Administration Reference Guide

Administration Overview

The Admin module helps you set up your Radekal Clinical system to match the requirements of your practice:

- Describe your clinic in detail
- Add and customize each user from providers to front desk personnel
- Connect to Practice Management System (PMS), labs, and pharmacies
- Set up standard procedures

Once your clinic is up and running on Radekal, Admin can help you manage:

- Security
- Patient records
- Reports
- User Information
- Labs

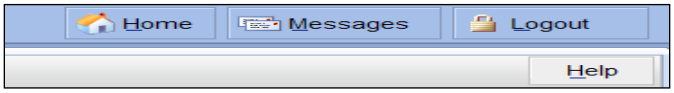
After logging in to the Admin module, you will see the page below – the Radekal Administrator Home Page. This page contains three headers, Tasks, Communications and Patient Management, covered in turn in this document. In this section, we will cover the Tasks portion of the page, as Messages is covered in the Radekal Docpad reference guide.

The Tasks section includes the features the Administrator can change about the Radekal applications and the preferences for individual users.

- **Clinic Information**: Allows the Admin to enter all important information regarding the clinic such as name, address, phone numbers, etc.

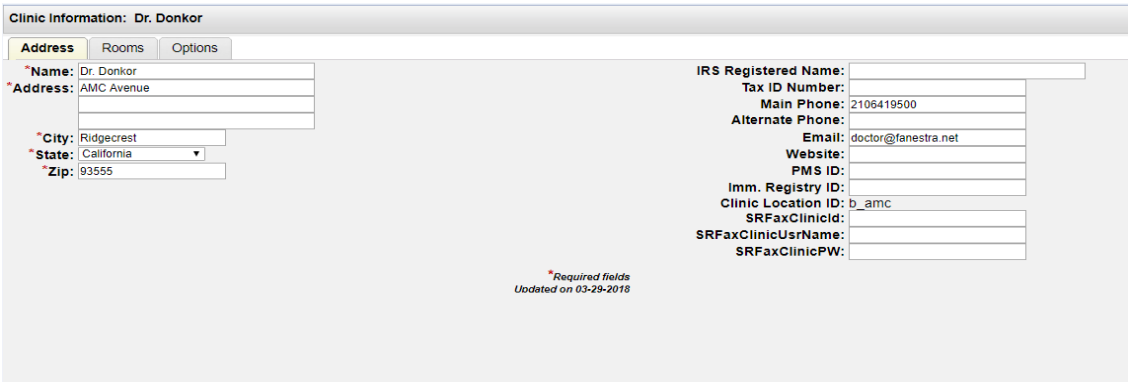
- **User Information**: Allows the user to enter or edit all the required information needed to allow a user the ability to access and use Radekal.
- **Lab Settings***:* Allows the user to edit the setting for the lab or labs that service your clinic.
- **Lab Insurance Settings**: Allows the user to link the lab to the PMS.
- **Nurse/Front Desk Order Settings***:* Allows the Admin user to choose what orders a specific employee is allowed to complete.
- **Prevention Defaults***:* Allows the Admin user to edit the Prevention parameters for all patients.
- **Clinical Decision Support Rules:** Allows the Admin user to define clinical decision support rules. CDS rules can be use to create reminders for certain conditions.
- **Pharmacy Defaults***:* Allows the user to enter pharmacies into Radekal. These pharmacies will be visible under all patients.
- **Contact Management**: Allows the user the enter their reachable information.
- **Printers and Faxes***:* Allows the user to enter the Radekal CUPS IDs and locations for all printers located in the clinic. The only option the user has for "Faxes" is entering the number 9 if it is required to send faxes.
- **Billing***:* Allows the user to set the time they want the Radekal system to begin batch printing of all patient encounters that day. Also, the user can manually enter the CPT codes for venipunctures involved with the Phlebotomist.
- **Patient List:** Allows the user to generate a list of patients based on various criteria.
- **Canned Texts***:* Allows the user to enter selected canned texts for Docpad, Nursepad and Front Desk
- **Security**: Allows the administrator to set password length and inactivity logout
- **References**: Allows the user to enter practice-related web page links to DocPad and NursePad such as WebMD or other medical reference sites.
- **Reports**: Allows the user to manually view all current batch reports before they are printed.
- **Syndromic Surveillance**: Allows the user to generate syndromic report to notify state or federal agencies of any situation needing attention, such as an outbreak of disease or multiple occurrences of radiation poisoning.

The **Admin** module has a Help menu built in. If you do not understand the different fields on a page in Admin, you can click the Help button in the top right corner of the page. When you select the button, a launch window will show information regarding the page you are current viewing.

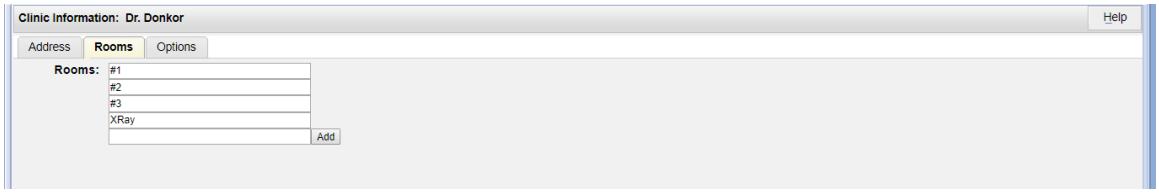


Clinic Information

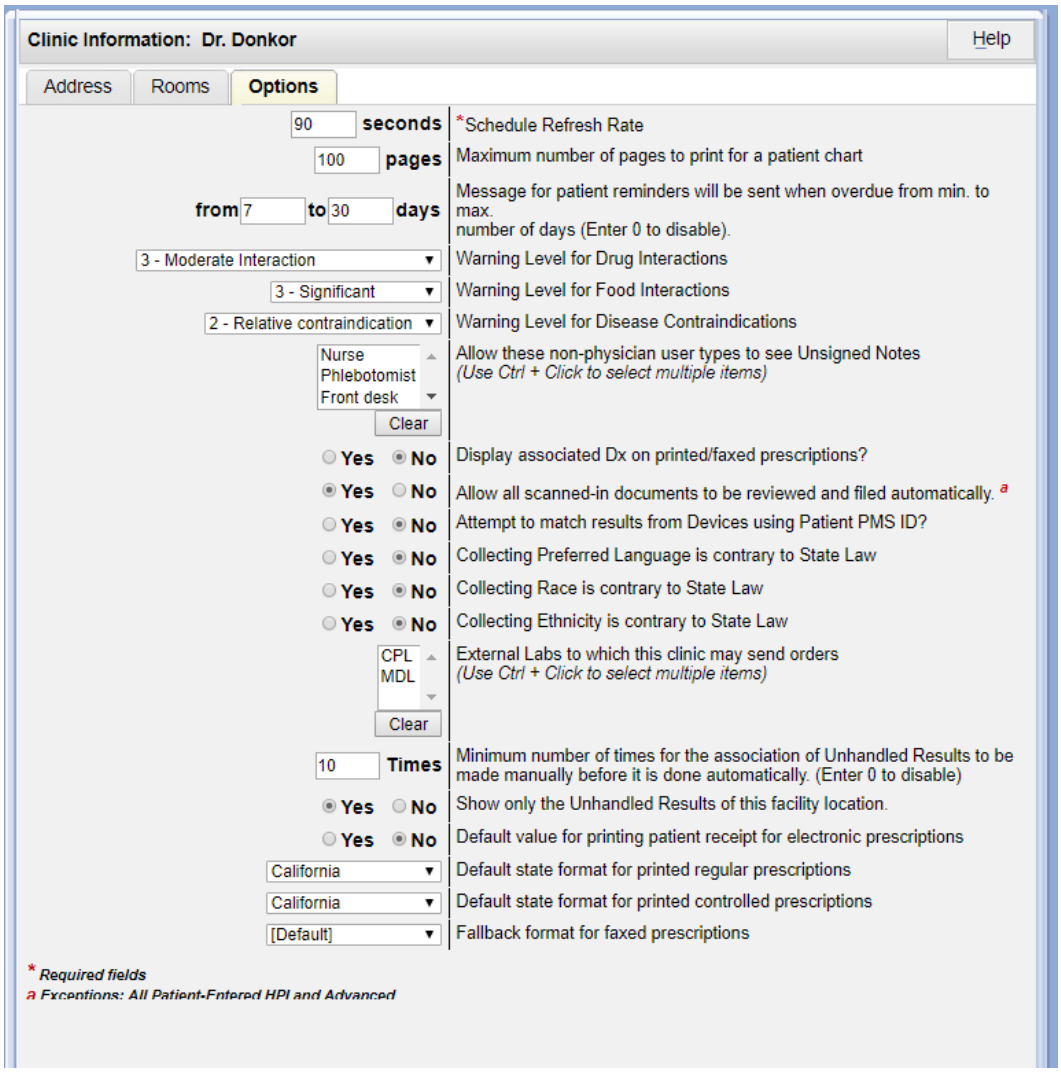
These are the 3 basic tabs that reference the clinic. The **address** tab is basic information about the clinic. This is the information that will print on prescriptions and other documents printed from Radekal. The red asterisk indicates the required fields. Your Practice Management System (PMS) will have an ID for that clinic.



The **Rooms** tab is where you set up your patient rooms. This is used to track you patients location. The room designation can be up to four numbers or letters, such as 1, 2, 3, OBGY, ENT, etc. The Administrator can add as many rooms as they want by using the Add button.



The **Options** tab is important. This is where you can set up many of the application defaults.



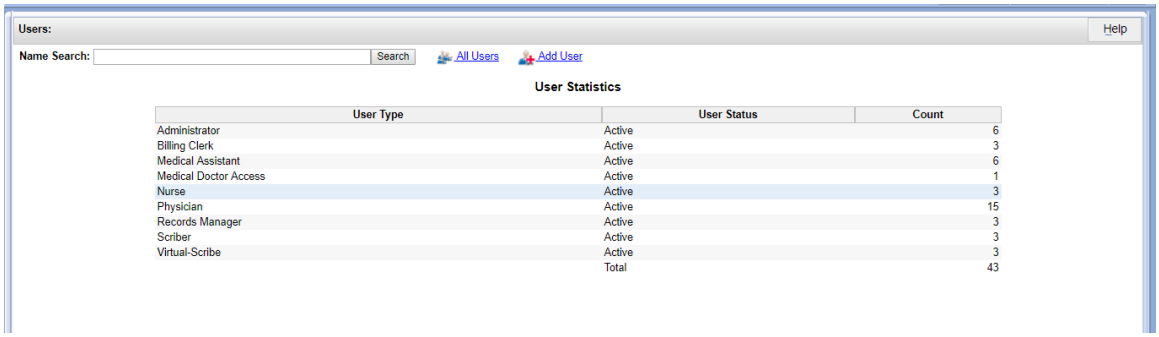
- The refresh rate is the number of seconds until the schedule page should refresh itself after being left idle. Minimum interval is 60 sec, and can be increased by intervals of 30 sec.
- You can set a maximum number of pages to print for a patient chart.
- Drug interaction warning levels are: major, moderate, minor, or insignificant. In general, at what level do you want to warn the physician of the drug interactions. For example. A stomach ache could be minor interaction.
- Food interaction warning levels range from Minor significant to Most significant to warn about interactions between medication and foods.
- Disease interaction warnings are: absolute contraindication, moderate contraindication, contraindication warning. Some medications are not appropriate for a given disease.
- Unsigned Notes can be viewed by non-physicians, just select the users.
- Associated Dx can appear on the printed or faxed prescriptions.

- Scanned-in documents can be automatically reviewed and filed in the patients' charts. If disabled, the users must manually review and file the scanned documents. Documents which are pending review may be accessed by clicking on the "Documents to Review" link from the Docpad or Nursepad homepage(if Nurse review of documents is enabled). This setting does not apply to test results.
- Attempt to match results from Devices using Patient PMS ID
- External Labs: You can specify which labs your clinic wants to send order to. You can choose more than one.
- Minimum number of times for association of Unhandled Results to be made manually before it is done automatically. (Enter 0 to disable.)
- Show only the Unhandled Results for this facility location.
- Default value for printing patient receipt for electronic prescriptions.
- Prescriptions faxed from Radekal will normally follow the format of the state to which you are faxing.
- If we don't support a particular state's format, then the format used will be the one chosen as the fallback format.

User Information

The User Information page allows the Administrator to enter the information regarding all users of the clinic's Radekal system. The first page shows the total number of users based on type, such as Administrator, Billing Clerk, Physician, Records Manager.

In this section, the user can create a new user, change the status of the user and set defaults for individual users. It also allows the administrator to view/modify information about a selected user. It allows the reset of a failed login in case the user was locked out.

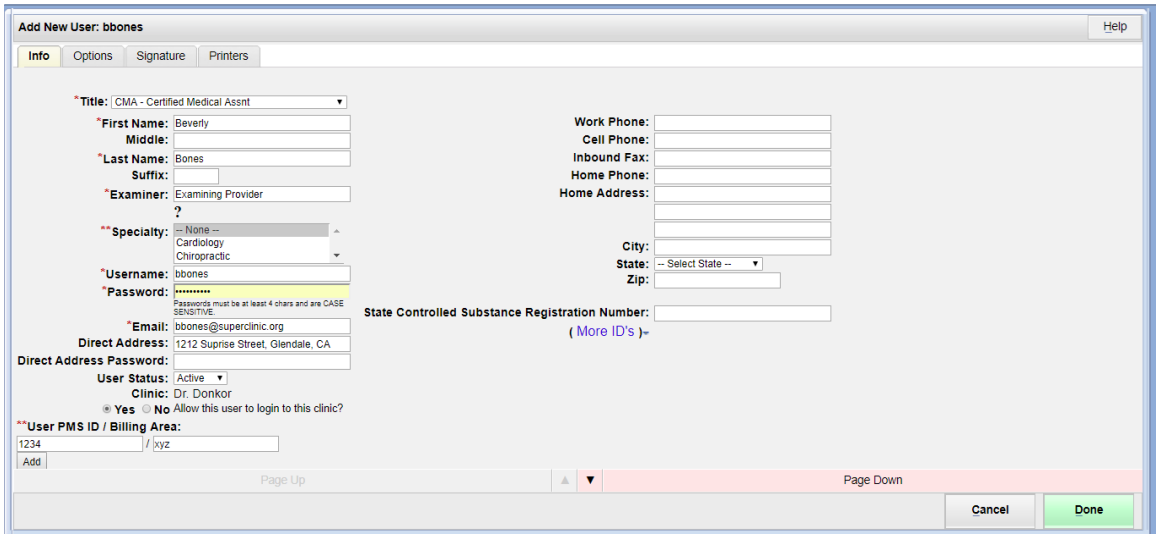


User Type	User Status	Count
Administrator	Active	6
Billing Clerk	Active	3
Medical Assistant	Active	6
Medical Doctor Access	Active	1
Nurse	Active	3
Physician	Active	15
Records Manager	Active	3
Scriber	Active	3
Virtual-Scribe	Active	3
	Total	43

Note: When you make any change to a user profile, you must completely log out of the Admin module for the changes to take effect.

The All Users button at the top of the page will list all the users who have been added to the Radekal along with their status and the last date their entry was modified.

Add a new user by clicking on the Add User icon.



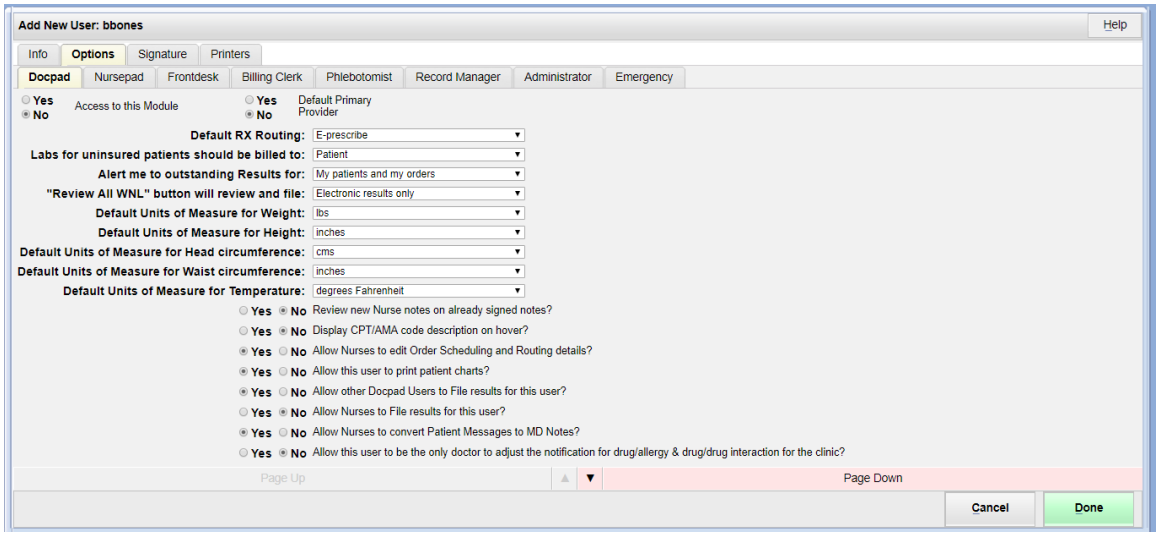
The **Info** tab is where you input the required information: first name, last name, title, user name and password. Make sure the user name is used only once. The password can be the same for different roles but not user name. The 'User PMC ID' is required for Docpad users. It's the ID in the PMS within the clinic, and you can add more.

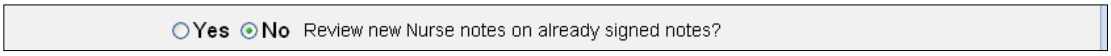
- The Title is where the Administrator selects the user's professional designation. The designation chosen in this field also determines what type of Radekal Module the user will use. For example, Physician, Nurse Practitioner, and Physician Assistant are all Docpad users, while RN, and LVN are Nursepad users.
- The Direct Address and password are used for access to the patient portal, used for secure communication between physicians at different clinics.
- The Users PMS ID/ Billing Area information links this user to the PMS.
- The State Controlled Substance Registration Number and other IDs that can be entered by clicking on Other IDs are only needed for physicians or other users who write prescriptions.

The **Options** tab is different for each user role.

For a physician:

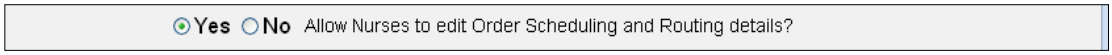
- Default RX routing: the default routing for a prescription when the Docpad user clicks "Sign" on the Rx pad. If sent to Nurse, it will create a new note order for the nurse who is assigned to handle Rx Orders for this user.
- Lab orders for uninsured patients can be billed to the clinic or the patient.
- A physician can receive "Outstanding Results" from their own patient as well as their own orders. Or just their patients, or just their Orders.
- "Review all WNL" (within normal limits) will send the files to the patients' charts automatically. As a good practice, if the document has to be approved by the physician, physically take the document to get approved.
- Select appropriate units of measure for the clinic.



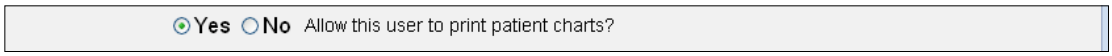


- If this is enabled, this physician can still receive any nurse comment added from the 'Current Nurse Note' associated with the same appointment. This will appear as a new 'Document to Review' for this user. be included in the 'Nurse Note' only.

- This is set in place so the user can quickly see the codes.



- This allows a nurse to make changes to an order created by this user.

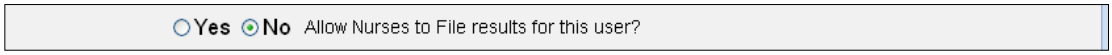


- The patient chart can will be printed to this user's printer settings.

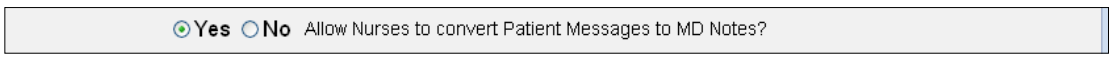
- If enabled, other Docpad users can file test results created by this user. The filed results will appear under the appropriate tab on the patient's "Test Results" page. It will no longer appear on the patient's face sheet. If disabled, no other Docpad user can file this user test results. The results will appear on the patient's face sheet under the "Unreviewed" tab of the "Test Results" page and on the user's list

of "Test to Review".

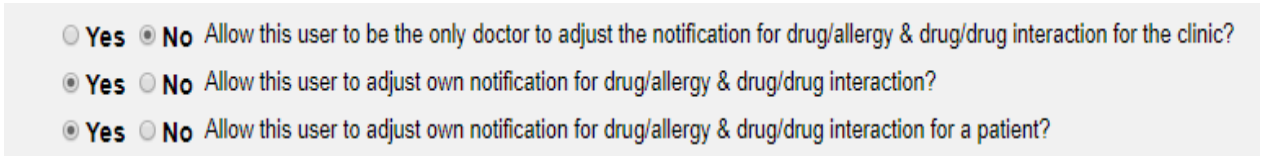
- This gives the nurse permission to sign off on this user's ordered results



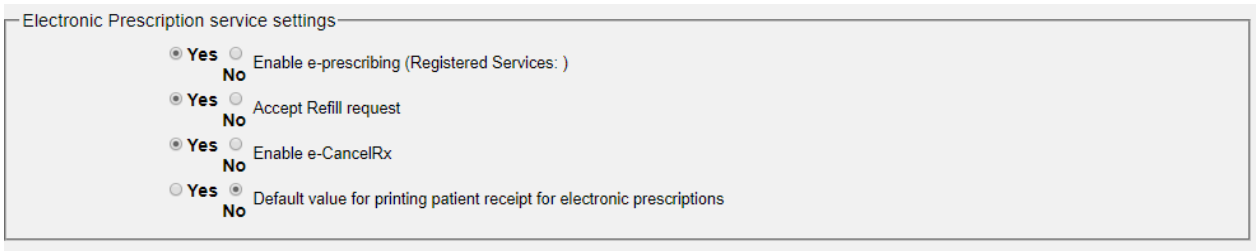
- If enabled, a nurse can convert a note created by other staff members as medical note that will be saved in the patients chart.



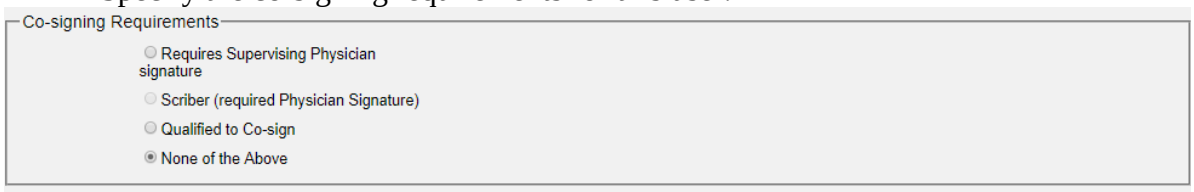
- Specify how this doctor is allowed to adjust drug/allergy/food/disease interactions.



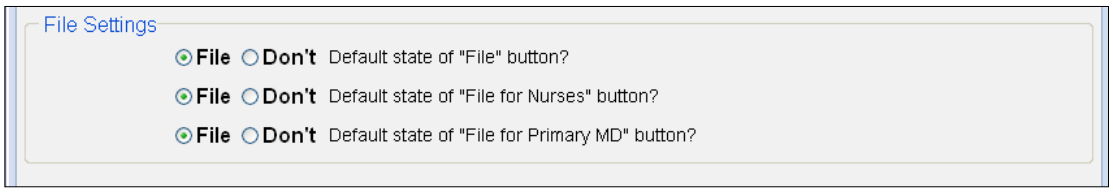
- Specify eRx setting for this user.



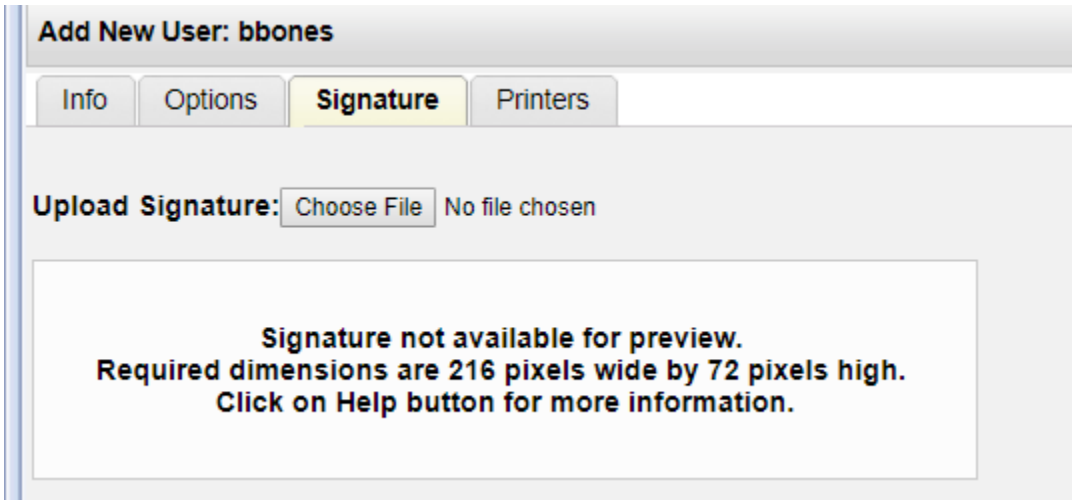
- Specify the co-signing requirements for this user.



- These are the default states for the file button in Docpad.

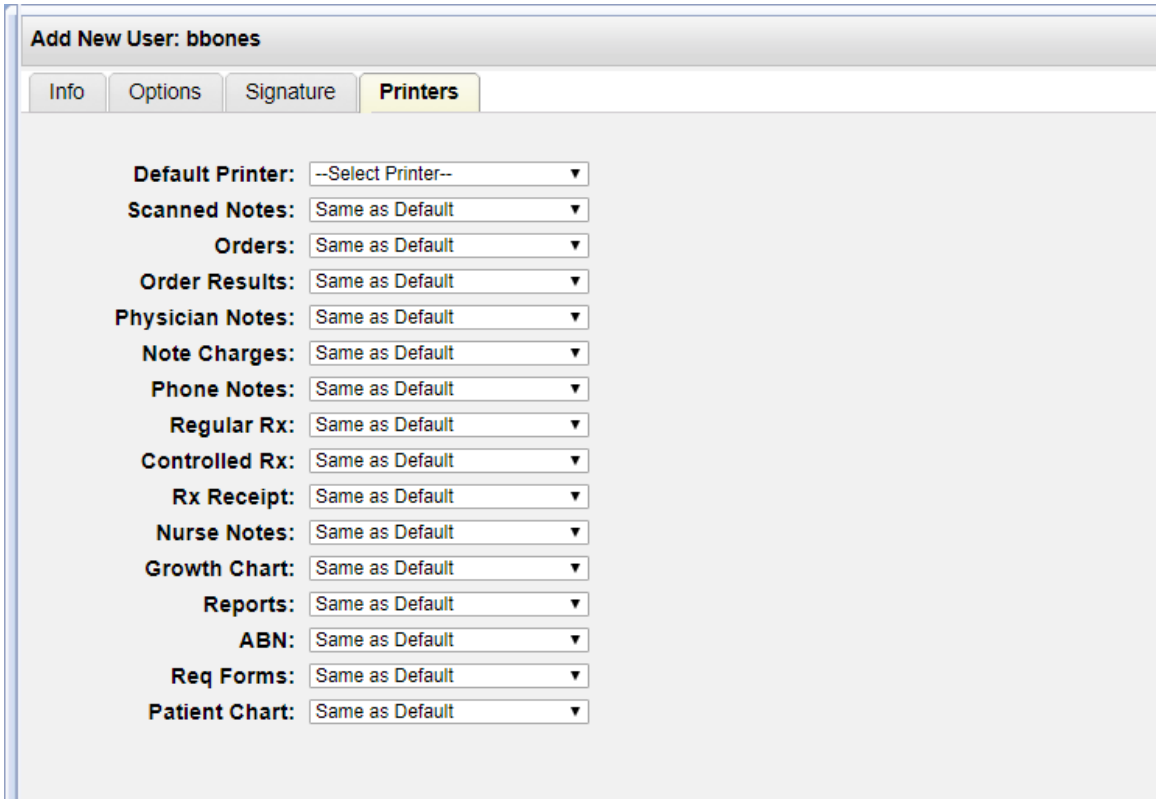


The **Signature** tab allows this user to have a personal signature on any signed note.
This is a scanned image with the following dimensions.
216 pixel wide by 72 pixels high.



Signatures are only necessary for providers. The signature only prints on Docpad notes. It is not printed on prescriptions.

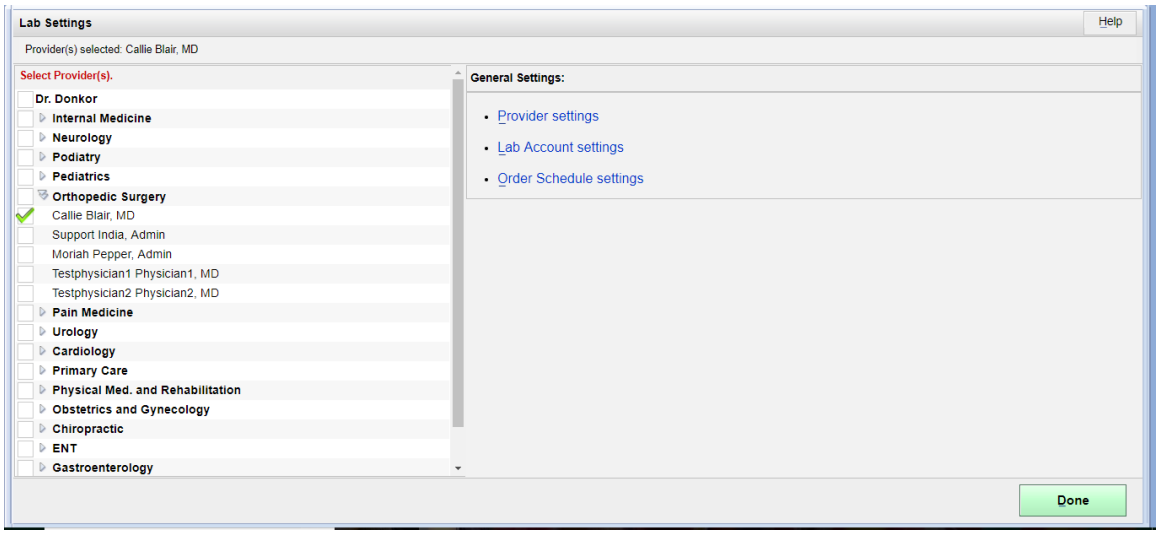
The **Printers** tab gives this user access to override the clinic's default settings. There has to be a default printer set up for every user to be able to print.



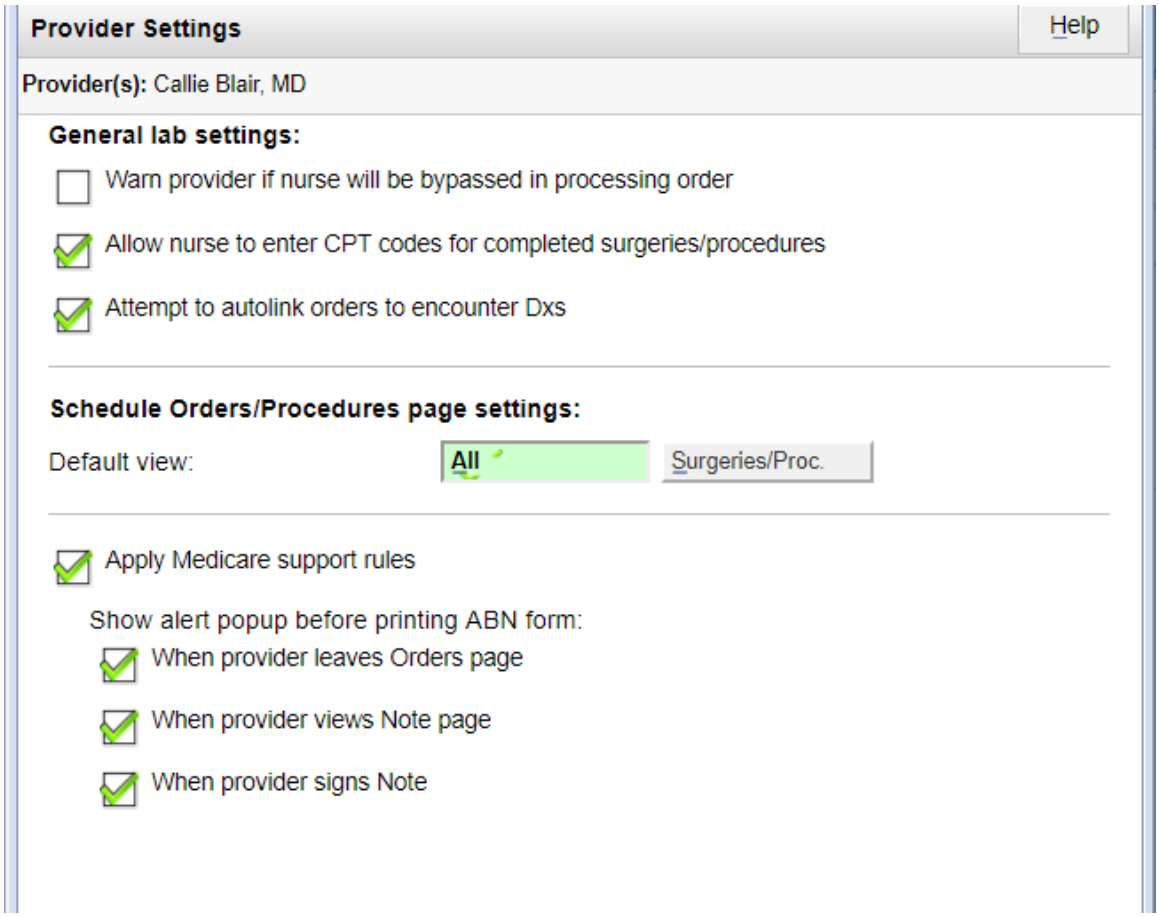
Lab Settings

These settings will allow you to enter account information for external vendor labs, as well as enter default scheduling and routing details for lab orders.

- The administrator can check the box to edit the settings for a whole group of providers, or click the triangle to select specific providers.



The **Provider Settings** section is set to specify General Lab settings, Schedule Orders/Procedure page settings and Medicare Support rules. This section gives the ability to Autolink orders to encounter Dxs, allows nurse to enter CPT codes for completed surgeries/procedures. It also applies the Medicare support rules.

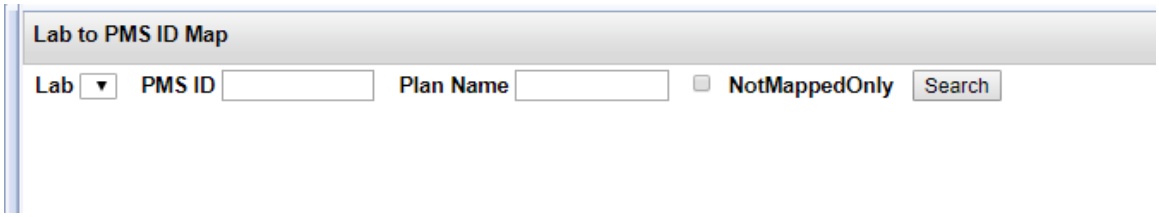


The **Lab Account Settings** section is used for setting up accounts for the chosen providers. These providers were chosen in the Clinic Information section. This is required to send lab tests to the lab that provides processing services for the clinic.

- Currently under development

The **Orders Schedule settings** section is used to set up the default states for order scheduling and processing per CPT code or per order type. The Docpad user can override these settings.

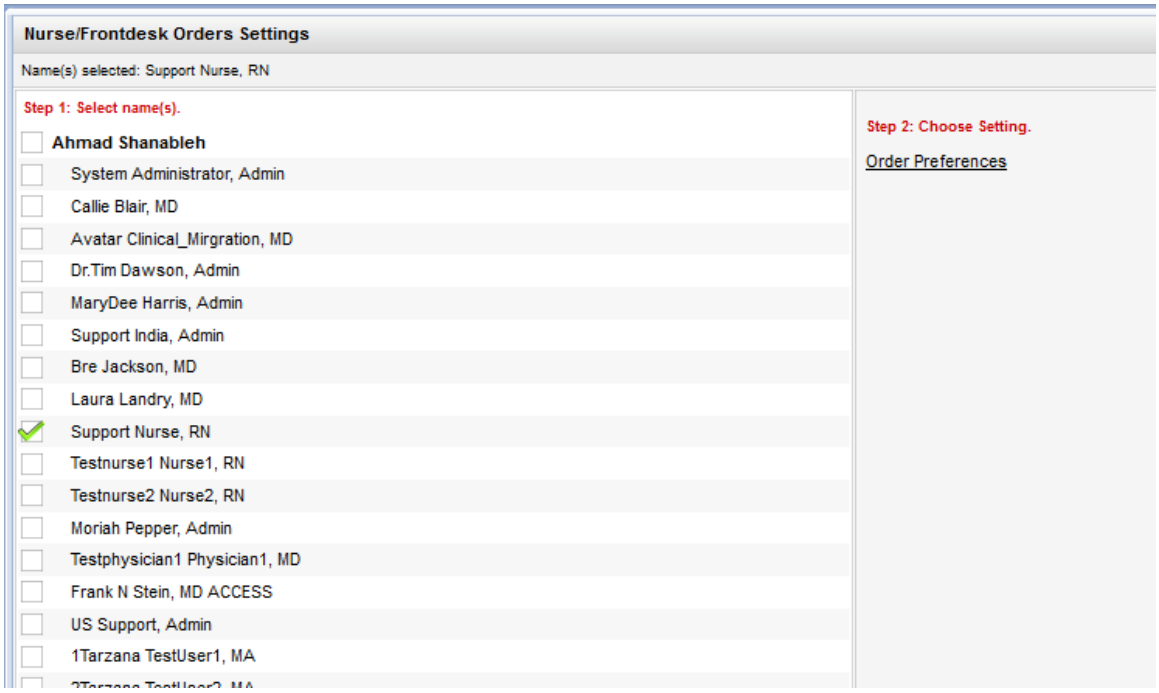
Lab Insurance Settings – maps CPT code to Order name

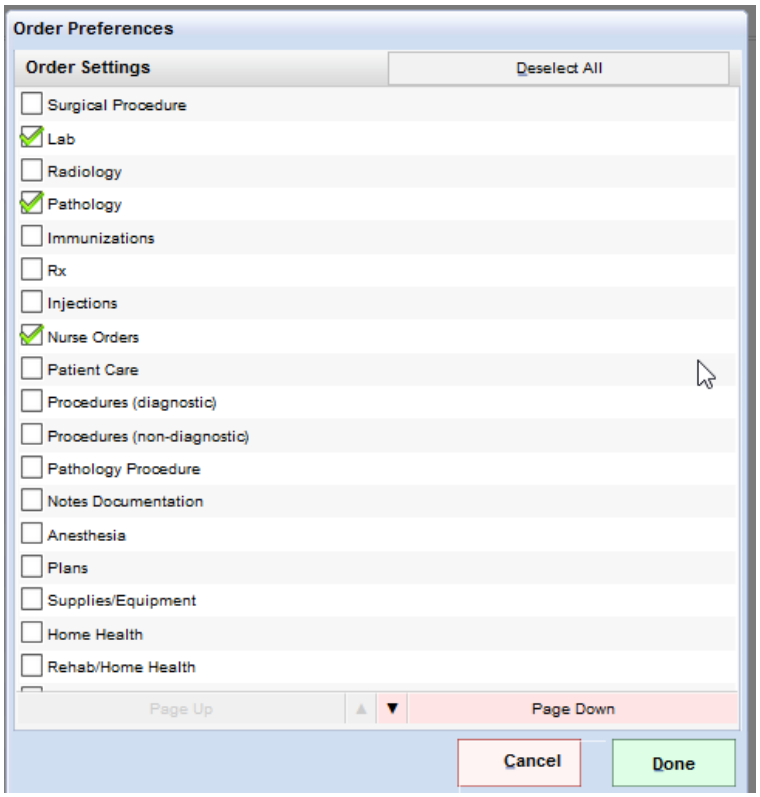


Nurse/Frontdesk Orders Settings

This section lets you assign different order types to a particular user for processing. For example some nurses might be allowed to order radiology while others cannot. First a nurse is selected, then the user must click on Order Preferences to see the selection box.

When a doctor places an order, that order will increment the order count as well as be automatically selected for processing when that user loads the Orders page.

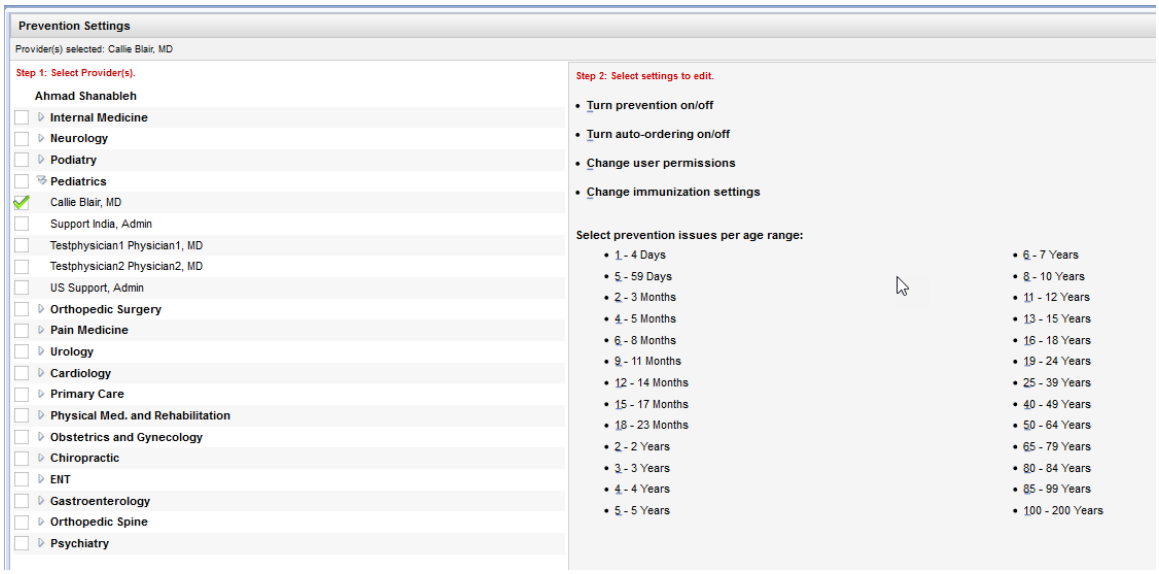



Order Preferences
Order Settings
Deselect All
Surgical Procedure
Lab
Radiology
Pathology
Immunizations
Rx
Injections
Nurse Orders
Patient Care
Procedures (diagnostic)
Procedures (non-diagnostic)
Pathology Procedure
Notes Documentation
Anesthesia
Plans
Supplies/Equipment
Home Health
Rehab/Home Health
Page Up
Page Down
Cancel
Done

Prevention Defaults

The administrator can create patient Prevention Settings for all providers at one time or, each provider can have a different profile set. The practical result of this design is to give each provider control of their preferred list without being overridden by the overall clinic list. All the prevention alerts are set by age range.

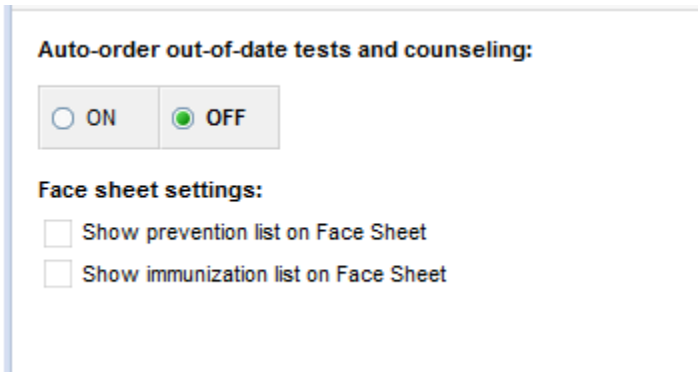
If there is more than one specialty represented in the clinic, the settings need to be done by specialty, even if they are exactly the same. The picture above has all the primary care providers green checked because the administrator checked the specialty. The picture below has only one provider checked.



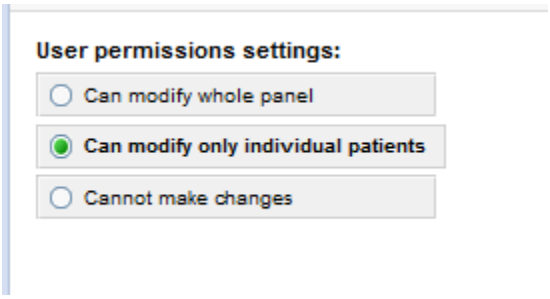
Turn prevention on/off controls whether or not the alerts for both prevention issues and immunizations will display in Docpad. If disabled, the user will not be see the alerts for out-of-date prevention issues or immunizations. The heading Prevention will not be displayed at the top right of the face page when the provider opens an encounter.

If the Docpad user has the preventions turned off, then the nurse assigned to them for that day will not see the prevention heading.

Turn prevention on/off must be **ON** for **auto-ordering** to work. If **ON**, orders which satisfy out-of-date prevention issues will be automatically ordered when the user signs a patient encounter. If turned **OFF,** out-of-date prevention issues will still be orderable, but the user will need to manually place orders to satisfy the prevention issues. This setting does not affect immunization, which must always be manually ordered.



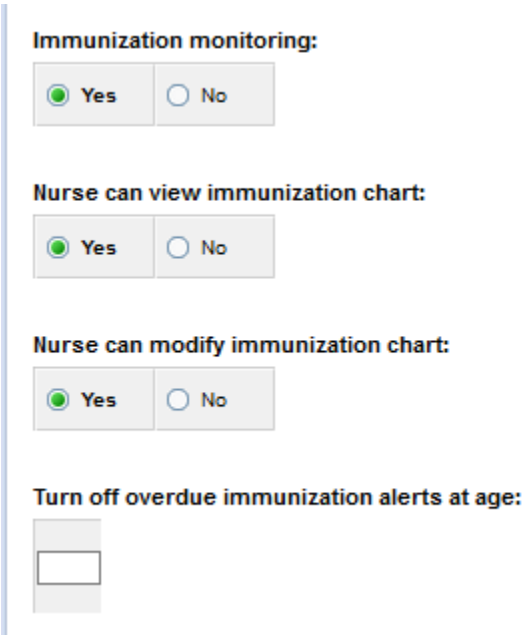
Change User Permission determines whether the Docpad user
1. Can modify whole panel: all the age ranges that are in Admin will display in Docpad under the Personalize the Software link
2. Can modify only individual patients: only change them in the prevention page of a patient's chart.
3. Cannot make changes: only Admin has the ability to change them at all.



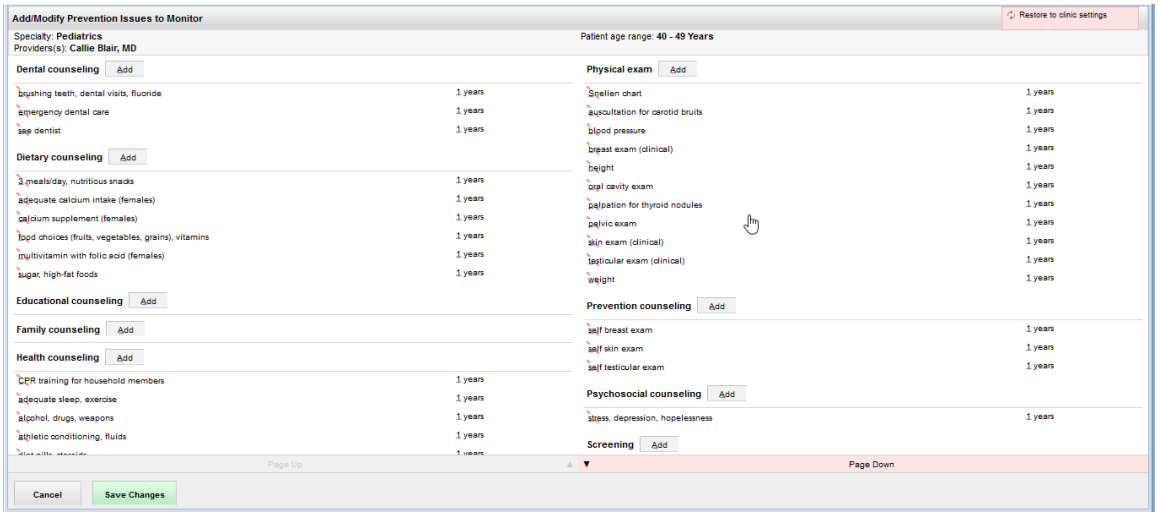
The **Change immunization settings** allows or denies the nurse access to view the immunization chart as well as modify it.

Turn off overdue immunization alerts at age;. The application is designed to show overdue immunizations for each patient. Therefore an adult patient that has not had or kept childhood records will have all those overdue alerts displaying. This is designed to prevent overdue immunizations that are given in childhood and adolescence from constantly displaying in adults. For example, a new 49 year patient will be flagged as having childhood DPT series as overdue. If the age setting is 18, then those childhood alerts will not be present in this patient's face sheet or in the overdue prevention list.

This will stop the immunization alerts for the appropriate age, whether it be an infant or adolescent, from displaying.



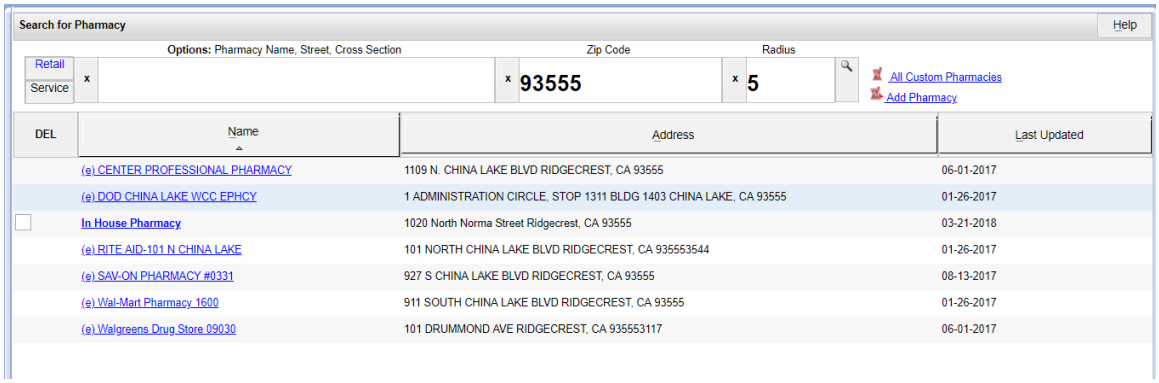
The Add/Modify Prevention Issues to Monitor section lets the user specify default prevention issues per age range. These can be overridden on Docpad.



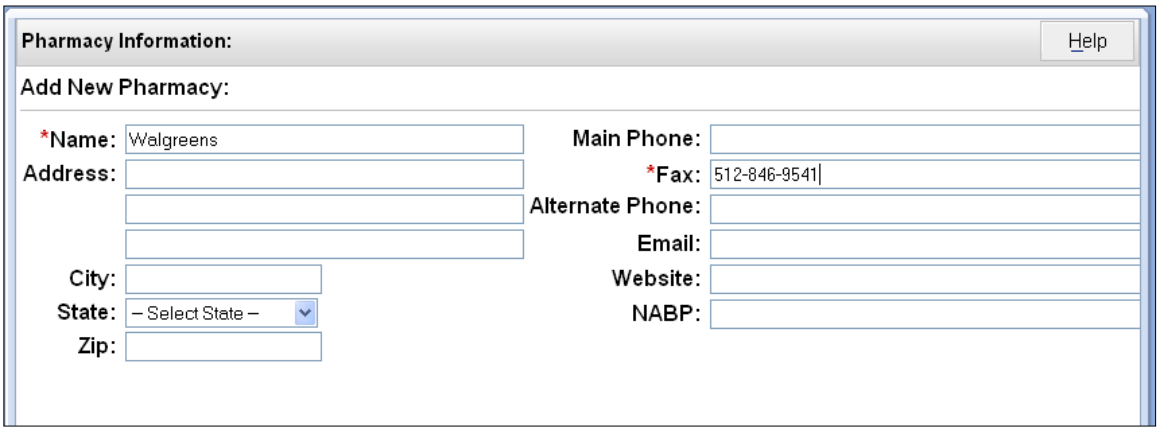
Clinical Decision Support Rules

Clinical Decision Support rules can be used as reminders for providers based on certain patient conditions.

Pharmacy Defaults



This section allows you to add a new pharmacy. After you have added pharmacies, you can search from that list, delete a pharmacy and edit the pharmacy detail. The only requirements are the name and fax number.



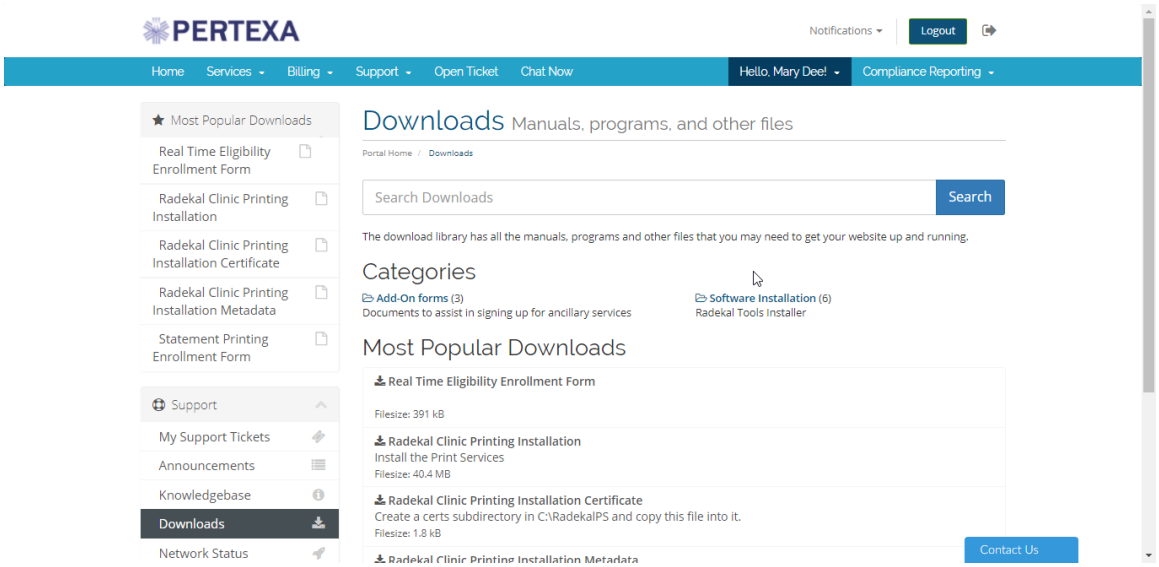
Contact Management

This link is an address book. There is no limit to the number of contacts that can be entered. The search box has the same capabilities of other alpha searches. The search results are listed underneath. Placing the mouse without clicking will display the contact information. Clicking on the contact name will open an editing page for that specific contact. Clicking on any delete box in the left column will allow the user to delete the contact next to the box you check and then clicking delete at the bottom right of the page.

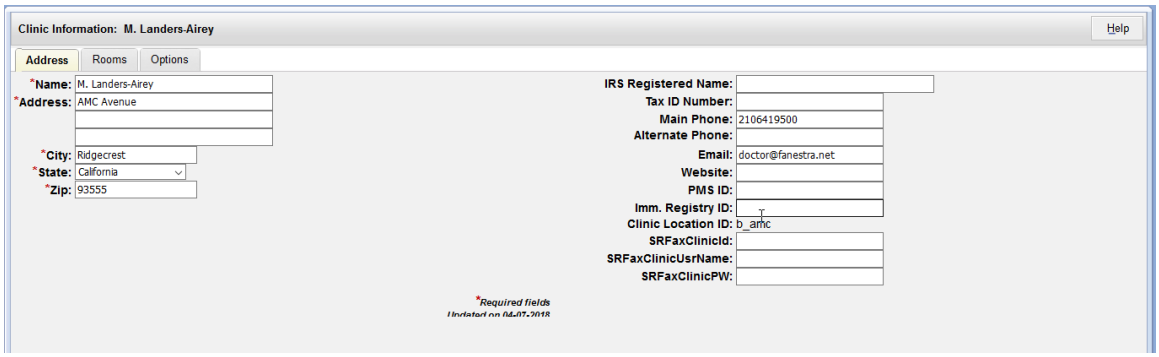
Printers and Fax

Currently Printers and Fax are not handled through this option.

Printers can be installed by downloading the appropriate files from the Support area of the Pertexa.com website.

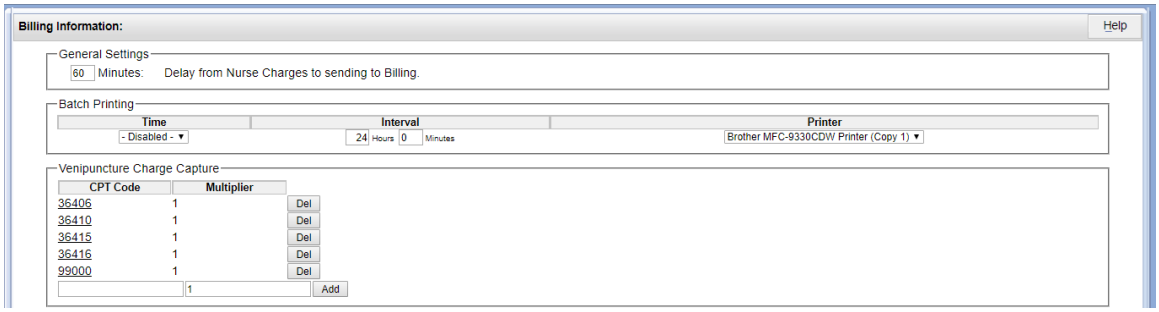


Fax can be set up through the Clinic Information section of Admin. The last three entries of the right column identify the clinic's fax information needed.



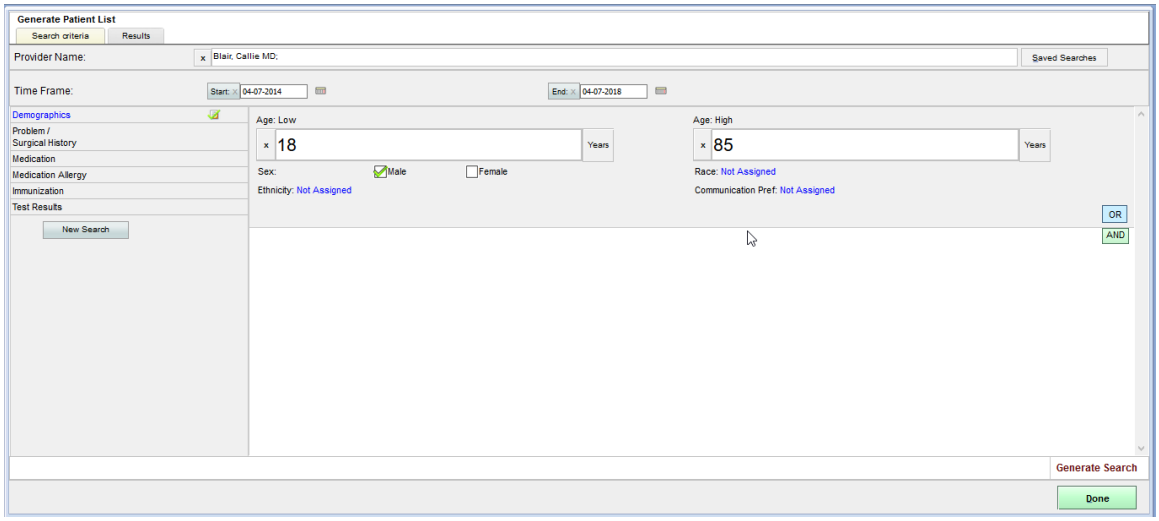
Billing

The Billing Information section allows the user to set the Batch Printing time and the interval of information to be printed. Also, the user can manually enter the CPT billing codes for phlebotomists involved in venipuncture.

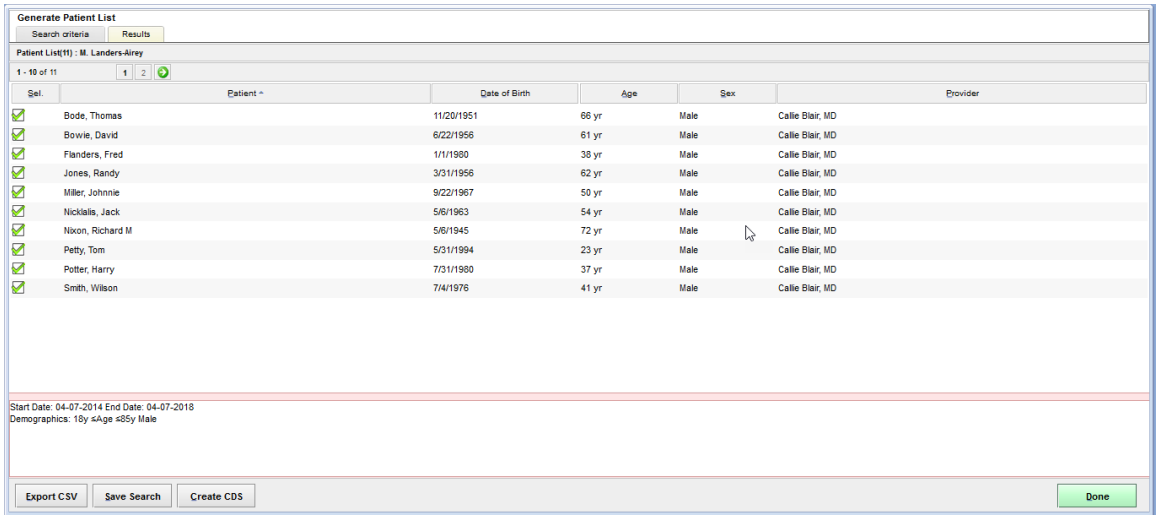


Patient List

Selecting Patient List allows generation of patient lists based on a variety of criteria as shown below for Demographics. Each tab on the left shows the appropriate parameters for that type of search.

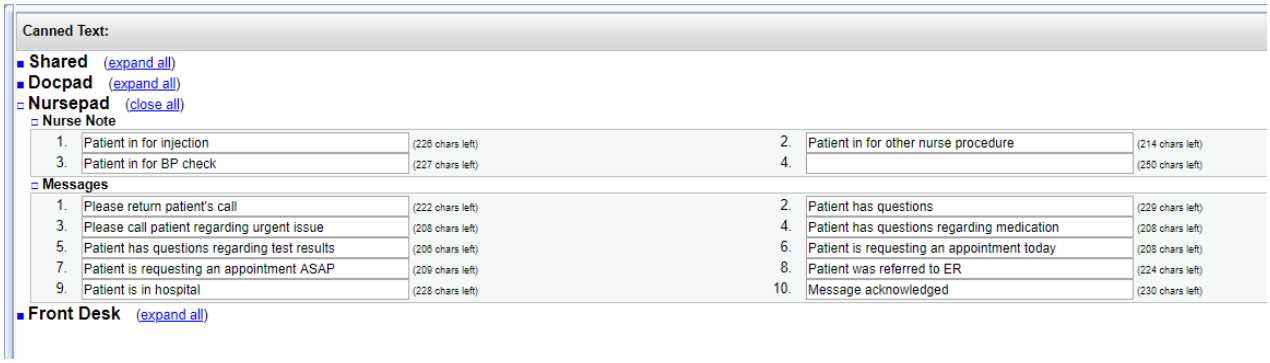


The Generate Search at the lower right corner produces the list based on the selected parameters. The lower left corner allows the user to Save the List, Export as an Excel spreadsheet, or Create a Clinical Decision Support rule.



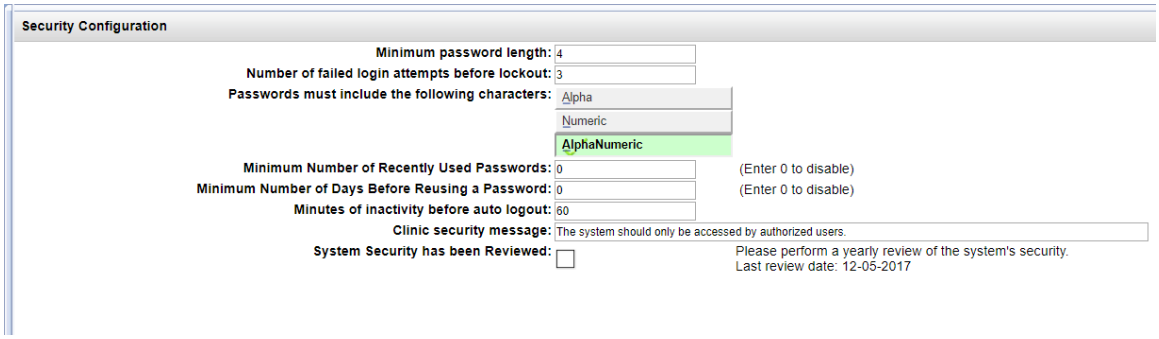
Canned Texts

These are text phrases being used in various areas in the web application. The phrases can be modified here.



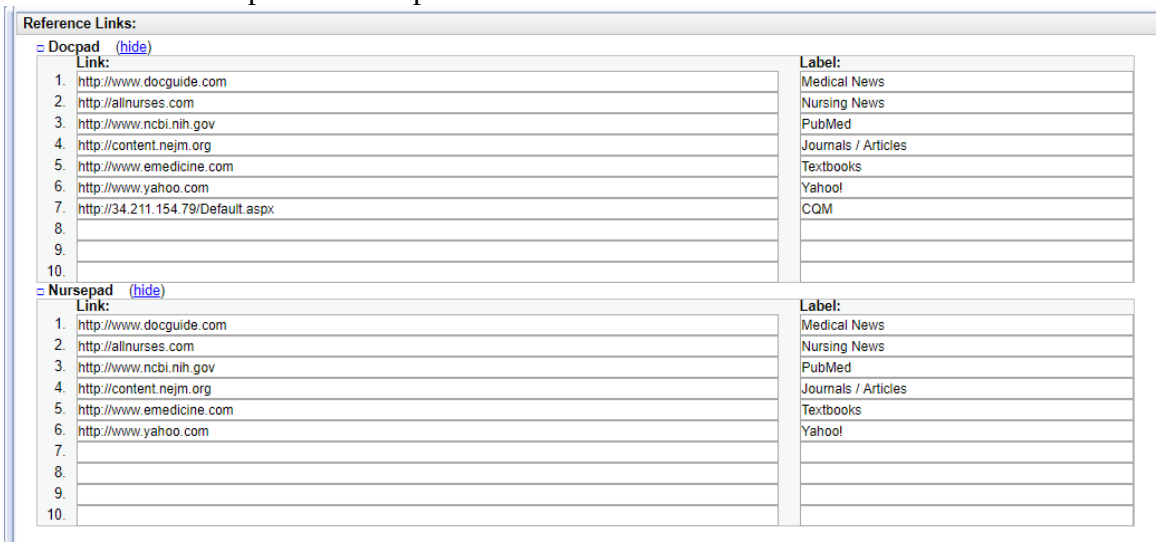
Security

The administrator sets password length and inactivity logout on this link.



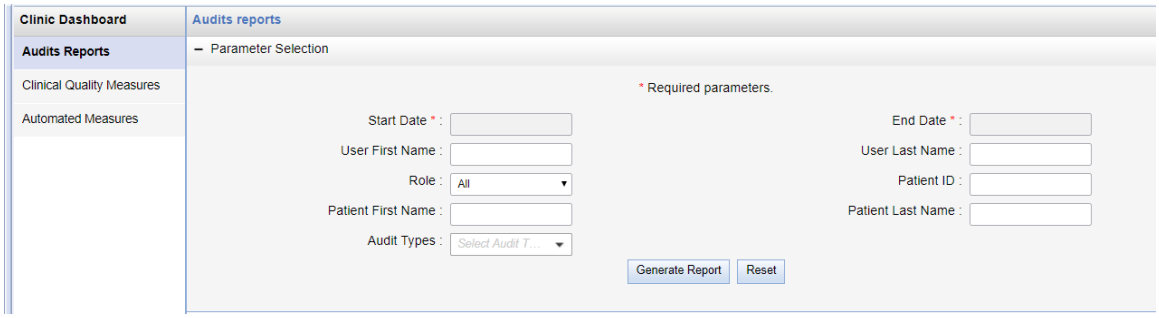
References

The Reference Links section allows the addition of reference sites as well as deletion of sites for either Docpad or Nursepad.

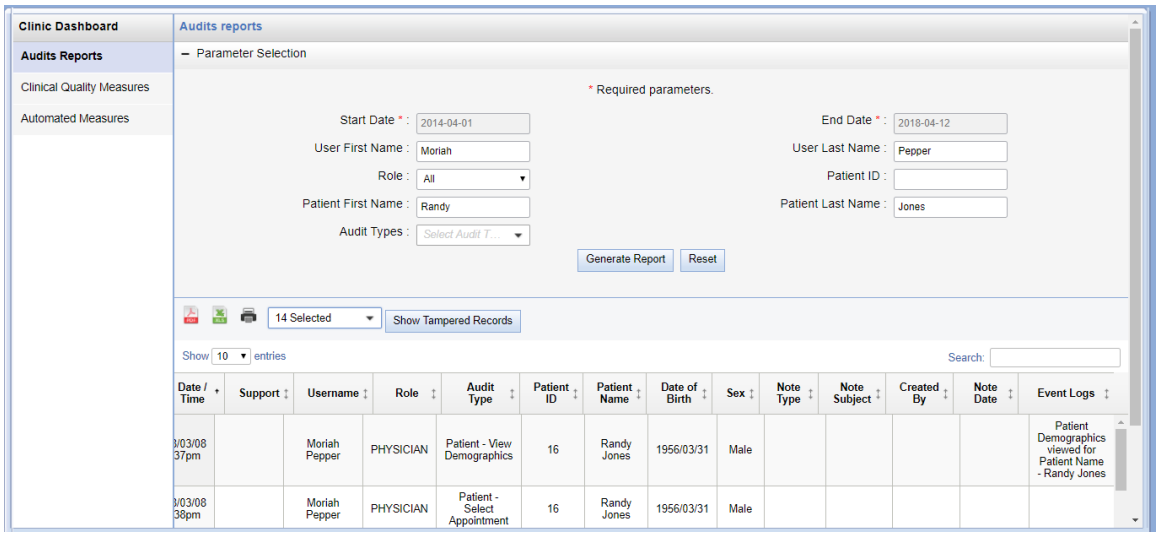


Reports

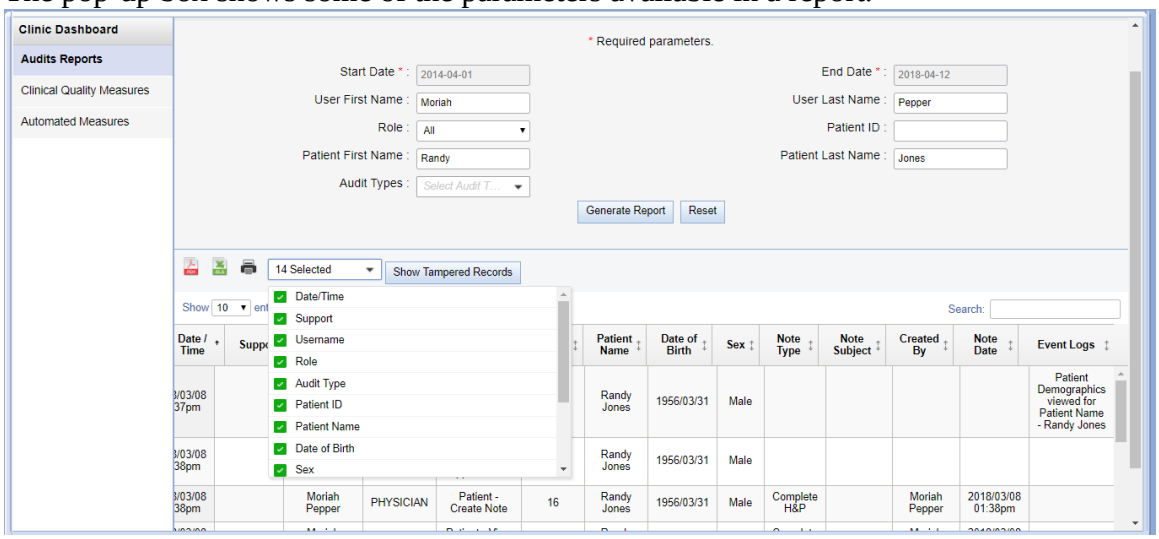
An administrator can print out reports for audits, CQM (using a third-party app), and automated measures. The CQM functionality will implement MACRA/MIPS when it is completed.



The audit report shows user and patient information based on a selection of parameters.



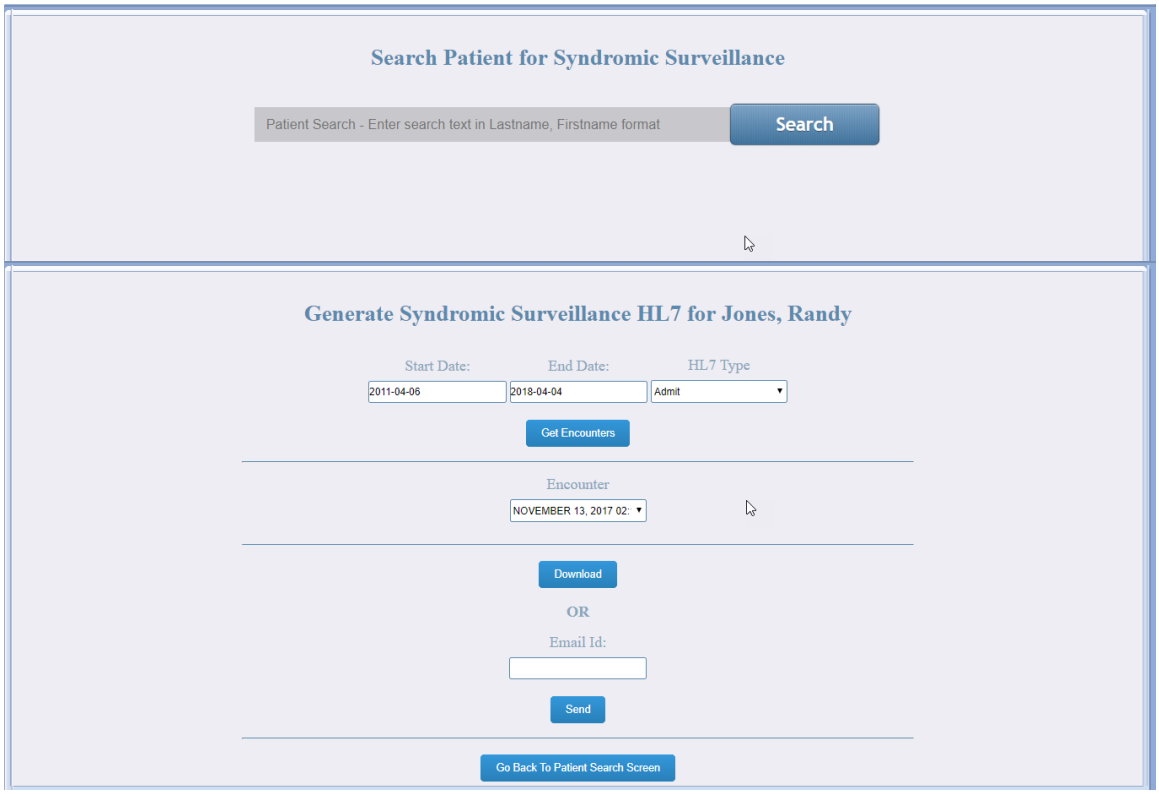
The pop-up box shows some of the parameters available in a report.



These reports can be viewed as a printable format as a webpage or as a .pdf file. The data can also be exported in .xsl format to be opened in a spreadsheet.

Syndromic Surveillance

This feature allows the user to generate a report to notify state or federal agencies of any situation needing attention, such as an outbreak of disease or multiple occurrences of radiation poisoning. This report can be downloaded or emailed as necessary.

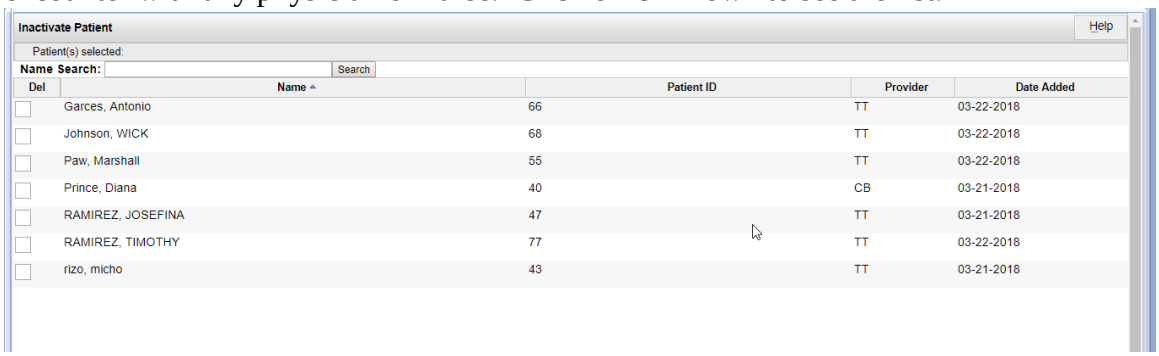


The Patient Management section has 4 links:

- Inactivate Patient
- Merge Patient Charts
- Patient Sync
- Patient Risk

Inactivate Patient

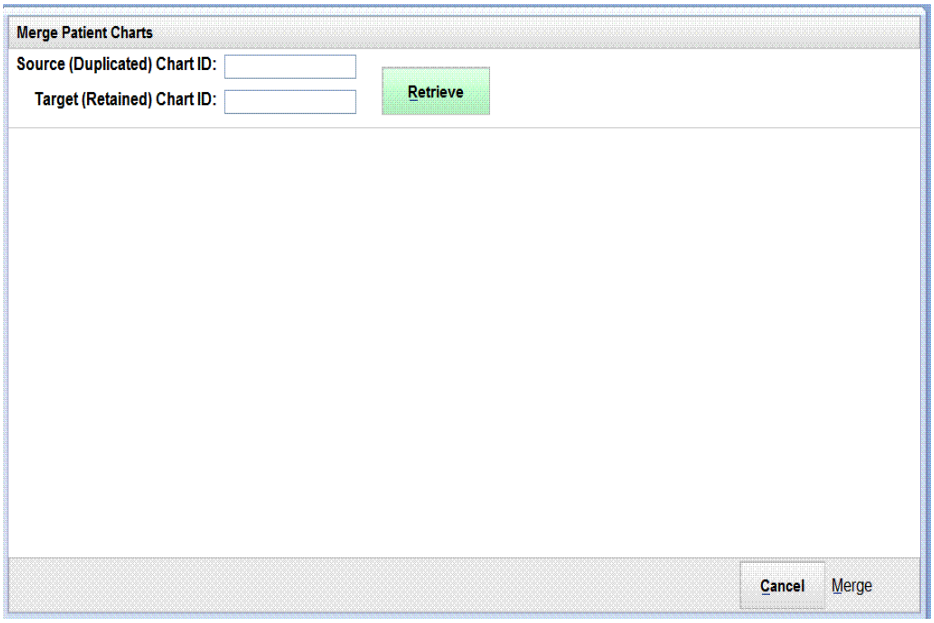
This page allows the administrator to remove any patient that does not have any encounter with any physician or nurse. Click on Unknown to see the list.



1. The chart must not have any documentation in it, in other words, a completely blank chart with no notations of any kind.
2. In the Admin module, click the link that says 'Inactivate Patient'. You can search for the patient's name using the search box at the top of the page or, click Unknown and choose them from this list. All these charts should be empty.
3. Select the patient and click the box to the left of the name. Hovering over the name reveals the patient's information.
4. After the names are chosen, click done.
5. A pop up will ask if you want to delete the selected patients. Click yes or cancel.
6. The chart will no longer be viewable in the application.

Merge Patient Charts

The merge chart link is used when there are two PMS IDs for same patient. Somehow more than one chart has been created for the same patient which can lead to incorrect information for the patient.

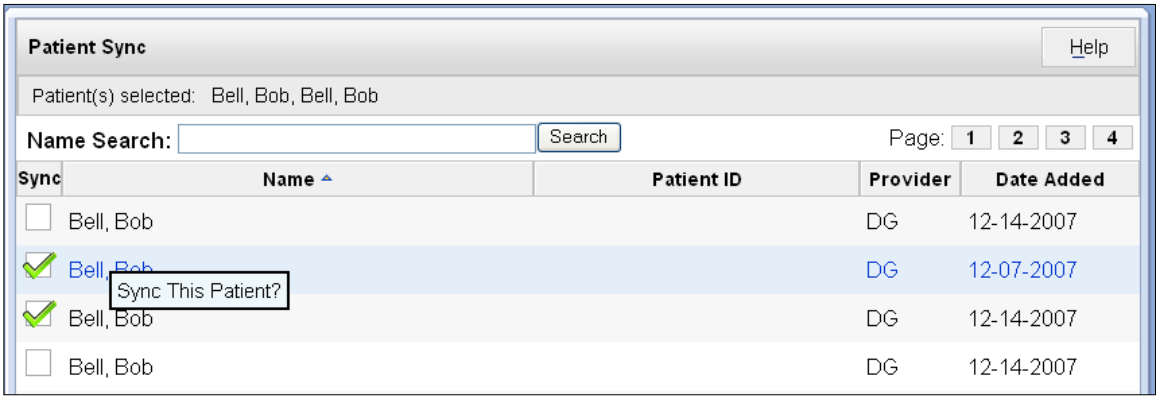


Click on the link and a page with the source chart and target chart boxes displays. The source is the chart number you want to delete and the target is the chart number you want to retain.

1. Enter the numbers and click retrieve.
2. The 2 charts will display with the source chart on the left and the target chart be on the right. There are NO restrictions on merging. You can merge 2 charts for any 2 patients, regardless of sex or age. Be careful and check ALL the details. The merge is not reversible.
3. When you are satisfied that you have the correct charts in the correct order, click merge and the left or source chart will disappear. The merge will be complete.

Patient Sync

This will allow the administrator to synchronize the patient demographic data with the PMS. Sync merges differences between the PMS and Docpad/Nursepad demographics. This feature is NOT the same as Merge Patient charts.



Same as Inactivate Patient, checking the box and clicking on the Done button will update the patient information. For safety reasons, a confirmation box will come up to make sure you want to update the patient.

Patient Risk

Risk assessment is important to Chronic Care Management under Medicare. The risk levels can be set up for the clinic on this page. Risk levels for patients are set in Docpad and will display on the Face Sheet in Nursepad and Docpad.