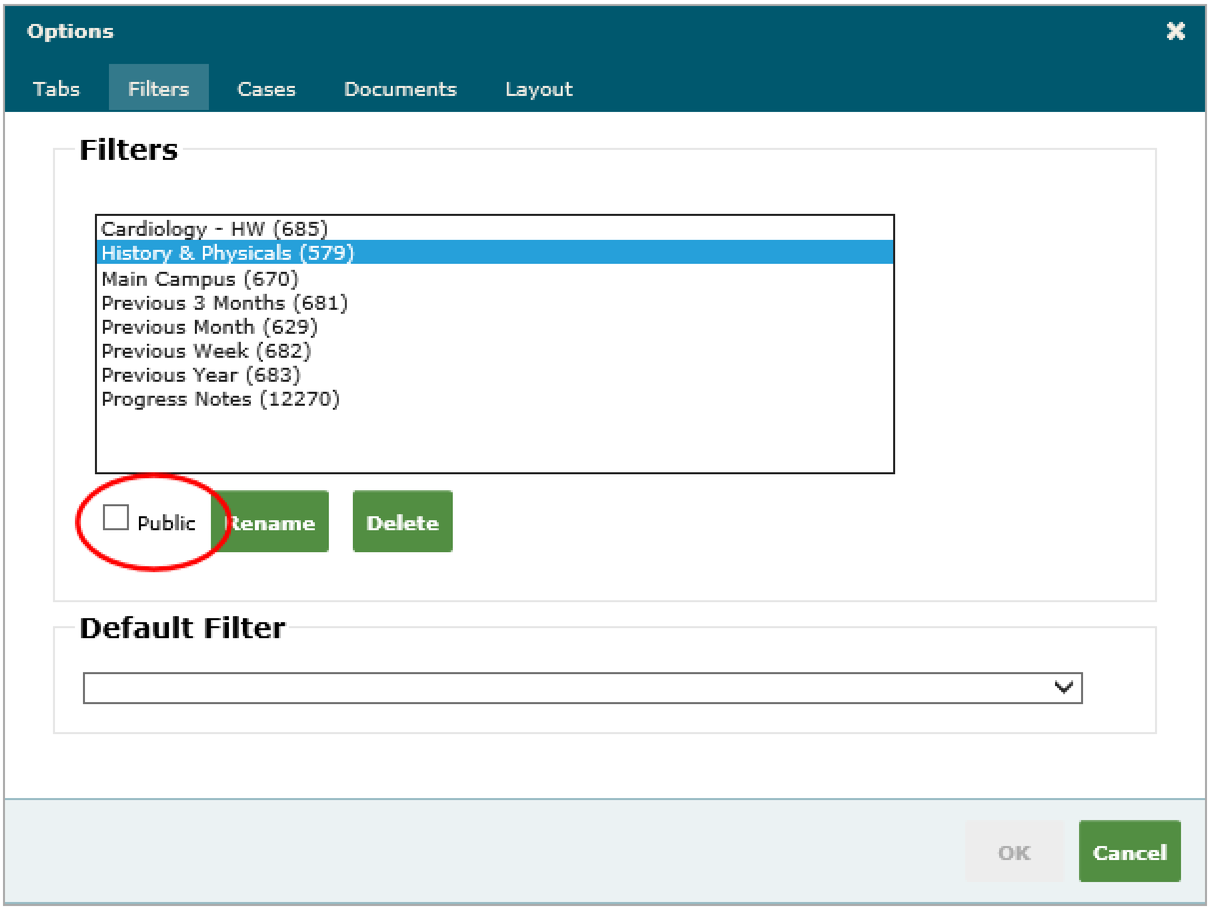
To make a filter private:

1. Rest your pointer over the main menu icon and click **Options**.



2. Click the **Filters** tab.
3. Select the filter you want to revoke public access to.

4. Clear the **Public** check box.



5. Click **OK** to save the change.

Grant Record Access

If you have the **Administration** medical record privilege, you can assign users access to specific records. When granted access to a record, users can view all medical record documents that are not restricted by confidentiality codes or secure tabs. Granting users access to a patient's record will be audit logged.

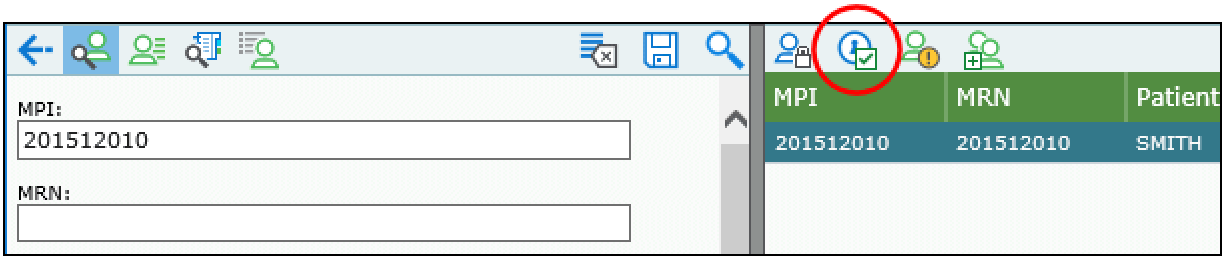
See the following topics:

- Granting Access to Records on page 395
- Revoking Access to Records on page 397

Granting Access to Records

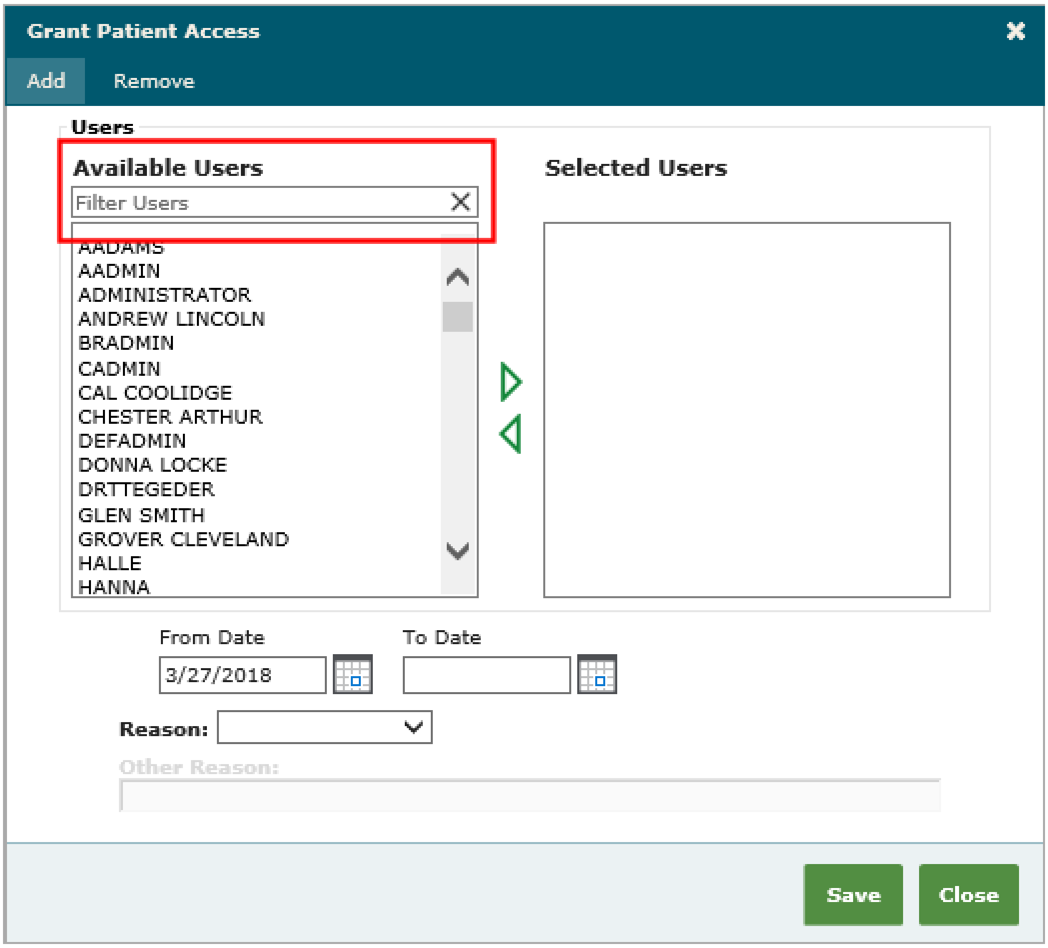
To grant a user access to a record:

1. Search for the patient using either Patient Search or Scheduled Patient Search.
2. Select the patient in the search results list.
3. Click the **Grant Patient Access** button.

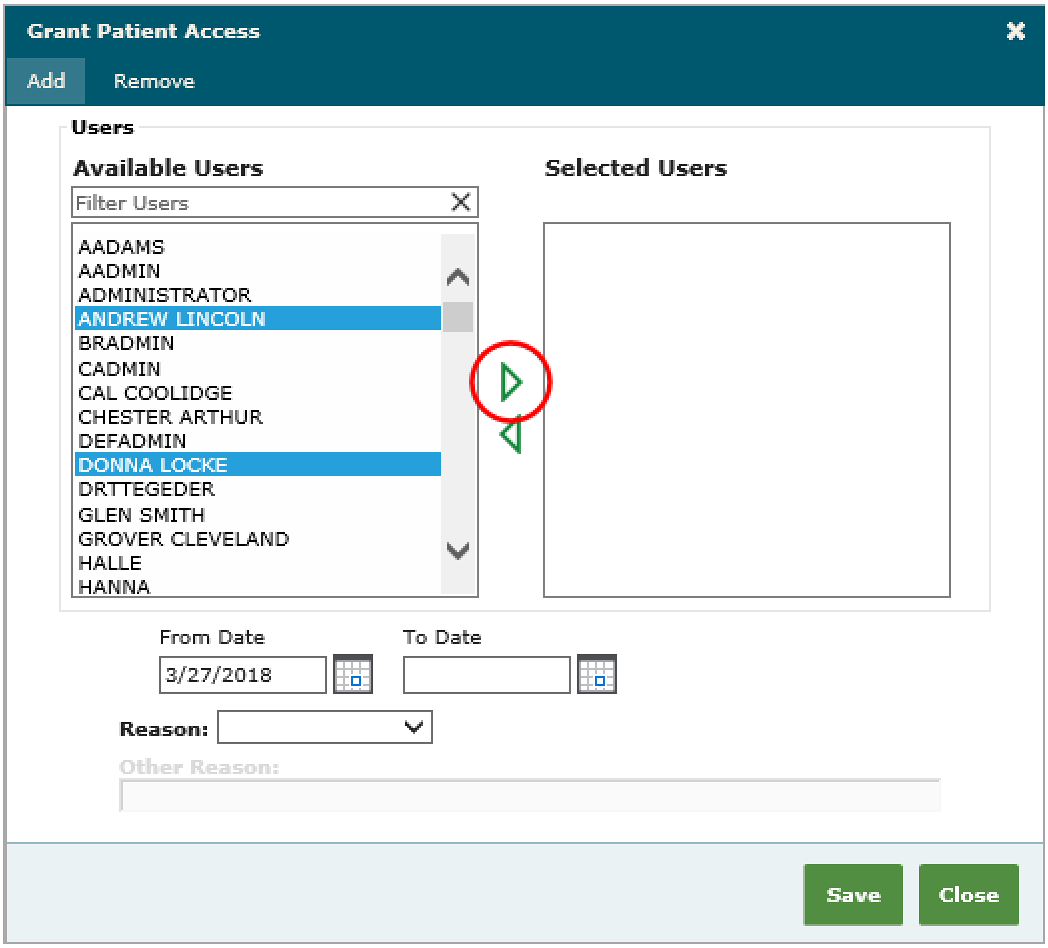


4. Under **Available Users**, select the users who require access to this patient's record. Only select users who should have the same period of access.

   To filter the list of available users, type part of the user's name in the field above the list.

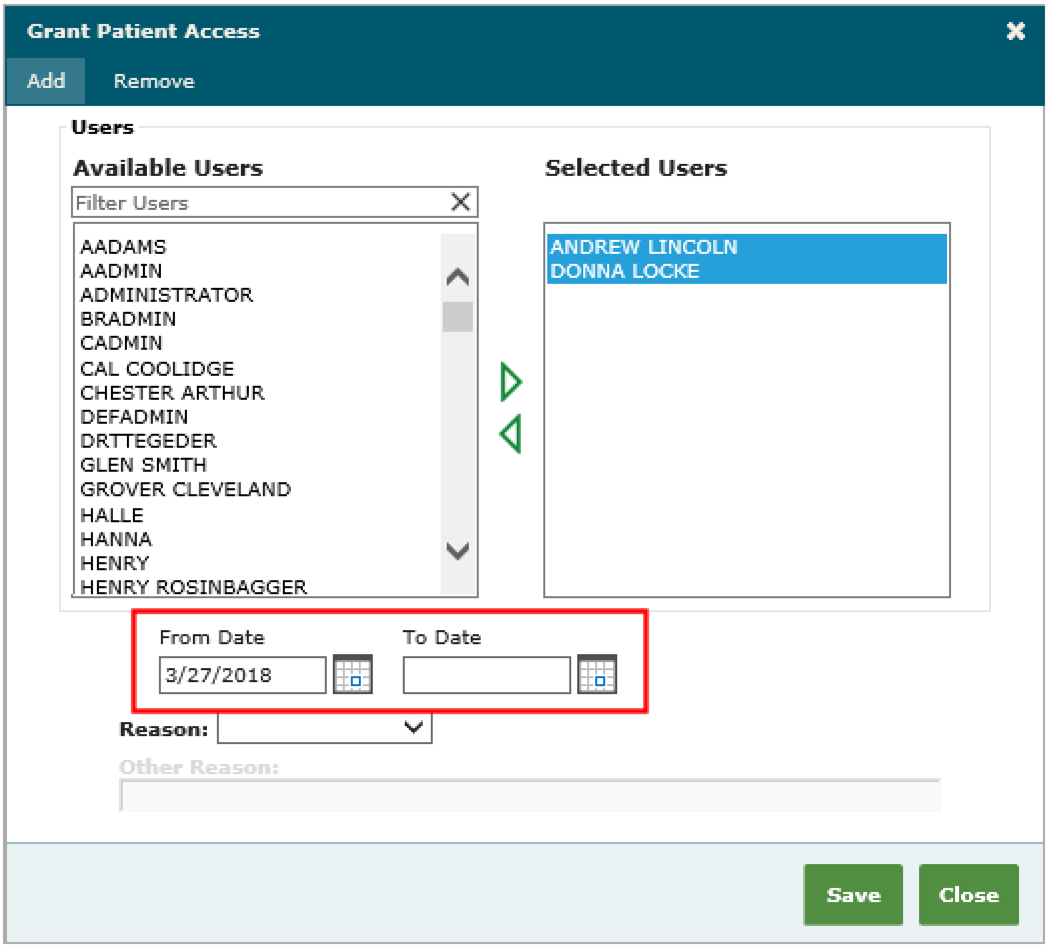


5. Click the **Add** arrow to add the users to the **Selected Users** list.



6. Set the **From Date** and **To Date** to the duration the users should be allowed to access the record.
    - Access to the patient record begins on the **From Date** and expires on the **To Date**.
    - If a **To Date** is not specified, the users' access will never expire.
    - To grant access for a single day, enter the same date in both the **From Date** and **To Date** fields.

- These dates apply to all users currently in the **Selected Users** list. Ensure only users who require the same period of access are currently selected.



7. If necessary, select the **Reason** you are granting users access. If you select **Other**, type the explanation in the **Other Reason** field.
8. Click **Save**. The selected users are removed from the **Selected Users** list.
   - If necessary, repeat this procedure to grant access to other users.
   - To revoke a user's access to this record, see Revoking Access to Records.

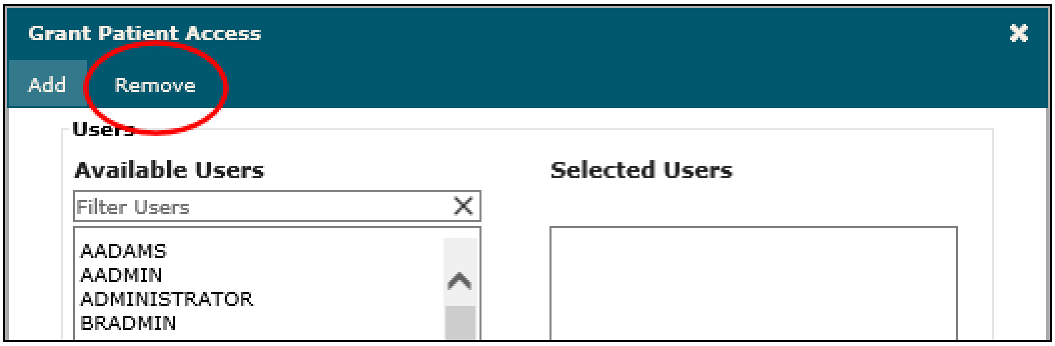
Revoking Access to Records

If you have the **Administration** medical record privilege, you can revoke a user's access to a record, even if the access period is scheduled for the future.

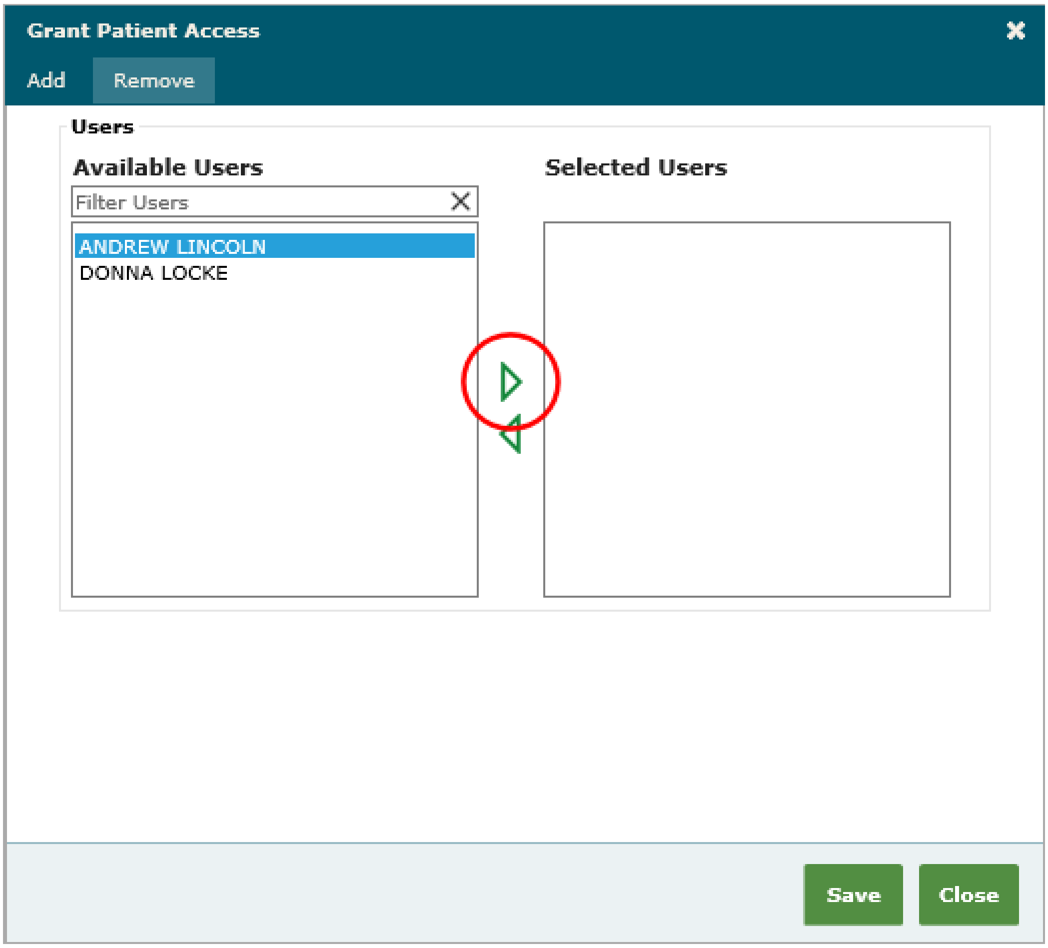
To revoke access:

1. Search for the patient using either Patient Search or Scheduled Patient Search.
2. Select the patient in the search results list.
3. Click the **Grant Patient Access** button.

4. Click the **Remove** tab in the **Grant Patient Access** dialog box.



5. Under **Available Users**, select the users whose access should be revoked.
   - Only users who have been granted access through the **Grant Patient Access** dialog are available.
   - Available users include those who currently have access and those who are scheduled to have access in the future.
6. Click the **Add** arrow to add the users to the **Selected Users** list.



7. Click **Save**. The period of access is removed for the selected users.

Confidentiality Codes

Depending on your system's setup and your user privileges, you may be able to assign confidentiality codes. Confidentiality codes can be assigned by users with the **Administration** medical record privilege.

Confidentiality codes allow you to limit the number of users who can access specific patients, charts, or documents. When a code is assigned to a patient, chart, or document, only users who are assigned access to the code can view the associated information.

See the following topics:

- Assigning Confidentiality Codes to Patients on page 399
- Assigning Confidentiality Codes to Charts on page 404
- Assigning Confidentiality Codes to Documents on page 407

Assigning Confidentiality Codes to Patients

Confidentiality codes are assigned to a patient from the **Confidentiality Codes** dialog box. If you have rights to assign confidentiality codes to a patient, you can access the dialog box in one of the following locations:

- Click the **Confidentiality Codes** button on the main toolbar in OnBase Patient Window.

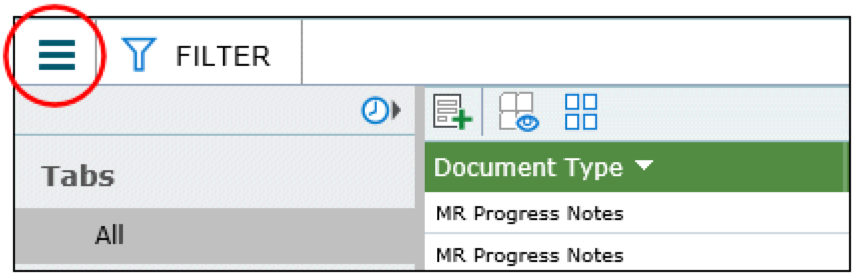
  See Assigning Confidentiality Codes to a Patient From an Open Record on page 400.
- Click the **Confidentiality Codes** button above the results of a Patient Search or Scheduled Patient Search.

  See Assigning Confidentiality Codes to Patients Retrieved Through Search on page 401.

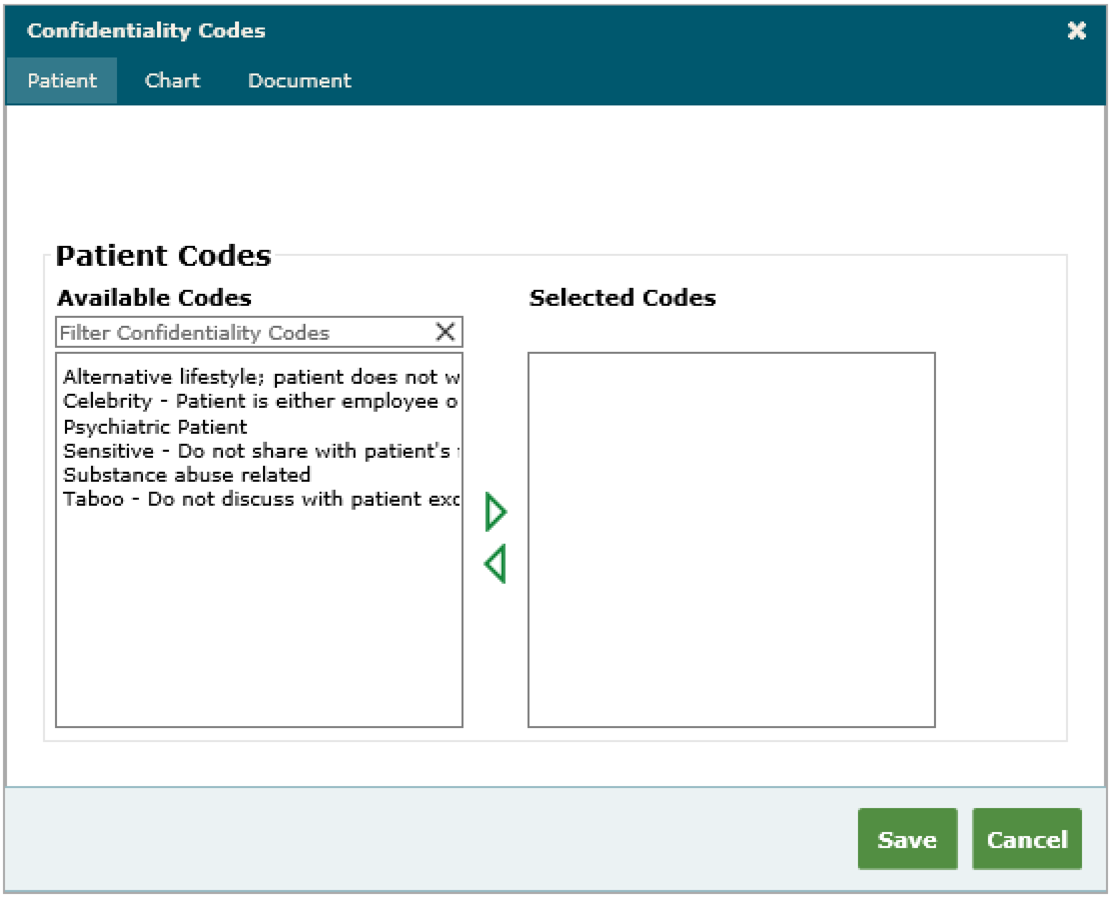
Assigning Confidentiality Codes to a Patient From an Open Record

To assign confidentiality codes to a patient while viewing the patient's record:

1. Rest your pointer over the main menu icon and click **Confidentiality Codes**.

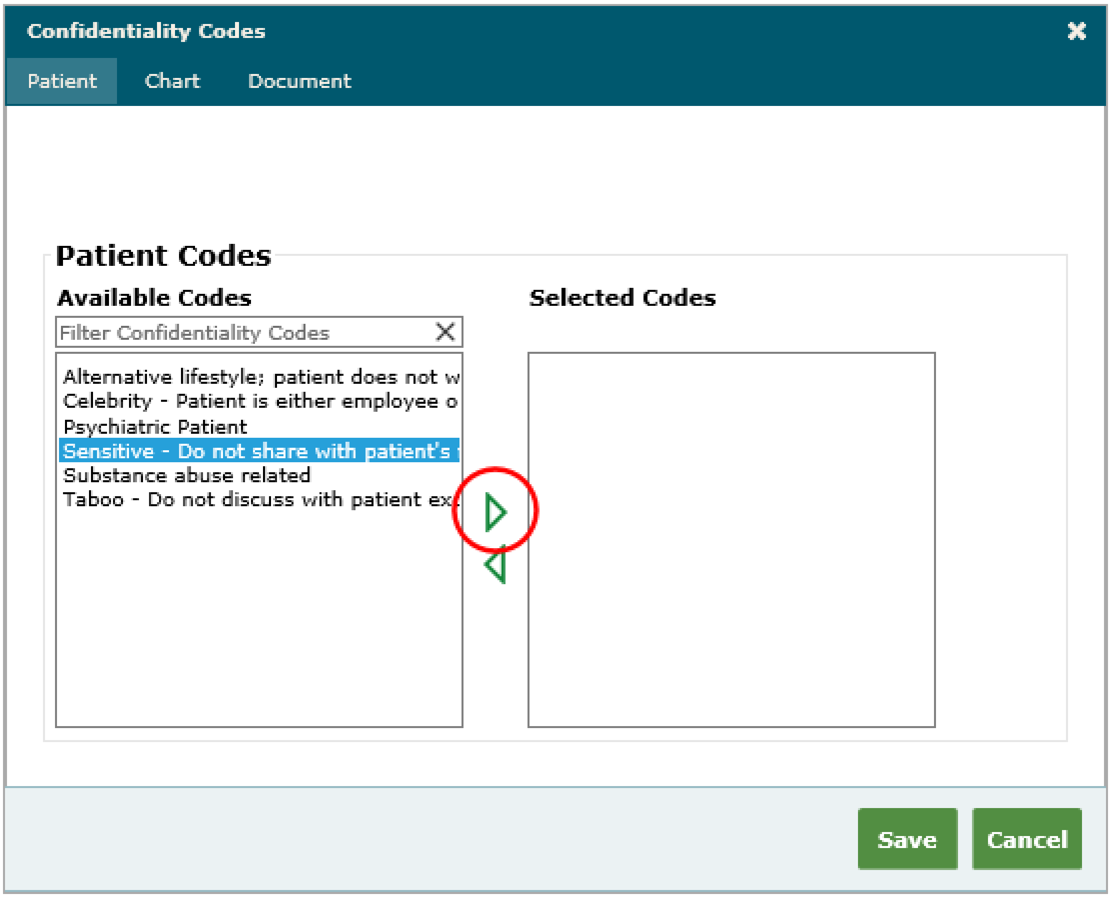


The **Confidentiality Codes** dialog box is displayed.



2. Select a Patient Code from the list of Available Codes.
   To filter the list of available codes, type part of the code's name or description in the field above the list.

3. Click the **Add** button.



The selected Patient Code is added to the list of Selected Codes, and an asterisk appears on the **Patient** tab to indicate there are unsaved changes.

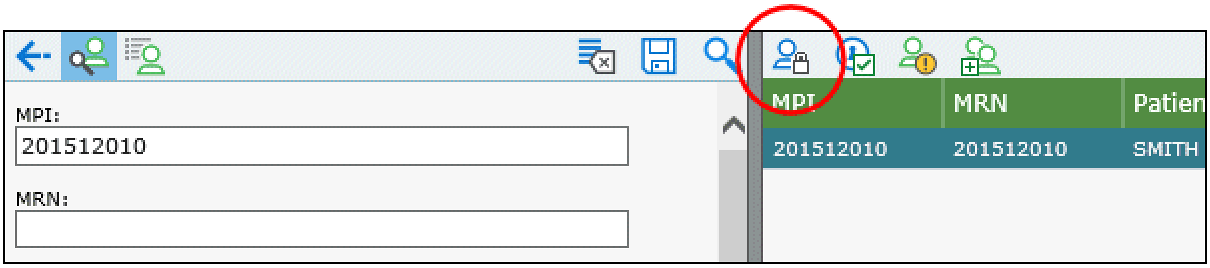
4. Click **Save**.

Assigning Confidentiality Codes to Patients Retrieved Through Search

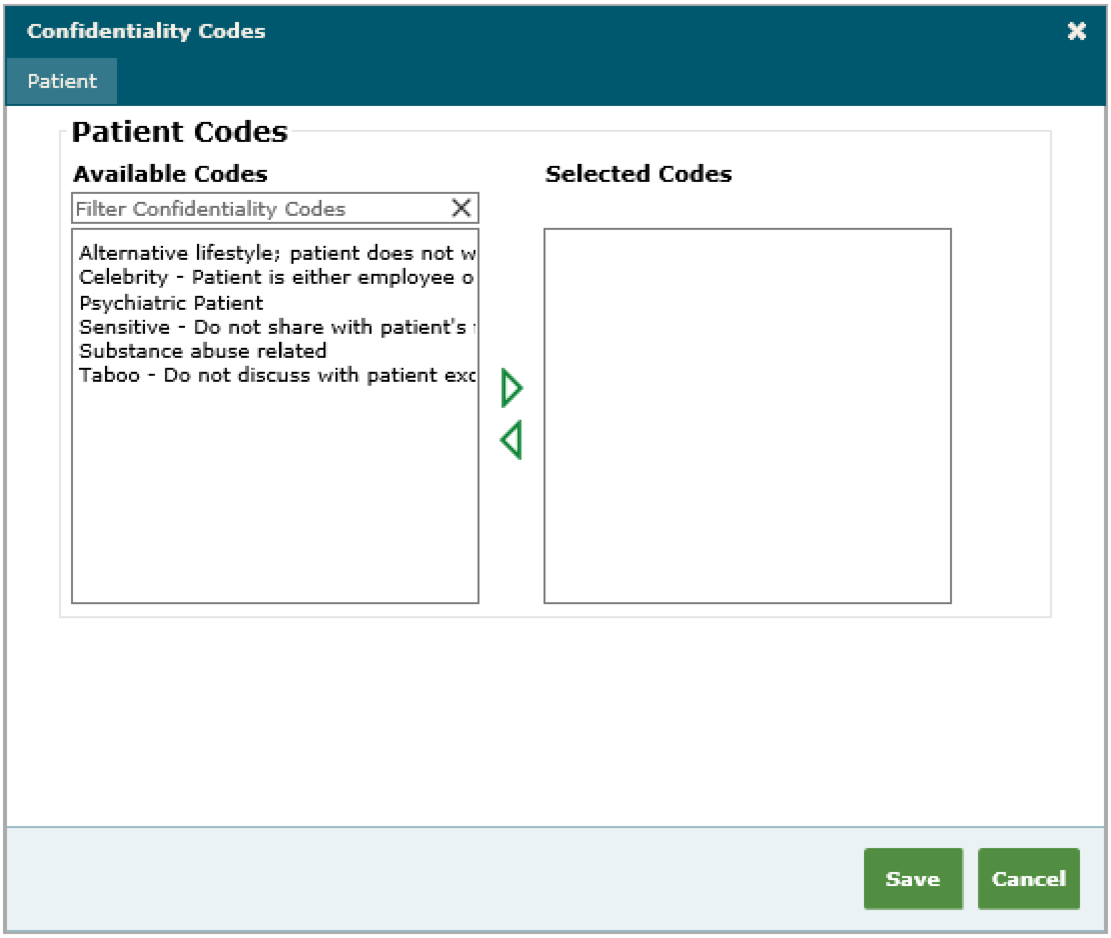
To assign confidentiality codes to a patient using Patient Search or Scheduled Patient Search:

1. Search for the patient using either Patient Search or Scheduled Patient Search.
2. Select the patient from the search results.

3. Click the **Confidentiality Codes** button.

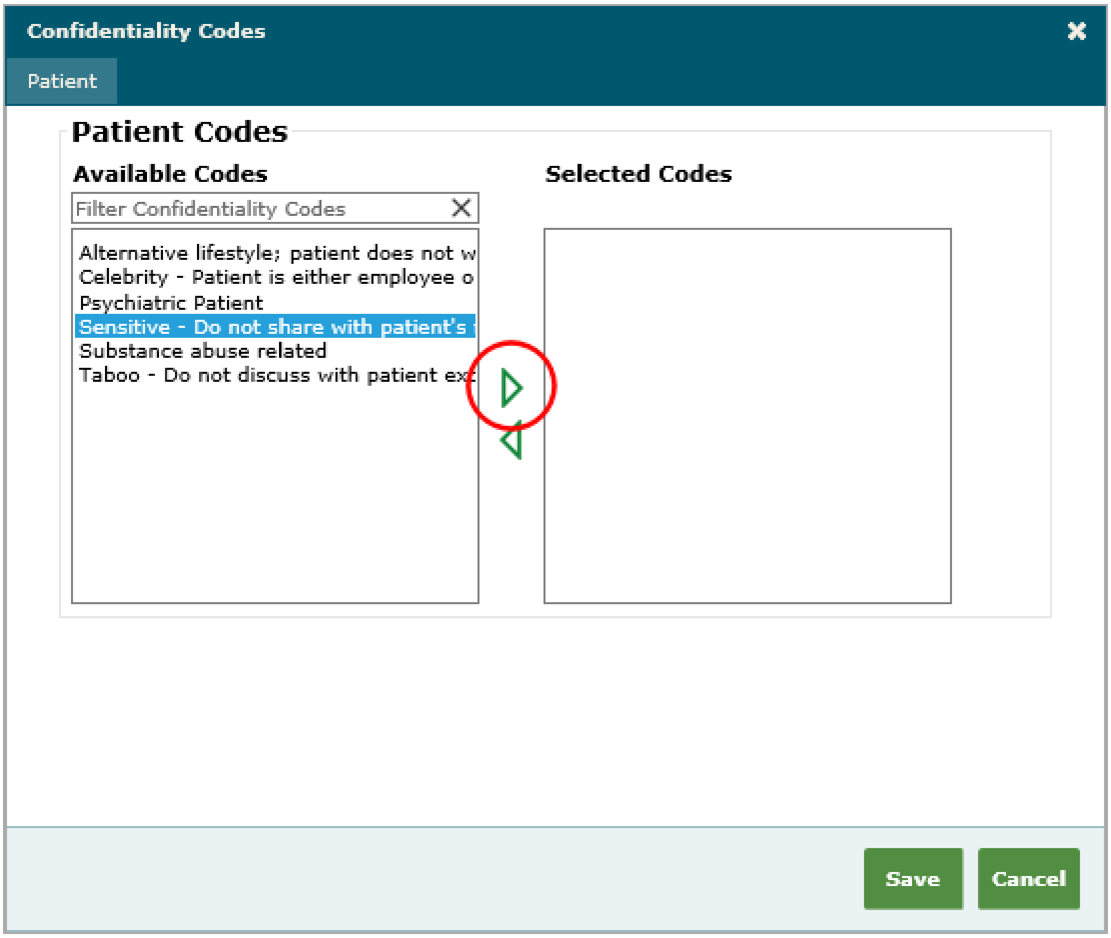


The **Confidentiality Codes** dialog box is displayed.



4. Select a Patient Code from the list of Available Codes.
   To filter the list of available codes, type part of the code's name or description in the field above the list.

5. Click the **Add** button.



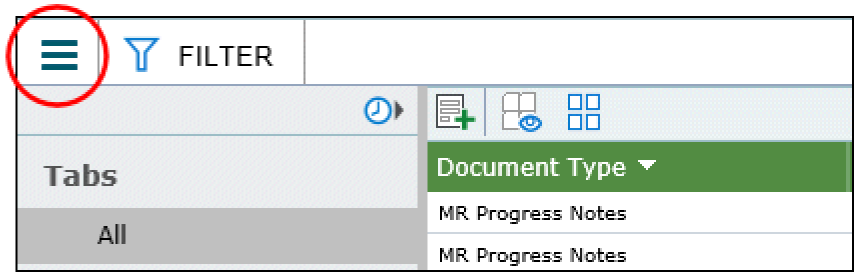
The selected Patient Code is added to the list of Selected Codes.

6. Click **Save** to save any changes. To close the dialog box and discard any unsaved changes, click **Cancel**.

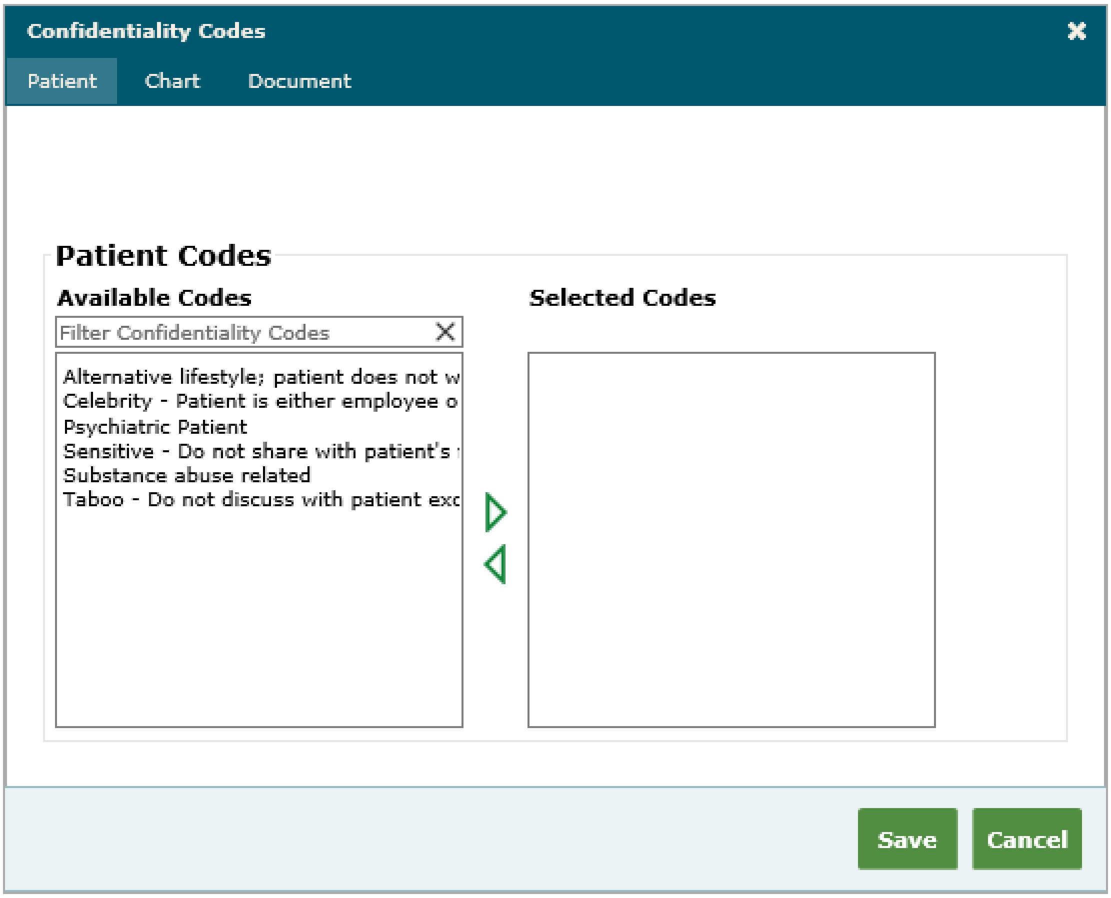
Assigning Confidentiality Codes to Charts

To assign confidentiality codes to a chart:

1. Open the patient's record.
2. Rest your pointer over the main menu icon and click **Confidentiality Codes**.

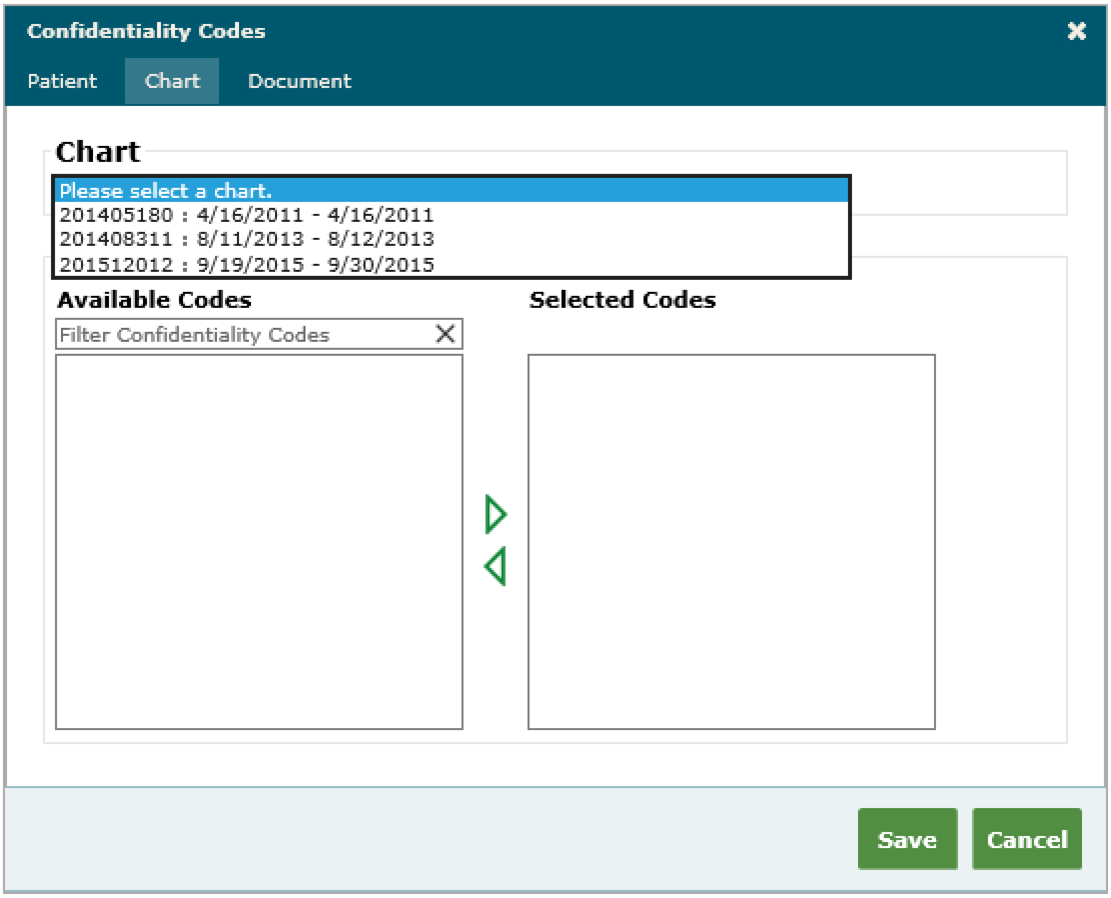


The **Confidentiality Codes** dialog box is displayed.



3. Click the **Chart** tab.

4. Select a chart from the **Chart** drop-down list.

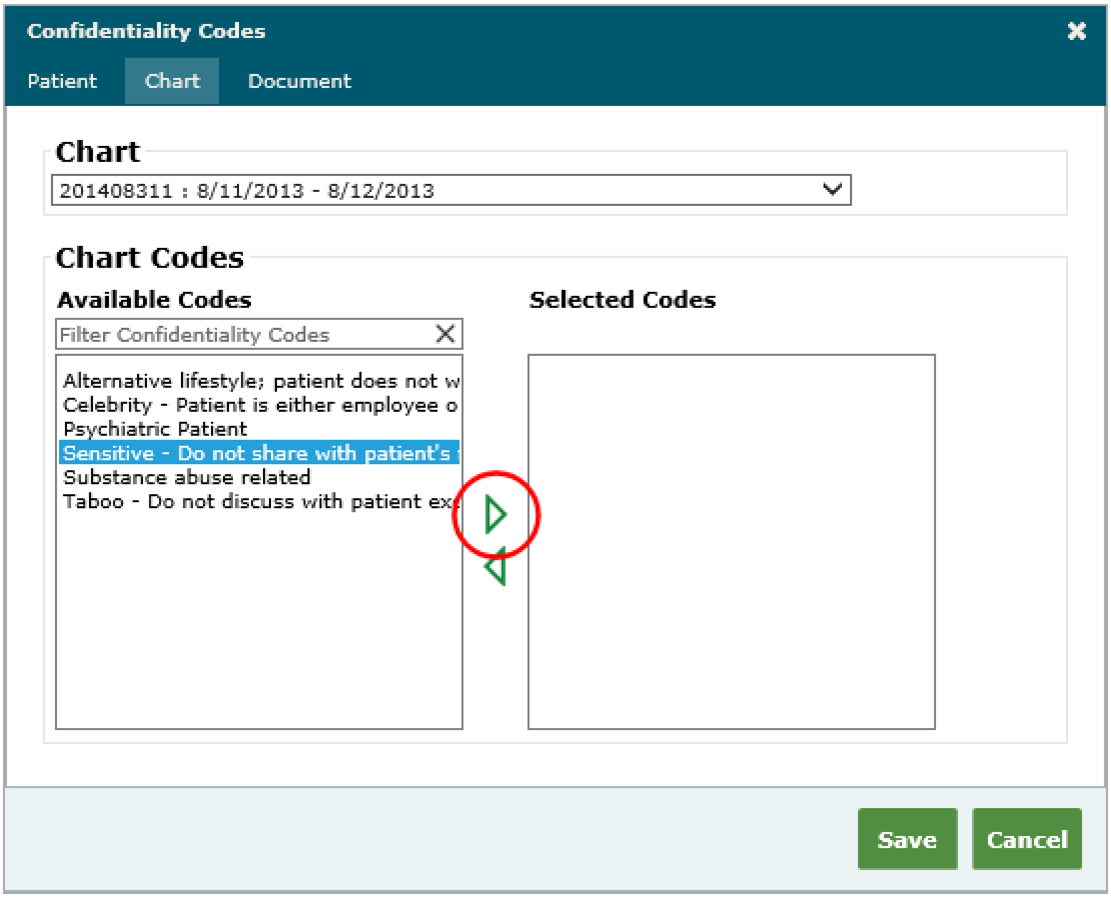


A list of available chart codes populates the Available Codes box.

5. Select a Chart Code from the list of Available Codes.

   To filter the list of available codes, type part of the code's name or description in the field above the list.

6. Click the **Add** button.



The selected Chart Code is added to the list of Selected Codes, and an asterisk appears on the **Chart** tab to indicate there are unsaved changes.

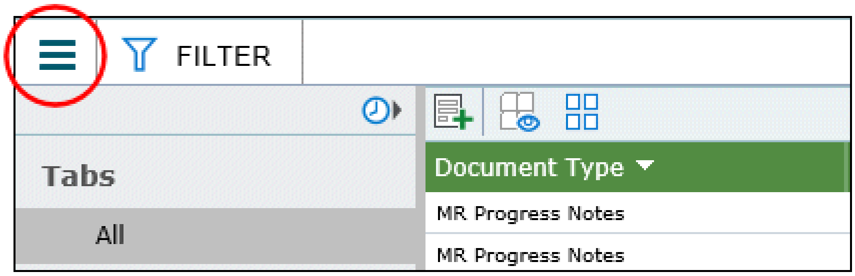
7. Click **Save**.

Note: If you are updating codes on multiple charts for this patient, you must click **Save** after updating each chart.

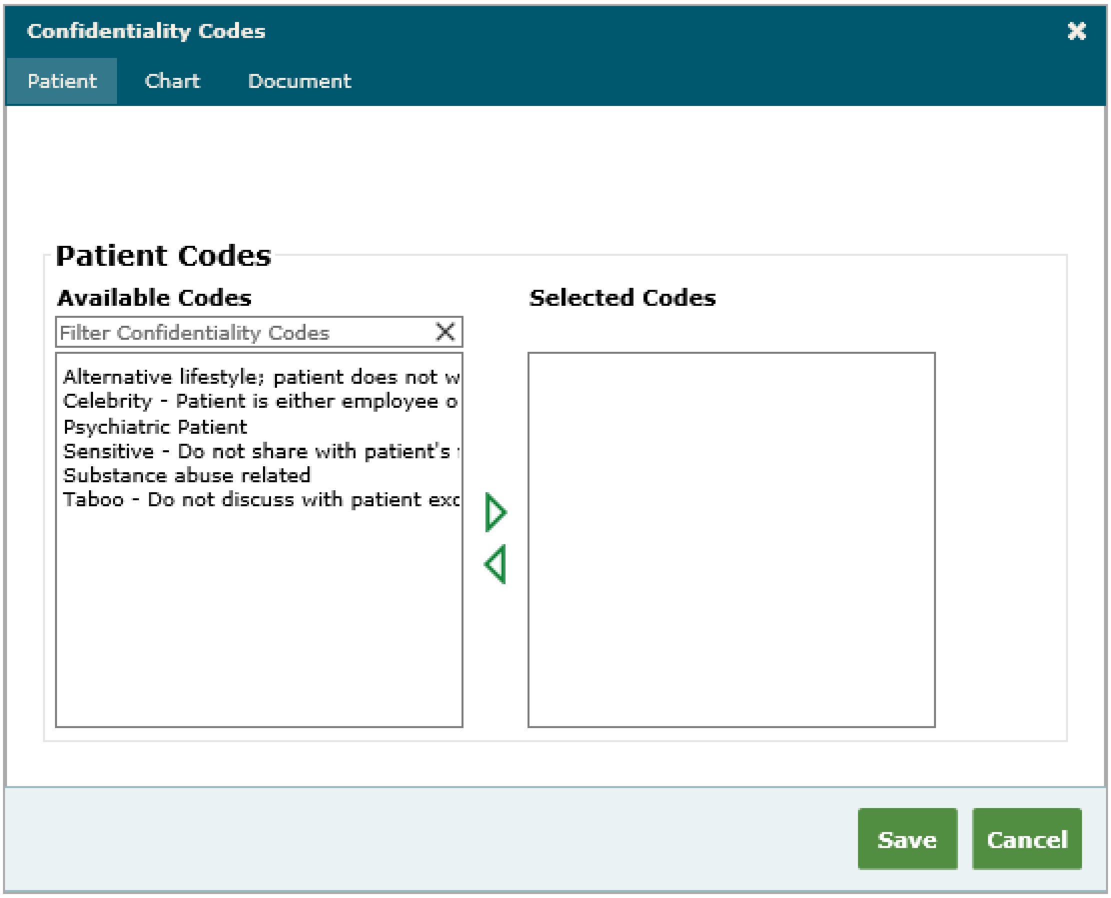
Assigning Confidentiality Codes to Documents

To assign confidentiality codes to documents:

1. Select one or more documents from the document list.
2. Rest your pointer over the main menu icon and click **Confidentiality Codes**.

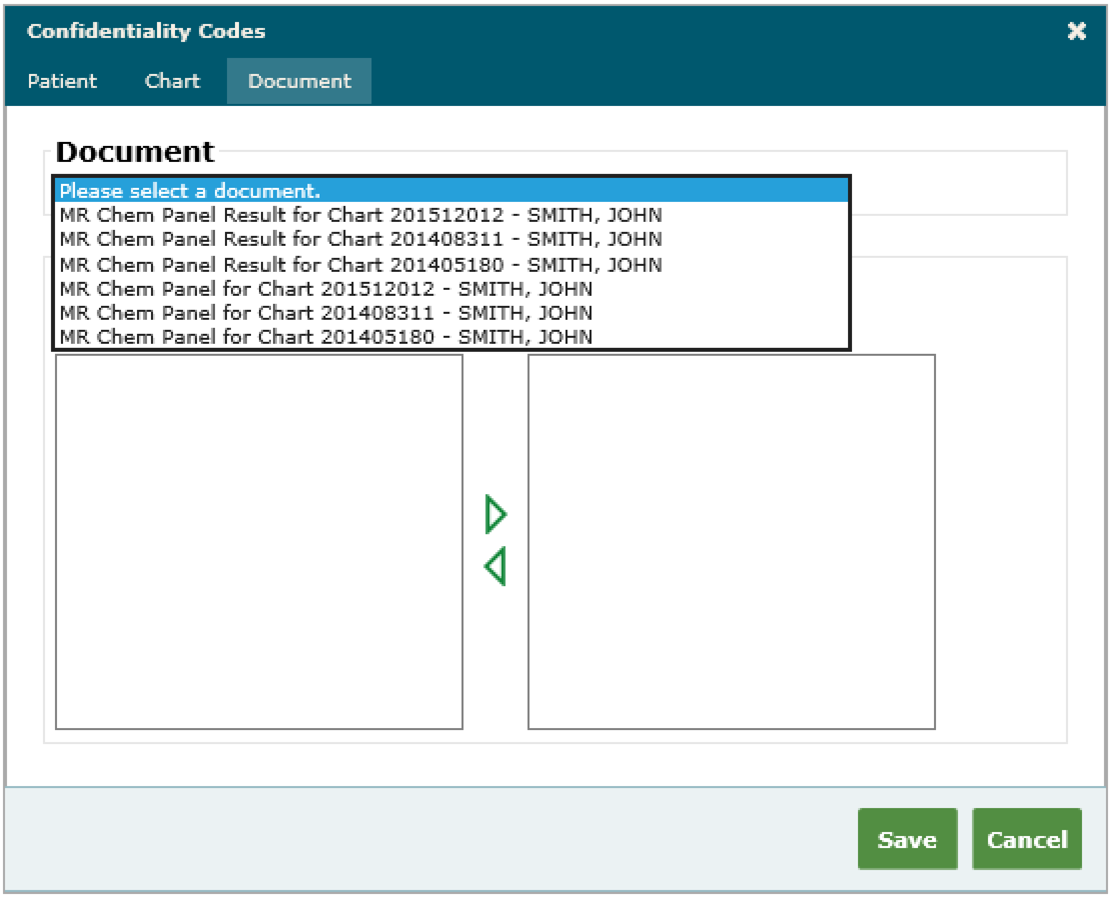


The **Confidentiality Codes** dialog box is displayed.



3. Click the **Document** tab.

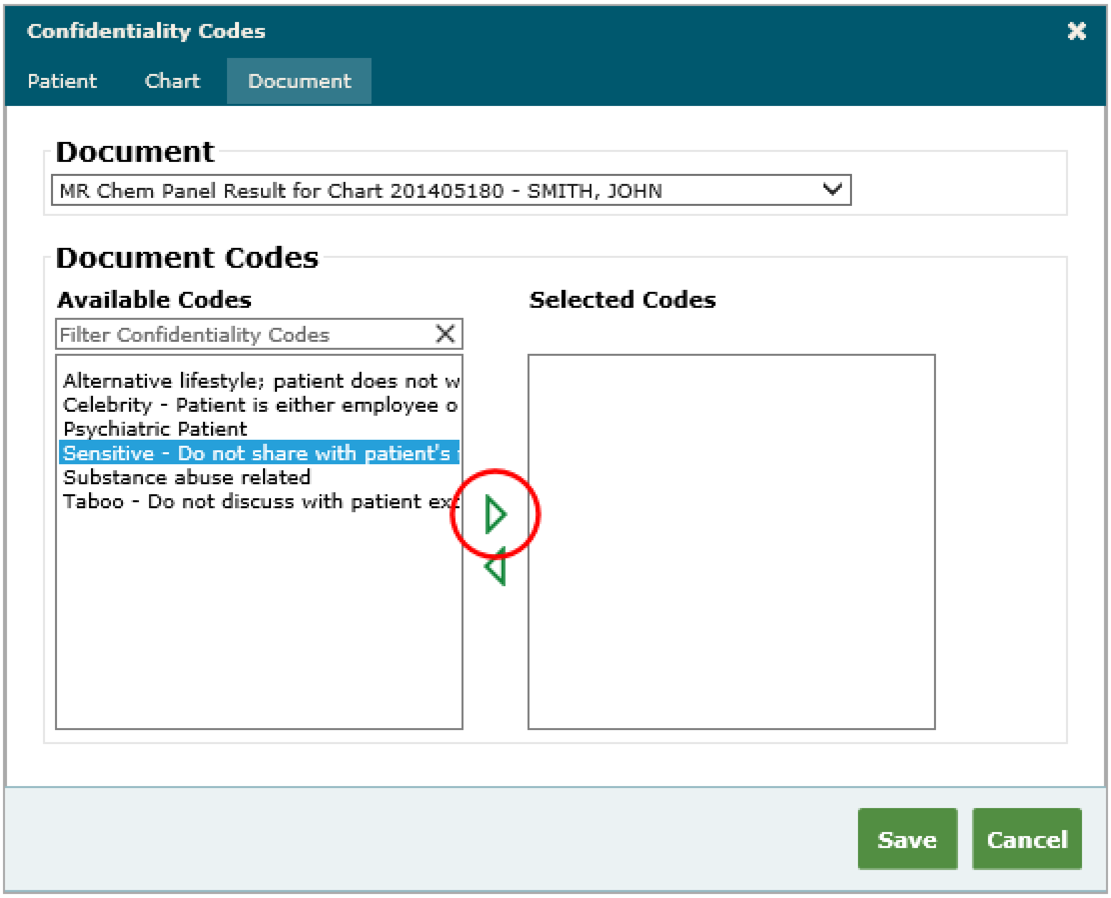
4. Select a document from the **Document** drop-down list. Only the documents you selected in step 1 are available.



5. Select a Document Code from the list of Available Codes.

   To filter the list of available codes, type part of the code's name or description in the field above the list.

6. Click the **Add** button.



The selected Document Code is added to the list of Selected Codes, and an asterisk appears on the **Document** tab to indicate there are unsaved changes on this tab.

7. Click **Save**.

Note: If you are updating codes on multiple documents for this patient, you must click **Save** after updating each document.

Patient Notices

If you have the **Administration** medical record privilege, you can select notices to be displayed for specific patient records within OnBase Patient Window.

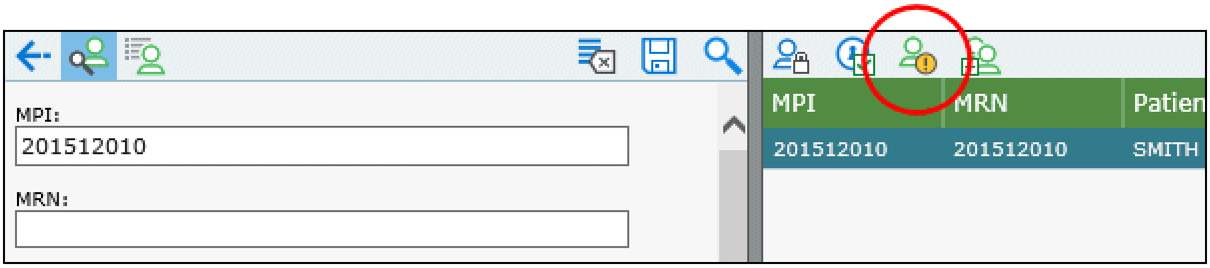
Notices provide a way of displaying special considerations for a patient on a facility-by-facility basis. For example, a notice may be displayed for patients who have opted out of allowing their records to be viewed within a specific facility.

Assigning Patient Notices

If you have sufficient privileges, you can assign patient notices using Patient Search or Scheduled Patient Search.

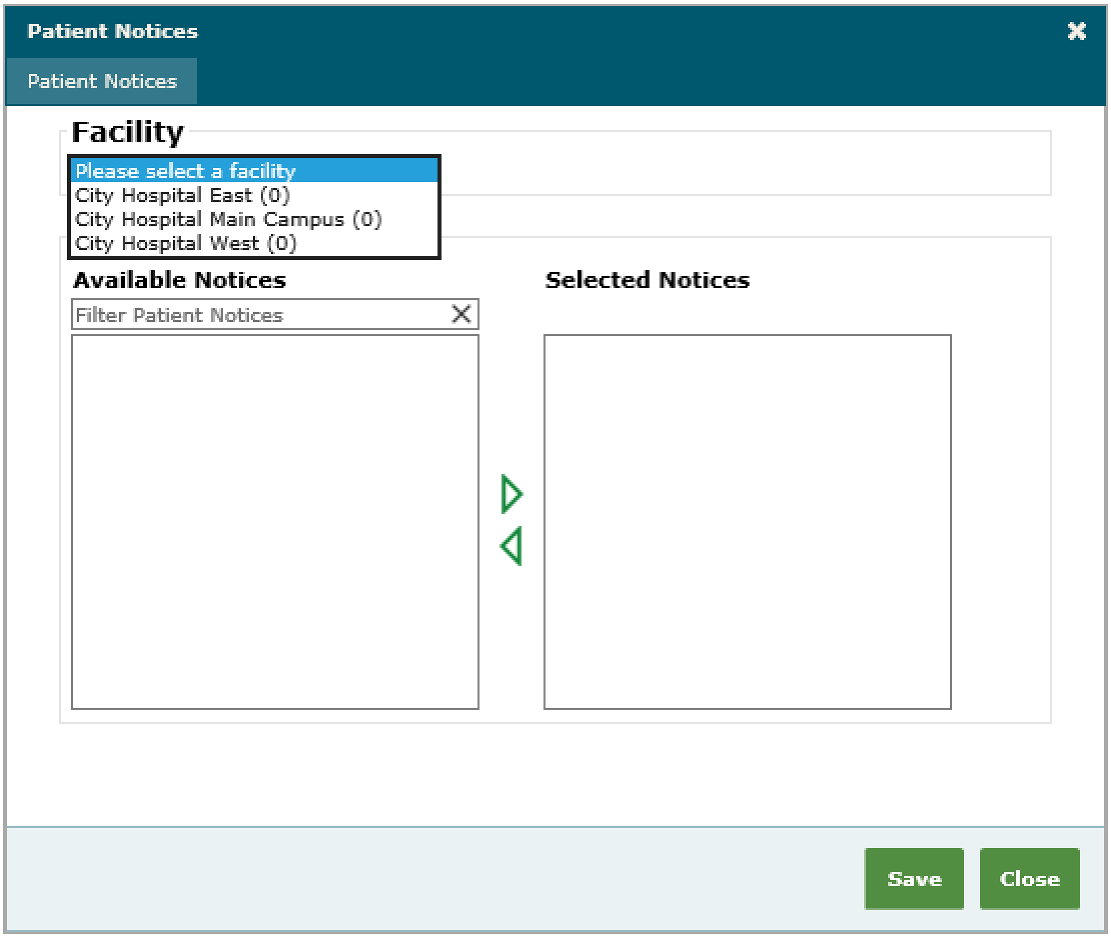
To assign patient notices:

1. Search for the patient using either Patient Search or Scheduled Patient Search.
2. Select the patient from the search results.
3. Click the **Patient Notices** button.



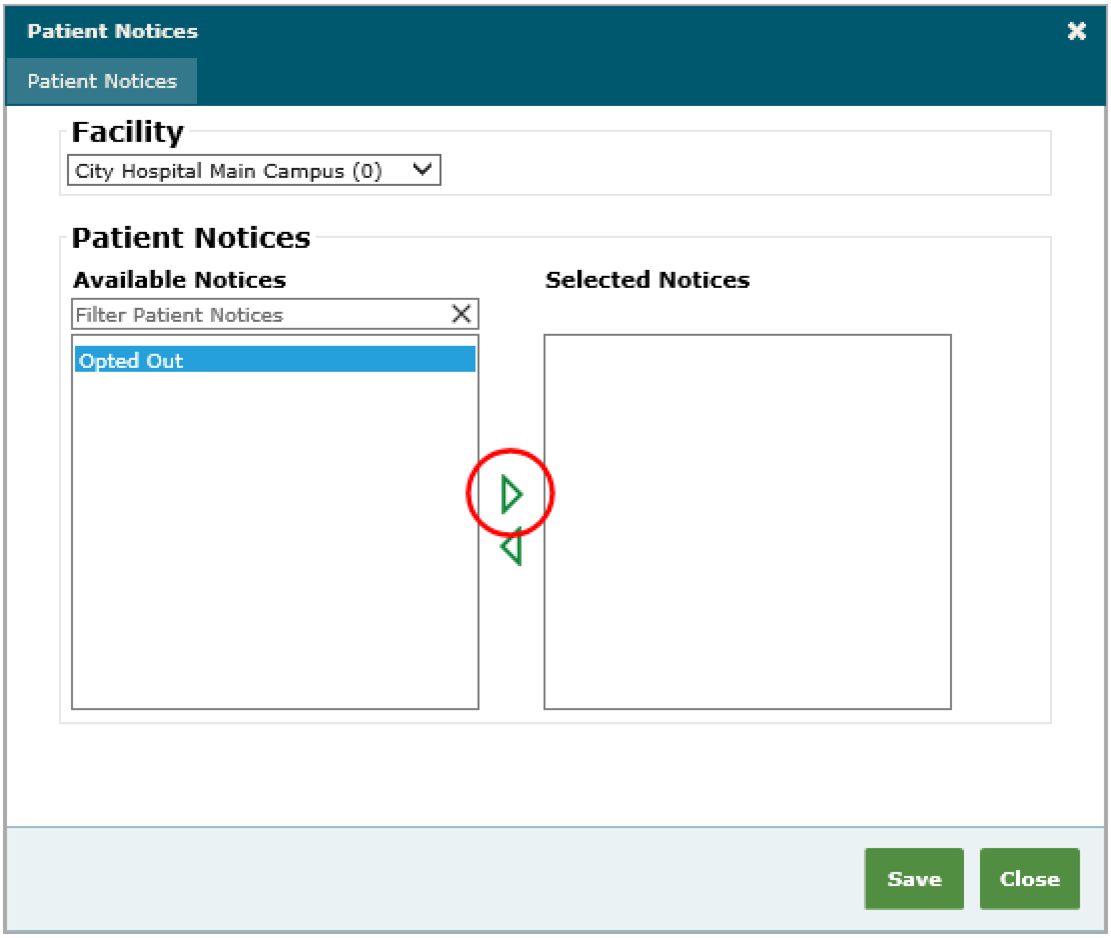
The **Patient Notices** dialog box is displayed.

4. Select the **Facility** you are assigning the notice for.
   The number displayed next to each facility's name indicates the number of notices currently assigned to the patient for that facility.



5. Select one or more notices to display for the patient.
   To filter the list of available notices, type part of the notice text in the field above the list.

6. Click the **Add** button.



7. Click **Save** when you are finished assigning notices for this facility.

Note: When assigning notices for multiple facilities, you must click **Save** before selecting a different facility from the **Facility** drop-down list. If you add or remove a notice and then select a different facility without clicking **Save**, the change is not saved.

8. Repeat these steps if other facilities should have notices displayed for the patient.
9. Click **Close** when finished.

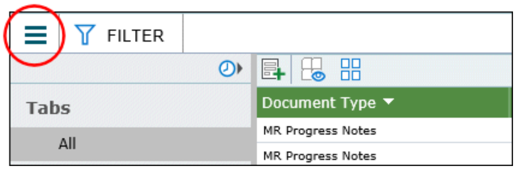
Quick Reference Guide

Print the following quick reference guide to help users perform common tasks in OnBase Patient Window.

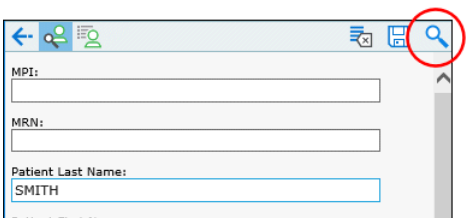
Searching for Patient Records

If you have search privileges, you may be able to use Patient Search, Scheduled Patient Search, or Chart Search. Available search options vary per system.

1. Select a search option from the main menu.



2. In the search pane, type a value in at least one field.
3. Click the **Search** button.

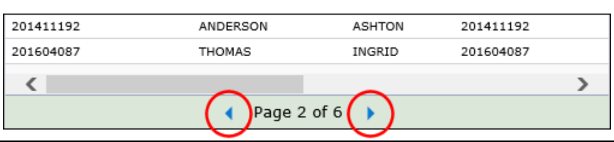


4. Double-click a record to open it and view its contents.

Navigating Lists

If a list contains a large number of items, then the list may be split across several pages.

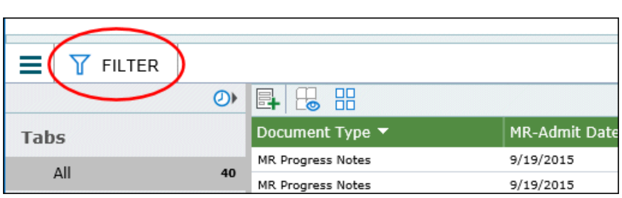
- To navigate to the next page of items, click the **Next** button at the bottom of the current pane.
- To navigate to the previous page, click the **Previous** button at the bottom of the current pane.



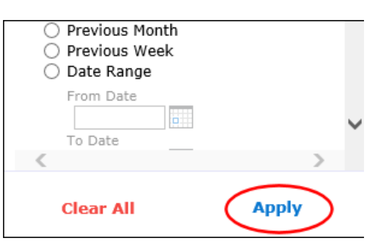
Filtering Documents

Use filters to display a specific subset of documents within a patient record.

1. Click the **Filter** button.



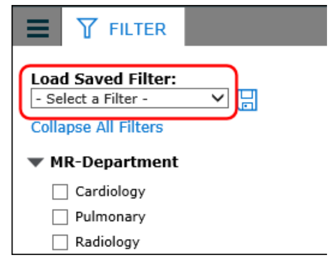
2. In the filter pane, select the criteria on which to filter.
3. Click **Apply**.



To save the filter for later, click the **Save Filter** button.

Applying a Saved Filter

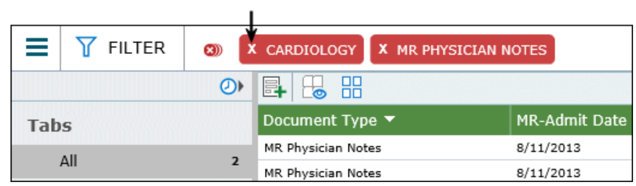
If you have any saved filters, a drop-down list is displayed below the filter pane.



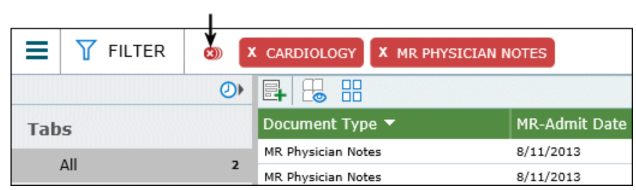
1. Select a saved filter from the drop-down list.
2. Click **Apply**.

Removing a Filter

To remove a specific filter, click the X displayed to the left of the filter's name.



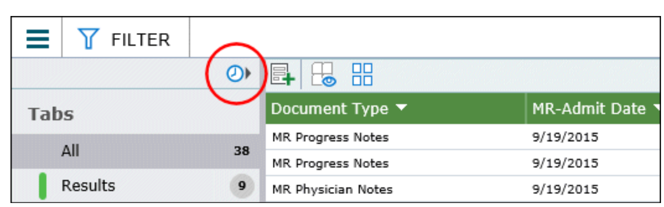
To remove all applied filters, click the **Clear All Filters** button.



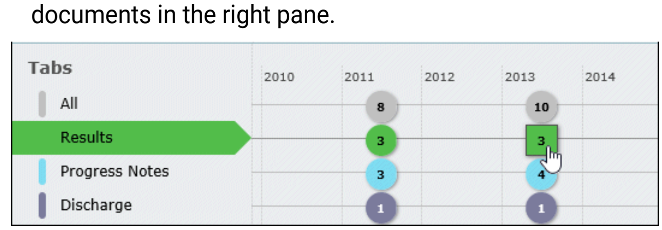
Opening Documents From the Timeline

Use timeline mode to browse documents chronologically.

1. Click the **Show Timeline Mode** button.



2. Browse to the documents you want to view.
   - Use the zoom buttons to zoom in or out.
   - Click and drag the timeline to the left or right.
3. Click an icon from the timeline to display the associated documents in the right pane.

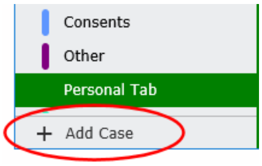


4. Double-click a document from the right pane to open it.

Creating a Case

Create cases to organize documents in a patient's record.

1. Click the **Add Case** button at the bottom of the tabs pane.

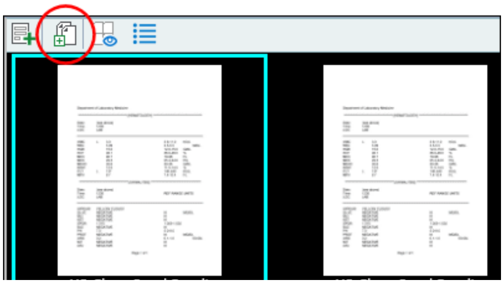


2. Type a name for the case in the **Case Name** field.
3. Click the color swatches button next to the **Case Color** box.

4. Select a color for the case tab.
5. If the **Public** option is available, select it only if you want the case to be visible to other users who view this record.
6. Click **Save**. The case is created and displayed alongside other tabs in the record.

Adding Documents to a Case

1. Select a document from the documents pane.
2. Click the **Add Selected Documents to Case** button.

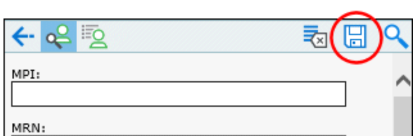


3. Select a case from the **Select a Case** dialog box.
4. Click **Save**.

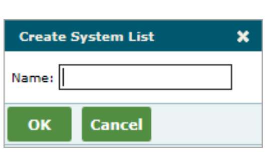
Creating a System List

If you have patient list privileges, you can create system lists using saved search criteria.

1. Select **Patient Search** or **Scheduled Patient Search** from the main menu.
2. Enter the search criteria you want to save.
3. Click the **Save** button.



4. Type a name for the list in the **Name** field.

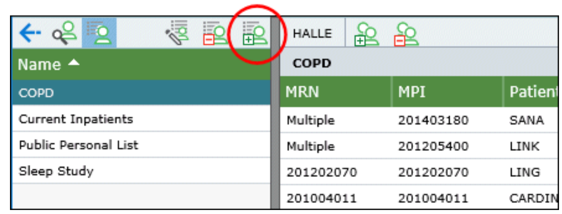


5. Click **OK**.

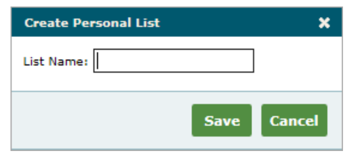
Creating a Personal List

If you have patient list privileges, you can create personal lists to monitor a specific set of patients.

1. Select **Patient List** from the main menu.
2. Click **Create Patient List**.



3. Type a name for the list in the **List Name** field.

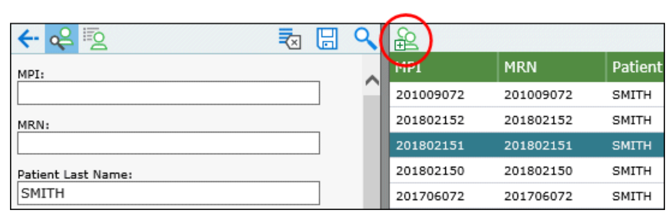


4. Click **Save**.
5. Continue to the next task to add patients to the list.

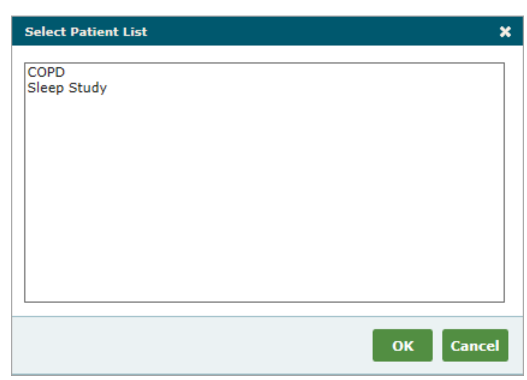
Adding Patients to a Personal List

Use the following steps to search for and add patients to a personal list.

1. Select **Patient Search** or **Scheduled Patient Search** from the main menu
2. Enter the criteria for the patients you want to retrieve.
3. Click the **Search** button.
4. Select the patients you want to add to the list.
5. Click **Add Patients to List**.



6. Select a personal list to add the patients to.



7. Click **OK**. The patients are added to the list.