

OSCAR EMR Training Collaborative

Quick Start Guide – OSCAR EMR Physician Dashboard **(BC Version)**

Table of Contents

- Access to OSCAR..... 2
 - Logging In 2
- OSCAR Administration 2
 - System Management 2
- Dashboard Manager 5
 - Assigning Indicators 6
- Dashboard Display 7
 - Indicator Panels 7
 - Indicator Info 8
 - Drill Down..... 8
 - Filter Results10
 - Tickler11

Access to OSCAR

Logging In

The following instructions explain how to login.

1. Enter the web address for OSCAR EMR in your browser.
2. Type your username and password (A) > Type your second level passcode if prompted (B) > Click the Sign In button (C)

OSCAR McMaster Trunk

User Name: ocardoc

Password: *****

Sign in

2nd Level Passcode: ****

for exte... area network access

OSCAR McMaster
OPEN SOURCE CLINICAL APPLICATION RESOURCE

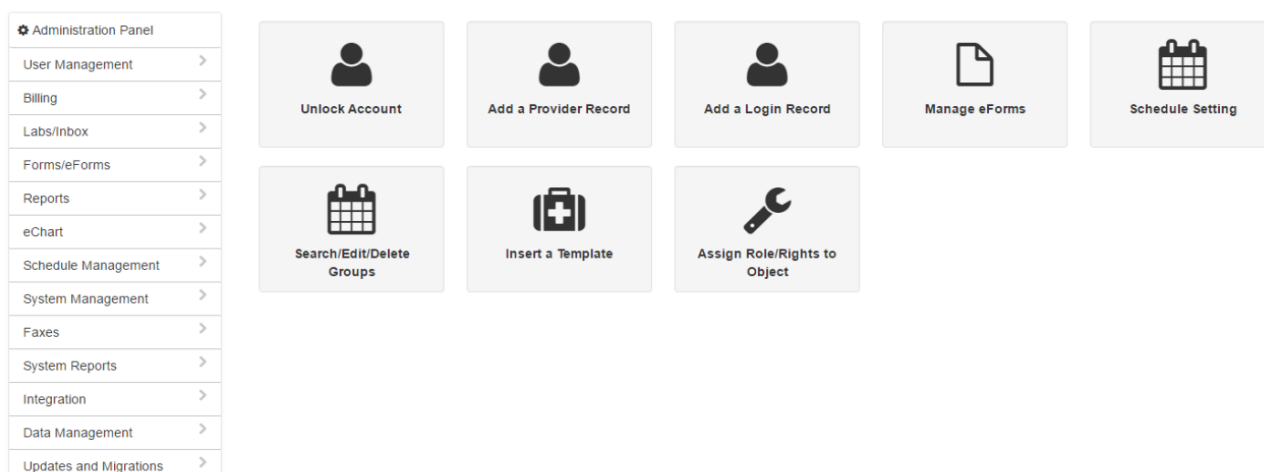
OSCAR Administration

System Management

OSCAR Administrators will need to assign privileges to users that require access to the Physician Dashboard. To do this, the administrator must go to 'Administration' in the Global Navigation Bar found at the top of all OSCAR screens.

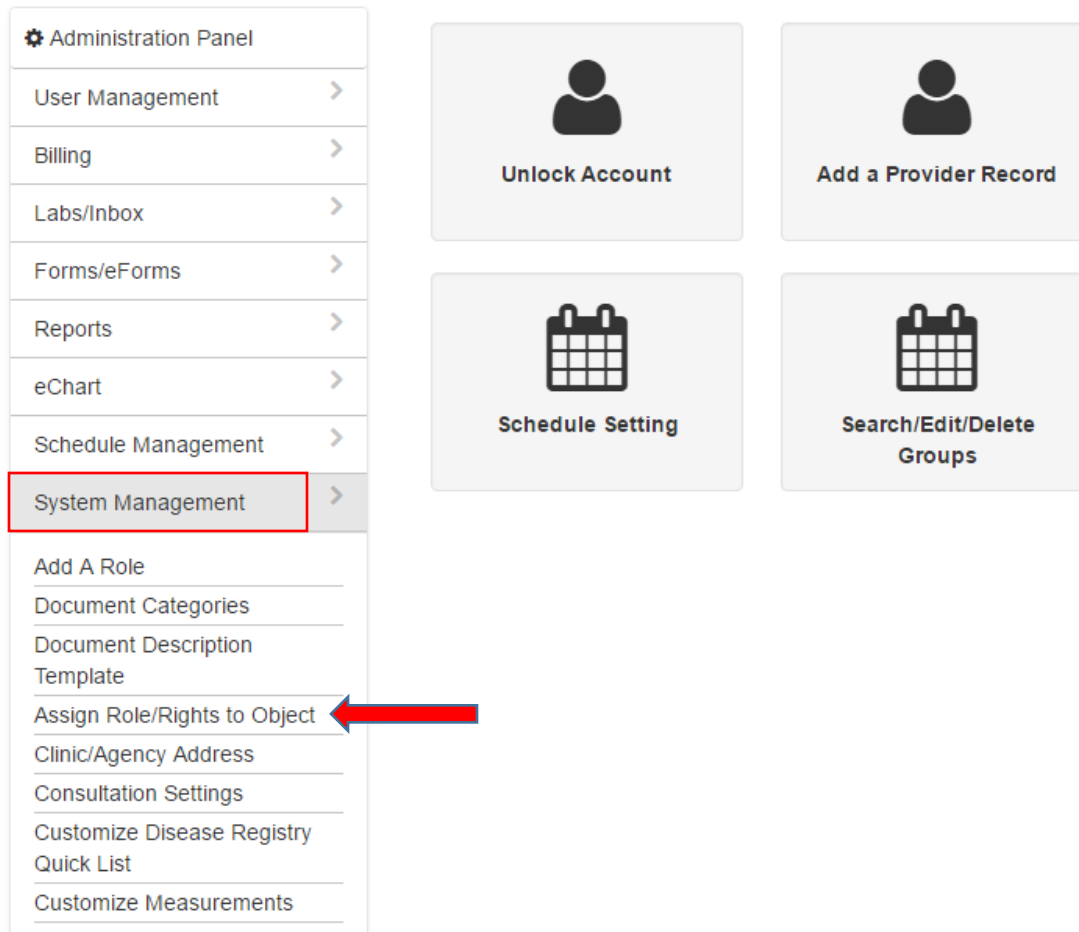


This button launches as a pop-up window with the Administration Panel containing control items of various categories. The Administration Panel is where users with an assigned 'Admin' role can adjust, add or edit system settings for the entire OSCAR system of a clinic.



The System Management section of the Administration Panel is where administrative users can adjust the settings that affect the privacy/security settings and general system controls within the OSCAR system.

- To grant access to the Dashboard, the administrator must click the 'Assign Role/Rights to Object' button in the Administration Panel.



To Assign Dashboard Privileges to an Existing Role:

1. Scroll down to the 'Add Role/Privilege' section of the list (A) > Locate the role name from the **second** drop-down list. (Select the role of doctor to configure access to the dashboard for all doctors.)
2. Use the 'Object ID' checkboxes (B) to select:
 _dashboardDisplay
 _dashboardDrilldown
 _dashboardManager
 and assign rights to the specified role(s). (Multiple objects can be added at one time).
3. Use the checkboxes to adjust the role access to the specified role (all rights, read only, write only, delete rights, no rights and/or update) (C).

4. Scroll to the bottom of the list and select the 'Add' button to add the selected object rights to the specified role

Add Role/Privilege			
Role	Object ID	Privilege	Priority
<div>A</div> <div> <input type="text" value="-"/> or <input type="text"/> </div>	<input type="checkbox"/> _admin	<input type="checkbox"/> No rights. <input type="checkbox"/> Read <input type="checkbox"/> Update <input type="checkbox"/> Write <input type="checkbox"/> All Rights	<input type="text" value="0"/>
	<input type="checkbox"/> _dashboardDisplay	<input type="checkbox"/> No rights. <input type="checkbox"/> Read <input type="checkbox"/> Update <input type="checkbox"/> Write <input type="checkbox"/> All Rights	<input type="text" value="0"/>
	<div>B</div> <input type="checkbox"/> _dashboardDrilldown	<div>C</div> <input type="checkbox"/> No rights. <input type="checkbox"/> Read <input type="checkbox"/> Update <input type="checkbox"/> Write <input type="checkbox"/> All Rights	<input type="text" value="0"/>
	<input type="checkbox"/> _dashboardManager	<input type="checkbox"/> No rights. <input type="checkbox"/> Read <input type="checkbox"/> Update <input type="checkbox"/> Write <input type="checkbox"/> All Rights	<input type="text" value="0"/>
	<input type="text"/>	<input type="checkbox"/> No rights. <input type="checkbox"/> Read <input type="checkbox"/> Update <input type="checkbox"/> Write <input type="checkbox"/> All Rights	<input type="text" value="0"/>
		<div>D</div> <input type="button" value="Add"/>	

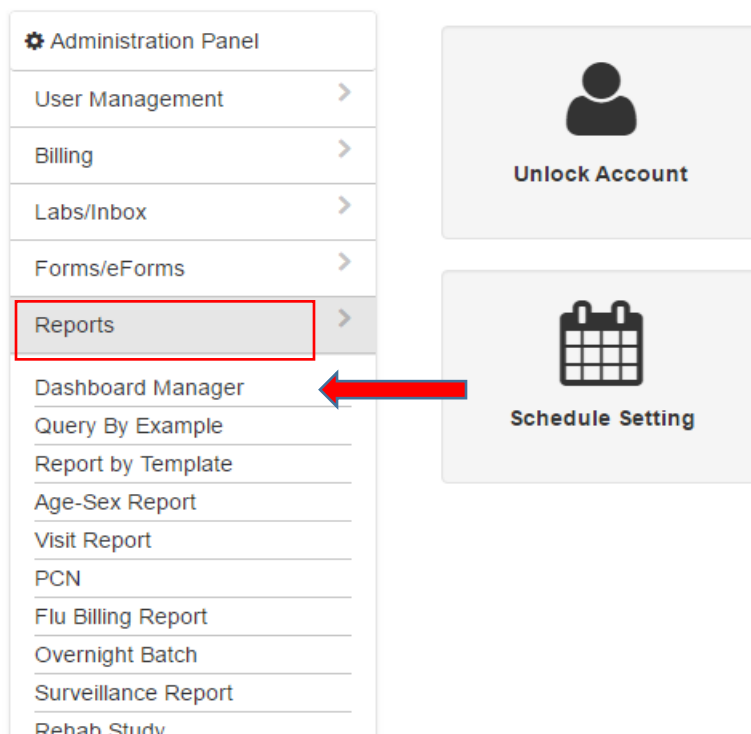
(D).

!	Users must allow pop-up windows in their browser settings to ensure the Administration Panel can launch.
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Dashboard Manager

Access to the Dashboard Manager is found by clicking the 'Administration' button in the Global Navigation Bar on OSCAR's main page.

- To get to the Dashboard Manager, click 'Reports' then 'Dashboard Manager'. The Dashboard Manager is meant for uploading and managing active Indicator XML Templates.



The Dashboard Manager interface shows a list of real-time introductory indicators that have been uploaded to your OSCAR system. They can be assigned to the DoBC CPQI PSP Panel Physician Dashboard (among other Dashboards in OSCAR). The library of indicators includes the *Indicator Name*, *Category* (i.e. CDM), *Sub Category* (i.e. Diabetes), *Framework*, and *Framework Version*. (The Shared column refers to sharing aggregate results with the Ontario Common Dashboard. This feature is not available to BC users and its setting is irrelevant for BC deployments.)

The Dashboard Manager allows the user to:

- A) Import an Indicator XML Template
- B) Create a *new* Dashboard or Edit an *existing* Dashboard
 - For example, the user may want to create their own "Favourites" Dashboard which includes those indicators that are most common or useful to their practice.
- C) Search Indicator Library using key words

B

A Import
 Indicator XML Template
Browse...
* Create Dashboard
✎ Edit Dashboard ▾

Indicator Library

Show 10 entries
C Search:

Disable/Enable		Dashboard	Shared	Name	Category	Sub Category	Metric Label	Framework	Framework Version
<input checked="" type="checkbox"/>	ⓘ Export	PSP Repc ▾	false	Active Patients Report	General	Patient Population		DoBC CPQI PSP Panel	2017-08-02
<input checked="" type="checkbox"/>	ⓘ Export	PSP Repc ▾	false	Age and Gender Histogram Report	General	Patient Population Histogram		DoBC CPQI PSP Panel	2017-08-02
<input checked="" type="checkbox"/>	ⓘ Export	PSP Repc ▾	false	Assigned Primary	General	Patient Population		DoBC CPQI PSP Panel	2017-08-02
<input checked="" type="checkbox"/>	ⓘ Export	DoBC CP ▾	false	Consider Chronic Pain	CDM	Chronic Pain		DoBC CPQI PSP Panel	2017-08-02
<input checked="" type="checkbox"/>	ⓘ Export	DoBC CP ▾	false	Consider COPD	CDM	COPD		DoBC CPQI PSP Panel	2017-08-02
<input checked="" type="checkbox"/>	ⓘ Export	DoBC CP ▾	false	Consider Diabetes	CDM	Diabetes		DoBC CPQI PSP Panel	2017-08-02
<input checked="" type="checkbox"/>	ⓘ Export	DoBC CP ▾	false	Consider Heart Failure	CDM	Heart Failure		DoBC CPQI PSP Panel	2017-08-02

Assigning Indicators

- To assign an indicator, choose the DoBC CPQI PSP Panel Dashboard from the dropdown list of available Dashboards (A) in your EMR and activate the indicator by clicking the toggle button on the left (B).

Show 10 entries

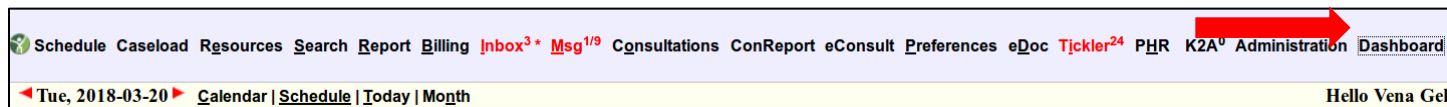
Disable/Enable		Dashboard	Shared	Name	Category	Sub Category
B <input checked="" type="checkbox"/>	ⓘ Export	A <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">DoBC CP</div>	false	Diabetes Prevalence	CDM	Diabetes
<input type="checkbox"/>	ⓘ Export	<div style="border: 1px solid #ccc; height: 20px; width: 80px;"></div>	false	Hypertension Prevalence	CDM	Hypertension
<input type="checkbox"/>	ⓘ Export	DoBC CF ▾	false	Chronic Pain Prevalence	CDM	Chronic Pain





PSP Reports can be assigned to the PSP Report Dashboard in the same manner.

Dashboard Display

To access the actual Dashboard Display with the results of the indicator queries, go to 'Dashboard' in the Global Navigation Bar in OSCAR's main screen and click 'DoBC CPQI PSP Panel' from the dropdown.



The Dashboard Display contains the category groupings of Indicator Panels. The queries are executed as soon as the Dashboard is opened and then upon each user action after that.

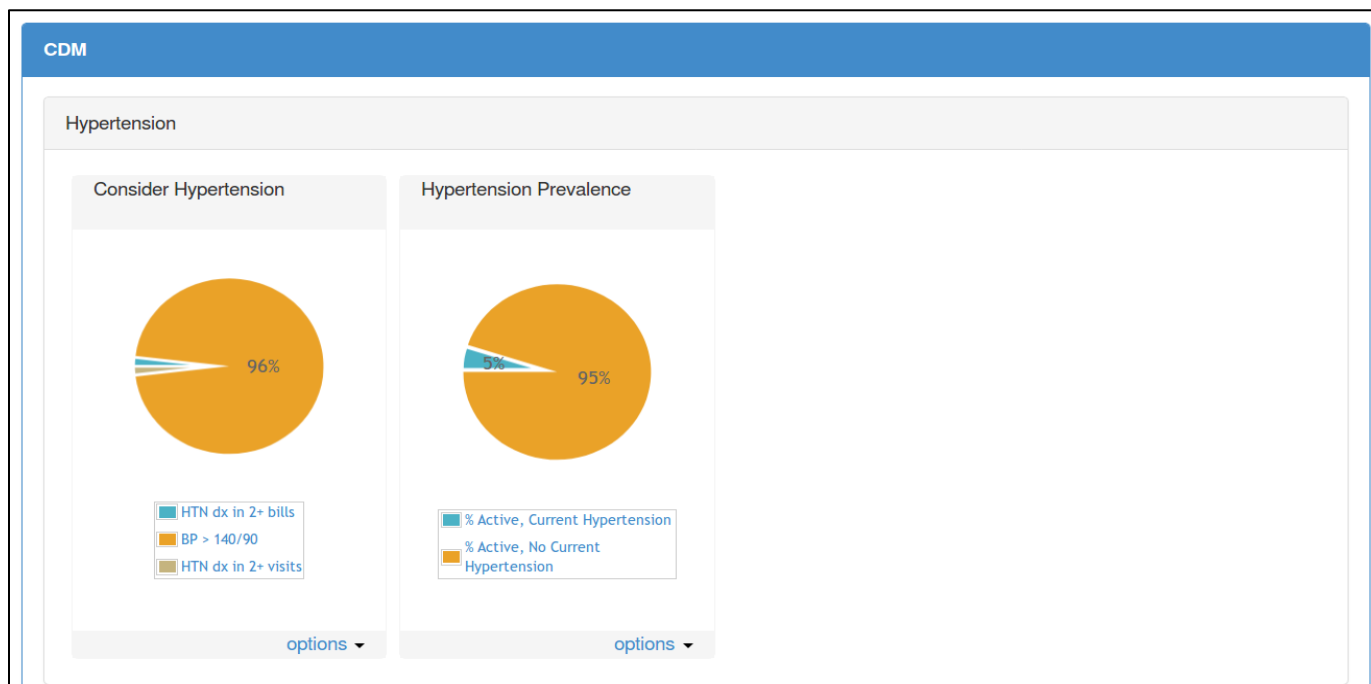
- A refresh button  allows the user to request a live update of the indicators when needed, and specifies the date and time of the last update.
- A 'Settings' button  provides quick access to the Dashboard Manager where they can create or edit the Dashboard as well as browse and import Indicator Templates.

Indicator Panels

This section groups and displays Indicators in the Dashboard by Indicator category.

Each panel includes:

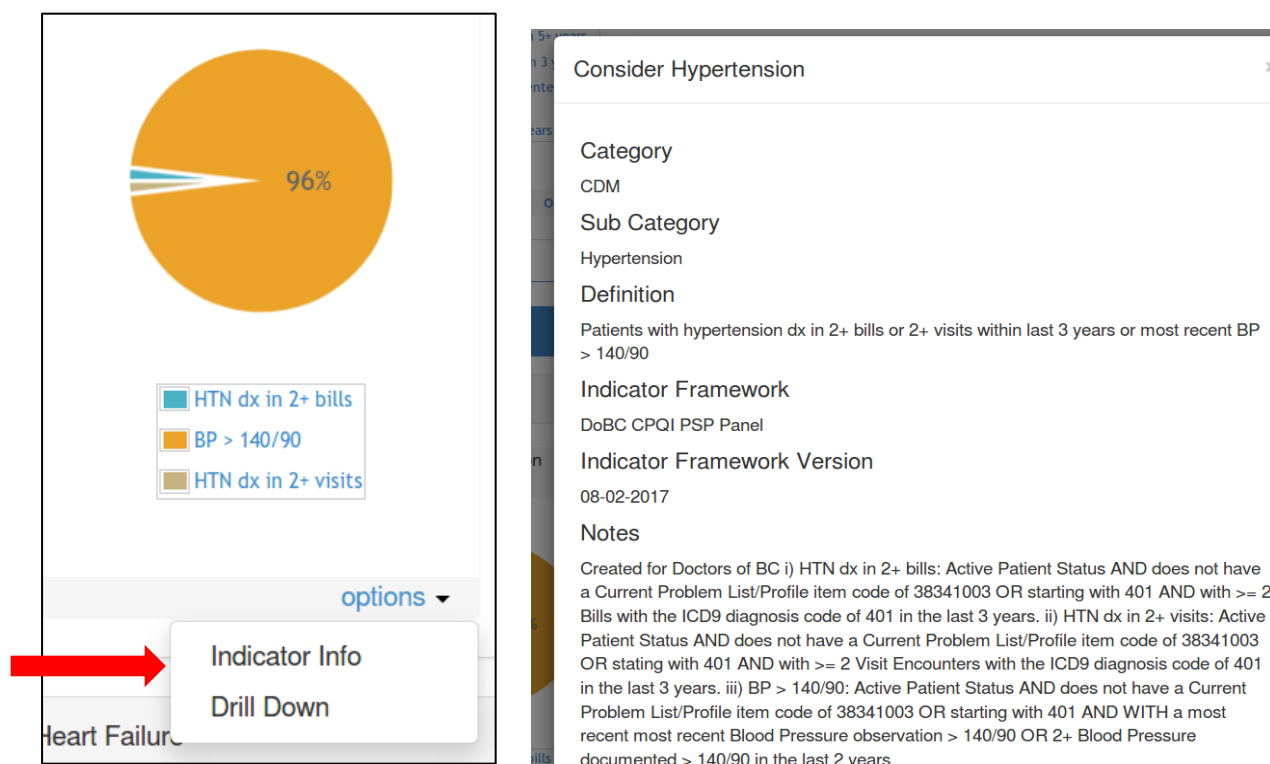
- Pie Chart (with the query results) and Legend
- Category (i.e CDM) and Subcategory (i.e. Diabetes)
- 'Options' dropdown menu containing 'Indicator Info' and 'Drill Down' controls



The results of each indicator query are pulled from the patient data of the physician who is currently logged in to OSCAR.

Indicator Info

- To access the details of each indicator, click the 'Options' button at the bottom of the indicator and click 'Indicator Info' from the dropdown menu.
- In this window, the user will find details including the Indicator definition, the framework from which it was developed and the Indicator framework version, as well as the Indicator query (not pictured).



!	The Indicator Framework Version indicates the date that the Framework Indicator was published. Changes to the 'official' indicators (Provincial) should never be performed. The user must only copy and modify their version of the indicator. The provincial indicator remains and a new indicator under the physician's name is added.
I	Please refer to “Customizing Dashboard Indicators” for more details about adapting indicators and version control.

Drill Down

The Drill Down View is a tabular display of the underlying data of the Indicator outcome and relevant patient information.

- To access the Drill Down table, click the 'Options' button at the bottom of the indicator and click 'Drill Down' from the dropdown menu.

The Drill Down View includes options to:

1. Print a PDF report of the data results or
2. Export the data in CSV format
 - This returns everything in a HTML page. The user can 'File' > 'Save As' .csv file in Excel.
3. View the Indicator details
 - i.e. Category, Definition, Framework, Version and a detailed Query which captures full patient demographic
 - Every column that is shown in the drill down is shown in the query
4. Filtering options (see next section)
5. Assign Ticklers
6. Access patient eChart
 - Each row of patient detail returned in the drill down will link to the patient eChart by clicking on the **Patient ID**
7. Choose the number of entries/patients to be shown on the page
8. Sort on columns
9. Go back to Dashboard Display

9 Dashboard
1 Print
2 Export
3 Details

Hypertension Prevalence

7 Show 10 entries

5 Tickler

All

All

Parameter

Filter

Reset

		8 Patient Id	8 Patient Name	Date of Birth (mm-dd-yy)	Age	Dx System/Code
1	<input type="checkbox"/>	91411010	Kerrick, Kesha	02-23-1958	60	icd9/401
2	<input type="checkbox"/>	92003013	Varuzzo, Annika	03-03-1943	75	icd9/401
3	<input type="checkbox"/>	92202012	Rabjohn, Torrie	11-13-1952	65	icd9/401
4	<input type="checkbox"/>	92307022	Bachinski, Kaitlin	10-24-1997	20	icd9/401
5	<input type="checkbox"/>	92412005	Brancheau, Patrick	06-07-1992	25	icd9/401
6	<input type="checkbox"/>	92503015	Gent, Christena	04-23-2009	8	icd9/401
7	<input type="checkbox"/>	92701014	Schabot, Edris	04-06-1924	93	icd9/401
8	<input type="checkbox"/>	92812010	Burden, Jeri	06-20-2002	15	icd9/401
9	<input type="checkbox"/>	92911005	Miyata, Noble	07-15-1974	43	icd9/401
10	<input type="checkbox"/>	93001016	Lineman, Burt	09-02-1995	22	icd9/401

Showing 1 to 10 of 52 entries

All

All

All

All

Previous

1

2

3

4

5

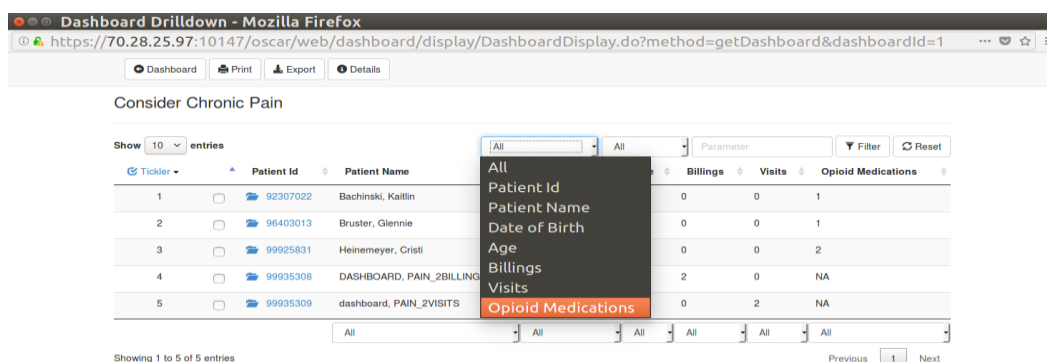
6

Next

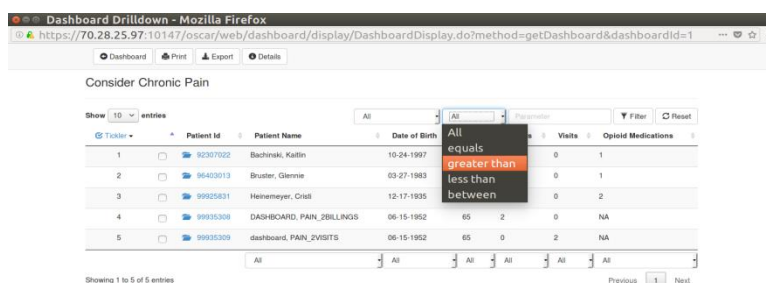
Filter Results

The Drill Down View includes the ability to filter a subset of patients that fall within a certain parameter or condition based on the results of the indicator query. For example, if accessing the Drill Down table of the Consider Chronic Pain indicator, the user will be able to do a detailed search of a particular value (or range of values) of any of the columns using the search filters.

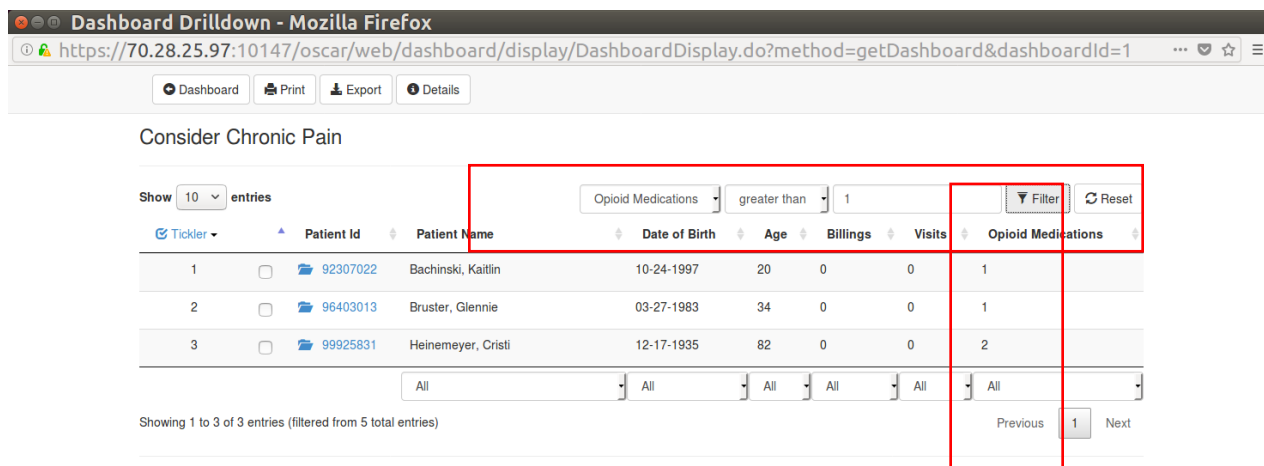
- 1) Choose the column you would like to filter:



- 2) Select the condition:



- 3) Specify the parameters and click the 'Filter' button:



The filtered results will show a list of patients who fall within the range of values that was chosen by the user.

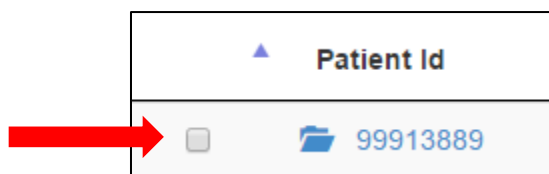



This functionality gives the user more control over what can be filtered to search for patients who may fall outside of the indicator criteria, allowing them to appropriately address those patients using the Tickler (see next section).

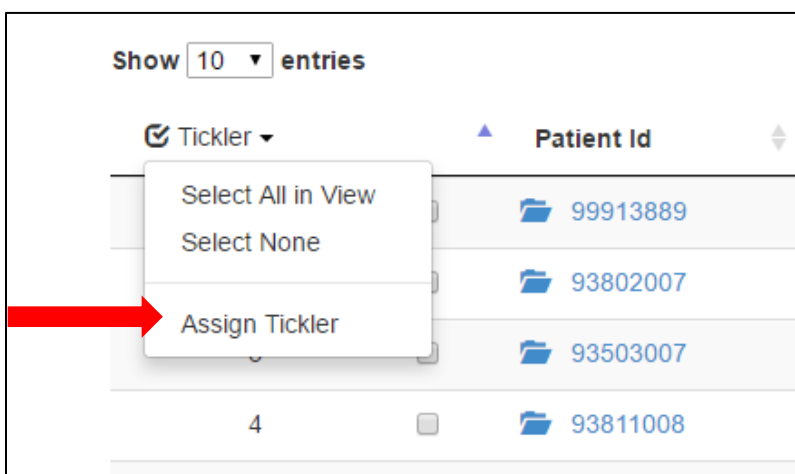
Tickler

Ticklers are used to identify groups of patient files with a specific action. Selection boxes will allow the user to assign selected patients a single Tickler action. The following instructions explain how to create a tickler.

- 1) Choose the patient that is to be assigned the Tickler action by clicking the selection box next to the Patient ID:



- The user can assign a single tickler to several patients in the Drill Down table by clicking multiple selection boxes manually or clicking 'Select All in View' in the Tickler drop down.
- 2) Go to the  **Tickler** button at the top of the table and select 'Assign Tickler'



- 3) In the pop-up window, the user can:
 - i. indicate the *Action*,
 - ii. *Assign* to a clinician or other staff,

- iii. specify *Priority* level, *Service Date* and *Time*,
 - iv. include a *Message* from a dropdown list of common options
 - v. Add a comment.
- 4) Click 'Save'.

Assign Tickler

Assign this Tickler action for each of the selected patients.

Action:
Follow-up Billing

Assign to:
oscardoc, doctor

Priority:
Normal

Service Date:
09-09-2016

Time:
--:-- --

Message:
Msg on ans. mach. to call clinic

Second reminder.

Save Close



The Tickler cannot be saved if required fields are empty.