OSCAR EMR Training Collaborative

Quick Start Guide – OSCAR EMR Physician Dashboard

(BC Version)

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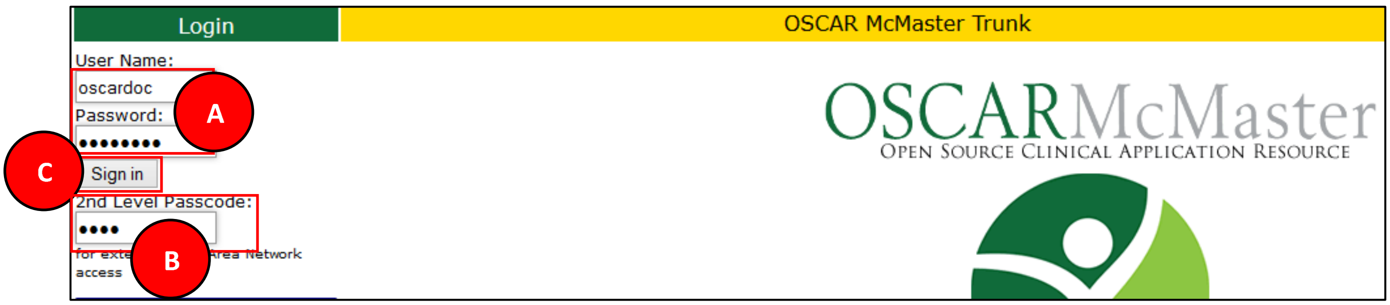
Access to OSCAR

Logging In

The following instructions explain how to login.

1. Enter the web address for OSCAR EMR in your browser.

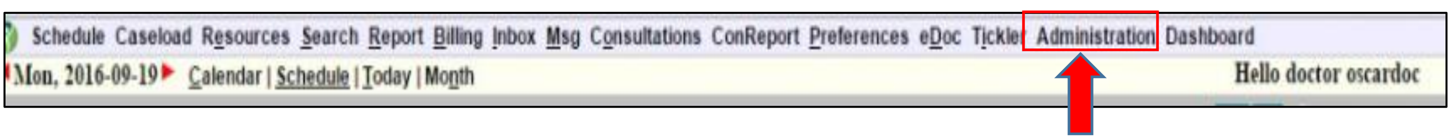
2. Type your username and password (A) > Type your second level passcode if prompted (B) > Click the Sign In button (C)



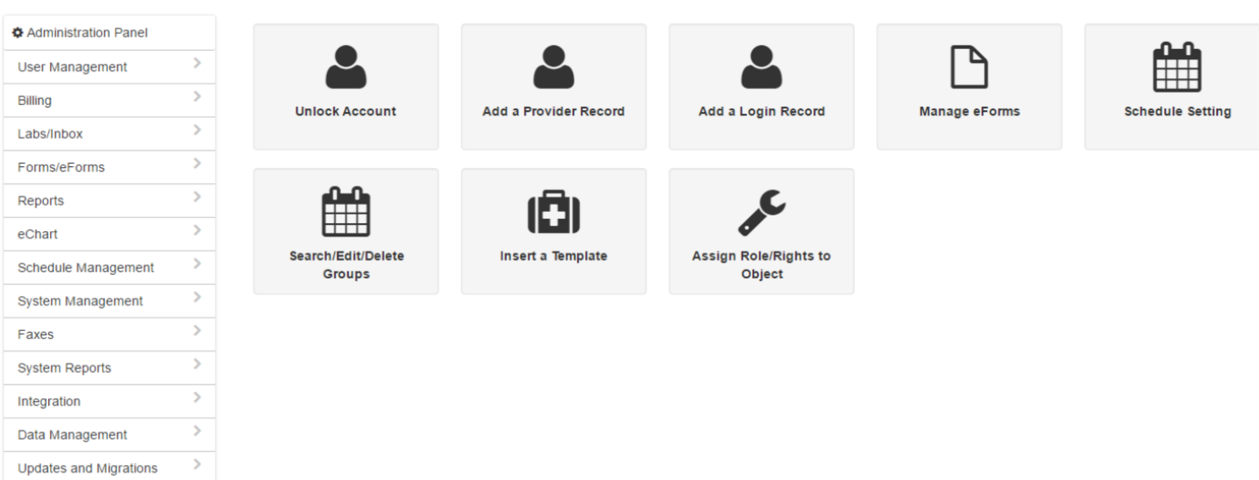
OSCAR Administration

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.

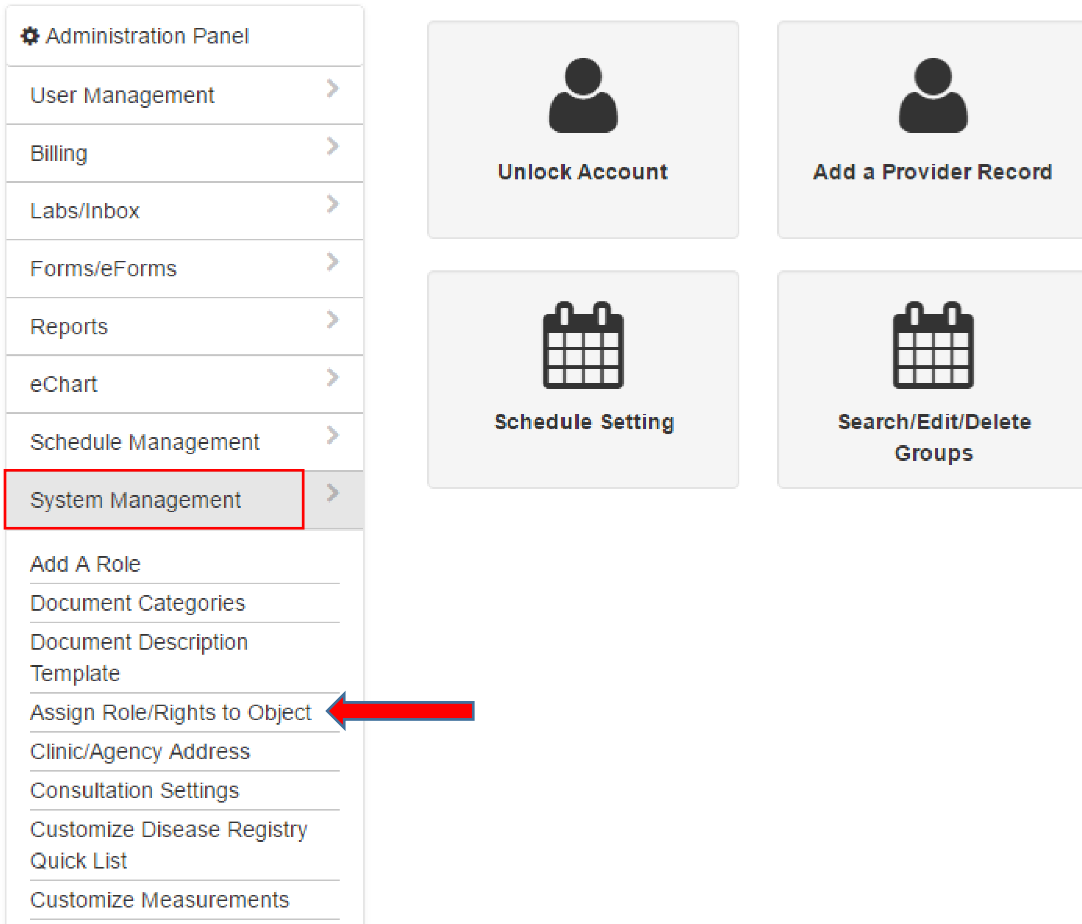


This button launches as a pop-up window with the Administration Panel containing control items of various categories. The Administration Panel is where users with an assigned 'Admin' role can adjust, add or edit system settings for the entire OSCAR system of a clinic.



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:

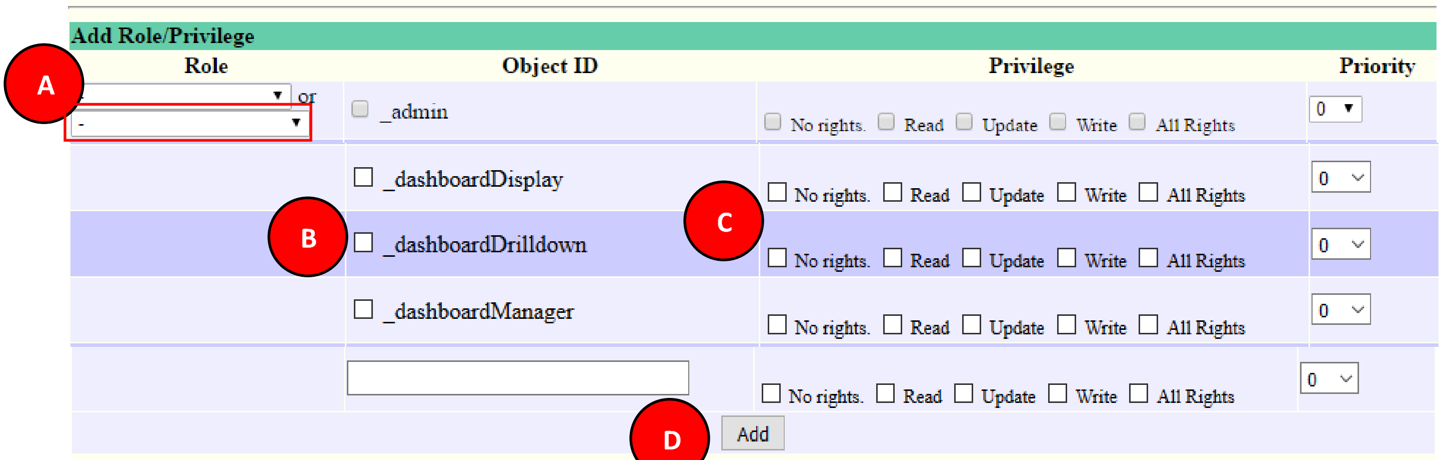
1. Scroll down to the ‘Add Role/Privilege’ section of the list (A) > Locate the role name from the **second** drop-down list. (Select the role of doctor to configure access to the dashboard for all doctors.)

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 (D).

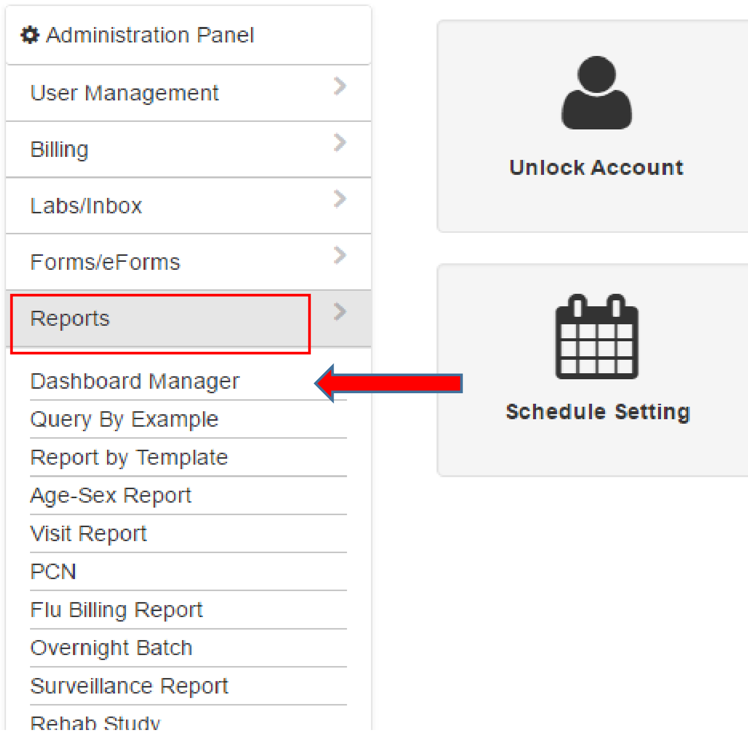


!	Users must allow pop-up windows in their browser settings to ensure the Administration Panel can launch.

Dashboard Manager

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

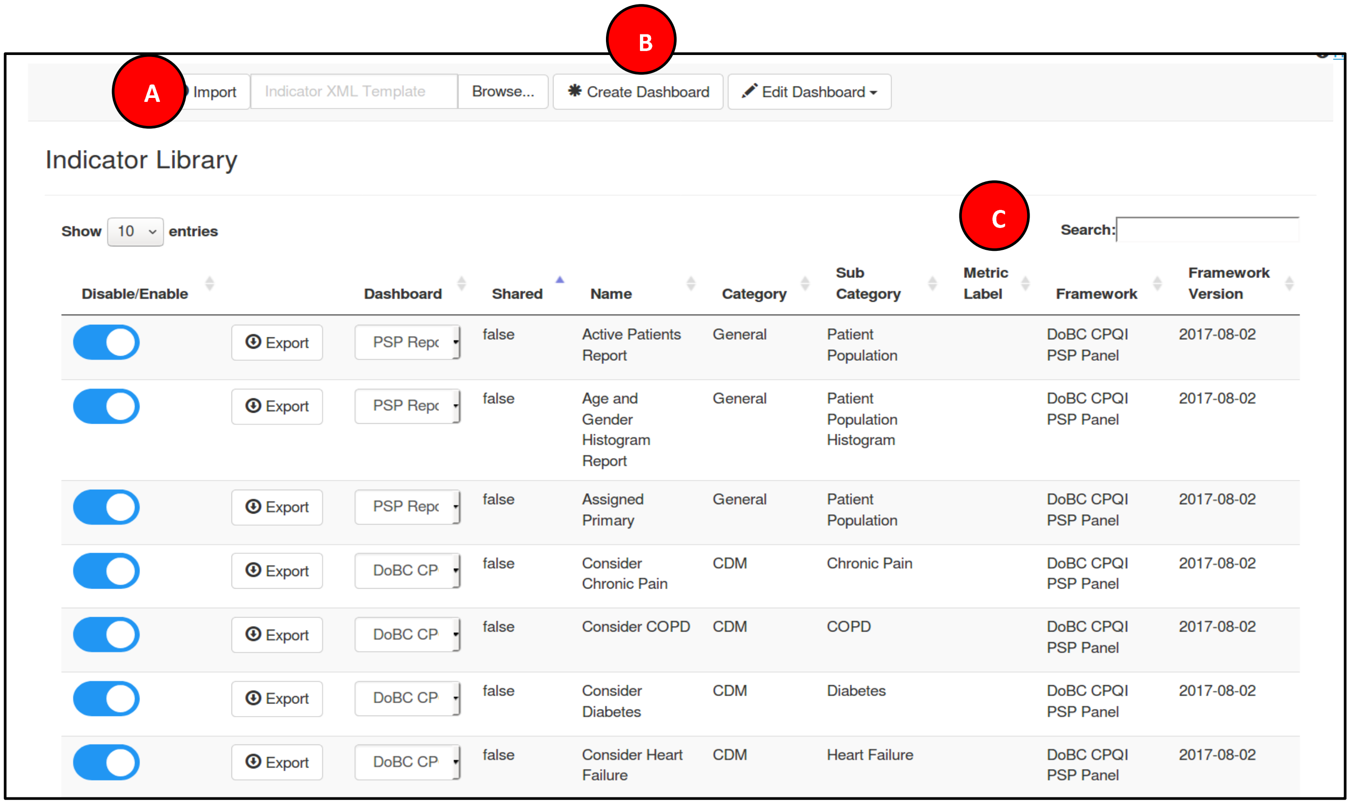
- To get to the Dashboard Manager, click '*Reports'* then '*Dashboard Manager'*. The Dashboard Manager is meant for uploading and managing active Indicator XML Templates.



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.)

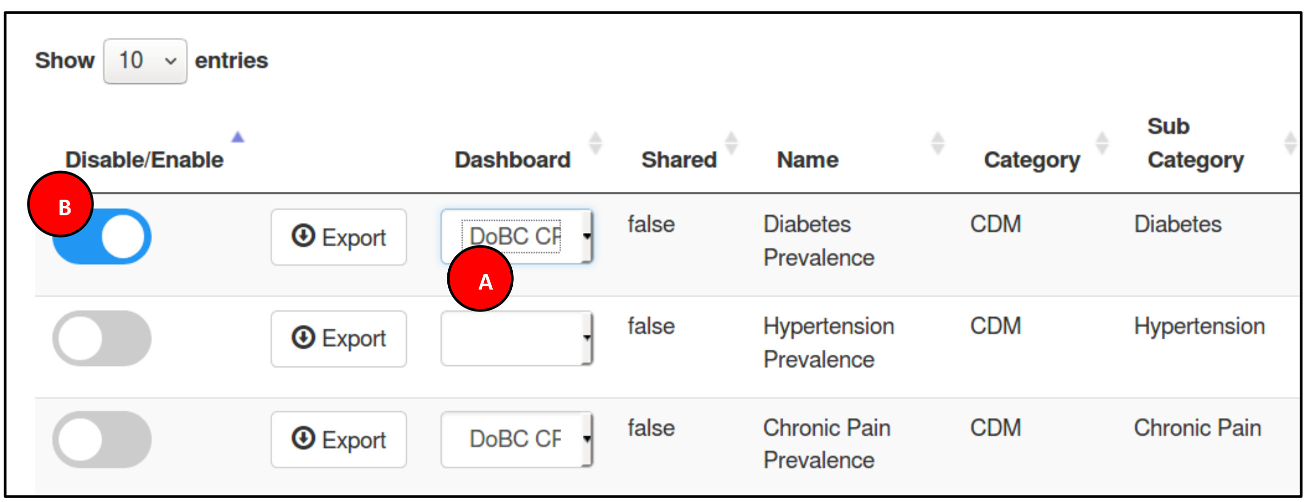
The Dashboard Manager allows the user to:

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



Assigning Indicators

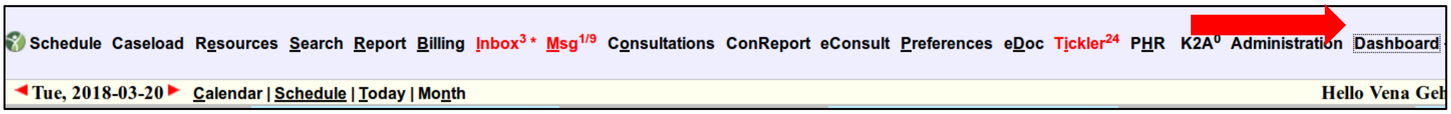
- To assign an indicator, choose the DoBC CPQI PSP Panel Dashboard from the dropdown list of available Dashboards (A) in your EMR and activate the indicator by clicking the toggle button on the left (B).



!	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.

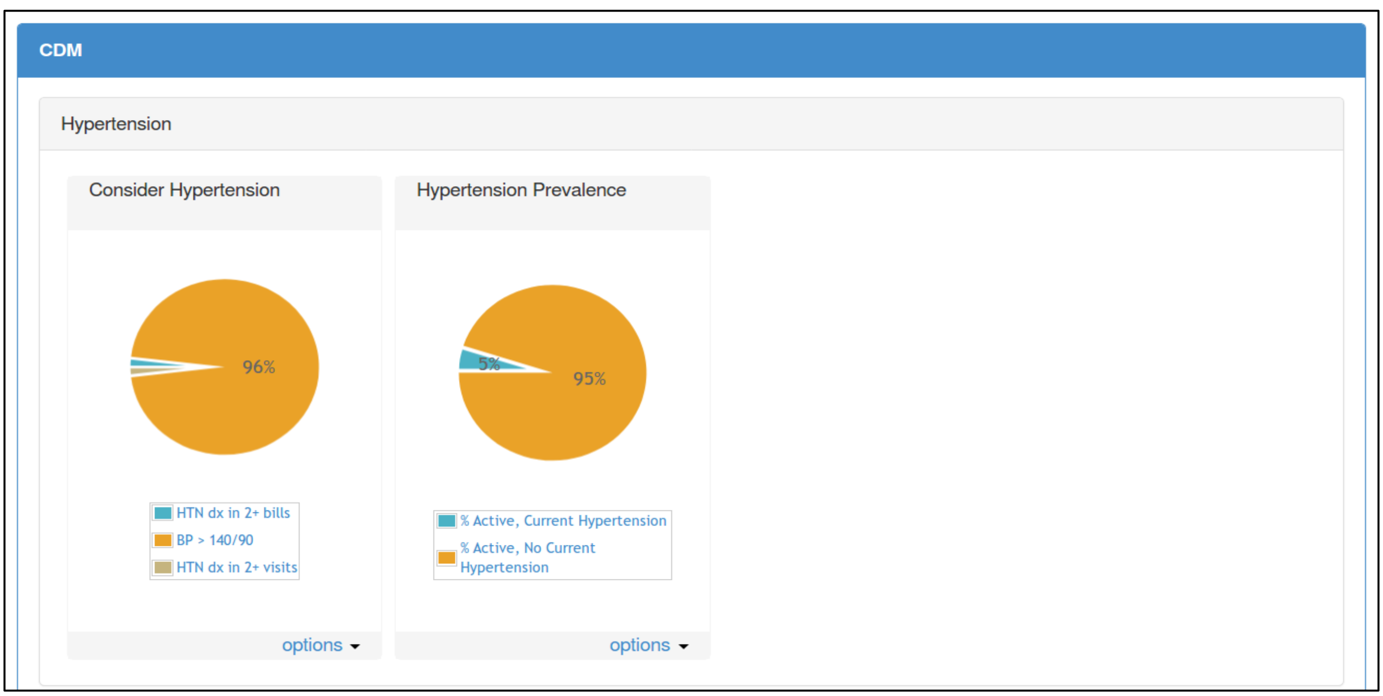
- A refresh button allows the user to request a live update of the indicators when needed, and specifies the date and time of the last update.
- A ‘Settings’ button provides quick access to the Dashboard Manager where they can create or edit the Dashboard as well as browse and import Indicator Templates.

Indicator Panels

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

Each panel includes:

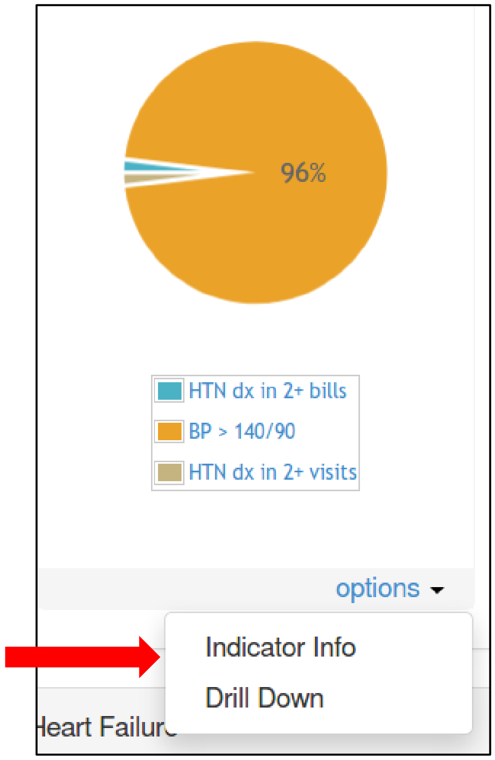
- Pie Chart (with the query results) and Legend
- Category (i.e CDM) and Subcategory (i.e. Diabetes)
- ‘Options’ dropdown menu containing ‘Indicator Info’ and ‘Drill Down’ controls

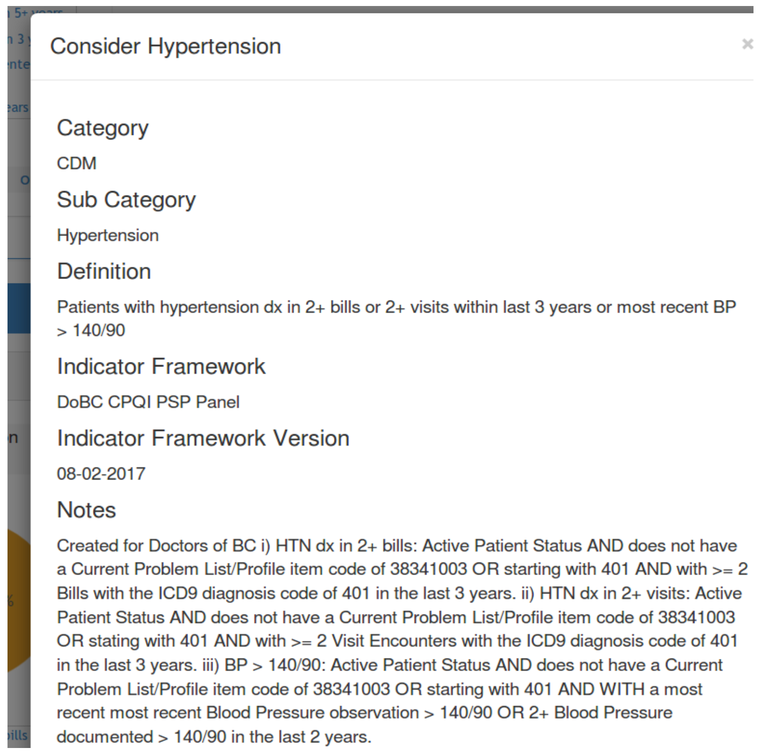


☑	The results of each indicator query are pulled from the patient data of the physician who is currently logged in to OSCAR.

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.
▯	Please refer to “Customizing Dashboard Indicators” for more details about adapting indicators and version control.

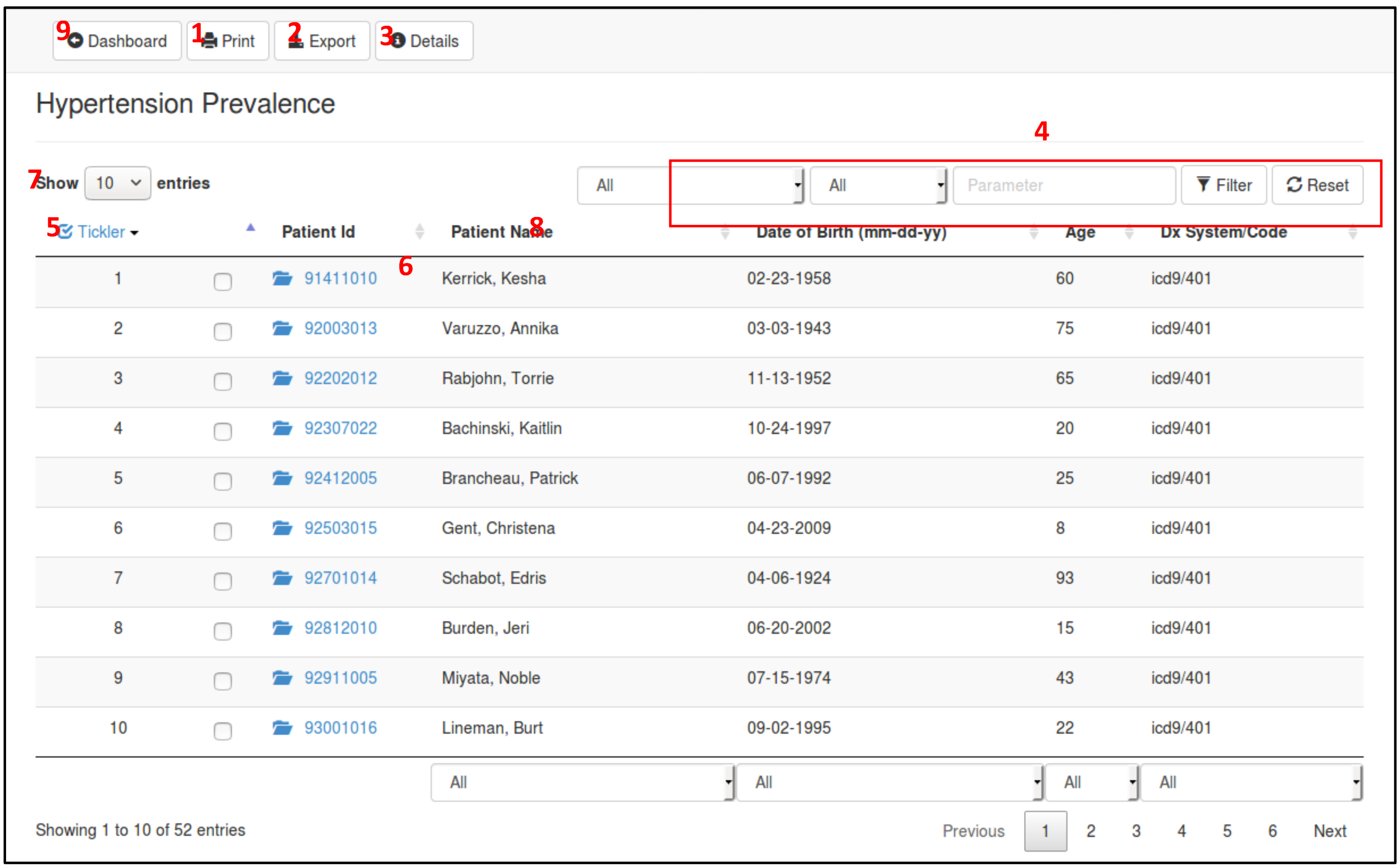
Drill Down

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:

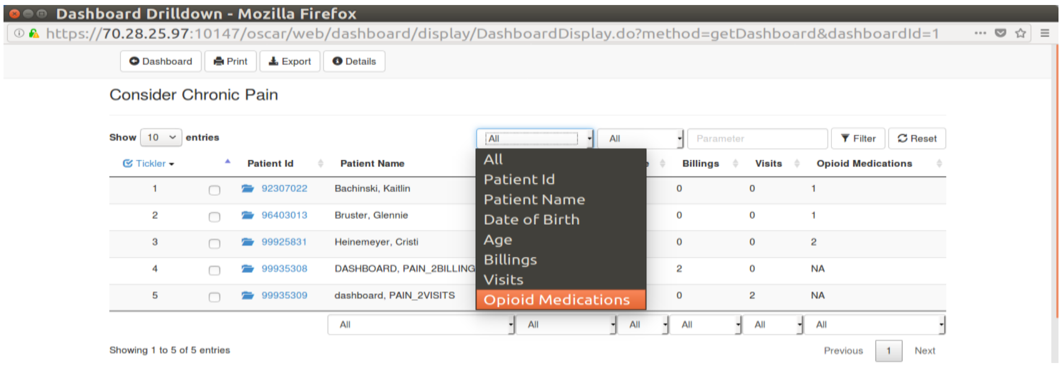
1. Print a PDF report of the data results or
2. Export the data in CSV format
   - This returns everything in a HTML page. The user can ‘File” > ‘Save As’ .csv file in Excel.
3. View the Indicator details
   - i.e. Category, Definition, Framework, Version and a detailed Query which captures full patient 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



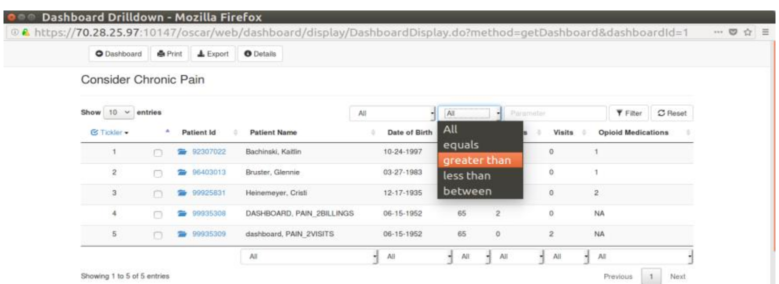
Filter Results

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.

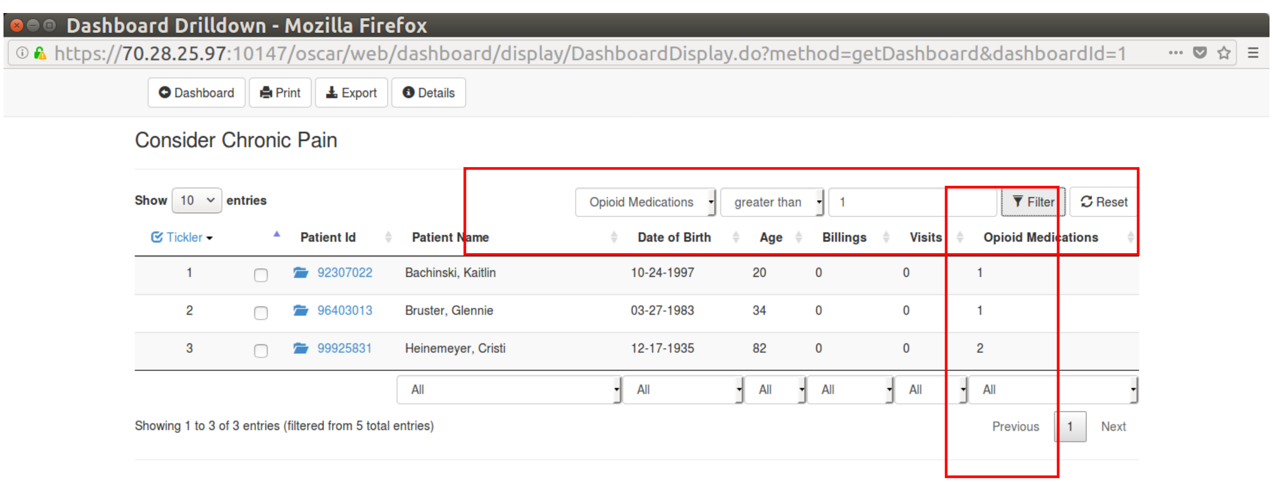
1) Choose the column you would like to filter:



2) Select the condition:



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



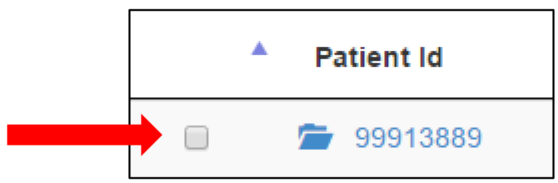
The filtered results will show a list of patients who fall within the range of values that was chosen by the user.

> 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

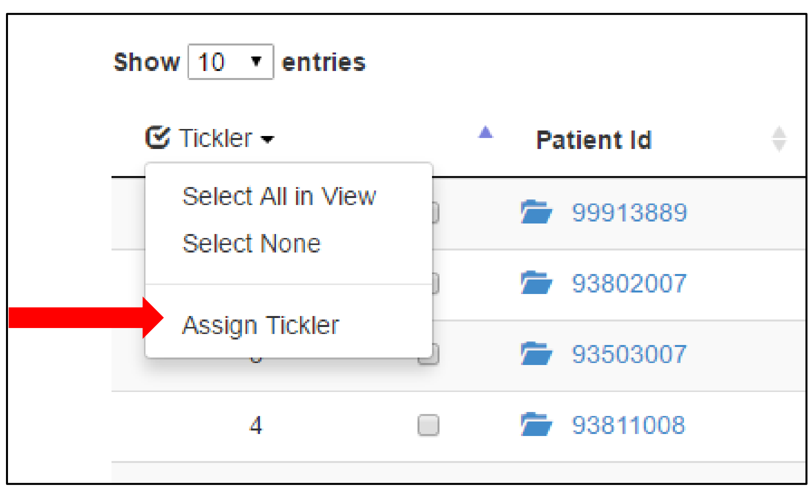
Ticklers are used to identify groups of patient files with a specific action. Selection boxes will allow the user to assign selected patients a single Tickler action. The following instructions explain how to create a tickler.

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.

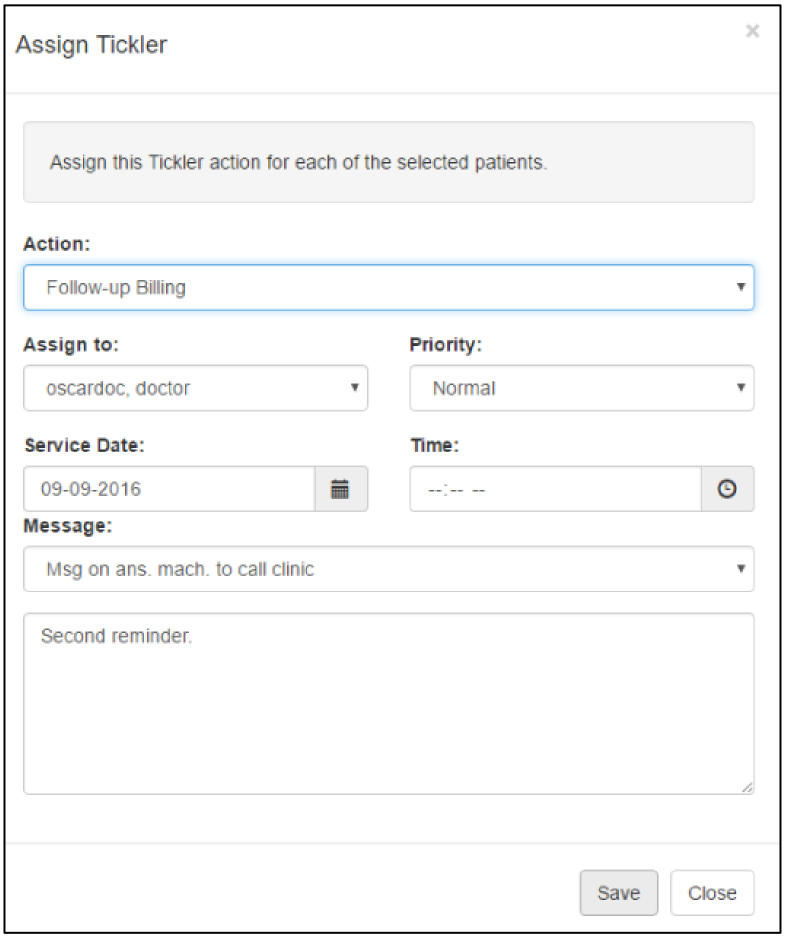
2) Go to the Tickler button at the top of the table and select 'Assign Tickler'



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’.



!	The Tickler cannot be saved if required fields are empty.